

Norms over policy: How the military's *apolitical* discourse theory drives institutional culture,
foments denial of political realities, and undermines service member rights

by

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AN ABSTRACT OF A DISSERTATION

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Abstract

The U.S. military attempts to convey an *apolitical* institutional identity through its rhetoric and cultural expectations of members, in line with its desire to be viewed as a neutral government agency by military members, the American public, and lawmakers. However, such an identity is impossible to achieve given the purpose, nature, and conduct of military forces throughout human history. The conduct of warfare is *political* by nature, imposing the will of one people, state, or nation on another. The military is authorized, funded, and directed by political representatives. It is a policy-making, policy-enforcing, policy-enabling entity. The aspiration of the U.S. Department of Defense to hold an *apolitical* organizational identity as a public institution—and to socialize a belief that its members are as well—might be noble, but is unachievable. This work explores how the defense department's *apolitical* discursive norm came into being, how it is communicated and enforced, and the effect it has on the citizens who serve in today's all-volunteer force. It is comprised of three research articles. The first is a discourse analysis of existing defense department policy governing political expression by military members. The second study uses open-ended interviews with former military members to gather insight on how military norms are communicated and enforced internally. The final article uses open-ended interviews with former military members to document the impact that institutional norms have on the civic agency of citizens in military service. Findings suggest that 1: institutional norms hold greater power over the expressive behavior of military member than defense department policy, 2: the primary means of norms indoctrination is through discursive communication, and 3: that the *apolitical* institutional norm is enforced through informal systems of social pressure among internal stakeholders.

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Table of Contents

List of Figures	x
List of Tables	xi
Acknowledgements	xii
Dedication	xiv
Preface	xv
Introduction	xv
Orientation to Dissertation Format	xx
Justification for Study	xxii
Chapter 1 - Introduction to 21st Century Civil-Military Norms	1
Military Enablement of Partisan Political Activity	1
Inevitable Political Realities of Military Existence	3
Military Identity Positioning	6
Defining Terminology	8
Contemporary Civil-Military Norms	11
An A/Political Institution?	16
Huntington’s Model of Military Professionalism	18
Trends of Depoliticization	20
Value Terminology	21
Historical Theories of Warfare	24
The Shifting of Civil Military Norms	30
Risk of Perpetuating Apolitical Expectations	34
Relevance	37
Addressing Critics	38
Discussion	40
Conclusion	41
Chapter 2 - Exploring Institutional Expectations of Military Members through <i>Hard Policy</i>	43
Background of the Topic	43
<i>Introduction</i>	44
<i>Theoretical Framework</i>	47

Summary of Discourse Theory.....	48
The Role of Institutional Theory.....	50
<i>Method of Exploration</i>	52
Current State of Military Practice	53
<i>Defining Political Terminology</i>	53
<i>Negative Perceptions of Politics as a Term</i>	56
<i>The Fog of Norms</i>	58
<i>The Rise of Institutionalism</i>	62
Insights from Current Study	65
<i>Policy Liberties for Political Expression by U.S. Military Members</i>	66
Authorized Nonpartisan Political Expression.....	66
<i>Policy Restrictions on Political Expression by U.S. Military Members</i>	68
Restricted Partisan Political Expression by Military Members.....	69
Restricted Nonpartisan Political Expression for Military Personnel.....	70
Restricted Political Expression for Part Time or Former Military Personnel.....	71
Discussion.....	72
Suggestions for Further Research	74
Chapter 3 - How Civil-Military Norms are Communicated and Perceived.....	75
Background of the Topic	75
<i>Introduction</i>	76
<i>Theoretical Framework</i>	77
<i>Method of Exploration</i>	80
Discourse Impact in Scholarly Thought	84
<i>Shaping Norms through Institutional Discourses</i>	84
<i>Constructive Anchoring</i>	89
The Current State of Affairs	91
<i>The U.S. Military's Apolitical Discourse</i>	91
<i>Setting Institutional Policy</i>	92
<i>Apolitical or Nonpartisan</i>	96
Insights from Current Study	101
<i>Method of Learning Apolitical Norm</i>	101

<i>Definitions of Political Terminology</i>	102
<i>Understanding of the Rules Pertaining to Political Expression by Military Members</i>	103
<i>Understanding of Civil-Military Norm Expectations of Military Member Political Expression</i>	104
<i>Perception of Military’s Political Nature</i>	106
<i>Perception of Military’s Partisan Role</i>	111
Discussion	113
Suggestions for Further Scholarship	114
Chapter 4 - The Impact of Civil-Military Norms on Military Members	118
Background of the Topic	118
<i>Introduction</i>	119
<i>Theoretical Framework</i>	123
Framework 1: Discourse as Constitutive of Organizational Identity	124
Framework 2: Institutional Theory	128
Framework 3: The Interpretive Approach	130
<i>Method of Exploration</i>	132
Insights from Current Study	134
<i>Perception of Need to Self-Censor</i>	135
<i>Shifting Norms: From Discouraging all Political Expression to Discouraging ‘Some’</i>	138
<i>Friction of Identities</i>	143
Discussion	147
Suggestions for Further Scholarship	150
Chapter 5 - Consequences, Implications, and Conclusion	151
Restating the Purpose	151
Review of Study Insights	152
<i>Reflecting on First Study</i>	152
<i>Reflecting on Second Study</i>	154
<i>Reflecting on Third Study</i>	155
<i>Merging Experience with Scholarship</i>	156
Insight Considerations through Contemporary Leadership Frameworks	161
<i>Application to Situational Leadership</i>	161

<i>Application to Cultural Considerations in Leadership</i>	163
<i>Application to Adaptive Leadership</i>	164
Theorizing Frameworks for Further Exploration.....	166
Societal and Scholarly Significance of the Topic	167
Suggestions for Future Scholarship	168
Conclusion	169
Bibliography	172
Appendix A - Interview Script.....	197
Appendix B - Interview Script.....	198
Appendix C - IRB Approval Letter	199

List of Figures

Figure 3.1. Apolitical Themes Identified in Senior Military Official Statements (from Spears, 2022)	98
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List of Tables

Table 2.1. Permitted Political Activities by Active Duty Military Members	68
Table 2.2. Restricted Partisan Activities by Active Duty Military Members	70
Table 2.3. Restricted Political Activities by Active Duty Military Members	70
Table 2.4. Restricted Political Activities by Non-Activated Military Members	71
Table 3.1. Key Insight Categories of Military Political Identity Perceptions.....	101
Table 4.1. Sorting Categories for Interview Data	133
Table 4.2. Key Insight Topics.....	133

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The pursuit of scholarship would be of no value if truth did not exist. Thanks be to God, the fount of all wisdom and author of all truth. May He be glorified in our efforts to learn. “Wisdom is supreme—so get wisdom. And whatever else you get, get understanding” (Christian Standard Version Bible, 2007, Proverbs 4:7).

This is a labor I have enjoyed, and hope it contributes productively to the continuing debate over how free societies should think on military matters. I endeavored for accuracy in this pursuit of knowledge. Any shortcomings in this report are my responsibility alone.

Dedication

The lovely wife of my youth has endured season after season in which I could not be present physically, or mentally even when home, due to the demands of military life. She takes it all in stride and has shown over two decades of unending love, support, and patience through it all. You would think that someone who has had to do as much single parenting as Lori has—due to the insanity of my schedule—would have protested when I decided to apply for this doctoral program, my fourth foray into graduate school. Not for a second. She embraced my dream as her own, and has lovingly cheered me on even as coursework took more of my time from her and our amazing children. Indeed, she is the Proverbs 31 woman.

Who can find a wife of noble character? She is far more precious than jewels. The heart of her husband trust in her, and he will not lack anything good. She rewards him with good, not evil, all the days of her life (Christian Standard Version Bible, 2007, Proverbs 31:10-12).

It is to Lori Ann Spears, my best friend, wife, and glorious mother of my children that I dedicate this work.

Preface

Introduction

Having recently concluded my time as a member of the U.S. Army, I often reflect on how life is changing now that my family and I are beyond the reach of both formal and informal military authority. One in particular stands out as among the most important: the sense of regaining my full citizenship right as an American. By law and policy, those in military service cede little in the way of personal and constitutional right when joining the military. Yet in culture—and at times in practice—one becomes akin to U.S. government property upon swearing in, as I was very clearly told one day in 2004 as a trainee at Fort Meade, MD. Such thinking drastically contradicts George Washington’s words that one does not lay aside his or her citizenship to take up the role and responsibility of a soldier (Washington, 1775). This remains technically true today under law and military regulations. However, that policy reality is fiercely challenged across today’s defense department in word and deed. Modern resistance to Washington’s citizen-focused philosophy stems from a constructed *apolitical* institutional identity, which formalized in the era immediately following the Second World War. The influence of General George C. Marshall and political scientist Samuel Huntington proved central to efforts by the military brass to *professionalize* the force, a movement began at the end of the 19th century as the military followed trends of professionalization in law, medicine, and engineering. The legacy of this transformation is enforced primarily through norms that are firmly established in military operating culture and perpetuated through institutional discourses.

Civil-military relations scholars and commentators generally cite Samuel Huntington as the father of *apolitical* military thought, based on his 1957 classic entitled *The Soldier and the State* (Babcock-Lumish, 2013; Brooks, 2020; Dubik, 2020; Schmidt, 2019). He wrote of four

separate constructs of military supervision: *Subjective military control*, *Civilian control by governmental institution*, *Civilian control by constitutional form*, and *Objective civilian control*. Huntington specifically argued in favor of what he acknowledged as the *theory* of *Objective civilian control* as the best way for a nation and its military to interact. “Objective civilian control achieves its end by militarizing the military, by making them the tool of the state” (Huntington, 1957, p. 83). This model is dependent on a system of military professionalism in which military officers “began viewing themselves less in the tradition of civilian-soldiers and more as members of an educated profession or arms” (Schmidt, 2019, p. 105), and thus sought to entirely remove themselves from all political considerations and defer to “the superior political wisdom of the statesman” (Huntington, 1957, p. 76). In return, the military was granted authority to self-regulate and carry out orders from civil authorities largely in the way it sees fit. This way of thinking presents an irony in that troops are expected to defend the nation, but only in the physical realm, and only from threats that act beyond the nation’s shores. This denies the reality that wars of the physical realm are advanced manifestations of conflicts in the space of ideas. This theory of a non-political military foments a mindset that denies the full spectrum of non-physical realms in which wars are conceived, planned, and fought. Furthermore, it casts misrepresentations upon the citizens who serve in the military, undermining their voice in the republic of which they are members. Finally, the process of “socialization and professionalization” that this theory energized “encourages politicization rather than insinuating affective neutrality into the professional military ethos,” (Schmidt, 2019, p. 28) which has contributed to the “dissolution of the principle of civilian control” (Schmidt, 2019, p. 182).

Many who cite Huntington as the father of the *apolitical* military tradition fail to fully explain his work. He argued that to fully professionalize, militaries must operate under the

system of *objective civilian control*. Huntington explains that this method of civil-military relations emerged in the 18th century, starting with the Prussian model of military service. In contrast to modern day military officers and thinkers who hold to the idea of *objective civilian control* as the norm, Huntington offered ample historical example of militaries that operated according to a model of *subjective civilian control*, an approach that deliberately intertwines the military with topics of domestic political debate across a given society. Yet, it was his theory of *objective civilian control* that was embraced by U.S. military figures as reality, and set the cultural norm that is echoed discursively and hailed culturally across the American military. It created a foundation of thought upon which a belief is built that members of the military should avoid participation in anything related to domestic politics both in and out of uniform, whether on or off duty.

Though Huntington advocated for implementing what has since morphed into the *apolitical* tradition of military service through the theory of *objective civilian control*, he acknowledged that this construct is not the norm in human history, U.S. history included. In *The Soldier and the State*, Huntington offers examples across U.S. history in which military officers performed in manners directly tied to domestic politics, and noted how military actions are inseparably tied to political intent. He links this reality to the constitutional separation of power that splits control over American military forces between the president and congress, while acknowledging that his theory of civilian control is not specified in the U.S. Constitution. “Objective civilian control has been extraconstitutional, a part of our political tradition but not of our constitutional tradition” (Huntington, 1957, p. 190). His work acknowledged prominent examples of overt political involvement by senior military officials include Generals Zachary Taylor, Winfield Scott, and George McClellan—men who ran for president as active-duty

military officers (Huntington, 1957; Lythgoe, 2022b). Such incidents are not limited historically to mid-19th Century America. John Glenn’s first run for senate in 1964 occurred while he was still an active duty Marine Corps officer. Even when not actively campaigning for office, military officers exert tremendous power for the political benefit or detriment of elected officials. For instance, during the Vietnam era, the uniformed Joint Chiefs of Staff knowingly aided Lyndon Johnson by using the military to score political points (McMaster, 1997). Generals who choose not to run for political office are frequently recruited into top governmental positions, a tendency that became common with the conclusion of the U.S. Civil War (Ekirch, 1956). Some generals are placed into cabinet-level positions—such as CIA Director, National Security Advisor, and other roles—while on active duty. Increasingly in American practice, the path to political power begins with serving in the military.

In more recent context, Chairman of the Joint Chiefs Gen. Mark Milley has been roundly criticized as a highly politicized general (Shinkman, 2021) for, among other actions, voicing support for highly politicized social topics (Schake, 2021), threatening to interfere with the commander in chief’s control of military forces, and assuring advance warning to the Chinese government of any planned military actions against them (Woodward & Costa, 2021). This followed on the heels of Army Lt. Col. Alex Vindman becoming a public figure for testifying against the sitting president, doing so notably in military uniform and demanding to be referred to by his rank in 2019 (Read, 2019). In 2023 the U.S. Space Force Deputy Chief of Operations, Lt. Gen. Deanna Burt, condemned states on LGBTQ+ policy while in uniform at an official defense department event (Glenn, 2023). White House spokesman John Kirby, himself a former spokesman for the Department of Defense and retired Rear Admiral, echoed condemnation of state laws on morality, saying the military has “a foundational, sacred obligation of military

leaders” to advocate for abortion access (Jean-Pierre & Kirby, 2023a), a highly contentious political topic. Kirby echoed that assessment in a White House briefing on October 3, 2023 by equating abortion access with routine healthcare, and as a “covenant that we make - the military makes with the people who sign up and volunteer” (Jean-Pierre & Kirby, 2023b). These kind of extra-constitutional, synthetic rights lack metaphysical grounding (Mohler, 2023), and are recent additions to the discourse covenants governing military operations. They join a growing list of institutional beliefs and expectations that are reflected in rhetoric, but are absent from policy, regulation, and the contracts signed by military service members when joining the force. Though these examples are only a fraction of similar incidents of military advocacy on contentious societal topics across national history, they have garnered attention as what appears to be an increasing frequency of intentional military involvement in domestic political affairs.

Into such a complex and highly debated cultural and political realm, this work explores the space between an institution’s official policy and its norms, as well as an investigation of how norms are enforced, and the impact they have on institutional members. Senior military officials, lawmakers, and much of society believe and proclaim that the military is *apolitical*, in spite of the reality that both the institution and its members engage in political activity (Schmidt, 2020). Gen. George C. Marshall’s refusal to vote is held up culturally as a virtue, while at the same time every military unit is required to have a voting assistance officer. Military officials frame all military actions as taken in service to the *apolitical* ideal of national security. Yet they do so against the backdrop that war is an extension of the national political will of a people and state upon another (Clausewitz, 1993). In short, there is a disconnect, perhaps even an institutional dysfunction, a gap between what is said, and what is realized when it comes to the relationship between the U.S. military and society. This has very real impacts on the agency and

right of American citizens who choose to join the military today. I thus argue that elected officials and military policymakers have constructed a *Theory of Social Doctrine of Military Members as Lesser Citizens* in the decades since the Second World War. This constitutes an institutional and societal misunderstanding of historic civil-military norms that has promulgated a historically-recent social perception that those who serve in the U.S. military hold a lesser status of citizen agency in comparison to their peers in civil society.

To further explore that idea, this work is intended to serve as a scholarly exploration of how the U.S. Military self-identifies in relation to the political context in which society operates, and how that understanding impacts the lives of those who serve in the military under the banner of defending constitutional right, while simultaneously being denied the benefit of those rights in civic context. This work examines the impact that cultural-military-political norms have on the understanding of U.S. military members' citizen right and agency—as well as the impact to the practice of their civic rights as formally prescribed in Constitution, law, and military policy.

Orientation to Dissertation Format

This dissertation takes the form of five chapters. The first is an extended introductory essay that summarizes the historical and cultural context of contemporary civil-military norms. Chapters 2-4 are standalone articles that use qualitative methods to explore the framing through which military institutional norms are communicated, the perceptions that such framing influences, and the impact of communicative norms on military service members as internal stakeholders. The final chapter reflects on the findings from each standalone article (chapters 2-4), and analyzes them through a sampling of contemporary leadership frameworks. This work benefits from an “insider academic research approach,” (Schmidt, 2019, p. iii) given my 20

years of experience as a uniformed member of the military institution. In such an approach, scholars draw on personal experiences to adapt insights based on the unique contexts of the environment under exploration (Boggs, 2017). That exploration will be organized as follows:

- Chapter 1: Introduction to current civil-military norms as related to the theory of the military and its members as apolitical agents among society. This chapter sets the stage by summarizing the basic history of how the theory of *objective civilian control* shaped U.S. military culture through the post-World War II era. It explains a working theory of a social doctrine of military members as being conceptually reduced to lesser citizens in the present era.
- Chapter 2 (Article 1) This will be the first of three separate studies conducted in this work. In it, I evaluate Department of Defense policy on allowable political activity by military members through a discourse analysis of official defense department policy.
- Chapter 3 (Article 2) Here, I explore perceptions of former military members about the manner in which the *apolitical* norm is perceived by those in military service. This is accomplished through a qualitative study that is based on interviews with former military members.
- Chapter 4 (Article 3) This article explores if and how the military *apolitical* norm shapes perception of military service members' political agency when both on and off duty. Findings are informed by insights gathered through a qualitative study based on interviews with military veterans.
- Chapter 5 serves as an overall discussion and conclusion. It reflects on findings from the three research articles, applies scholarly leadership frameworks, and discusses

implications of findings on consideration of civil-military norms in future scholarship and societal discussion.

Justification for Study

In all things, honesty in the best policy. To be a truly *apolitical* institution, the military would have to undergo a transformation to remove it entirely from the policy process. Given that such is impossible and undesirable from a constitutional standpoint, military leaders and elected officials should level with the American public about the fact that the military institution is indeed an active instrument of U.S. national and international policy, as is already well inferred in current defense department operating doctrine. When institutions signal one value, but demonstrate another, they risk breeding conflict across all stakeholders.

There are two primary reasons I offer in making the case for a reevaluation of the military's rhetorical identity as a nonpolitical public institution. The first is authenticity with the American public. As an institution, the military must live up to its own rules. Department of Defense (DoD) rules for political expression, its operating doctrine, and its spoken cultural expectations are in conflict. The unwritten *soft policy* is "often misunderstood or misapplied" (Maurer, 2020, p. 354). The second reason is that in the age of democratized information, defense leaders, now more than ever, need to prevent any possibility of damaging trust within the force over perceptions of values incongruence. Third, few studies exist that explore macrophenomena: the large-scale processes that influence the culture of organizations, including traditions, policies and customs (Lammers and Barbour, 2006). This topic lends itself to expanding that genre of literature. Finally, though there is a resurgence of literature questioning the theory of the military as an *apolitical* institution, little of it explores how the resulting norms

are conveyed to—and impact—military members. This work aims to offer insights on how institutional norms are conveyed, received, internalized, and acted upon from a human perspective, within an institutional setting.

Chapter 1 - Introduction to 21st Century Civil-Military Norms

Military Enablement of Partisan Political Activity

Imagine a day in the life of a U.S. President on an ordinary trip to headline a campaign rally for a fellow party member who is running for a congressional or gubernatorial seat that's considered important for the president's policy agenda. As he prepares to depart the White House, advance military teams have already deployed to the event city to assist the Secret Service and myriad other agencies that provide presidential travel support. The motorcade has already been transported aboard U.S. military aircraft, along with the helicopters—from the U.S. Marine Corps helicopter squadron HMX-1—that will ferry the president from the airport into the city. A stay behind portion of the fleet carries the nation's chief executive from the White House to Joint Base Andrews, where he boards a militarized Boeing 747 that becomes Air Force One when the commander-in-chief steps aboard. This aircraft is staffed, maintained, and flown by military personnel. The presidential military aide, an active duty uniformed officer who must always be within close proximity to the chief executive, joins the chief executive on the trip. Once the president arrives to the venue for the political rally, he steps onto a stage that was prepared by the joint military unit known as the White House Communications Agency. The chief executive makes a passionate, highly partisan speech with an intent to influence public opinion and voting. He does so in total reliance on U.S. military people and gear to do so.

Both on this trip, and in daily life, the American president receives direct support from the White House Military Agency, which coordinates things including movement, food services, hospitality services, and medical support. His personal physician is a military officer. When the chief executive comes and goes from the White House, uniformed military service members hold the door, and carry the umbrella. A short distance east of the White House, congressional offices

are staffed with military fellows, who assist with constituent services and policy creation. Military officers are assigned across the expansive collection of executive offices that shape national policy, including the National Security Council. Presidential evacuation sites are themselves military installations. These are all essential support services for the nation's chief executive. Indeed, the military is a key player in supporting those who conduct the domestic political competition across the nation. This is aside from the political impacts of war that the military carries out by presidential order with congressional appropriations. Closer to home, military actions have often unfelt, but very real consequences for the American public, especially those who live in communities that are impacted by military basing and training decisions. I experienced this first hand during my time as the commander for the U.S. Army Alaska Headquarters Detachment.

On July 8, 2015 it was revealed that top Army officials planned to cut 2,600 soldiers from Joint Base Elmendorf-Richardson. This would have delivered a severe blow to the Alaskan economy that relies heavily on military spending. On July 21, 2015, the Senate Armed Services Committee held a hearing to confirm Gen. Mark Milley as the next Army Chief of Staff. During that hearing, Alaska Senator Dan Sullivan asked if Milley would reevaluate planned cuts to Alaska-based forces if confirmed (CSPAN, 2015). Milley promised to do just that. Making good on that promise, the newly confirmed Army chief of staff traveled to Alaska in early 2016 to tour military facilities with Sullivan, and attended a command pitch—tailored to political interests—for retaining forces at the U.S. Army Alaska headquarters. Two weeks later, Milley testified that the number of Army forces stationed in Alaska would not be reduced after all (Dan Sullivan, United States Senator for Alaska, 2016). One thing is certain. The U.S. military is integral to the

daily political functioning of this nation. “Military operations can never be fully separated from politics” (Ingesson, 2018, p. 77).

Inevitable Political Realities of Military Existence

The U.S. military is a federal cabinet agency that is funded by congress, commanded by the president, and enabled with the scale of weaponry to install, bolster, or replace governments abroad as an instrument of national power. Military training manuals, referred to within the force as *doctrine*, speak of the environmental aspects of the war, political factors being among them (Department of Defense, 2018). The military not only conducts war in political environments. It exists at all times in political environments. Those who run the institution “influence policy by and through establishing and controlling policy procedures, informing the policy process, formulating policy options, and implementing national security policy decisions” (Schmidt, 2019, p. 181). Military objectives generally reflect the political goals of presidential administrations (Brodie, 1973). All military officers are senate-confirmed for all promotions starting at the mid-career rank of O-4, and all three-star and above officers are presidentially appointed for their terms in office at those ranks. These factors naturally bring political consequence and challenge the ideal expressed widely across the military institution that it stands apart from the nation’s political framework.

Politics is baked into military existence from top to bottom, stem to stern. Whether it be naming of bases or ships, allocations of defense spending by state, or even grooming standards for military members, defense department operations, desires, and decisions are political. Yet a discursively constructed norm runs across the defense department, lawmakers, and much of American society that the U.S. military is an *apolitical* institution (Schmidt, 2019). That

theoretical status is further bestowed upon military members. According to Colonel (Ret.) Tony Monaco, the resulting image of the U.S. military member thus became one of an apolitical moral warrior who espouses justice and is accountable solely to nation and God (Monaco, 2024).

Though the U.S. military wants to be seen as being above the political fray, it answers to a diverse array of competing stakeholders that inevitably have political motivations. Unlike other federal cabinet agencies, the American citizenry tends to feel more a sense of ownership over—and shared value with—the DoD. As such, for military leaders to make decisions that align to the policy positions of their elected superiors can mean frustrating segments of the public. The mainstream of society and the military seem to misunderstand the role of defense forces, and their members in the current Western context, being influenced by the constructed notion of a *nonpolitical* force. This leads to the overall problem statement for this dissertation: A misunderstanding between both U.S. society and its military institution and service members over a theoretical model of depoliticized military control has separated the public from its armed forces, enabled strong institutionalism within the military, and intruded on the constitutional rights of those who participate in military service, reducing their role in a system that they theoretically serve to defend and perpetuate.

Though this topic is one that goes back well into the historical record, it has received a relative increase in attention in recent years in light of major societal shifts across the United States. Among senior military officials, once loath to engage on domestic issues, several have become active in making statements related to social topics in their official capacity. In recent years the voice of retired general officers has become more pronounced in political campaigns, spurring a separate debate about the influential role these citizens continue to play after departing military service (Burke & Reid, 2020; Caslen, 2023). Though this practice faces criticism, it is

not unprecedented from a historical perspective. There are far more stories of politically-involved military officers over the nation's history than those like Generals Sherman and MacArthur, who sought to distance themselves from the appearance of interest in domestic political affairs (Mansoor, 2016). Yet the discourse continues among senior military officials that the military has been and remains *apolitical*. Progressives lament post-Vietnam era when the military became more openly conservative. Conservatives lament the current era in which the force is embracing progressive social doctrines. Both sides declare an increasing ideological, or partisan, politicization. What neither side readily admits is that the military is inherently political, making shifts based on where the political winds blow at a given time inevitable. Despite its attempts to convey a perception of distance between it and the domestic political arena, "Every single individual holding a federal job in the executive branch works for the President of the United States" (Mohler, 2020, Part 1, para. 3), and is thus expected to support the administration's policy agenda.

The last four presidents took special interest in military issues. President George W. Bush prioritized military pay. President Barack Obama prioritized instituting social changes. President Donald Trump prioritized defense modernization. President Biden is renewing the Obama priority to anchor social change across the force, as well as providing military funding and materiel to Ukraine. A president's policy agenda impacts the *National Security Strategy* of each administration, which in turn influences the *National Defense Strategy* and the *National Military Strategy*. In addition to these guiding strategic frameworks, the annual *National Defense Authorization Act* contains priorities from the president and congress on how the military is to operate. This constitutes formal political influence on the U.S. military. Under this strategic and political guidance, the DoD creates defense policy to align with these executive and legislative

requirements. The Department of Defense plays a highly-influential role in the creation of these documents, ensuring that its fiscal and policy interests are included in the guidance to be signed by the president (Schmidt, 2019).

Military Identity Positioning

The U.S. military attempts to hold to several value identities. Foremost among them is a sense of *honor* and *service* to the nation. Central to that theme is a discursively shared norm that the military institution is *apolitical*, a term used across and beyond the defense department without clear definition. This aspirational identity harkens to the model of English constitutionalism proposed by Walter Bagehot in the mid-19th century. He theorized two parts to the unwritten, but well-practiced rule applied through the ages between the British Crown and parliament: the *efficient* and the *dignified* (Bagehot, 1867). Though this tradition, the legislative process is conducted by the elected representatives in the House of Commons, constituting the *efficient* branch of government. The *efficient* is marked by the passing trends and whims of society that Shakespeare alluded to as the “tide in the affairs of men” (Shakespeare, 1988, p. 82). In contrast, the crown is theoretically expected to remain above the political fray and social trends. In this model, the monarch stands unmoved, unfazed, predictable and steady, at all times enduring as a steady institution that serves all English citizens regardless of class and partisan affiliation. This doctrine is reflected in George Washington’s dislike of politics (Beck et al., 2011), believing there to be a difference between the practice of domestic power competition and statesmanship.

In similar fashion, the theory of *objective civilian control* states that the nation’s defense apparatus should be a rock that all citizens look to as an institution worthy of trust from all

citizens. Yet, we are warned that “No formal theory will ever be able to take into account the full range of micro and macro influences associated with contextual factors or intended spheres of influence” (Boggs, 2017, p. 23). Political scientist Samuel Huntington proposed this style of civil neutrality for the military’s identity following the era of World Wars. The idea of the military as serving all society, regardless of political persuasion, has become a bedrock principle upon which military trust was built and maintained over the last century. But this public perception is a recent phenomenon in American culture, historically speaking. This culture reflects the “prevailing values, philosophies, customs, traditions, and structure, that over time, have created shared individual expectations within an institution about appropriate attitudes, personal beliefs, and behavior” (Dorn et al, 2000, p. 3).

As I discuss in greater detail in the next chapter, politics is about how decisions are made that allocate power. For now, I theorize five specific ways in which the military is inextricably tied to politics. First, war is an action of policy enforcement. Second, those who serve in the military are citizens, and thus have a constitutional right to participate in the civic discourse. Third, the Department of Defense is a congressionally funded cabinet agency of the presidency, and the largest among the federal agencies. Fourth, the military works to influence public policy. Finally, the military is used by elected officials to advance social policy agendas. This final reason is especially important in light of the institution’s attempt to brand itself as *apolitical*.

In this opening chapter, I review contemporary civil-military norms as related to the theory of the military and its members as apolitical agents among society, offer a summary of historical context and key events that were instrumental in the formation of current norms, review the theory of military professionalism, discuss the variance of perceived meanings

associated with political terminology, and summarize recent civil-military scholarship on the *political*—or *apolitical*—identity of the U.S. military.

Defining Terminology

One cannot attempt to make an argument without defining terms and considering all relevant points of view. How words and terms are understood is key to enabling understanding and obviating the confusion that commonly accompanies such nuanced and complex topics. Terms such as *politics*, *political*, *apolitical*, *partisan*, and *nonpartisan* connect to aspects of life that touch all members of society—the polis—in one way or another. These words can hold broad or narrow meanings based on an individual’s experience and perspective. A lack of clear understanding of political terminology increases misperceptions on how to relate well to the social world in which military service members exist. This points to one of the gaps in current civil-military literature: the lack of attention to the reality that political commitments are as much reflected in partisan activity as indicated by them. This is also true across much of civil-military relations literature, in which a hesitation to assign definitions to key terminology results in a body of circular arguments that fail to consider both historical and contemporary realities. “When our language does not permit us to distinguish between political and apolitical (or prepolitical) engagements—and when we cannot even be certain what ‘engagement’ entails—we build an academic Tower of Babel one essay at a time” (Berger, 2012, p. 25). In the military context, words and terms related to politics tend to merge into a sense of synonymous understanding. This is not a new development in societal comprehension. German philosopher Carl Schmitt wrote in 1932 that “The word political is today often used interchangeably with party politics” (Schmitt, 2007, 32). What is political is always subject to debate. “Indeed, nothing

is *a priori* political or apolitical and to say something is already an attempt to ‘do’ politics” (Olsson, 2007, p. 337).

The word *apolitical* is defined as “1. Having no involvement with or interest in politics. 2. Having no political significance” (Webster's II, 2005, p. 54). There is no formal regulation that requires the military, nor those who serve within it, to be *apolitical*. The policy which speaks most closely to this matter is Department of Defense Directive 1344.10: *Political Activities by Members of the Armed Forces*. This Department of Defense Directive (DoDD) does not contain a single instance of the word *apolitical*. It places limits on actions pertaining mostly to issues of partisanship and generally respects the larger frame of political action of military service members. However, that spirit does not carry over into the common discourse that tends to combine all things related to political thought into a generalized meaning. This brings negative consequence; “politics loses all meaning if anything and everything can fall within its purview” (Berger, 2012, p. 24).

We draw the modern word *politics* from the Greek word *politeia*, which “refers to a confluence of individual values with community values... simultaneously a concept, a social and political membership, a set of beliefs, and a set of behaviors that every day reinforced the integration of all those things together” (Manville & Ober, 2003, pp. 10-11). Politics are not concerned merely with parties of affiliation and the candidates who run under party umbrellas. At its most basic form, politics has to do with how humans relate to one another (de Jouvenel, 1963). It is a process through which decisions are made that impact access to, or exclusion from, civil standing, access to goods, and having voice beyond one’s home (Gee, 2014). Measured against that lens,

the military's vast resources and immense budget make it one of the most political institutions in the U.S. government. Any military action or policy of significance will have political ramifications that ripple across local communities, the private sector, state and federal authorities, and the world because of the significant effects it can have on the lives, economies, and governments that are impacted (Schmidt, 2020, para. 8).

Politics is about the processes used to impose authority, rule or withhold agency—all actions undertaken by military units on daily occurrence. As such, “political struggles are as much about power as about the definition of the legitimate political conceptions” (Olsson, 2007, p. 340).

Politics has again become a particularly charged and divisive topic in recent years. This is not always the case in the affairs of humanity. In 1908, G. K. Chesterton wrote of two principles of politics. The first is

that the essential things in men are the things they hold in common, not the things they hold separately. And the second principle is merely this: that the political instinct, or desire is one of these things which they hold in common (Chesterton, 2014, p. 95).

In like fashion Berger writes of the unifying capability of political freedom: “Politics, conversely, involves people coming together freely to strive greatly, act boldly, and—in the shining light generated by free individuals acting cooperatively—reveal their distinctiveness and find meaning in their lives” (Berger, 2012, p. 24). In 1889, Civil War hero and former governor of Maine Joshua Chamberlain defined politics as “the organization of the human elements and powers for the promotion of right living, and to secure the noblest ends of living attainable in human character” (Chamberlain, 1994, p. 197), a definition in harmony with the attributes that military regulations call service members to embody. In such context, politics is viewed as a

function of life that can unite rather than divide. I will explore the meanings of terminology in policy, in contrast to how terms are interpreted socially, in more detail through chapter two.

Contemporary Civil-Military Norms

I attended U.S. Army basic training at Fort Jackson, SC in the fall of 2003. In one of the many briefings received over the course of the nine-week combat training course, we were told by a legal officer that once you join the military, you stay out of politics. I had heard that expressed in different ways before joining. It was interesting to hear it stated so bluntly in that moment. She was referring to the theory that the military is an *apolitical* institution. This is widely spoken among members of the armed services. It has become more prevalent of late in congressional testimony as some senior military officers are being challenged for appearance of partisan endorsement, a break from the tradition in which military officials keep opinions on ideological preference to themselves (Snider, 2016).

Many political and military senior officials advocate for the military as a community set apart from society to be perceived as absent from politics. How did that belief come about, and how realistic or truthful are those expressed desires? That George Washington bowed to the Continental Congress at the conclusion of his military service is viewed by proponents of the military's *apolitical* norm as an initial indicator that the institution has been separate from the political realm since its inception at the time of the Revolutionary War, through which it transferred national political allegiance from the British Crown to a newly formed American colonial government. However, being theoretically subservient to civilian leadership does not necessarily indicate a blind ignorance of the political process, and the military institution's role

in achieving it. Indeed, Washington himself carried out the policy desires of the Continental Congress in commanding military activities pertaining to the American War for Independence.

This *apolitical* norm fits the parameter of a structure, which is marked by unwritten rules and socialized norms (Tracy, 2013). These “norms of behavior in civil-military relationships... come in all shapes and sizes” (Maurer, 2020, p. 352). This concept of an apolitical socialized norm (Tracy, 2013) within the military is an indicator of disconnect between the reality of why the U.S. military exists, how the institution is perceived, and the cultural expectations placed on it. This reflects the kind of social phenomenon that may be what the late culture sociologist Murray Davis labeled as an illusion, noting “what the phenomenon really consists of lies ‘below’ its surface” (Davis, 1971, p. 315).

There has been a renewed interest on whether the military can truly be an apolitical institution in recent times (Babcock-Lumish, 2013; Drohan, 2020; Golby & Karlin, 2020; Schmidt, 2019; Taylor, 2021). U.S. society—from which the military ranks are drawn—has entered a historical season of heightened political interest and friction as the state becomes increasingly involved in nearly all aspects of life, and younger generations tend more toward public activism than their ancestors (Seemiller & Grace, 2019). Yet in 2020, only 47% of military members voted, in comparison to 74% of civilians among similar demographic cohorts (Federal Voting Assistance Program, n.d.). This is despite internal military programs that encourage service members to vote in domestic elections. To support such initiatives, military units are required to appoint unit voting assistance officers (Department of Defense, 2019). These designees receive specialty training in how to assist military members with how to “understand their voting rights, how to register to vote absentee, and have access to accurate nonpartisan voting information and assistance” (Voting Assistance Officers, n.d.).

Defense department policy addresses rules of expression for military members. Rather than requiring military members to refrain from *partisan* expression—as defined and addressed by DoDD 1344.10—defense officials, lawmakers, and many scholars who conduct work in civil-military relations theory instead refer to *apolitical* expectations for those in military service, without there being a clear understanding on what the word *apolitical* means (Babcock-Lumish, 2013). Defense department regulation addresses topics of *partisan* nature, restricting activities of military members in a narrower fashion than it is credited for by institutional and social discourses on the topic. Though an artifact of hard policy, DoDD 1344.10 acknowledges that the rules formalized in it are based on the “traditional concept that members on active duty should not engage in partisan political activity” (Department of Defense, 2008, p. 2), a tradition that Huntington’s writings helped to inspire.

By regulation—what I refer to as *hard policy*—active duty service members are expressly allowed to attend campaign events in their personal capacity, donate to partisan campaigns, and express their perspectives on a policy topic or candidate (Department of Defense, 2008). However, in alignment with a 20th-century narrative that the military—and those within it—are *apolitical*, a school of thought exists within influential sectors of the military that those currently in military service should nonetheless abstain from such involvement. This line of thinking extends among some that military officers should not vote (Cavanaugh, 2016; Sherbourne, 2016; Toner, 2015), in spite of the formal rules that guarantee their rights of civic engagement. At times, this spills over into an internal form of social pressure that discourages military service members from discussing contentious political issues while on duty or off duty in their personal capacities. Despite pressure to be viewed as disinterested in politics and things related to politics, those who serve in the military come from all segments of society and “are not as strictly

apolitical as Huntington's objective civilian control theory intends" (Lythgoe, 2022b, p. 100). Nevertheless, that theory holds strong root today as a point of value across the military as a homogenous community. However, it did not come into widespread acceptance until after World War II, when "senior military professionals began viewing themselves less in the tradition of civilian soldiers and more as members of an educated profession of arms" (Schmidt, 2019, p. 55).

People expect their militaries to win, and to protect the homeland. Military victories instill confidence in the public that the victorious force represents (Shaw, 2013). Likewise, "military defeat is always a serious matter, and if not redeemed in good time can have its own political consequences" (Brodie, 1973, p. 34). Publics, in the foreign lands in which the U.S. military operates in, expect America's armed forces to preserve innocent life. Political leaders expect the military to accomplish national security objectives and reflect a social order in line with competing factions among the public. The American public also has an expectation that the institution will represent all of them, regardless of their party affiliations, i.e.: that it will remain *apolitical*. The metaphoric meaning that the services signal has taken hold to reflect "broader societal cultural meaning(s)" (Yanow, 2000, p. 48). The institution is figuratively caught between the proverbial 'rock and a hard place,' needing to satisfy the national publics that it represents each of them, while working to achieve the political ends of elected officials. It is inevitable that all things related to policy are in some way political. In Western society today, it is challenging to find topics that are not in some ways affected by political winds.

The societal trend of the mid-20th century was one toward attempted depoliticization of institutions. In that context, Huntington's philosophy solidified and became a de facto policy by corresponding to the politics of the day (Lyon & Chesebro, 2011). This contemporary *apolitical*

institutional norm has held for decades. Maj. Gen. (Retired) David Barno and Dr. Nora Bensahel, both professors of strategic studies at Johns Hopkins University, maintain that a wall of separation must be preserved between political and military matters (Barno & Bensahel, 2019). The downstream effect is one in which those who wear the U.S. military uniform are conditioned that they should not express opinions on the policies that they enforce when deployed overseas, and at home station. However, within the force, for a service member to be accused of being *political* is an insult of highest order. “The Huntington model can fuel disdain among military personnel for politics and its practitioners” (Brooks, 2020, p. 29). At the Army basic training class I attended in 2003, a drill sergeant bragged that he hated civilians. I wondered what he had considered himself to have been before enlisting. “Those who see themselves as professionals define away the possibility that their actions might be political. An officer socialized to Huntingtonian norms potentially assumes that, because he is a professional, he is by definition apolitical” (Brooks, 2020, p. 17).

Though institutional norms (soft policy) have strong effect, it is often forgotten that they are not law (hard policy). Political scientist Bertrand De Jouvenel (1963) noted the role of norms in restraining behavior, observing that statements such as “you cannot do this” are not factual when it comes to norms (de Jouvenel, 1963, p. 45), but cause an imaginary reality in one’s head in which there is an obstacle to doing it.

Men are impelled to act with their fellows not because a majority has so decided and a proclamation has been issued to which the minority must bow, but because in such a social condition it comes naturally to go with the others (de Jouvenel, 1963, p. 177). Such institutional and cultural discourses have a way of replacing fact with narrative, which makes it easier to control people’s thinking and behavior. This *apolitical* military discourse is

thus used with the goal of garnering public approval of the institution, which is inherently a political objective when considering what equates to *political* and *apolitical*. Additionally, the military service member is a piece of the societal puzzle that is expected to risk life and limb and, in some circumstances, even take lives in order to promote the policy interests of the state. This highlights what appears to be a values incongruence that will be explored in depth in the next chapter.

An A/Political Institution?

Despite its desire to avoid the appearance of domestic political engagement, the U.S. military inevitably appears among the headlines of political news coverage. In 2020 U.S. Army Lt. Col. Alexander Vindman received national attention for choosing to retire from the Army, claiming career persecution in the same week that he was selected for promotion to Colonel (Britzky, 2020). Vindman became famous in 2019 for testifying against President Trump, in uniform, during a congressional hearing in which he demanded to be referred to by his military rank on camera. This was a departure from the tradition of military officers assigned to the National Security Council, and other Capitol Hill offices wearing business attire to align with the civilian atmosphere (Horton, 2019). In 2020, the Chairman of the Joint Chiefs of Staff, Gen. Mark Milley, also made headlines in an undesirable fashion for wearing his fatigues to patrol Washington, D.C. during recent protests in the nation's capital (Cooper et al., 2020), and later telling a congressional committee that he wants to understand white rage (CSPAN, 2021). Soon thereafter, Defense Secretary Dr. Mark Esper was fired for contradicting the president publicly (Lubold, 2020). The prevailing perspective of the military as an apolitical institution makes the act of serving military leaders contradicting the president taboo. When serving uniformed leaders

challenge a president, it also leaves the services in question of what to do next: to obey the expressed intent of the commander-in-chief, or to obey the service official who is challenging the president. Occurrences of serving military leaders challenging a president are amplified by the increased use of open social media platforms by military members to express personal thoughts on political topics (Brooks, 2020). Many people have cited events like these—in which military officials enter the political news cycle—to claim that the military is becoming politicized, and that such is a recent phenomenon. However, that interpretation of recent events overlooks the history and mission of the Department of Defense throughout the nation’s history.

There is a disparity between the grand narrative (Tracy, 2013) that the military act as an apolitical institution, and the reality of the military’s mission with respect to national policy pursuits. These tensions are not new (Barno & Bensahel, 2019). The use of military power for political purposes is a common theme across human history. Among the foundations of the Western military tradition, Frederick the Great is credited with uniting Germanic tribal lands for the purpose of expanding his kingdom in the 1700s (Lynn, 2005). By expanding the Prussian empire, Frederick amassed the power to tax the populace to grow his army to achieve greater territorial ambitions (Lynn, 2005). The discourse of a gulf between military and political processes is a uniquely Western concept (Brodie, 1973). Dictatorial powers in other parts of the world make no contention of who is in charge of their militaries.

The political revolutions in Russia, Italy and Germany had produced dictators with the ruthlessness and will to put themselves unequivocally in charge. In these countries there was never the slightest question who was boss, and it was not the military (Brodie, 1973, p. 30).

Stalin and Hitler both purged their officer ranks, ensuring loyalty to party-driven ideology rather than to the people of Russia and Germany. The same remains true in many nations-state governments today, North Korea being the most notable ongoing example. Closer to home, recent work reports that the advancing militarism of the past century in the U.S. (Ekirch, 1956) has morphed into an unaccountable, praetorian military institution (Schmidt T. A., 2019).

Huntington's Model of Military Professionalism

In his 1957 book *The Soldier and the State*, political scientist Samuel Huntington argued that U.S. military officers should serve in an *apolitical* fashion in order to fulfill the requirements inherent to the profession of arms.

Politics is beyond the scope of military competence, and the participation of military officers in politics undermines their professionalism, curtailing their professional competence, dividing the profession against itself, and substituting extraneous values for professional values. The military officer must remain neutral politically (Huntington, 1957, p. 71).

This is a work from which those who study civil-military relations widely accredit the idea of the military officer as a politically sterile actor within an *apolitical* institution (Brooks, 2020; Landru, 2018). This theoretical concept of a professional military force was relatively unorthodox in the U.S. at the time, a nation whose populace had been traditionally hesitant to approve of standing armies, preferring a reserve-style militia system for homeland defense.

American social doctrine changed following the Second World War. Having fought two World Wars within 30 years, the United States embarked on an initiative of deterrence, raising a large global military superpower of expeditionary forces available for a wide range of military

actions in support of foreign policy objectives worldwide. One way to earn public trust for such a large and permanent armed institution residing among the public would be to make the public feel that the military institution was disinterested in the political whims of the day and existed to serve every faction in the nation, regardless of which political party is in power. This speaks more specifically to the practice of *partisanship* than *politics*. Yet discourses common to the U.S. military institution instead use terms associated with *politics* broadly, such as *nonpolitical* and *apolitical* in describing its desired identity among the fray.

Transitioning to a permanent, large-standing force in the post-World War II era stimulated new ways of thinking about what a *professional* military should look like. Defining the meaning of a profession is challenging, as it tends to be “a social construct that changes over time” (Beasley, 2018, p. 105). Yet attributes of professionalism generally accepted today include lines of work that serve the public good, are self-regulating, and require expert knowledge (Millett, 1977). Huntington’s perspective took hold and fomented a cultural expectation that was eventually memorialized in military regulations that preclude active duty service members from running for civic office, advocating for or against a specific political party, or attending partisan campaign events in uniform (Department of Defense, 2008; Department of Defense, 2021). This begs the question of how one defines things which are *political* and *apolitical*, *partisan* and *nonpartisan*.

Huntington's idea remains aspirational across much of the force. Yet a growing list of civil-military scholars and observers are openly skeptical of the narrative, noting it is not practical given the realities of military existence, whether in a theoretically free society or one ruled by heavy hand (Babcock-Lumish, 2013; Brodie, 1973; Drohan, 2020; Golby & Karlin, 2020; Kels, 2008; Krasnican, 2021; Lythgoe, 2022b; Maurer, 2020; Schmidt, 2020). “The

military has fully embraced the Huntingtonian myth, and used it as a justification for a ‘membrane’ between the political and military in order to create an autonomous professional sphere” (Babcock-Lumish, 2013, p. 49). One veteran interviewed for subsequent chapters of this dissertation put it this way: “Humans are essentially political beings, so there has never been a time when soldiers were automatons.” Another perspective says that the military should acknowledge its *political* qualities, while avoiding the appearance of *partisan* interests. “While the U.S. military can never avoid partisan politics altogether, it must nevertheless be non-partisan enough to maintain internal cohesion and the trust of political leaders and the American people” (Lythgoe, 2022b, p. 103). Thus while it might be scandalous to ponder this aloud within the ranks, it is worth asking if there is validity to the military’s claim of *apolitical* identity, given increasing skepticism of the idea as “a useful fiction” (Bacevich, 2005, p. 210). Anchored discourses are powerful, but are not always accurate. Looking beyond civil-military discourses, we can see ideas that took hold across society in the same way. These include claims that humans use only 10% of their brains when there is no supporting evidence (Swami et al., 2012), or that breakfast is the most important meal of the day, both discursively-conveyed, influential myths that are challenged by the preponderance of evidence (Spector, 2020).

Trends of Depoliticization

In contrast to historic tradition, the mid-20th century brought about a trend toward cognitive depoliticization, “a discursive logic which frames an issue in terms of a social consensus about an inevitable, natural development best left to technocratic or market considerations” (Maesele et al., 2017, p. 169). Institutions sought to portray themselves as being politically neutral, as well as political figures in the U.S.—a point highlighted by John F.

Kennedy's claim that public servants can compartmentalize personal values from the actions of governance (Kennedy, 1960). Moves to bring reason to fractious topics included institutional acts of sharing political power with administrative agencies, and the rise of expert influence to deal with complex topics of political salience in society. It was into this context that Huntington introduced his idea of a politically-detached military. These moves mirror a shift in political science scholarship, in which scholars challenged traditional boundaries between political and apolitical in order to expand the former significantly" (Berger, 2012, p. 25). This attempt to compartmentalize the civic elements of life contradicted an early Greek perspective on the stewardship of a republic, which understood that humans are political creatures and have an impulse to associate into political orders for the management of societies (Aristotle, 1952b).

Scholarship more recent to our time challenges the idea of civic neutrality. "Politics is about something other than neutrality. Democratic politics challenges, redefines, and renegotiates the division between the good and the just, the moral and the legal, the private and the public" (Benhabib, 1992, p. 83). Military members aspire to be experts in the application of force, who must understand the full context of the environments in which they train, operate and fight. "Rather than hide behind the guise of value neutrality, the expert must actively employ his or her own subjectivity to understand the views of others—citizens, politicians, and decision makers, among others" (Fischer, 2000, p. 253).

Value Terminology

It is not entirely unusual that what one person considers to be a matter of *politics* to be what another considers to be a matter of *principles*. This holds for the reverse as well. Common understandings of what constitutes *politics* are vague across much of society. The predominant

formula for what constitutes the practice of *politics* among political scientists is the combination of power and choice. To others, a definition of politics might be limited to the execution of duties by elected officials. Still others hold to different perspectives. We talk of electoral politics, work politics, and even family politics. Yet if asked for a definition of what words such as *politics*, *partisan*, *political*, *apolitical*, and *nonpartisan* mean, few would likely demonstrate thoughtful and informed understanding.

Epistemic communities, such as the military, revolve around the idea of “value-based rationale” (Haas, 1992, p. 3), and communicate through terminology that harkens to it, using markers that include creeds such as the Army’s published institutional values of loyalty, duty, respect, selfless service, honor, integrity, and personal courage. In the military context, aspirational identity references often come discursively wrapped in *value terminology* (Vielledent & Spears, 2023). Rhetoric about war “is dressed into speeches about patriotism, love of country, and ‘we must all put our shoulders to the wheel’” (Butler, 1935, Chapter 2, para. 3). As the Russian Nobel Laureate novelist, and political dissident Alexander Solzhenitsyn wrote, such orders prepare national citizenries to accept “war and conscription orders issued... as the will of God” (Solzhenitsyn, 1974, p. 12). Such rhetorical markers link to broad ideas that I refer to as *value identities*. For example, the word ‘ready’ represents a value identity in the military.

The public expects the military to be ready for combat. How is that quantified? There are certain markers, such as a soldier being current on his or her physical fitness test, immunization requirements, rifle marksmanship, etc. Other vague ideas used as value terminology make use of terms and ideas including ‘readiness,’ the “war to make the world safe for democracy,” war as a “glorious adventure” (Butler, 1935, Chapter 3, para. 17), and what one veteran interviewed for this dissertation labeled “the rhetoric of good order and discipline” to harken to “the veil of

national security” (Schmidt, 2019, p. 2). The same phenomenon is at work in much of civic discourse associated with the concept of ‘the public good.’ Value terminology refers to phrasing that lacks firm definition in the context used, and appeals to emotion—making the associated ideas easy to rally stakeholders around. In the military context, the word *apolitical* is one such value term. Value terminology relies on the logical fallacy of circular argument, in which the outcome is merely repetition of the premise absent evidence to demonstrate causal relationship. Without clear criteria, anything at all can be argued to equate to ‘readiness.’ This helps explain why definitions are frequently excluded from the discourse surrounding this complex and important issue. The intent is to influence rather than inform.

Moral philosopher Harry Frankfurt’s reflection on the tactic of ‘bullshit’ offers additional insight through which to consider how those who act as conduits of value terminology do so. One person may espouse inaccuracies or fallacy-based arguments out of ignorance, when “a person’s obligations or opportunities to speak about some topic exceed his knowledge of the facts that are relevant to that topic” (Frankfurt, 2005, p. 63). In other words, one conveying inaccurate information or employing fallacious reasoning may not mean to deceive, but is instead grasping for anything to say in defense of a topic that he or she lacks understanding of. Another impetus for the employment of rhetorical sleight of hand is that the speaker is concerned with agenda rather than fact, and is willing to misrepresent context, use specious argument, or even knowingly misstate facts in order to make a point. “He does not care whether the things he says describe reality correctly. He just picks them out, or makes them up, to suit his purpose” (Frankfurt, 2005, p. 56). By using terms that are thought to be culturally unassailable, institutional proponents of value terminology technique portray a sense of social Gnosticism among claimants of the particular cause at hand. This is a morally risky endeavor. By “making

assertions without paying attention to anything except what it suits one to say, a person's normal habit of attending to the ways things are may become attenuated or lost" (Frankfurt, 2005, p. 60).

Historical Theories of Warfare

Throughout human history, to assert that warfare and politics are inextricably intertwined, and that war has a distinctly political element, had not been a controversial statement (Bacevich, 2011; Brodie, 1973; Golby & Karlin, 2020). It is historically abnormal for militaries to sequester themselves from society and attempt to disconnect from political topics. Tradition over the course of human history is replete with kings ordering military campaigns for purposes that included increasing political support among their subjects. We find an early take on the *apolitical* framework reflected in Western military identity thought, written by the early Christian church leader Paul in AD 67, during his final imprisonment in Rome: "No one serving as a soldier gets involved in civilian affairs. He wants to please his commanding officer" (Christian Standard Version Bible, 2007, 2 Tim. 2:4). Paul wrote during the time of the Roman Empire, a society in which wealthy men with political aspirations sought opportunities to command armies on military conquests for the purpose of building their public standing as part of long-term political ambitions. Even today the military background of veterans who seek elected office is often used in trying to establish their credibility.

Over the span of human history, "the idea that a nation engages in war for some distinctive political end could hardly have been overlooked" (Brodie, 1973, p. 4). Across ancient times, up through the 20 century, the political implications of military action were more openly acknowledged than in the past century. For example, in the Athenian empire, citizens voted on whether or not to go to war with a clear understanding that such state efforts may demand their

personal military service in that pursuit (Manville & Ober, 2003). Similarly, Sun Tzu's writings clearly indicate that even in ancient times military leaders recognized the decision to engage in warfare as political (Handel, 2001; Tzu, 1963).

The connection between the U.S. military and the American political structure goes back to the nation's founding. The U.S. Army and Navy predate the republic's formation and helped to set the conditions for its formation through the Revolutionary War. At that time, English officers were commissioned based on social and political status. Commanders were elected by their men. That tradition carried over into American practice through the U.S. Civil War era nearly a century later. George Washington became the first U.S. President after serving as the nation's first General of the Army. Many political successors likewise emerged from the military ranks over the course of our national history, veteran status being a key biographical detail touted in their runs for political office (Mansoor, 2016).

Prussian military officer Carl Von Clausewitz observed the Napoleonic campaigns of the early 1800s and authored a collection of writings published posthumously by his wife, in his influential treatise *On War*. This work has become one of the most authoritative and foundational texts for Western military officers to read as they advance through the mid-career ranks since its initial publication in 1832. In contrast to the prevalent discourse spoken across Western societies that their militaries function independently of all things political, Clausewitz wrote that "war is not merely an act of policy but a true political instrument, a continuation of political intercourse" (Clausewitz, 1993, p. 99). He was confident in saying that war and politics cannot be separated, writing that political aims are the starting point of warfare, and that the amount of political will to accomplish a specific policy objective directly correlates to the amount of force that nations are willing to exert to achieve it (Clausewitz, 1993). Nations that engage in war without a

political end are “simply perpetrating wanton destruction of life and goods” (Brodie, 1973, p. 6). Echoing that assessment more recently, Simon Anglim, a teaching fellow in the King’s College Department of War Studies in London wrote that “all war is explicitly political, and so every action by any member of the armed forces in the performance of any military operation will have political intent and implications” (Anglim, 2018, p. 138). This reflects a similar sentiment expressed by former U.S. Civil War General Joshua Lawrence Chamberlain in 1889, who wrote that war is “a political question submitted to the arbitrament of arms” (Chamberlain, 1994, p. 192).¹

Famed Civil War general William Tecumseh Sherman is often cited by defenders of the *apolitical* norm for refusing to run for the presidency, even saying he would not serve if elected. His supposedly *apolitical* ethic did not stop him from ensuring that northern soldiers under his command could take furlough to vote when requested to do so by President Lincoln (Kels, 2008). Public reaction to the Army’s interference in elections during the reconstruction era led to passage of the Posse Comitatus Act that restricts military interference in domestic civil affairs (Ekirch, 1956). Contrasting with Sherman, Civil War General George McClellan lambasted President Abraham Lincoln and ran against him for the presidency in 1864 as the Civil War raged on. In this period of American history,

It was common for general officers to be appointed to senior ranks for purely political reasons, whether to garner political support of a particular constituency or to address a particularly complex political issue or challenge. Many of these politically appointed

¹ Chamberlain commanded the 20th Maine Volunteer Infantry Regiment during the U.S. Civil War, and rose to the rank of brevet major general and later became the Governor of Maine.

generals were empowered to overrule civilian governments and displace democratically elected civilian officials (Schmidt, 2020, para. 13).

While war is a competition between political elements, it is the political masters who determine the enemy that the soldier will fight, leaving the soldier free of such concern (Schmitt, 2007). This works both ways though. When a commanding officer's concerns are civilian affairs, the soldier likewise focuses efforts there.

The Second World War changed everything militarily, bringing about a permanent industry of armament (Eisenhower, 1961). America's geographic isolation from other superpower nations fomented a philosophy in which U.S. forces are expected to be used only overseas (Durso, 2020). In the 20th century, the tide of thought among Western military theorists pivoted to a doctrine in which Western militaries act in isolation from the political process, and are thus *apolitical*. This change coincided with the transformation of the United States from a nation that had historically maintained a small standing military during peacetime into a sustained global military superpower following the conclusion of the World War II. It was in the immediate years after the war that the collection of military departments were merged into a single Department of Defense by order of legislation signed by President Truman.

Historically-informed understandings acknowledge that a society's armed forces carry out practices of warfare as part of the state's political mechanisms. Yet as the West emerged from the Second World War, the U.S. departed its long-standing norm of a limited peacetime military and adopted a permanent, global military posture. Into this era, General Douglas MacArthur—senior Southwest Pacific Commander of World War II—was fired by President Truman in 1951 for challenging Truman's vision of U.S. involvement in the Korean War. In contrast, World War II military figure Gen. George Marshall considered the perception of U.S.

military officers having a perceived political status in society as problematic (Coffman, 2000). Marshall made it publicly known that he did not vote, an avoidance that remains as standing precedent among some military members. The impact of that thought movement was likely amplified across the military due to implementation of Posse Comitatus Act. Signed into law initially in 1878, this legislation prohibited the U.S. military from enforcing law domestically. This was a significant departure from military uses on domestic soil in the nation's first century.

Things changed for how the U.S. military wanted to be perceived going into the second half of the 20th century, following the Second World War and the Korean War. Huntington (1957) argued that this standing, post-war force and its members should isolate from the civic politic in order to fully *professionalize* in the age of what the former Supreme Allied Commander Dwight Eisenhower warned of as the rising *military-industrial complex* (Eisenhower, 1961). An earlier version of the speech included congress among those to blame for a *military-industrial-congressional complex* (Hornblow, 2009).² Among the things required by for a vocation to achieve the status of being a profession is a grant of that status by a trusting public (Millett, 1977). To achieve such trust required a change in public perception, which had been historically opposed to large, standing armies (Coffman, 2000; Huntington, 1957). By the end of the 1950s,

some doubts were being expressed as to the advantages of encouraging political thinking by professional military officers and the assumption of political responsibilities by professional military institutions. It became obvious that the Joint Chiefs of Staff could not participate in the 'good' politics of policy without also becoming enmeshed in the

² The late Senator, and veteran of the U.S. Navy John McCain, held the original language of "military-industrial-congressional complex" to be more accurate of the modern defense department arrangement than the language of "military-industrial complex" that made the final cut for Eisenhower's farewell address in 1961.

‘bad’ politics of partisanship. The need for some secure fount of impartial professional judgement became more widely accepted (Huntington, 1957, pp. 459-460).

Huntington’s theory of *objective civilian control* offered a potential avenue to overcoming public skepticism toward a permanent, large-standing Army.

Even in military actions that are regaled as campaigns of humanitarianism, the reality of political ends cannot be escaped (Brodie, 1973; Chamberlain, 1994; Miller, 2023). Dwight D. Eisenhower acknowledged in his autobiography that military objectives to liberate Europe from Hitler’s forces were at times adjusted in order to conform to political objectives (Eisenhower, 1948). In a 1952 address at the U.S. Army’s Command and General Staff College, British Field Marshall Sir William Slim acknowledged that elected officials and national policies have a definite impact on the process of military command (Slim, 1990). Brodie blames the stalemates of the First World War on “a failure to match military design with political purpose” (Brodie, 1973, p. 15). Since the end of the Second World War in 1945, the U.S. has deployed forces many times, but has not deployed under a formal declaration of war since 1941. These deployments span a wide range of missions that include, but are not limited to, combat operations, counterinsurgency, humanitarian assistance, defense support to civil authorities, training and advising, and counternarcotic operations. Historian Victor Davis Hansen notes that the U.S. military of today reflects an imperialistic design with its approximately 600 bases positioned around the globe (Hansen, 2023), rather than a defense force for the protection of the U.S. homeland.

There is ample room for debate as to how this ongoing use of military forces comports with national security versus political strategy. In his farewell address to the nation, President Dwight D. Eisenhower, himself a military figure, warned that the growing military establishment

wielded tremendous political influence (Eisenhower, 1961). The U.S. military does not train as much for defending the U.S. homeland, as it does for combat activities overseas. Retired U.S. Naval officer James Durso writes “the Pentagon has likely spent more time thinking about defending Germany’s borders than America’s” (Durso, 2020, para. 21). In the same spirit, former Secretary of Defense Robert Gates believes that the U.S. has become over-reliant on the military as an instrument of national power, leaving several nations around the world in shambles following misguided U.S. efforts at nation building through military force (Gates, 2020).

The Shifting of Civil Military Norms

The contemporary *apolitical* civil-military norm faces increasing debate and is being challenged now even by some still in the active-duty military ranks. “Sometimes norms that seem helpful, and that are even rooted in noble goals, can become destructive” (Goleman et al., 2013, p. 175). A large segment of military officers in service today do not recognize the disconnect between their beliefs in *apolitical* professionalism and their actions to the contrary (Brooks, 2020). Politics surround civic life, yet serious discussion that is well informed with proper senses of meaning for politically-associated terminology can be hard to find. The rhetoric of the military as abstinent from all political factors is thought of by some as a pretension (de Jouvenel, 1963), a “historical fog bank” (Dilorenzo, 2003, p. 20), a “vaguely conceived principle” (Brooks, 2020, p. 21), or even an ad populum fallacy in which something is assumed to be true because enough people believe it. The norm faces increasing suspicion and appears to be less widely accepted now than in times past (Maurer, 2020). This “romanticized history of the military” and “institutional personal” foments a normative bias that “creates a scholarly blind spot” about the nature of the U.S. military complex (Schmidt, 2019, p. 33). Into this increasing

criticism of assumption, questions are being asked about the once seemingly invincible norms associated with objective civilian control. “Should we still consider the civil-military norm in question to really be a norm? Should we still consider it to be a civil-military norm worth sustaining?” (Maurer, 2020, p. 14). It is said to be “both confusing and counterproductive” (Golby & Karlin, 2020, para. 2), as well as unrealistic and crumbling (Donnelly, 2020).

This question is especially salient when noting silence among military elites when presidential candidate Joe Biden said that the military would forcibly remove Donald Trump from the White House if he lost the 2020 election and did not depart voluntarily (Durso, 2020; Jacobs, 2020; Mucha & Bradner, 2020). The next month two retired military officers penned a commentary calling for the Chairman of the Joint Chiefs of Staff Gen. Mark Milley to remove Donald Trump from the White House (Nagl & Yingling, 2020). Though Nagl & Yingling’s commentary received strong criticism among many who closely follow military matters, their willingness to take a highly-politicized position is not exclusive to former members of the military. President Biden was quoted at least twice in 2023 saying that military fighter aircraft would be capable of overcoming American citizens who advocate for gun rights (Morris, 2023). That sentiment was then echoed by U.S. Army Staff Sgt. Cindy Bronson in a video she posted to TikTok. In it, she said:

“Understand that if active duty military actually get deployed within the United States, that weapon is not just going to be pointed at other people, other countries, it’s pointed at you. If you do not get in your house when I tell you to, you become the enemy. Martial law. You know, when your rights get curtailed? You don’t have those same freedoms that the constitution guarantees at that point” (cited in Travis [@Travis_in_Flint], 2021).

These comments were made in military uniform. As of the time of this writing—over two years later—no units within Bronson’s chain of command have commented on this publicized example of political expression conducted in uniform. Such language harkens to uses of the military to arrest lawmakers, journalists, and others who expressed criticism for President Lincoln during the U.S. Civil War (Dilorenzo, 2003), subordinate U.S. citizens to military forces, and guide the outcome of elections in both northern and southern states in the post-Civil War years—a period during which southern states were governed by military officers as military districts (Ekirch, 1956). More recently, the White House Press Secretary said that military members serve the presidential administration (RNC Research, 2024). To say the least, messaging on this topic is increasingly inconsistent.

Some of the nation’s most senior military officers—referred to as general officers for having attained what’s referred to as *flag rank*³—are showing a growing level of comfort with making their thoughts about contentious domestic political issues known, even when in uniform. Oftentimes, these statements contradict the president’s perspective, and sometimes even convey a personal social policy desire. This was highlighted in 2020 by statements Secretary of Defense Dr. Mark Esper and the military chiefs of staff made on matters of heated cultural debate (Weisgerber et al., 2020). In so doing, they advocated for how social agency, government resources, and constitutional rights should be realigned, all things in which politics are rooted. This kind of official military advocacy on domestic social fights is a notable departure from the Huntingtonian norm, and complicates the military institution’s efforts to maintain a discourse narrative of holding to an *apolitical* identity. It is usually lost on most civilian observers that

³ These ranks are Brigadier General, Major General, Lieutenant General, and General (Rear Admiral, Vice Admiral, and Admiral for the Navy and Coast Guard)

officers appointed to such senior ranks are presidentially nominated and senate confirmed. The reality is that once an officer enters into the flag ranks, he or she has departed the realm from which dispassionate political neutrality can be credibly claimed. As military historians have noted for centuries, generals are savvy political actors. It is a requirement for them to reach increasing levels of rank, authority, and stature. Gen. Marshall's example of making it known that he abstained from voting was echoed in our time by Gen. David Petraeus. Yet Petraeus maneuvered as masterfully as any federal politician (Bacevich, 2011). "For better or worse, there is today little doubt that a prerequisite for occupying the highest military billets is a considerable level of political savvy and expertise in bureaucratic maneuvering" (Kels, 2008, para. 10). Yet through all the political steps taken to achieve promotion to the most senior ranks of the U.S. military, the discourse common to them all is their *apolitical* nature. The increasing practice of uniformed political advocacy draws questions over whether these officers are speaking from a place of genuine concern for the good of the nation, or from a place of personal political, even partisan, perspective.

Though there is an uptick in writing on civil-military norms in the last decade, a thorough understanding of why current generations represented in the armed services feel the liberty, or even the need, to push beyond what had been acceptable in the age of contemporary norms is lacking. A potential reason may be that "the military appears to be a career choice rather than solely a service choice" (Seemiller & Grace, 2019, p. 283). The military's era of professionalization over the previous century was based on the idea of service to a cause. In contrast, modern recruiting increasingly portrays military life in terms comparable to civilian employment, focusing more on financial incentive and less on narratives that emphasize selfless duty to a higher cause.

We are living in a period of national history in which civil-military norms are being reevaluated. This claim begs the question of ‘what norms?’ On one hand it is argued that the intersection of political and military realms is a moment of disruptive social evolution. On another, it can be argued that the period in which the theory of an *apolitical* military existence became mainstream was itself a disruption to the historic understanding that warfare is inherently political. “Fractures appear in what was thought to be a solid edifice of customary standards of conduct defining what it means to be a ‘professional’ in the profession of arms” (Maurer, 2020, p. 344).

Risk of Perpetuating Apolitical Expectations

Recent scholarship on civil-military relations argue that the theory of military *apolitical* professionalism does more harm than good in at least four ways. First, it enables misunderstanding of how general officers should be involved in policy; this may endanger the trust relationship between future presidents and their military advisors, and potentially taint the advice that those advisors give to the commander in chief (Barno & Bensehal; Brooks, 2020; Burke & Reid, 2020; Donnelly, 2020, Durso, 2020; Golby & Karlin). If presidents think their generals have a hidden agenda, it could have devastating impacts with global implications (Durso, 2020).

Second: the current apolitical expectation adds to a misunderstanding between military members, their political superiors, and the general public (Brooks, 2020; Donnelly, 2020).

It is almost certain to initiate a new level of disharmony and politicization in civil-military affairs, a step-change in the loss of trust between soldiers and statesmen that has been growing for the last three decades, and a serious blow to the ideal of above-the-fray

“professionalism” that has been the at the core of the officer-corps ethos since the days of George Marshall (Donnelly, 2020, para. 5).

Out of a fear of inadvertently speaking on a matter that could have political consequence, many military leaders choose silence. This contributes to a growing misunderstanding between the public and members of the military.

Third: cultural pressure to be viewed as *apolitical* makes it easy for military leadership to avoid acknowledging the political implications of their actions, and to avoid responsibility for their contributions to strategic failures. American political leadership has ceded too much oversight responsibility to the uniformed brass, who can claim that failures are the result of not receiving the proper appropriations from the executive and political branches (Brooks, 2020). However, Brodie warns that politicians should not be let off the hook either, for they are responsible for the selection of senior military commanders (Brodie, 1973).

The fourth reason to question the value of the theory of *apolitical* military professionalism is that it sows epistemological confusion among military members. In conforming to this “official story,” their ways of thinking on complex matters are deformed (Dreher, 2020, p. 103). One service member’s conviction is another troop’s politics. “This tautology alleviates the impulse for self-scrutiny about what it means to be *apolitical* and what the behavioral and intellectual bases are for such a stance” (Brooks, 2020, p. 17-18). Unable to understand what it means to be *political*, traditionalist military officials are unable to defend against real and perceived partisan interference within the institution (Brooks, 2020; Golby & Karlin, 2020; Krasnican, 2020). Left unaddressed, this conflicted institutional paradigm risks undermining trust among those who serve in today’s military. Trust in one’s fellow troops is critical to military fighting capability, something that adversary nations seek to undermine.

I propose a fifth reason that perpetuating the theory of *apolitical* civil-military norms as institutional canon in an age of heightened political and partisan advocacy within the ranks: it enables what I refer to as a social doctrine of military members as being conceptually reduced to lesser citizens in modern times. When society expects military members to lay aside their constitutional rights to speech and bodily autonomy—absent a clear and pressing national security need—the gulf between the public and its military widens and U.S. citizens in uniform are denied agency and rights guaranteed by law and regulation, by discourse-influenced opinion and norms. The military is comprised of people who retain their individuality, including their thoughts on social topics. Yet, because the public feels a sense of ownership over the military institution, many of the louder voices that comment on the topic of military politicization do so from a perspective of service members as automatons, who are believed by some to be locked out of participation in the policy debate because of their status as military-affiliated public servants. This effectively robs the body politic of the voices of those positioned to be best informed on topics pertinent to national defense.

Finally, attempting to define the military’s institutional character in one word, *apolitical*, encourages a sense of identity that is not based in reality, encourages military policymakers to think in simplistic terms, and allows those acting in bad faith to hide behind the uniform when making and enforcing decisions aimed at advancing partisan interests. This enables policy decisions within the military—and at the national level—that unnecessarily risk counterproductive, even immoral, outcomes. “Theories can have unintended negative consequences if they oversimplify the issue” (Boggs, 2017, p. 22). The current civil-military norm seems to be defended for its public relations value over reality or historical precedent, in spite of the institution promising truth to American—and allied—publics. It enables a narrative

in which the military's character is presented in a way that contrasts with its historical role as an active agent of the American policy process. Recent polling data suggests that the appearance of military political advocacy—which contrasts with military institutional claims—is tempering public trust in the armed forces (Ronald Reagan Institute, 2022). As the appearance of such a values incongruence gains ascendancy, it could further erode declining trust within the services, and with key publics.

Relevance

Addressing the military's place in the political process is critical for maintaining the public's trust. In the current age of democratized information, military exercises carry an increasing risk of perception of contributing to the perception that the military is being actively weaponized against the American public. Recent examples include the use of military hardware during the 1993 siege in Waco under President Clinton, rumors of a mal-use of military personnel during operation Jade Helm in 2015 during the Obama administration, and military support to border enforcement in 2018 under the Trump administration. Likewise, honesty with military members is required to prevent a loss of trust and allegiance within the ranks, as a perception grows that military leaders are increasingly acting in overtly political ways, while signaling and calling for the rest of the force to stay *apolitical*.

Military commands cannot contain reporting of actions taken in public to the same extent as in times past.

The fact that so many people have a camera and video recorder in their pocket is not only changing the ways that social processes, including conflict, can be viewed but also highlighting the shifting controls and screaming that researchers are not the only producers of knowledge (Margolis & Zunjarwad, 2018, p. 622).

The modern information environment puts everything under a microscope. People across the nation would not have been in an uproar if Ulysses S. Grant, Normal Schwarzkopf, or George Patton appeared publicly in the capital city wearing a military field uniform, as Gen. Milley faced in 2020. Relying on clarifying language when things go bad in the news cycle is a risky crisis management strategy (Yanow, 2000). In an environment of hyper-partisanship in all aspects of society, military service members need to be comfortable addressing the topic in a realistic manner (Golby & Karlin, 2020). People tend to reproduce the norms of their institutions (Lammers & Barbour, 2006). They need to be able to understand where those norms come from and be able to speak to them realistically.

Addressing Critics

Civil-military dynamics are not something that can be proven or disproven objectively via means of quantitative scientific method. They have been long debated in similar conceptual means as other topics like theology, reason, and ethics. Millennia of work in these fields use argumentative methods. This work seeks, as with hymn lyrics penned in 1827 “to follow in their train” (Heber, 2020, p. 666). While attempting to measure through methods aligned to social science research, the following chapters are more akin to studies conducted in the realms of philosophy, history, and theology than much of the quantitative scholarly work in the fields of leadership and communication study. This is one scholar’s attempt to add a small insight to a very boisterous conversation on a topic of emotional connection among those who study or follow civil-military affairs. In taking on an issue of adaptive challenge in the military, I know full well that “no one who tries to name or address the dysfunction in an organization will be popular” (Heifetz et al., 2009, p. 17).

All research is impacted by the perspective and experience of the author and research participants. Mine is no different. I acknowledge up front that “There is no neutrality. There is only greater or less awareness of one’s biases” (Rose, 1985, p. 83). It is personal experience and fascination that draws me to this topic of scholarship. My voice is a tertiary one among many others that speak through the interview process to specifically inform Chapters 3 and 4. This work makes use of multiple data streams that include lived experience of both myself and others, factual events in military history, and results reported across other recent civil-military relations research to crystallize findings (Ellingson, 2011). Where a critic may see the inclusion of autoethnographic, *insider* knowledge to be a risk, I offer that it adds unique insight with which to explore an issue of which one uninitiated to military culture may be less aware of the contextual nuance of the topic. Insider academic research allows scholars “to break through bureaucratic hurdles and understand the complexities of a social phenomenon ill-suited for quantitative methodologies” (Schmidt, 2019, p. 64). Some of those insights have been shared in this introductory chapter to add context from first-hand experience to the discussion. The combination of methods enables a holistic look at the impact of ongoing cultural norms that have a deeply personal impact on the U.S. military population, and the understanding of their role by interested publics.

The subject of civil-military norms is one on which unanimous consensus is likely not possible (Davis, 1971), as “human phenomena are themselves the subject of controversy.” (Lincoln et al., 2017, p. 138). Yet it is an important area for continual exploration as free societies and military forces are naturally in tension. “There is a realm of activity that policymakers need to have evaluated, systematically, rigorously, and methodically, which centers not only on values but also on other forms of human meaning, including beliefs and

feelings” (Yanow, 2000, p. 4). One challenge of this sort of research is that it inevitably falls into the sector of ‘one man’s terrorist is another man’s freedom fighter.’ “The criteria of political wisdom are indefinite, ambiguous, and highly subjective. Politics is an art, military science a profession” (Huntington, 1957, p. 76). In like fashion, one man’s politics are another man’s principles. “Confronting people with ‘facts,’ even facts they conceded, does not necessarily get them to change deeply seated theories about the world—and there are few theories as deep seated as our views about social goods and how they are and should be distributed” (Gee, 2014, p. 128).

Discussion

The concept of an *apolitical* force was challenged from the beginning of U.S. National history by the words of George Washington: “When we assumed the soldier, we did not lay aside the citizen” (Washington, 1775, para. 2). The Huntingtonian mindset likewise faces renewed challenge in light of public dynamics that demand that institutions enter an increasingly contentious political fray (Brooks, 2020; Golby & Karlin, 2020; Schmidt, 2020). I expect the results of this study to shed light on variance of understanding on what terms like *political*, *apolitical* and *partisan* mean among those in the military. “The formation of our own interests has its own forgotten history” (Lyon & Chesebro, 2011, p. 73). It is time to explore anew not only how military policy on political expression among those in uniform came into being, but also its impact on military institutional culture and credibility with stakeholders.

Conclusion

As an institution, the military must live up to its own rules. The U.S. military fits within the parameters of a *helping profession*.

We think of people in helping professions as obligated to help people who need help if their need falls into the domain of the professional's skills. Thus, we think that priests, doctors, nurses, and teachers are there to help people and are professionally and morally obligated to help people in need (Gee, 2014, p. 121).

The public is not going to be shocked that the U.S. Department of State, or Department of Education carries out the politics of the sitting presidential administration. The Department of Defense, however, is expected to stay out of politics because it has signaled an apolitical identity for so long that the overwhelming majority of Americans accept it and take for granted that the military can be trusted, regardless of who the commander in chief is at the time. If the brass wants to maintain that trust, its members must ensure that the defense department's actions align with the *apolitical* narrative in widespread use. The alternative approach is to acknowledge the natural political realities of those who make war on behalf of political leaders, a reality that was uncontroversial throughout most of human history.

The articles contained in this exploration attempt to provide a contemporary perspective on the military's social identity and to provide recommendations on how to address that identity. Those who wear the uniform have opinions on political matters. The military conducts operations to achieve political ends. Now is a good time to renew exploration of the military's place in societal debate, as indicators contradicting defense department claims seem to have become more prevalent to the point of impacting public sentiment on the military. It is my hope

to make a meaningful contribution to the growing body of work exploring the military's role in society and societal (policy) processes.

Chapter 2 - Exploring Institutional Expectations of Military Members through *Hard Policy*

Background of the Topic

Governments, institutions and organizations all have written codes by which they operate. These examples of *hard policy* are usually expressed in law, regulation, or other formats of policy. However, the processes by which collectives operate is often according to cultural norms that are conveyed through discursive means. “Norms are statements that seek the practical effect of acting, believing, or feeling a certain way. Norm statements are prescriptions of what the world ought to be, not descriptions of what the world is” (Steinmetz, 2021, Chapter 6, Normative inquiry as the basis of political theory section). These norms—which I refer to as *soft policy*—do not always align with the actual—*hard*—policy.

Written policy constitutes reality of rule on a topic. These rules are typically the fulfillments of deliberative proceedings by policymakers that establish the line between behavior that is considered appropriate and inappropriate for members of a society, institution, or organization. For example, when someone is formally charged in a criminal court of law, the charge is based on violation of statute that is written as part of the laws governing society. Similarly, in military context, there are set standards that govern expectations that military members must meet. A common example is how military policies establish baseline requirements for how many repetitions of a certain physical exercise one must do within a specified time limit to pass a physical fitness evaluation. These are rudimentary examples of *hard policy*. In contrast, *soft policy* is based on the norms, assumptions, and preferences of those who hold influence in a particular setting.

Consider a civic setting, such as speed limits. Speed limits are established in hard policies. However, depending on factors that can include location and temperament of law enforcement officers, there can be a *soft policy* in which motorists are allowed to drive a certain percentage over the limit before being cited for a violation of the law. *Hard policy* is based in the written law, statute, regulation, or policy of a setting. *Soft policy* is instead based on norms that maintain flexible connection to formal governing documents. It reflects, enables, and reinforces norms that are often assumed by stakeholders to have the backing of actual organizational policy, or law, but are more likely instead rooted in understandings and tradition. This is a dynamic at work in the U.S. military when it comes to the perception, enforcement, and continuation of its *apolitical* norms, as discussed in Chapter 1. In the earlier historical survey, we saw how the military's *apolitical* norm presents a unique case in which the norm (ie: *soft policy*) preceded the creation of formal regulation (ie: *hard policy*) on the topic of allowable political expression by military members. The full means of how this occurred and perpetuates is beyond the scale of this study. However, the remaining chapters will further explain the means of norms socialization used across the U.S. military, and how those norms manifest in the lives of military members. From there, I coalesce insights to inform a theoretical model of how norms (ie: soft policies) gain influence across institutional settings.

Introduction

The phenomenon of paradox is deeply imprinted onto the DNA of the U.S. military (Brooks, 2020). The Department of Defense is a government institution that communicates values of inclusion, but necessarily excludes people from entry and retention based on a wide range of factors including health, beliefs, physical capability, and conduct. It boasts of its care

for people, while at times enabling toxic leaders to exercise near totalitarian power over U.S. citizens who volunteer to serve the nation in uniform (Military Family Advisory Network, 2022). The military espouses creeds of protecting the homeland, while often performing missions that lack clear linkage to national security (Brodie, 1973; Butler, 1935; McMaster, 1997; Miller, 2023; Palcisko & Rogers, 2022). It is also an institution that follows the lead of elected officials to carry out policy directives under force of weaponry on a grand scale, while simultaneously signaling an *apolitical* institutional identity.

One of the hallmarks of the U.S. military as a public institution is the idea that it is disinterested in—and removed from—the civic politic. The word, *apolitical*, is used commonly in loose, yet often absolutist fashion, within the ranks as a value descriptor. Use of *apolitical* terminology conveys an idea that is not well defined and is often misunderstood (Golby & Karlin, 2020). Does the argument that the military is *apolitical* mean that war is a non-political act? Does it mean that the armed forces do not exert policy influence? Does an *apolitical* military mean that military members do not participate in elections, or have thoughts on policy issues? The meanings are unclear and are inferred in broad ways, as will be discussed more in Chapter 3. Despite a lack of clarity, this rhetoric has been infused into the military services and across the American public through sustained institutional discourses to the point that it shapes internal and external perception of the military's identity. The *apolitical* narrative is conveyed in many forms, including training briefs delivered across the military services, as well as remarks from senior defense officials, and elected officials in recent years. The concept of the military as an *apolitical* institution has been so forcefully used in a social constructionist fashion that it has taken deep root within the services and in Western cultural understanding, which will be explored further in subsequent chapters.

Definitions matter, especially when they can be used in ways that have limiting impacts on access to social agency for segments of the national citizenry. If something is to be labeled as *apolitical*, it begs the question of what that word means in the given context. A term used repeatedly—without definition—can prove problematic, especially when organizational actions contradict the messaging. Such instances represent a clash of absolutes between philosophical worldview and things that can be commonly observed. U.S. Defense Policy does not describe what is meant by *apolitical*, nor does it prescribe an *apolitical* institutional identity or require such identity or lifestyle of its members. Nevertheless, the term is predominant in military discourses.

The military institution places limitations on what kind of political advocacy and levels of partisan civic engagement its members can participate in while on active duty military service (Department of Defense, 2008).⁴ Yet these rules are communicated in such a way to condition people both inside and outside the force to think of the military institution in a disinterested and civically disconnected identity frame that contrasts with the role of service members as American citizens, and of the armed forces as an instrument of national power. Echoing this philosophy, an editorial published in the *New York Times* argued that “a suitably professionalized military stands aloof from politics” (Bass, 2018, para. 4). In this age of heightened political tension, this misunderstanding of where the rules are for service members leads to cultural pressures for those in the ranks to forfeit much of their civic rights and responsibilities to participate in the society that they may well face an armed enemy on behalf of. This seems in some ways a form of institutional agnosticism in which military doctrine acknowledges that

⁴ For the purpose of this study, the term *active duty* refers to military members serving in the active service components of the U.S. military, as well as members of the reserve and National Guard components who are in an activated status.

political factors shape the purpose of engaging in warfare (Department of Defense, 2018), while the institution itself generally claims an inability to understand or interact with the political realities of military existence. Such could be indicative of a state of institutional paradox (Brooks, 2020). Thus the following chapter objective and research question:

Objective: To explore how institutional expectations are conveyed through formal policy in a military context.

RQ: How are formal expectations over military members conveyed through official U.S. Department of Defense policy?

The purpose of this qualitative policy analysis is to identify the intent of military regulation on this topic and determine how military policy on political identity—as well as the rights of service members to participate in the civic politic—is understood in accordance with its wording and intent. That understanding is complicated by a broad cultural interpretation of the military’s desired institutional identity, as communicated through institutional and societal discourse. This work sets the context through a literature-informed discussion of the definitions of key words in military policy versus broader interpretations of these words, and explore the impact of institutionalism on societal interpretations of military institutional norms. It culminates in an expositional analysis of how defense department regulations convey guidance on political expression by its members.

Theoretical Framework

Humans are institution-making beings. Communicating vision is part of that creative process. Existing organizations and institutions likewise must continue casting vision as part of survival (Putnam et al., 2008). There are material elements to this process, such as the physical

and logistical details of setting up or modernizing an organization. The unquantifiable identity, however, is often built through discursive means as a way to constitute how an organization or institution wants to be perceived. “Communication is a process through which collective forms such as institutions are constructed in and through interaction, instead of being merely a conduit for enacting discourses” (Cornellissen et al., 2015, p. 14). In short, discourses are causal (Barad, 2003). Those seeking to create perceptions of reality use discursive practices to impart ideas of reality that transform cogitatively into ontological assumption among stakeholders and observers, hence the logical connection to discourse as an enabler to the constitution of organizations. Imbued with such power of influence, effective Big-D discourse takes on an appearance of policy, ie: discourse as rule within the institutional context, *soft policy over hard policy*.

Summary of Discourse Theory.

The power of words is a theme that goes back to the beginning of humanity. The Biblical book of Genesis speaks of all creation as coming into existence through words (Christian Standard Version Bible, 2017, Genesis 1:1 – 2:3), the book of Proverbs going on centuries later to say that “Death and life are in the power of the tongue” (Christian Standard Version Bible, 2017, Proverbs 18:21). Discursive tradition was used to transfer knowledge and wisdom from one generation to the next, shaping how people viewed the world long before widespread use of writing. “The philosophers of antiquity... looked upon the active effort of discursive thought as the properly human element in our knowledge” (Pieper, 1952, p. 10). Michel Foucault is credited by many with popularizing more recent exploration of how language impacts institutions and society. He referred to discursively-informed meanings as “rules of formation” (Foucault, 1972,

p. 48). These rules are thought of as the “general systems of thought that are located socio-historically, providing implicit cultural codes which impact on the way people think and behave, and influencing the everyday assumptions of organizational actors” (Sutherland, 2018, p. 269). Discourses are inclusive of “the local sociohistorical material conditions that enable and constrain disciplinary knowledge practices such as speaking, writing, thinking, calculating, measuring, filtering, and concentrating” (Barad, 2003, p. 819). They shape speech practices used as part of making institutions (McPhee & Zaug, 2008). Discursive practices partner with the formal and efficient causes that embody the communicative constitutional process to create organizations (Putnam et al., 2008), to constitute how “boundaries, properties, and meanings are differentially enacted” (Barad, 2003, p. 821).

Institutional discursive practices have a very human impact. Organizations cannot communicate absent human involvement. When organizations or institutions speak, it is because they have gained the human capital and creativity needed to provide a function within “the interactional world unique to the organization” (McPhee & Zaug, 2008, p. 35). Those actors communicate institutional expectations and values to coproduce knowledge among relevant stakeholders (Cornelissen et al., 2015; Upton et al., 2019). To do this, complex organizations must communicate to four audiences 1. institutional members, 2. the institutions themselves, 3. internal subgroups, and 4. “colleagues in a society of institutions” (McPhee & Zaug, 2008, p. 21). Those who perform within institutions can be served, or mistreated, by the norms associated with the discourses of which they are expected to play a part. The norms embedded into the linguistic tools of discourse create expectations for what institutional stakeholders should consider a way of life to be taken for granted (Barrett, 2015). As noted by Barad, “discourse is

not what is said; it is that which constrains and enables what can be said. Discursive practices define what counts as meaningful statements” (Barad, 2003, p. 819).

Discourse study is segmented by little-d and Big-D discourse (Fairhurst & Uhl-Bien, 2012; Gee, 2015). Little-d discourse looks at mechanics of word-based communication, things such as the terms and linguistics used in daily engagement. Big-D discourse study explores how those elements of verbal communication shape perceptions of reality on a wide scale. Big-D Discourse brings constitutive power to organizational identity and culture, and convey “Prevailing narratives, which explain how things are, are shared by a group of people, help them make sense of their world, and provide a rationale for decisions and actions” (Swart, 2015, p. 350). For example, in military culture an enduring Big-D discourse states that the U.S. armed forces constitute the greatest military in the world (U.S. Army, n.d.). But how does one quantify that, especially in light of only a single major campaign victory since the conclusion of the Second World War? One can quantify the largest and most highly funded military by measuring manpower, equipment, and budget. But a descriptor such as *best* is more a matter of perspective than matter objectively quantifiable—absent victory in a significant peer-on-peer war. It is an observational or value judgement conveyed in discourse, one that is used to maintain a public image and instill esprit de corps among those in uniform.

The Role of Institutional Theory.

Institutional theory attempts to define what institutions are, explain how they take shape, analyze how they attempt to position as social assets, understand the encompassing roles they have across societies, governments and individuals, and explain how they enact political policy through means that bypass the legislative process (Amenta & Ramsey, 2010; Berthod, 2016;

Clemente & Roulet, 2015; Cornelissen et al., 2015; Dzur, 2019; Lawrence, 2008; Leicht & Fennell, 2008; Meyer, 2008; Philips & Malhotra, 2008). The framework offered by institutional theory is the approach traditionally used in civil-military norms research (Schmidt, 2019). Institutionalism is defined as “adherence to or belief in established forms” (Webster's II, 2005, p. 588). The study of how these forms create and engage collective internal discourses can be aided with an acknowledgement of the commitments of institutional theory. This framework offers a theoretical lens through which to explore the difference between the words of institutional actors and the deeds of their institutions, which often have political impacts. It is an ideal lens for exploring military norms given that national security elites “are also political actors with their own interests” (Schmidt, 2019, p. 28).

The political ramifications of military processes is a highly nuanced area of study, as “an institution is a set of rules and practices that are relatively durable—individuals may come and go, but the rules and practices themselves endure over longer periods of time” (Steinmetz, 2021, Chapter 3, para. 4). Human practices such as marriage and government are institutions. In American culture, the military is also thought of as having institutional standing, transcending generations for a higher purpose. Actors within such manmade institutions work toward ends aligned with their interests (Schmidt, 2019). Institutional theory provides the backdrop in helping to explain how—and why—institutions enact policy while denying political implication. The framework offered by this framework “suggests that the regulation of organizational behavior occurs through and is a consequence of taken-for-granted beliefs, schemas, and values that originate in larger institutional contexts” (Leicht & Fennell, 2008, p. 433). These contexts are conveyed through institutional discourses, which help people to clarify patterns that constitute shared perceptions of social reality (Cunliff, 2009).

Method of Exploration

This policy discourse analyzes Department of Defense policy (ie: hard policy) on political expression by members of the U.S. armed services. Discourse analysis draws on how meanings are conveyed through discursive means, which can offer meanings that are incongruent with policy wording (Arribas-Ayllon & Walkerdine, 2011; Gee, 2014; Gildersleeve & Hernandez, 2012). It is a method that “focuses on the talk and action within policy: the text of policy, its meanings, and its discourses” (Gildersleeve & Hernandez, 2012, p. 6). This qualitative analysis extrapolates specific phrasing from U.S. Defense Department policy with regard to U.S. military institutional identity and rules pertaining to political expression by military members through an exegetical review of policy wording. An exegetical approach surmises meanings through a literal, historical interpretation of policy text (Zuck, 1991). This review analyzes meanings based on policy content, with allowance for context where relevant. It highlights meanings conveyed in specific relationship to words that frequently come up in discussing military institutional identity, including: ‘*politics*,’ ‘*political*,’ ‘*apolitical*,’ ‘*partisan*,’ ‘*apartisan*,’ and ‘*nonpartisan*.’ For this analysis, I use Gee’s Politics Building Tool (Gee, 2014), an approach in which the researchers explore how communication supports construction of social goods, and how it attempts to grant, or withhold, access to that good among particular groups. Results from this analysis set the context for a comparison between institutional *hard policy*, and perceptions of *soft policy* by military members in the subsequent chapters.

Current State of Military Practice

Defining Political Terminology

Political competition can evoke great passions in any society, encompassing the dynamics at work in how groups, organizations, institutions, and societies function. In U.S. military culture, *politics* is frequently linked with the meaning of words like *political* and *partisan* (ie: relating to advocacy for a specific political party) directly, or through nuance (Babcock-Lumish, 2013). Yet words and terms related to *politics* are ambiguous and interpreted differently among people, despite meanings that formal definitions may entail. “We often use the categories of the social, political, and economics as if they were separable, they are instead thickly intertwining” (Allen & Somanathan, 2020, p. 342). The line between participating in civic processes and conducting political advocacy is debatable and often determined in the eye of the beholder (Kels, 2008). The two are frequently linked. Politics is a deeply personal matter for people. One person’s politics is often thought of by another as having to do with moral principles.

At its most basic element, politics is the combination of power and choice, “the art and science of how power is distributed and exercised in a society” (Dreher, 2020, p. 60). If it deals with civic power, it deals with things that are political. Politics is about the conditions and manner in which power is used across society in the hope of altering social conditions (Steinmetz, 2021). Politics goes far beyond election cycles and encompasses—at a minimum—all things related to power, management of resources, the granting—or withholding—of agency to individuals or groups, and creation and implementation of policy (Gee, 2014). It is about the ways that people are ruled over and how that rule impacts their ability to function in society, “the features required for a life of commerce, culture, recreation, and, yes, discussion, philosophical

or otherwise” (McCarthy, 2023, p. 4). The 20th Century French Philosopher Bertrand De Jouvenel stated that “Politics consists of nothing other than human behavior” (de Jouvenel, 1963, p. 38). In his Second Treatise on Government, John Locke argued that politics is about the power that citizens entrust to the state to be stewarded for their benefit (Locke, 1997).

As a word, *politics* is often used in broad ways, and is usually undefined cognitively and conversationally among individuals—especially in the military context (Babcock-Lumish, 2013). Formal dictionary definitions include “the art and science of government,” “public life and affairs as involving authority and government,” a particular set of ideas, principles or commitments in politics,” “activities concerned with the acquisition or exercise of authority or government,” and “and organizational process or principle affecting authority, status, etc.” (Oxford English reference dictionary, 2002, p. 1121). Elsewhere, politics is defined as “the activities or affairs of a government, politician, or political party,” the “conduct of or participation in political affairs,” and “the methods or tactics involved in managing government or state” (Webster's II, 2005, p. 875). The word *political* means to have involvement with those processes (Webster's II, 2005).

We might think of the political realm as comprising the formal institutions of the state, from its highest level of national legislatures and executive bodies to city councils and school boards and local water districts... we often use the categories of the social, political, and economics as if they were separable, they are instead thickly intertwining (Allen & Somanathan, 2020, p. 342).

Despite such easily accessible definitions, words like *politics* and *political* seem to fit within the same category as pornography did in the 1964 *Jacobellis v. Ohio* case (*Jacobellis v. Ohio*, 1964). Supreme Court Justice Potter Stewart remarked that he might not be able to define

what pornography is using words, but could recognize it when he saw it (Gewirtz, 1996). In like fashion, it can be challenging for many to neatly, succinctly capture the essence of our feelings about the definition of politics in a tidy, dispassionate manner. But we can sense when things have political connotation because we are members of a polis. “We do not obtain knowledge by standing outside of the world; we know because ‘we’ are *of* the world” (Barad, 2003, p. 829). Political realities affect—and are affected by—a continual stream of factors that include circumstances, contexts, and decisions. Politics is not restricted to the context of state-based governance. We talk about work *politics*, church *politics*, and even family *politics*, among other kinds.

The manner in which the English-speaking world handles this topic blurs the meaning. For example, the meanings of *politics* and *policy* are shared by a single individual word in each of the romance languages, pointing to a historical acceptance of “the objective connection between politics and policy that American usage tends instead to separate” (Johnson & Howley, 2015, p. 225). From this perspective, “human life is political precisely because we are part of a polis. We are part of a community, and politics is about the right ordering of that community” (Mohler, 2022, Part 2, para. 2). When attempting to create an orderly society, decisions are made that require individual concessions and a level of ceding personal autonomy, whether voluntarily or through force of armed enforcement. The political processes through which that occurs is “a state in which human beings attempt through often heated but *nonviolent* means to persuade others to make particular polity choices” (Wingo, 2020, p. 161). A broader take on political definition imagines politics as a means through which humanity integrates with the universe (Bicas, 2020). The evaluation of activities that are tied to distribution of social goods is naturally political (Green, 1994). Prussian soldier and military theorist Carl Von Clausewitz, who served

during the Napoleonic era, wrote that war is itself the continuation of politics (Clausewitz, 1993), or “the most extreme political means” (Schmitt, 2007, p. 35). To that end, not only are the lives of military members part of the societal polis but so is the act of war itself, which deals with how state assets are allocated.

In military culture, words such as *politics* and *political* are used broadly and without clear definition, a practice to be further explored in Chapter 3. Though there is an argument to be made that *political* and *partisan* are two very different things, political topics are adopted by partisan actors, making things related to *politics* and *partisan* deeply intertwined. The political parties adopt political issues that descend from worldviews that often pre-date the parties themselves. Can one be *political* and not *partisan*, or *partisan* and not *political*? This is a philosophical debate, the kind of which often “cannot be answered with complete finality” (Pieper, 1952, p. 63). As such, I enter it with the caution that the purpose of philosophical exploration should not be to generate “endless and perverse questioning of everything” (McCarthy, 2023, p. 4), but to seek clearer understanding of complex and emotionally-charged topics.

Negative Perceptions of Politics as a Term

In his 1932 work on the subject of political theory, Carl Schmitt argued that the word *political* is not clearly defined and that it “is most frequently used negatively, in contrast to various other ideas, for example in such antithesis as politics and economy, politics and morality, politics and law” (Schmitt, 2007, p. 20). When the very word comes up, people “often mean crude strategies of power, conniving, dirty dealing, and even outright corruption,” (Steinmetz, 2021, Chapter 1, para. 2) the aim of which is to “keep the populace alarmed (and hence

clamorous to be led to safety) by menacing it with an endless series of hobgoblins, most of them imaginary” (Mencken, 1954, p. 29). Terms associated with what people think of as constituting political “are widely circulating currency, and so tend to lose neatness and acquire emotional associations” (de Jouvenel, 1963, p. xvi). As such, “people do not like politics even in the best of circumstances... They do not like politics when they view it from afar and they certainly do not like politics when they participate in it themselves” (Hibbing & Theiss-Morse, 2002, p. 3).

In attempting to avoid association with this negative perception, military discourses highlight an *apolitical* institutional identity that positions the military as being above the arguments about societal direction. In associating the military with an honor culture, service members in contemporary time are socialized to eschew the idea of relating to the political realm, seeing themselves as professional guardians of principles that transcend political things—a theme we will see reflected through interview insights in subsequent chapters. This is most often reflected when military members speak of being *apolitical*. In challenging the predominant military narrative on this topic, retired Air Force Brigadier General Thomas Drohan defined being *apolitical* as the ability to separate personal belief from professional duty and aligns the military’s desire to avoid perception of political interest with being *non-political* rather than *apolitical* (Drohan, 2020).

Apolitical is defined as the opposite of *political*. Dictionaries describe those who identify as *apolitical* as not interested, concerned with or connected to political affairs, or as those who have an aversion to political affairs (Collins Dictionary, 2020; Dictionary.com, 2020; Webster’s II, 2005; Lexico: Oxford English and Spanish Dictionary, 2020; Merriam-Webster Dictionary, 2020; The Free Dictionary, 2020). *Apolitical* events are defined as those that do not have political significance, relevance or importance (Dictionary.com, 2020; Merriam-Webster

Dictionary, 2020; The Free Dictionary, 2020). Both individuals, groups and institutions that claim to be *apolitical* are defined as “politically neutral; without political attitudes, content, or bias” (Collins Dictionary, 2020), and “not connected to any political party” (Cambridge Dictionary, 2020). Like *political*, *apolitical* is an exceptionally broad term, one that does not appear in actual military *hard* policy.

The Fog of Norms

As noted in Chapter 1, there is a growing debate about the application of civil-military *apolitical* norms in an age of hyper-politicization at work across American society in our time. Defense department policy allows for nonpartisan political expression. But where does one draw distinctions between partisan and nonpartisan? Department of Defense Directive (DoDD) 1344.10: *Political Activities of Members of the U.S. Armed Forces* offers a generally clear line based on political party affiliation. But in reality, things are never simple when it comes to topics that arouse passions as political discussions tend to do. For context, I offer two recent examples in hopes of orienting the reader more clearly to the complex dynamic at work in the military regarding *norms* versus *rules*. The following examples highlight two uniformed military officials who expressed political thought in public forum. One was punished, the other affirmed.

In 2021 Space Force Lt. Col. Matthew Lohmeier was relieved of command for publishing a book titled *Irresistible Revolution: Marxism’s goal of conquest & the unmaking of the American military*. In it, he documented growing influence of contemporary social ideologies on military policy in recent years. Lohmeier called for military members to stay patriotic, above the political fray and focused on their oaths of service to all, regardless of the political dynamics associated with working in a federal agency.

To the best of your ability, strive to remain apolitical in your speech in the current hyper-politicized environment. This means that partisan policy discussions fall outside of your sphere of activity. Allow the politician and the civilian citizen to be concerned with those things (Lohmeier, 2021, p. 187).

This argument is within the bounds allowed by Department of Defense policy on allowable expression by military members.

Lohmeier's speech in this work was unmistakably political, but was not partisan according to the definition of partisan activity and expression contained in DoDD 1344.10. According to this policy, activity supporting or relating to candidates, issues, and ancillary organizations not specifically affiliated with political parties is allowable by military members in their personal time, out of uniform. Issues relating to state constitutional amendments or referendums, approval of municipal ordinances, and others of similar character do not meet the mark for *partisan* activity under defense department policy (Department of Defense, 2008).

Lohmeier's published expression was allowed by DoDD 1344.10. Nevertheless, it was viewed by his superiors as violating norms—*soft policy*—that held military members should refrain from comment on topics of political salience, even when speaking in one's personal capacity on personal time. Lohmeier could not be charged for a crime for writing his book because there was no violation of the Uniform Code of Military Justice, as defined by the Department of Defense *Manual for Courts Martial*:

If not personally contemptuous, adverse criticism of one of the officials or legislatures named in the article in the course of a political discussion, even though emphatically expressed, may not be charged as a violation of the article. Similarly, expressions of

opinion made in a purely private conversation should not ordinarily be charged (Joint Service Committee on Military Justice, 2019, p. IV-21).

However, senior commanders are given tremendous leeway when it comes to administrative actions, such as removing subordinate officers from command. Administrative actions require no evidence or formal charge in order to justify. They can be initiated at the pleasure of a senior commander for any reason that need only be explained as a ‘loss of confidence,’ the reasons for which never need be detailed. Lohmeier’s command took the route of *administrative action* as a punitive measure for this work, relieving him from command of the 11th Space Warning Squadron, thus ending any chance for future positions of leadership and consideration for promotion.

A contrasting story occurred in July of 2022, when U.S. Army Sgt. Reagan Hasenfrazt posted a video to TikTok, in which she criticized the Supreme Court ruling in the *Dobbs v. Jackson Women’s Health Organization* case that struck down the 1973 *Roe v. Wade* decision (Moniuszko, 2022). Unlike Lohmeier, this soldier began a video expressing strong opinions on a political topic in uniform. Hasenfrazt asked how she could continue to serve the nation in the wake of the court’s decision. Where Lohmeier called on military members to abstain from participating in political debates, Hasenfrazt said “you bet your ass you’re going to hear my voice, because I will not stop. I will not rest and I will not be silent because this is an attack on women in this country, 100%” (Posobiec, 2022). As with the example of Lohmeier’s case, this expression of political sentiment received heightened attention for breaking *apolitical* norms. Unlike Lohmeier’s example, Sgt. Hasenfrazt advocated for a political position in uniform as an active-duty member of the U.S. Army’s 4th Infantry Division (Leary, 2022). This was a violation of defense department policy, in which a military member may “express a personal opinion on

political candidates and issues, but not as a representative of the Armed Forces” (Department of Defense, 2008, p. 2). Yet in contrast to the military’s reaction to Lohmeier’s book, Hasenfratz did not face punitive administrative action. An Army spokesman endorsed her rights to expression, stating that the Department of Defense “does not prohibit Army personnel, at any time, including when they are at work or on duty, from expressing their personal opinions about non-partisan issues, even if politically charged” (Fonrouge, 2022, para. 4). There have been many similar cases in recent years in which contradictory rulings beg the question of which test is used to determine what counts as unauthorized political activity, given that outcomes often contrast with military regulation (Maurer, 2020). In both cases a norm superseded the rules, but to opposite results. It appears that rules were customized to each situation (Maurer, 2020). No explanation has yet been offered by military officials to explain why there is such a variance of reactions to cases such as those referenced above.

Why the different treatment of these two cases? Defense department rules on political expression theoretically apply equally to officers and enlisted members, and across all the branches of military service. How could these cases—that fall under the same military regulation—have such different outcomes? As we will see in Chapter 4, one theory has to do with rule enforcement based on ideological stance, which aligns with research data that indicates “military elites are politically tainted. They are not apolitical, impartial, or neutral” (Schmidt, 2019, p. 87). Both instances highlight the relevance of a question raised by National Defense University professor Gregory Foster. “Is it acceptable to forbid those in uniform to speak out in opposition to policy, while permitting and encouraging them to speak out in support of policy?” (Foster, 2020, para. 15).

Such discrepancies in the application of institutional policy are aided by the imprecise use and understanding of key terms associated with the topic of the military and its relation to civic processes. The broad manner in which terms associated with U.S. domestic politics, and a lack of clear understanding related to the terminology of *politics*, contributes to a common misperception about the mission of the U.S. military as part of national governance (Lythgoe, 2022b). This enables norms that go beyond the letter and spirit of the relevant military regulations, undermining actual *hard* policy and contributing to a perception that underestimates the lawful civic rights of military service members.

The Rise of Institutionalism

The military institution regards itself as the Profession of Arms and is widely regarded as being among the formal professions to gain such legitimacy during the period of industrial revolution roughly two centuries ago (Skelton, 1992). Early institutions were limited to the realms of governance, church, medicine and law (Burns, 2014; Dzur, 2019; Leicht & Fennell, 2008; Merckle, 2019). Members of those institutions held a certain prestige, being thought of as possessing *professional* standing, in contrast to the rest of society. These people of learning and social stature had means of influence—thus power—over their fellow societal inhabitants. Institutional theory offers a framework through which to explore how certain people are set apart as what Sowell (1995) would refer to as ‘The Anointed,’ those who hold special standing in society based on their affiliation with professions or institutions. The study of professions is “intertwined with institutional theory” (Leicht & Fennell, 2008, p. 431).

In *Julius Caesar*, Shakespeare wrote that “There is a tide in the affairs of men” (Shakespeare, 1988, p. 82). The tide of the *apolitical* discourse appears to have come in with the

commercial age following the Second World War. Throughout human history, military forces were the physical personification of a head of state's power and enabled the force of political will on subjects and competing powers. Many armies of antiquity fought not only out of loyalty to king or empire, but also for a share of the plunder, and for land in the empire—things that touch power and place in society, ie: things that have political connotation.

Many esteemed military philosophers acknowledged the political roles enabled by military forces over the course of human history (Brodie, 1973; Clausewitz, 1976; Handel, 2001). Within this understanding was occasional mentions of political indifference or avoidance by military officers like William Tecumseh Sherman and George Marshall. Their legends transformed into an institutional creed during the 20th century, influencing the idea that war is too noble an act to have political connotation. This was a departure from previous American social thought that considered soldiers to be among the low class of society (Ekirch, 1956). In 1957 Political scientist Samuel Huntington argued that in an age of a permanent, standing, global U.S. military force, its officers must remove themselves from processes related to the civic politic in order to fully *professionalize* (Huntington, 1957). Military officials began to actively curate this perception across the force following the Vietnam War (Hill et al., 2013). This idea quickly expanded and was foisted upon the individual citizens who serve in the armed forces.

Huntington's work is widely regarded across the military as defining what a *professional* military officer should be in a globalized and fully industrialized structure, and inspired a sort of *verbal inflation* (Sowell, 1995) to shift U.S. military identity discourses. This paralleled moves among other public institutions to present the appearance of being removed from all processes related to politics, a rhetorical tactic referred to as an *all-or-nothing argument*, a technique that is used selectively “to deny whatever needs denying, however true it may be” (Sowell, 1995, p.

91). Similar arguments popped up in the 20th century—among them a modernist interpretation of Thomas Jefferson’s letter to the Danbury Baptists (Jefferson, 1802) from which an imagined constitutional pretext exists that faith belief should have no impact on policy decisions (*Everson v. Board of Education*), and more recently John F. Kennedy’s presidential campaign—which argued that moral worldview and civic politics could be compartmentalized from one another (Kennedy, 1960), despite millennia of tradition to the contrary. A challenge of swinging the pendulum from one extreme to the other is that it tends to eventually swing back. Historians and Nobel Peace Prize Winners Will and Ariel Durant warned of risk from the modern tendency to replace legacy ideas passed down through the history of human experience.

Out of every hundred new ideas ninety-nine or more will probably be inferior to the traditional responses which they propose to replace. No one man, however brilliant or well-informed, can come in one lifetime to such fullness of understanding as to safely judge and dismiss the customs or institutions of his society, for these are the wisdom of generations after centuries of experiment in the laboratory of history (Durant & Durant, 1968, p. 35).

The continuing evolution of thought in the Western context is likewise fomenting a re-visitation of a vision for military identity that has been inflated beyond the original positions of Huntington or Marshall.

In the American institutional context, there is often a cultural sentiment that politics is left to the people, while public policy abstains from political considerations and should be left to administrative agencies and institutions (Johnson & Howley, 2015). This depoliticizing effort gained steam in the 1960s, when institutional actors “adopted stances of objectivity and believed that the results of their work would anchor social planning and policy making in a politically

neutral and scientific rationality” (Greene & McClintock, 1991, p. 13). This period coincides with the rise of public relations as an industry in Europe and the United States (Reed, 2013). As a word, *politics* gained a negative connotation, landing among the topics that it was considered impolite to bring up beyond campaign seasons, or around the Thanksgiving table. Yet institutions and their associated policy functions remain inevitably interwoven into daily political life. It was during this time that then President Richard Nixon is said to have remarked that his job was to focus on foreign policy and leave domestic affairs to unelected cabinet officers (Brodie, 1973).

Insights from Current Study

The canon of rules that restrict U.S. military service member political activities are contained in The *Uniform Code of Military Justice*, Department of Defense Instruction 1325.6: *Handling Protest, Extremist, and Criminal Gang Activities Among Members of the Armed Forces*, and Department of Defense Directive 1344.10: *Political Activities by Members of the Armed Forces* (Lythgoe, 2022b). The first two documents mentioned have very limited applicability to this study. DoDD 1344.10 is the official defense department policy dedicated solely to rules pertaining to political expression by active-duty service members. This guidance was echoed in separate policy notes leading up to national elections in 2016 and 2020 (Department of Defense, 2016; Department of Defense, 2020b).

The policy is generally one of both stated *allowance* and *constraint*, meaning it specifies both *allowable behaviors*, and *limitations on behavior* for uniformed members of the Department of Defense. It speaks to one’s personal agency in society, which is within the purview of Gee’s Politics Building Tool (Gee, 2014). First published in 1986—roughly three decades after

Huntington’s theory of objective civilian control was introduced—DoDD 1344.10 spans 15 pages, including enclosures. This policy document is divided into two basic sections: the policy document, and four enclosures that include policy references, term definitions, guidance on participation at nonpartisan political events, and restrictions on seeking or holding elected office as a member of the military. It is a *lawful regulation*, meaning violations by military members can be cause for punitive action through the *Uniform Code of Military Justice* (Joint Service Committee on Military Justice, 2019). There are no instances of the words *apolitical*, *apartisan*, or *politics* in this regulation. Roughly one-third of the instances in which the word *political* comes up in the regulation, it is paired with *partisan*, which the document defines as matters directly affiliated with political parties. Thus there is an inference that *political* likely equates to *partisan*. As we will see in the next chapter, this document is not part of formal training, and is generally unknown among military service members.

Policy Liberties for Political Expression by U.S. Military Members

Authorized Nonpartisan Political Expression.

DoDD 1344.10 is highly permissive on matters of *nonpartisan* political activities, which refers to expression not clearly linked to a candidate or cause that is officially affiliated with a political party. In general—when off duty, not in uniform, and acting clearly in a personal capacity—active duty members of the U.S. military are technically afforded much of the same civic expressive and participatory rights as their civilian counterparts when it comes to political expression and participation not linked to a political party or party-endorsed candidate or event (See Table 2.1). The spirit of the regulation can be accurately summarized as allowing nonpartisan political expression when off duty, in personal capacity, out of uniform.

Table 2.1. Permitted Political Activities by Active Duty Military Members

Active-duty military members are permitted to do the following, subject to the following stipulations: in a personal capacity, when off duty, not in uniform, and not using government resources.

Rights of Expression

- Express personal opinions about political issues and candidates for elected office
- Participate in a political petition
- Display a political bumper sticker on one's personal vehicle
- Express personal opinions in published writing about political candidates and issues, so long as it is not part of an organized communication effort
- Attend a demonstration in the United States, except if the event is illegal or likely to become violent⁵

Rights of Participation

- Join partisan and nonpartisan political clubs and attend associated meetings
 - Serve as a nonpartisan election official
 - Attend partisan fundraising events, and make financial contributions to political campaigns, within the boundaries of campaign finance laws
 - Serve in an elected or presidentially nominated office, or an office under title 5 of U.S. Code (when serving on active duty for more than a period of 270 days) with approval of the secretary of the military service⁶
 - Serve as nonpartisan schoolboard member, on a neighborhood planning commission, and similar agency at the local community level (Applicable only to enlisted military members)
 - Serve on a schoolboard located on a military installation (Applicable only to commissioned military officers)
-

Policy Restrictions on Political Expression by U.S. Military Members

Restrictions on military members' political behavior can be categorized into three headings: 1. restrictions on *partisan* activities for active duty military members, 2. constraints on *political* activities for active duty military members, 3. constraints on political activities by non-activated military members (such as retirees, and non-activated members of the reserve or National Guard service components).

⁵ See Department of Defense Instruction (DoDI) 1325.06: Handling Dissident and Protest Activities Among Members of the Armed Forces (Department of Defense 2012).

⁶ See paragraph 4.3.3 (Department of Defense, 2008, p. 7) for rule on not being allowed to campaign or manage a campaign for elected office.

Restricted Partisan Political Expression by Military Members.

Specified constraints are generally connected to activities directly connected to causes, events, and candidates that are formally connected to a political party, such as campaigning for a Republican or Democrat candidate for elected office (see Table 2.2). Restrictive rules follow two basic tenets that military service members on active duty should 1: “not engage in partisan political activity” and 2: should avoid inferring that their political activities constitute official endorsement by the Department of Defense, and subordinate agencies (Department of Defense, 2008, p. 2). The common theme for restrictions is that members of the military, serving in activated status, cannot take formal advocacy or leadership roles in *partisan* campaign at any time, in any capacity. Partisan activity is described as

Activity supporting or relating to candidates representing, or issues specifically identified with, national or state political parties and associated or ancillary organizations or clubs. Issues relating to State constitutional amendments or referendums, approval of municipal ordinances, and others of similar character are not considered under this Instruction as specifically identified with national or State political parties (Department of Defense, 2008, p. 12).

Table 2.2. Restricted Partisan Activities by Active Duty Military Members

Active-duty military members are not permitted to do the following at any time:

- Solicit votes or donations for a partisan campaign, whether verbal or in writing
- Participate in partisan fundraising efforts (beyond attending fundraising events and making personal contributions)
- Serve as an official member of—or volunteer for—a partisan organization or election campaign
- Speak before a partisan event
- Advocate for or against a political party in public forum
- Distribute partisan literature
- Conduct political opinion research on behalf of a partisan organization
- Participate in a partisan parade
- Attend a partisan political event in official capacity, except as part of an officially approved joint service color guard
- Use contemptuous words regarding to the president, vice president, members of congress, the governor and legislature of the state or territory the service member abides in, nor any member of the chain of command
- Attend a demonstration that is illegal or likely to become violent⁷

Restricted Nonpartisan Political Expression for Military Personnel.

Certain expressive acts—not specific to a particular political party—are constrained for active duty military members. The commonality of these three specific restrictions is that they relate to a limited list of election campaign activities (see Table 2.3).

Table 2.3. Restricted Political Activities by Active Duty Military Members

Active-duty military members are not permitted to do the following:

- Display large political signage on member’s personal vehicle, nor display political signage on a military installation
- Contribute to an active-duty military member’s campaign, receive campaign contributions from an active-duty military member, or solicit funds for an active-duty military member’s political campaign
- Campaign for political office, even if authorized by the military service secretary to run.

⁷ See DoDI 1325.06: Handling Dissident and Protest Activities Among Members of the Armed Forces (Department of Defense 2012).

Restricted Political Expression for Part Time or Former Military Personnel.

Restrictions on non-active—and former—military members limit the percentage of visual images from one’s time in uniform that can be used in campaign materials, and the length of time a military reserve or National Guard members can serve in an elected office while simultaneously serving in an activated military capacity (see Table 2.4).

Table 2.4. Restricted Political Activities by Non-Activated Military Members

-May not use imagery from time in military duty as the primary imagery for political campaign promotional materials
-May hold elected office and exercise the duties of that office if activated for a period of 270 days or less. May continue to hold political office, but may not exercise the duties of that office if activated for more than 270 days

Absent from this policy are any rules that prohibit service members from engaging on nonpartisan *political* topics. Yet the Huntingtonian theory is cited in a manner seemingly intended to bolster a sense of moral authority, beyond statutory authority, “in keeping with the traditional concept that members on active duty should not engage in partisan political activity” (Department of Defense, 2008, p. 2). Within the directive is catch-all paragraph 4.1.5, which states:

Activities not expressly prohibited may be contrary to the spirit and intent of this Directive. Any activity that may be reasonably viewed as directly or indirectly associating the Department of Defense or the Department of Homeland Security (in the case of the Coast Guard) or any component of these Departments with a partisan political activity or is otherwise contrary to the spirit and intention of this Directive shall be avoided (Department of Defense, 2008, p. 5).

This wording enables enforcement beyond the wording of the specified points of the regulation, thus inviting subjective interpretations congruent with norms (*soft policy*). A veteran interviewed

for subsequent chapters said of this: “It must be a gray area as heck, because you have rights as a citizen. We’re not actual slaves, right?” The appearance of this sort of disconnect, or paradox, heightens questions over the level of state or institutional politics at work in norm enforcement (Foster, 2020). This “restrained approach... creates a gap between what servicemembers *can* do legally and what they *should* do” according to institutional norms (Lythgoe, 2022b, p. 22).

Discussion

The objective of this policy discourse analysis is to explore how institutional expectations are conveyed through formal policy in a military context by asking how they are conveyed through official defense department policy. The first takeaway is that the defense department’s applicable regulation—hard policy—spells out rules in the frames of *political*, *partisan* and *nonpartisan*, rather than *apolitical* or *nonpolitical*. The predominance of the policy is of *stated allowance* toward *political* and *nonpartisan* expression by military members, and *stated constraint* toward most *partisan* activity. Defense department policy wording differs from the *apolitical* norm frequently invoked on this topic. This begs the question of how the *hard policy* on this topic is conveyed from paper to military service members. This chapter has evaluated how rules on political are reflected in defense department policy. Chapter 3 explores how both *hard* and *soft policy* are conveyed to, and socialized among, military members.

The mindset fostered by the Huntingtonian culture that overshadows defense department policy discourages critical thinking and sows the seeds for wide variation of standards applied to American citizens who commit seasons of their lives to the force (Drohan, 2020). Previous scholarship on this topic suggests that military service members feel pressured to abstain from political activities that are specifically allowed by the regulation. “The notion of an ‘apolitical’

military has instilled in many military leaders a deep aversion to talking about political subjects” (Krasnican, 2021, para. 3). In 2022, a total of 13 former Secretaries of Defense and Chairmen of the Joint Chiefs of Staff reinforced this idea in a published letter, in which they addressed political expression by military members only in context of restriction (Carter et al., 2022). This institutional drumbeat enables paradox in an institution that has clear rules for nearly every imaginable situation to implement them with flexibility according to the political winds of the day through legal charges or administrative actions, both of which can be career ending. This reality is becoming more pronounced in this age of heightened political balkanization across the United States.

This is a complex issue, but one that boils down to a basic friction between social expectations and actual rules for those living within an institutional context. While this article does not explore the topic through a lens of legal expertise, it should be noted that the broad language of DODD 1344.10, paragraph 4.1.5, further enables the kind of nuance that adds to misunderstanding and confusion on this topic, in a policy that is otherwise clearly stated (Babcock-Lumish, 2013; Lythgoe, 2022b). This clause mirrors what is referred to as the ‘catch-all’ article of the *Uniform Code of Military Justice*. It states that members of the military can be charged for conduct that is: “(i) to the prejudice of good order and discipline in the armed forces; (ii) was of a nature to bring discredit upon the armed forces; or (iii) to the prejudice of good order and discipline in the armed forces and of a nature to bring discredit upon the armed forces” (Joint Service Committee on Military Justice, 2019, pp. A17-16). Such broad wording allows for tremendous creativity for commanders to determine what actions are right or wrong, appropriately *political* or inappropriately *partisan*. As written, DoDD 1344.10 is simultaneously both clear and vague, and allows tremendous weight to be given to perception of civic actions by

military members. That perception is at least partially driven based on which political party holds the preponderance of societal power or cultural influence at the time (Lythgoe, 2022b). Insights in Chapter 4 will speak to this issue in more depth.

Suggestions for Further Research

I became introduced to the official regulation on military member political expression only when it became a topic of personal interest because of what appeared to be contradictions between what I had been taught about allowable expression my military members, and what I began to observe over the last eight years of my career in the U.S. Army. In discussions with peers on the topic, it became apparent that there is a lack of formal education on formal rules—*hard policy*—in comparison to socialization on norms—*soft policy*—within the ranks. With the policy analyzed, civil-military scholars would do well to study how DoDD 1344.10: *Political activities by Members of the Armed Forces* is reflected in military indoctrination and training, as well as how it is explained in norms-generating and perpetuating activities. The second research article of this work will begin with an exploratory study of how military members are educated in the rules and norms pertaining to civic expression during their terms of service. Now on to Chapter 3, where we will explore how policy on political expression is taught and socialized among military members.

Chapter 3 - How Civil-Military Norms are Communicated and Perceived

Background of the Topic

Perceptions of institutional identities, rules, and norms have an impact on institutional cultures and stakeholder thinking—how people see themselves—whether at small group or wider societal levels. In the military context, the discourse of the armed forces and its members as having an *apolitical* identity has created an institutional culture in which there is a widely accepted perception that service members lay aside much of the expressive right of citizenship. As I heard throughout my career, this belief is justified because ‘you know what you’re signing up for when you join.’ Yet “It is one thing for a norm to exist. It is another to know that it exists” (Maurer, 2020, p. 344).

Often, cultural restrictions and expectations one learns along the way of a military career are in addition to—or contrast with—actual organizational policy, were not shared when that person was a potential recruit, and do not exist in the contract signed by military service members. Nevertheless, such institutional expectations can be palpable. The *apolitical* identity commitment includes when military members are off duty, as is highlighted by the U.S. Space Force recently taking action against a non-activated reservist who—in his personal capacity and while off duty—expressed concerns over a trend of increasing incidents of partisan commitments taking root in the force at a friend’s personal retirement ceremony (Gomez, 2023). Such instances highlight the paradox in which citizens who are expected to defend the nation using armed force are encouraged to perceive that they cannot enjoy the fruits of ordered liberty that their military service is said to assist in preserving. If such expectations are informal, how does

one learn them? How are such norms socialized? This chapter explores how the military's institutional norms are communicated to—and thus perceived by—military service members.

Introduction

A common refrain heard during my military career is that one should check the regulations when unsure of the right way of accomplishing a task. In the Army, how to manage a physical fitness test, the procedures to run a rifle marksmanship qualification range, or administer the body weight composition program are examples about which we are admonished by supervisors to 'check the regulation.' However, when it comes to the level of political engagement a military member may participate in when off duty, I never once heard an encouragement to check the governing regulations. 'The military is *apolitical*, and so are we' was the typical answer to any discussion on this topic. It was only after 18 years of military service that I looked up the regulation for myself (Department of Defense Directive 1344.10: *Political activities by Members of the Armed Forces*), and found it to be less restrictive than military service members are generally led to believe.

Institutional narratives often set the stage for paradox by making people believe and adopt identities about their organizations that are contrary to official policy. The way in which military culture frames discussion of current issues leads many who are affiliated with the institution to entirely avoid thinking through the connection between their work and policy. In military parlance, terms like *partisan* and *political* have a vulgar connotation that no one wants to be identified with (Golby & Karlin, 2020; Schmidt, 2019). Such terminology can be used as a tool to silence uncomfortable or politically inconvenient discussions. Given the negative meaning attached to the word *political* in military culture, discussions about the equitable

application of rules on political expression are not usually welcomed for open discussion in the ranks. Yet it remains a subject that impacts how many in military service think and act on matters of personal civic agency. Thus, in this chapter, I explore perceptions of former military members about the manner in which the *apolitical* norm is conveyed to and perceived by our military men and women. Every person interviewed for this study is no longer in military service. However, for ease of prose flow, quotes will be attributed by the final rank held by each interviewee during his term of military service, ie: an Army Major, an Air Force Colonel, etc.

Theoretical Framework

In the context of military policy, norms are often communicated verbally, and from supervisory officials who themselves may have never looked at the governing policies. In doing so, they offer an example that institutional communication produces strong perceptions among internal and external stakeholders. This correlates with Communicative Constitution of Organizations (CCO) theory, which will serve as a frame for focusing analysis in this study. “Communicative constitution presumably embodies the material (composition or elements), the formal (framing or forming), and the efficient causes (principles or rules for governing) that bring organizations into existence” (Putnam et al., 2008, p. 4). CCO posits that organizations are created through communicative practices. “The world is not something that produces information. Information is something that produces the world” (Wilson, 2014, p. 263). In the work ahead, we will explore how such a phenomenon manifest in military culture.

This paper also incorporates an interpretive theoretical framework to explore how discourses shape the cultural identity and expectation of the U.S. military institution and its members. “Interpretivism is most consonant with natural settings, with the human inquirer as the

primary gatherer and interpreter of meaning, with qualitative methods” (Green, 1994, p. 536). This lens offers an ideal approach for exploring how an *apolitical* norm compares in power of persuasion to contradictory governing policy, and the long-standing philosophy of warfare that argues militaries cannot exist apart from political realities. As noted in Chapter 1, a basic review of military history suggests that a major change in sentiment about the military’s role in society occurred within the 19th Century, and has been assumed since to represent objective reality.

Scholars often conclude that norms are degenerating but do not first ask whether the actors themselves demonstrated knowledge or acceptance of those norms, nor whether (or to what extent) those acts reveal a mark of moral culpability or blameworthiness that justifies some punitive or administrative response (public or private) to those actions (Maurer, 2020, p. 347)

I thus intend to investigate how military service members are socialized to the narrative of the military as an *apolitical* institution, in hopes of increasing understanding of this topic and encouraging future discussions to transcend the simplistic manner in which the predominance of civil-military scholarship currently organizes it.

Discourse scholarship suggests that influential individuals and institutions use discursive practices to transform an idea into an accepted reality among large segments of the public (Arribas-Ayllon & Walkerdine, 2011; Barbour, 2017; Brown & Brown, 2012; Cornelissen et al., 2015; Fairclough, 2011; Gee, 2014; Gee, 2015; Gildersleeve & Hernandez, 2012; Larson & Phillips, 2005; Lyon & Chesebro, 2011; Rogers, 2011; Woodside-Jiron, 2011). Beyond shaping the existence of organizations, discourses shape institutional identities and stakeholder perceptions of those organizations. I refer to this as a *Discourse as Constitutive of*

Organizational Identity framework. This theoretical lens focuses on how institutional and stakeholder discourses establish identities that shape associated perceptions, norms, and expectations of institutional members. This theoretical tradition has seamless connection to discourse theories.

While personally challenging the notion that how people communicate literally creates organizations, I agree from practice and observation that communication shapes perspectives among internal stakeholders regarding an organization's identity and purpose. For example, the 'Soldiers Creed' states that members of the Army never accept defeat (U.S. Army, n. d.). It is clear from the fall of Kabul as the U.S. withdrew from Afghanistan in 2021 that the slogan of invincibility is questionable. In contrast, Col. Matt McFarlane's internal communication campaign at the 4th Infantry Brigade Combat Team (Airborne), 25th Infantry Division in 2013 shaped perception of the organization as one striving to be an elite unit with strategic implications for national security (Spears, 2019). His sustained campaign of discourse did not literally dredge the unit from earthen minerals into existence, but shaped stakeholder perception, organizational reputation, and unit morale, thus transforming the unit's culture into one of high performance. Indeed, words are powerful when conveyed persuasively and internalized by motivated stakeholders. As such, "while scientists use numbers to support their theories, interpretive scholars use words" (Griffin et al., 2019, p. 32).

With the current military institutional norms reviewed in Chapter 1, this article seeks to learn how those norms are perceived as a result of communicative means. To that end, I propose the following chapter objective and research question:

Objective: To assess how institutional norms are conveyed and enforced through communicative means in a military context.

RQ: How do discourses about domestic politics and political participation of military members shape their perceptions on what is permissible?

Within this exploratory limit, I offer two propositions:

Proposition One: Military service member perception of rules related to political expression differs from wording of the governing policy.

Proposition Two: The perception of the military as a *nonpartisan* entity is becoming less certain as a belief among military members in contemporary context.

Method of Exploration

Because institutional norms are a socialized matter, gaining insights from others who have experience with learning, abiding, and perpetuating them adds to understanding the ways in which they are created and endure. “Scholarship investigating national security actors, policy, process, and implementation can be difficult without direct knowledge or practical experience” (Schmidt, 2019, p. 63). For that reason, this research makes use of an *insider* approach, which is especially useful in exploring institutional norms through the lens of lived experience among stakeholders in a highly contextualized, bureaucratic institutional culture (Schmidt, 2019). Insiders bring an “ability to take tacit knowledge and articulate and reframe it as contextually embedded, theoretical knowledge” (Schmidt, 2019, p. 65). Qualitative interviews with former service members can shed light on means of receiving, interpreting, and internalizing military institutional norms. By including perspectives of others who spent their careers in this institutional context, I hope to enrich the findings from other methods on how written and spoken policies translate into meaning for those affected (Yanow, 2000).

I solicited former military members from across informal veteran group networks that I am associated with, due to my status as a veteran, to participate in this research. My reputation as a veteran and military officer, as well as my knowledge of military culture, were immediate assets to gaining trust of those who agreed to participate. This outreach was conducted through email, social media direct messaging, and electronic veteran group chats. I explained the research, shared the interview script and informed consent form, and offered to answer questions of any potential participant. The interview script was approved through doctoral committee and Kansas State University's Institutional Review Board, which granted approval on October 26, 2023 (see Appendix C).

The goal was a range of 5-10 interviews total for manageability and to enable in-depth follow up on the domains of questioning as new insights surfaced during information gathering. This size is compatible with the phenomenological nature of this work that seeks to understand lived experience (Guetterman, 2015; Marshall et al., 2013). A total of nine (n=9) male veterans responded and agreed to be interviewed for this report. The participants' time in military service ranged from 10-43 years, representing time spent in the U.S. Army, Air Force, and Marine Corps. Two served as enlisted military members, achieving the noncommissioned officer⁸ ranks of Gunnery Sergeant and Sergeant Major—the highest enlisted rank. The remaining veterans interviewed served as commissioned officers, ranging in rank from Captain to Lieutenant General—the second highest officer rank one can achieve. Range of experience spanned from the lowest enlisted ground-level soldier up through enlisted chief of a military career branch with high-level Pentagon experience, and presidentially-nominated military service academy

⁸ Noncommissioned officers are enlisted military members who have achieved a rank of official leadership. The noncommissioned officer ranks start at Corporal, Sergeant (Army, Marine Corps, Air Force and Space Force), or Petty Officer (Navy).

commandant. All served in the active duty force, with one having also served time in the National Guard and reserve prior to joining the active-duty force. Each veteran conveyed interest in this research topic and demonstrated comfort with sharing from personal experience. Live interviews were conducted from November 7-21, 2023. Eight of these engagements (n=8) were conducted over zoom, with the ninth participant (n=1) choosing instead to send answers in writing on December 15, 2023. Interviews for questions related to this chapter lasted an average of 27 minutes.

Currently-serving military members were excluded from this process for two reasons: first because of the potential requirement to undergo additional military-specific IRB processes to conduct research on active-duty military members. The second reason is the risk that currently serving military members may feel a tension between answering according to their perceptions, versus answering according to what they feel would be expected by the chain of command. Those who have conclude their time in service, now freed from military career concerns, bring insights that benefit from reflection over past experience. They are more likely to answer according to what they believe, rather than what they think might be expected of them by elements of the military institution.

A question script guided this semi-structured process, with an allowance to go beyond prepared questions based on insights gained during conversation. “Unstructured interviews are more flexible and organic in nature. The interviewer enters the conversation with flexible questions and probes, or maybe even with just a list of bullet points” (Tracy, 2013, p. 139). As an insider, I was familiar with the nuance, jargon, and language of the military. That status allows the interviewer to know “how to best frame questions, follow-up on replies, participate in discussion, and obtain richer, relevant data while building trust, rather than creating anxiety or

suspicion” (Schmidt, 2019, p. 66). Questions were offered to each research participant in advance. When needed, I verbally re-worded questions for clarity. The full list of questions is contained in Appendix A. On occasion, based on answers given, I followed up with an associated open ended question to further explore unique insights that come through the initial response.

Interviews were transcribed verbatim, with minor extraneous word-fillers and inadvertent repetition of consecutive wording in single sentences removed for clarity. A single printed copy of each transcript was printed, with no identifying markers, as working copy for review and coding. All associated materials secured in password protected folders on my personal laptop, and a password protected cloud service. I shared transcripts with each research participant with the invitation to update answers and wording to one’s personal satisfaction. Only one asked for a single word change to alleviate possibility of confusion. Preliminary results were also shared with each participant.

The guiding principle through this process was to identify key points of perception and experience related to how the military socialization process conveys institutional identity and expectations of military members on the matter of political expression. Transcripts were manually coded using a series of open, axial, and selective coding (Strauss, 1987). My familiarity with military jargon helped in discerning the nuance of word choice used in responses (Schmidt, 2019). Open coding began during the process of data collection to align questions to research objectives based on information gathered during the initial exploratory stage of historical and literary review. During the subsequent process of axial coding, I noted basic demographic markers of participants and removed extraneous response material that did not directly apply to the study objective and RQ. Next, I deduced and categorized basic perceptual patterns common to multiple research participants. Finally, a process of selective coding enabled

me to further explore data within the patterns that emerged through axial coding to identify predominant themes and quotes that align with the study purpose, as viewed through the *Interpretive and Discourse as Constitutive of Organizational Identity* frameworks. This resulted in identification of six overall study objective-linked categories through which insights were organized. This study attempts to contribute to the lineage summarized above by specifically evaluating perceptions of word meanings over a longitudinal period of military service through the eyes of those who lived it. It aims to identify key terminology used to educate on institutional expectations, and explore how institutional members make sense of complex dynamics in which organizational discourses and actions may not be in total alignment.

Discourse Impact in Scholarly Thought

Shaping Norms through Institutional Discourses

Literature reviewed for this study offered six specific themes on how discourses shape institutional norms. First, discourse is a powerful tool of persuasion. “Make your words sound good and moral, and you can get your followers to do most anything to bring it about” (Bond, 2018, p. 143). Throughout the history of humanity, spoken and written words have held tremendous power to create identity perceptions whether for individuals, organizations, or institutions. The impact of words can influence perceptions that give rise to entirely new vocabularies in pursuit of newly-conceptualized orders (Barrett, 2015). Because human beings cannot personally and comprehensibly test and evaluate every subject about which we need to have an opinion on, we need to trust that things told to us are accurate. But often, inaccurate things are conveyed that give a perception that is not aligned with fact, influencing people to believe in ways not aligned to reality (Frankfurt, 2005). Even when intending accuracy, words

are often used to convey highly nuanced subject matter in overly simplistic terms that fail to adequately explain the full depth of a topic (Brodie, 1973; de Jouvenel, 1963). In military context, this manifests in a contestation of meanings that occurs between the space of the textual wording of military policy and institutional practices (Vielledent & Spears, 2023), a topic that will be further explored in Chapter 4.

Second, though words have power, discourses do not conduct their persuasive work alone. They are aided when able to work in concert with stakeholder worldview. To gain predominance, a way of thought “has to be advanced that appeals to our intuitions and instincts, to our values and our desires, as well as to the possibilities inherent in the social world we inhabit” (Harvey, 2005, p. 5). In essence, we tend to be receptive to arguments that align with previously existing personal beliefs, and resistant to arguments that challenge them. Intuitions—especially when developed over time in unique contexts—take a macro view and attempt to “grasp the essential patterns” (Griffin et al., 2019, p. 34). The patterns sensed through institutional discourse and culture reinforces thinking, which further shapes perceptions and behaviors among institutional members.

Third, discourses are dependent on word choice and framing. Perceptions do not come solely as a response to word choice, but are highly influenced by them. In the case of this study’s topic, the social identity of the military as removed from politics and basic civic processes represents a sort of spoken addendum to the theory of American social contract, which itself was not voted on, but was stated until the idea took root that such contract exists between a people and their government.

Most of us have come to accept civilian control and the normative antipode of politicization — political neutrality — as both necessary and desirable in democracy if it

is to survive and thrive. Neither of these fundamental precepts is mentioned in the U.S. Constitution – or for that matter in statute. Rather, they have come to be embraced and accepted as matters of practice over time (Foster, 2020, para. 6).

Once accepted on large scale, such concepts are “freed from the feedback of uncooperative reality” (Sowell, 1995, p. 94). Given that this dissertation brings a commitment that institutional existences have political connotations, this article’s interview questions include topics of word choice, as well as understandings, related to political terminology in the experience of military life and training (see Appendix A).

Fourth, discourses shape systems of individual and collective belief, and can be used to inform, misinform, and dis-inform. For example, discourses can convey truth that unifies society and lays the groundwork for a nation of ordered liberty, as does the U.S. Declaration of Independence in stating that “all men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the pursuit of Happiness” (1776, para 2). Discourses can also be used to deceive and enchain, as Orwell warned: “The party told you to reject the evidence of your eyes and ears. It was their final, most essential command” (Orwell, 1983, p. 62), himself echoing an earlier warning that

We shall soon be in a world in which a man may be howled down for saying that two and two make four, in which furious party cries will be raised against anybody who says that cows have horns, in which people will persecute the heresy of calling a triangle a three-sided figure, and hang a man for maddening a mob with the news that grass is green (Chesterton, 1926, para. 2).

The use of discourse brings even greater risk of grand scale manipulation in the present, given the mass reach of 21st Century global communication infrastructure.

The media, academia, corporate America, and other institutions are practicing Newspeak and compelling the rest of us to engage in doublethink every day. *Men have periods. The woman standing in front of you is to be called 'he.'* Diversity and inclusion means excluding those who object to ideological uniformity. Equity means treating persons unequally, regardless of their skills and achievements, to achieve an ideologically correct result (Dreher, 2020, p. 15).

As a persuasive tool, discourse has become even more influential in an age labeled by some as a post-truth era, in which “there is not only doubt about mystical things; not even only about moral things. There is most doubt of all about rational things” (Chesterton, 1926, para. 2).

The era is marked by

various forms of skepticism which deny that we can have any reliable access to an objective reality, and which therefore reject the possibility of knowing how things truly are. These ‘antirealist’ doctrines undermine confidence in the value of disinterested efforts to determine what is true and what is false, and even in the intelligibility of the notion of objective inquiry (Frankfurt, 2005, pp. 64-65).

Into this paradigm, those who create the most successful narratives can wield the greatest influence over societal behavior.

Truth exists, but what constitutes it is increasingly contested in an increasingly existential philosophical age (Pieper, 1952). Each attempt to frame a cultural concept of their character attributes involves the use of discourses. It is a primary method through which human experience is shared through spoken narratives, and one that is incredibly powerful in shaping societies.

People believe that what they know is real, that they are experiencing directly and understanding fully reality as it is in its true state. What people think to be real becomes

real to them and forms the basis for future decisions and actions. This is similar to the famous Thomas Theorem that states that what people think to be real becomes real in its consequences (Spector, 2019, pp. 65-66).

Fifth, discourses are used to set perceptual boundaries among people in community. Societies tend to determine meanings, properties, and boundaries through discourses (Barad, 2003). They offer means through which we make sense of life experiences and translate them “into a linear form, mapping out reality by coding experience as an opportunity or threat, as helpful or obstructive” (Sutherland, 2018, p. 276). When these experiences are translated and conveyed repeatedly—especially with the backing of cultural influencers—their claims have a way of being received and accepted as truth, regardless of whether those claims are accurate, because “We perceive the version of reality that our culture communicates” (Anzaldua, 2012, p. 100).

Sixth, discourse is capable of socializing thought, and shaping perceptual visions. In so doing, discursive means can reinforce perceptions that are deeply ingrained in the individual and collective sense of identity. Once accepted, these perceptions can take cognitive root as truth, leading individuals to limit proof points to the portions of knowledge or experience that reinforce their truth beliefs (Eisenburg et al., 2013). The vision has become so deeply rooted across all segments of society that “many grow to adulthood unaware that there is any other way of looking at things, or that evidence might be relevant to checking out the sweeping assumptions of so-called ‘thinking people’” (Sowell, 1995, p. 6).

Through institutional discourses, stakeholders are socialized into believing that certain norms are not only customary, but are also the best way of doing things (Leicht & Fennell, 2008). The process of conveying these discourses are most effective when repeated on mass

scale. Institutions often accomplish that feat through deliberate mediated communication campaigns that aid in shaping desired identities (Monge et al., 2010). In turn, these identities drive organizational creeds, beliefs, and expectations that military service members are catechized to, and shape how associated stakeholders measure themselves “within the accepted and valued beliefs and ideas of a particular community, culture, organization, nation, continent, or worldview” (Swart, 2015, p. 361). Senior institutional officials build on the imagined realities, as well as the accompanying beliefs and values espoused in applicable organizational discourses, to shape reinforcing leadership discourses (Leicht & Fennell, 2008).

Constructive Anchoring

Social construction theory posits that institutions and societies shape perceptions of reality through repetitive use of selected discourses, and thus speak new realities into existence (Barrett, 2015). This has tremendous implications for societal belief, as “prevailing narratives derive their power from being so well known and accepted that people would say, ‘this is just the way things are’” (Swart, 2015, p. 361). Successful attempts at altering perceptions of reality require newly-introduced information to become deeply ingrained into what people think as to become a regime of truth that gains acceptance as legitimate, to be taken for granted, and no longer subject to question or debate (Barrett, 2015; Harvey, 2005; Sowell, 1995; Sutherland, 2018). Once those ideas take root, discourses have a cyclical effect, perpetuating what is often referred to colloquially as an echo chamber. “Discursive practices... enact local causal structures through which one ‘component’ (the ‘effect’) of the phenomenon is marked by another ‘component’ (the ‘cause’) in their differential articulation” (Barad, 2003, p. 821). Societal discourse adjusts to the influence of those words to sustain power and perceptual impact,

enabling perceived realities with a sense of permanence (Benhabib, 1992). Acclaimed writer, lecturer and theologian C.S. Lewis remarked on the lasting power of social discourses in 1945 in his novel titled *That Hideous Strength* that inaccurate ideas can have staying power on societies for generations.

Of course, it is a superstition; but it is that particular superstition which has pressed upon our society for a great many centuries. It can be experimentally shown that it still forms a dominant system in the subconscious of many individuals whose conscious thought appears to be wholly liberated (Lewis, 1996, p. 335).

Acceptance of this vision eventually goes beyond what is considered to be ontological, taking on the qualities of moral attributes (Sowell, 1995).

All organizations and institutions create and sustain discourses that perpetuate identity and express norms. The social constructionist tradition holds that discourses not only enable organizations, but can also create new worlds (Barrett, 2015; Fairhurst & Grant, 2010). This mirrors with the performative understanding of discourse study, which challenges the philosophy that words represent preexisting ontological realities (Barad, 2003). Yet discourse is not inherently ontological. Meanings conveyed through discursive practices are not necessarily true simply because they are conveyed (Frankfurt, 2005). Discourse can convey lies as convincingly as they can convey truth. Discourse is one means through which humans try to make sense and understand the world. Theories holding that words have power to literally create ontological realities risk that “Instead of treating ourselves as inherently constrained by reality, it treats reality as constrained by our acceptance” (Sowell, 1995, p. 246). Such intellectual habit enables the kind of flexibility in ethical modeling that could have dire consequence for military actions, as has been very painfully demonstrated historically by instances in which armed forces used

military power to achieve evil ends. Likewise, questions of truth and falsity seem a continuing aspect of the human condition, one that even world leaders cannot outrun. When face to face with Christ roughly 2,000 years ago, Pontius Pilate—governor over the Roman province Judea—responded to Christ’s claim of being the embodiment of truth by asking “‘What is truth?’” (Christian Standard Version Bible, 2017, John 19:38).

The Current State of Affairs

The U.S. Military’s Apolitical Discourse

The word *apolitical* is familiar to all members of the U.S. military and those who follow and conduct scholarly work on civil-military dynamics. It is used as a *value term* in military culture and carries cultural value across the force. As discussed in Chapter 1, it is not unusual for military officials to use such *value terminology* in social appeal. In military context, terms such as *readiness*, *lethality*, and *national security* constitute value terms (Vielledent & Spears, 2023) that are used frequently and often repeated “quite mindlessly and without any regard for how things really are” (Frankfurt, 2005, p. 30). Value terminology is highly nuanced and usually goes undefined, but conveys institutional or organizational expectations that are enforced one way or another. The uses of terminology in this fashion can cause people to “go along with things they wouldn’t if they had a common frame of reference to help them understand what is actually meant by the word” (Pluckrose & Lindsay, 2020, p. 12).

The narrative of an *apolitical* force indicates a paradox about the place of an extraordinarily powerful institution among self-representative society (Dubik, 2020). Can the military truly be *apolitical* in light of the most basic facts of its role in national security policy? Some recent scholarship conducted among senior military officials claims not.

Military elites commonly and errantly perceive themselves as impartial, neutral, and apolitical servants of the state. To be apolitical, by definition, is to have no interest or involvement in political affairs. It insinuates political impartiality or neutrality.

Historically and by nature, the military and military elites are not impartial, neutral, or apolitical (Schmidt, 2020, Unraveling the myth section).

The military is a policy-driven, policy-creating, policy-enacting cabinet agency of the U.S. federal government. It grants and withholds social agency and access to goods and makes use of great force to emplace and lift certain governmental figures around the world, and to remove others. Political processes are naturally intertwined with military existence at all levels of command structure. Whether it be the naming of bases or ships, which states military assets are based in, or how senior defense officials try to steer legislative and presidential decision-making (Brodie, 1973; McMaster, 1997; Schmidt, 2019), the preponderance of military operation are inevitably connected to political processes and have political impacts. Likewise, those who serve in the military maintain their citizen existence, which has political connotations (Lythgoe, 2022b). Questions about norms have a way of arising when institutional claims are contradicted by contradictory actions. The norm must then be continually reinforced discursively, as “An apolitical military does not maintain itself” (Dubik, 2020, p. 6).

Setting Institutional Policy

Every time a military service chief of staff comes into office, the first list of spoken priorities immediately becomes institutional *soft policy*, until formalized in written *hard* policy. For instance, the expressed top priority of current U.S. Army Chief of Staff, Gen. Randy George, is *warfighting* (South, 2023). His immediate predecessor Gen. James McConville’s top priority

for the Army was the *people strategy* campaign (Department of the Army, 2019). Before that Gen. Mark Milley prioritized *readiness* (Hale, 2016). Prior to that, Gen. Raymond Odierno made sexual assault prevention the Army's top priority (Odierno, 2013). These priority terms are repeated and discussed frequently across the force during each chief's tenure. Such statements have an impact of social constructivism on how the military institution operates during each chief's term of office (Lythgoe, 2022b).

At a more local level, military commanders establish expectations of priority through a means referred to as *command intent*. This refers to how a military commander visualizes and describes a desired future reality. *Command intent* is frequently referenced in military training events and is mentioned in several military regulations. However, those regulations do not assign a specific definition to the term. Command intent is generally understood as an institutional principle rather than a specified rule (Shattuck, 2000). As noted in Chapter 1, terms and words that convey a value identity in military context are often used in ways to convey a perception of high priority for organizational actions and subsequent supporting policies. Within the military, *command intent* takes on the characteristics of unofficial policy, and takes the nature of an addendum to organizational norms.

In addition to unique priorities of a military service secretary or chief of staff, senior military officials reference an enduring norm of military 'apoliticism.' This idea originated in the 20th century and was recently reinforced in a commentary by a group of former Secretaries of Defense and Chairmen of the Joint Chiefs of Staff (Carter et al., 2022). Their admonition came in the same month it was revealed that Chairman of the Joint Chiefs of Staff, Gen. Mark Milley—by his own admission—took the highly unusual step of undermining President Trump's military command authority in the final weeks of the administration (Woodward & Costa, 2021).

This points to the reality of a post-WWII praetorianism “that is discounted by scholars, *formally* denied by military elites, and blissfully ignored or disregarded by civilian leadership (Schmidt, 2019, p. 187). During WWII, the War Department’s service chiefs functioned absent any effective civilian oversight; Fleet Admiral William Leahy remarked that the military was ““under no civilian control whatever”” (cited in Huntington, 1957, p. 429). The 1949 Hoover Commission’s report to congress said that military elites exist in nearly a “complete absence of control” and are “virtually a law unto themselves” (Hoover, 1949, p. 190). Senator Barry Goldwater testified at a 1969 congressional hearing that “we almost took as gospel... anything that came from the Pentagon, without really looking into it in depth” (The Military Budget and National Economic Priorities, 1969, p. 471). Similar concerns over an unsupervised and unaccountable military institution surfaced in the Packard Commission report to President Reagan in 1986 (Packard, 1986). More recently, former acting defense secretary Christopher Miller wrote that the principle of civilian control has limits according to contemporary military thinking. Specifically referring to Generals Mark Milley and Kenneth McKenzie—Commander of U.S. Central Command at the time—“they were more than happy to defer to civilian leadership when civilian leadership agreed with their perspective. But if they disagreed, the knives immediately came out” (Miller, 2023, p. 203). In an interview for a feature piece in *The Atlantic*, Milley said that the military keeps a system between the president and those carrying out orders that are viewed unfavorably by the generals. Lt. Col. Alex Vindman—who testified against President Trump as an active-duty military officer in 2019—called these actions a subversion of the chain of command—based in situational ethics—that “undermines the military’s credibility at a moment of real national security threats” (Vindman, 2021, para. 10).

Despite admissions by both Milley and many of his predecessors to the contrary, Milley frequently refers to the military's—and his personal—*apolitical* character. The *apolitical* identity discourse has been used widely by military officials since the mid-1900s, and is largely attributed to the work of political scientist Samuel Huntington (Babcock-Lumish, 2013; Brooks, 2020; Dubik, 2020; Lythgoe, 2022b; Rapp, 2015; Schmidt, 2019), author of the classic on civil-military relations titled *The Soldier and the State* (Huntington, 1957). Huntington proposed and advocated for a theory of *objective civilian control*, under which those who put on the uniform suspend their right to voice in the civic-political sphere for a greater good of the military as a *professional* public institution. Huntington believed that military officers should abstain from political discourse and participation for the purpose of enabling U.S. military professionalism in the nuclear, post-World War II era. This idea has been adopted by the military institution as a principled value, and remains spoken as an institutional norm, despite not reflecting in official policy.

Proponents of this argument for an *apolitical* norm claim connection to the legacy of officers like Generals George Marshall, Dwight Eisenhower, and George Patton, men whose memories are affixed to the modern U.S. military institution. Each of them declined to vote, believing it to be an inappropriate exercise of right for one in military service (Cavanaugh, 2016). More recently, Gen. (retired) David Petraeus spoke of maintaining that practice even in his post military career as CIA Director and beyond. Such thought constitutes a personal value that stands apart from the formal rules spelled out in military policy. In contrast, retired Gen. Carter Hamm wrote that the problem is not officers who vote, but officers who will not obey orders from a commander in chief that he or she did not vote for (Hamm, 2016).

Department of Defense policy largely recognizes constitutional right of citizens in military uniform to participate in basic civic processes such as voting, supporting candidates and causes in a personal capacity, and expressing personal convictions in respectful manner, as reviewed in Chapter 2. Despite the facts of defense policy, a perception of vast and unrealistic restriction remains. Dubik refers to this as the *paradox of civic participation*: the permeable space between how a military member lawfully participates in citizen right, and the risk that doing so might enable development of a military voting block (Dubik, 2000). Whether or not such a voting block exists, there is certainly a military influence block propelled through a collection of lobbying associations that military members can join (Ekirch, 1956), such as the Association of the United States Army, Military Officers Association of America, Veterans of Foreign Wars, etc. The military services maintain close, formal relationships with influential organizations like these as part of larger, ongoing outreach efforts to steer public perception, policy and fiscal appropriations.

Apolitical or Nonpartisan

There is a wide space between the definitions of words such as *apolitical* and *political*, *partisan* and *non-partisan*. Defense department policy on this matter restricts *partisan* political expression for active duty military members. According to U.S. military regulation, *partisan* matters are those that have to do with an event or campaign that is directly linked to a political party (Department of Defense, 2008). This contrasts with the strategic use of *apolitical* terminology in messaging that sets much broader cultural expectations under which military members are expected to avoid expressing or participating in any activities related to issues of polity. For military members to exercise their rights fully—according to defense department

rule—is viewed in unfavorable light due to the negative connotation associated with politics in military culture. This contrasts with de Jouvenel’s distinction about the personal citizen sharing his or her perspective on matters of policy, in contrast with those who seek public office in order to officially create and change policy (de Jouvenel, 1963).

Senior military officials maintain the use of *apolitical* in strategic messaging on this topic in contrast with military regulations that memorialize a *nonpartisan* rather than *apolitical* standard. The use of imprecise, simplistic wording on such a complex topic perpetuates a sense of confusion about what level of civic and political engagement those who serve in military uniform may participate in without attracting undesired negative attention to self for actions that are allowed according to military regulation. “The personal or private can indeed be political, if and when citizens seek to express personal decisions or influence previously ‘private’ issues through the polity’s organs: political processes and institutions. Until then their pursuits are either apolitical or prepolitical” (Berger, 2012, p. 26). However, military discourses assign different meanings to what Berger notes as *apolitical* and *prepolitical*. In a separate discourse analysis study conducted during doctoral coursework, I identified four varying schemas that reflect in statements by senior military officials regarding what is meant by the word *apolitical*. In that analysis, it appeared that even senior military officials were not in alignment about the meaning of the word.

Figure 3.1. Apolitical Themes Identified in Senior Military Official Statements (from Spears, 2022)

Schema 1: Apolitical as avoiding alignment to a domestic policy cause
Schema 2: Apolitical as preventing appearance of endorsement for a political cause
Schema 3: Apolitical as disconnected from societal realities
Schema 4: Apolitical as avoiding participation in social warfare

The line between being *apolitical* and being *nonpartisan* is not difficult to judge from a technical standard (see Chapter 2). Yet it is perhaps impossible to judge from a practical standard. Political parties do not create worldview issues, but rather adopt them. Recent examples involving federal decisions highlight this tension. In 2021, the Internal Revenue Service rejected a tax-exempt status request from an advocacy group named *Christians Engaged*, saying that “Bible teachings are typically affiliated with the [Republican Party] and candidates. This disqualifies you from exemption under IRS Section 501(c)(3)” (cited in Lee, 2021). In contrast, one year earlier, the U.S. Office of Special Counsel released a memorandum stating that federal employees are free to advocate on behalf of the Black Lives Matter organization in their official capacities without running afoul of Department of Defense rules, or the Hatch Act (U.S. Office of Special Counsel, 2020). Of course, the Bible predates establishment of the Republican Party, and Black Lives Matter openly claims political identity and goals (Black Lives Matter, 2022; Wong, 2015). Similarly, whether a government should be more or less involved in one’s personal life is a worldview debate that predates the American political parties. Incidents of a similar context and friction between military members and their commands necessitated a 2020 update to *Department of Defense Instruction 1300.17: Religious Liberty in the Military Services* (Correll, 2020).

Soft policy signaled through discourse about military institutional identity trickles down to the lowest level. Military members are told from their time as new recruits that they should stay out of politics, that they have a responsibility to be apolitical. My first encounter with this norm came in the fall of 2003 during basic combat training at Fort Jackson, SC. An Army attorney gave a class for the trainee course, and stated the requirement for soldiers stay out of politics. In contrast to this spoken norm, each military unit is required to have a voting assistance officer to assist military service members with exercising civic-political rights at the ballot box, as voting abstention is no longer an institutionally-signaled part of the military's *apolitical* norm for military service members (Lythgoe, 2022a). Clearly there is a difference between 'getting into politics,' and voting.

We find it natural to say that a certain man 'has gone into Politics,' an expression quite shocking in terms of democratic theory, according to which every citizen is personally committed to the seeking of the public good. What we mean of course is that this man has entered the *cursus honorum*, is trying to occupy successively more important positions of authority (de Jouvenel, 1963, p. 159).

Nevertheless, terminology dealing with the exercise of civic politics is often used in overly broad manner. What people actually mean in discussions related to politics is often left unsaid, with the substance generally assumed.

The written policy on levels of allowable political conduct by members of the military (Department of Defense, 2008) is less limiting than most among the U.S. armed forces and the public at large realize. Restrictions on political activity and expression are specific mostly to running for civic office or participating in campaign activities on behalf of a candidate who is aligned to a specific political party (Department of Defense, 2008). The military's spoken

institutional norm gives a more restricted appearance. As noted in Chapter 2, official defense policy demarcates the line between *political* and *apolitical* based on whether one is advocating for a specific political party. For example, U.S. military service members can take a position in a personal capacity on a social issue that is clearly political. However, they cannot endorse specific political parties, or party-affiliated candidates. That said, all things related to power and social policy are inherently political. Discourse scholar James Gee offers a broader view of what should be defined as *political*: “any situation where the distribution of social goods is at stake” (Gee, 2014, p. 96). For Gee, it is not only about the allocation of goods, but also the dynamics around who is, and who is not, accepted into social circles, whether or not they are afforded social status, and the dynamics at play around “social interactions and conflicts throughout society” (Gee 2014, p. 126).

Though this is an emotional topic that people will inevitably disagree on, it is important to discuss. When people talk past each other, and make incorrect assumptions and interpretations, it sows distrust. This lack of trust is permeating society, as noted in a growing list of annual global Edelman Trust Barometer reports (Daniel J. Edelman Holdings, Inc., 2024). With the public visibility that social media offers service members, the decrease of trust that comes with political polarization is creeping into the ranks (Urban, 2017), with only 32% of military families currently recommending service in the armed forces to young people (Strong et al., 2024). Service leaders may be forced at some point to take a consistent stand on political expression among troops, rather than leaving interpretations of what constitutes proper political speech to the often disproportionate adjudication of local commanders.

Insights from Current Study

Upon surveying interview responses, six primary categories emerged by which to sort insights based on general consensus of issue-specific experience and sentiment (see Table 3.1).

Table 3.1. Key Insight Categories of Military Political Identity Perceptions

-Method of Learning Apolitical Norm
-Definitions of Political Terminology
-Understanding of the Rules Pertaining to Political Expression by Military Members
-Understanding of Civil-Military Norm Expectations of Military Member Political Expression
-Perception of the Military's Political Role
-Perception of Military Partisan Activity

Method of Learning Apolitical Norm

The method of learning the apolitical norm refers to how research participants were educated in—or socialized to—the rules and norms of the military's position on political identity, norms, and expectations. The primary method of learning reported was verbal transmission through a variation of mandatory training briefs received throughout one's military career, or when attending unit formations.⁹ An Army Sergeant Major reported learning about the rules on military expression from public service announcements on American Forces Network television programming when he was stationed overseas. One Army Lieutenant Colonel replied sensing the *apolitical* normative expectations over the course of his career: "I just kind of always understood." "I was brainwashed properly," said a Marine Gunnery Sergeant. The overwhelming majority of research participants were unaware of the existence of any formal military regulation on political expression. Even if through informal means, it appears that each veteran interviewed

⁹ Unit formations are gatherings where the entire unit is physically assembled in order to ensure full personnel accountability and make announcements to the entire organization.

had a sense of “informed intentionality,” meaning they were aware of and accepted that an expression-limiting norm existed and would be enforced upon them (Maurer, 2020, p. 364).

Definitions of Political Terminology

As noted earlier and in chapter 2, meanings associated with political terminology are imprecise and vary from one person to the next. This was apparent among the interview cohort for this portion of the study. There was a notable difference in what research participants perceived the definition words such as *political* and *nonpolitical* to be prior to their periods of military service, versus meaning perceptions after their period of military service. Pre-service definitions reflect an idea that one defines *political* based primarily on actions linked to electoral politics, or those who undertake them. One officer said *political* refers to “people who set government policies and decide how people live.” A sergeant major responded that the word *political* refers to a person who is “interested or involved in politics.” Associations of actions described by political terminology consistently trended negative among interviewed veterans after their time in military service, compared with what they reported pre-service perceptions as having been. This suggests that the experience of military life builds a negative perception of activities related to election cycles (see Table 3.2). One respondent said he thinks of those who are political as “polarized, opinionated, and close-minded.” As noted in another recent dissertation, the word politician is viewed as “a pejorative term inside the military community” (Schmidt, 2019, p. 124). Pre-military service perceptions of nonpolitical among the mainstream of participants shifted from a general lack of interest in politics to a belief that being *nonpolitical* meant following military norms once they were indoctrinated into military culture. Of this, an Army Major stated:

“When I became active duty, nonpolitical on a personal service level started meaning to follow the rules and regulations of the active Army.”

Table 3.2. Defining Political Terminology

<p><u>Political (Before Period of Military Service)</u> -Being interested or active in political affairs -Making policy -Elections, Courts, Laws -Running for elected office</p>	<p><u>Political (After Period of Military Service)</u> -Those who want to avoid upsetting others -Legislated Policy -One who is dogmatic and polarizing -Political events such as rallies, protests, and marches</p>
<p><u>Nonpolitical (Before Period of Military Service)</u> -Avoiding political activity -Lack of interest in social issues or policy outcomes</p>	<p><u>Nonpolitical (After Period of Military Service)</u> -Following military rules / norms on political expression -Apathy to / Silence on salient cultural events and social issues</p>

It appears that socialization processes that occurred during their time in the military shifted perceptions of politics from generally neutral definitions-based to negative value-based. Of note, the most often words used to convey the military institutional norm were reported as *apolitical*, and *nonpartisan*.

Understanding of the Rules Pertaining to Political Expression by Military Members

Veterans who participated in this study demonstrated a generally correct understanding of the rules that military members are held to regarding political expression, in accordance with Department of Defense Directive (DoDD) 1344.10: *Political Activities by Members of the Armed Forces* (Department of Defense, 2008). Two participants perceived that their military affiliation barred them from any expression in support of a political candidate or cause—such as attending meetings of political organizations and displaying a bumper sticker on a personal vehicle. This was an incorrectly assessed norm that contrasted with military policy. They correctly reported a

general perception that military members can participate in voting and certain election-affiliated activities on personal time, in civilian clothing. There was a clear perception of needing to separate from one's work identity in order to participate in political expression. An Army captain said

“When we were told domestic politics off duty, it was that we could attend stuff right? You get to attend rallies, you could attend protests. Don't do anything illegal, obviously, but you cannot wear anything in military insignia. You cannot have a way to tie yourself back to the military, and it has to be very apparent that you're going in your personal capacity.”

The tone of this portion of the conversation trended more toward what a military member *cannot* do versus what one *can* do. There was a sense that norms hold more power over behavior than rules. An Army lieutenant colonel described it this way:

“Participation in rallies, marches, protests, etc. were technically allowed but frowned upon unless it was in support of something the leadership supported.”

Understanding of Civil-Military Norm Expectations of Military Member Political Expression

The amount of dialogue on how veterans perceived civil-military norms on political expression by active duty service members was double the dialogue on their understanding of the formal rules. The word *apolitical* was a prevalent theme indicator that lacked definition, but was clearly a noted expectation. “There is a perceived apolitical norm,” said one officer. An

“apolitical norm was pretty perceived,” said another. A senior ranking Air Force officer said

“When service members see politicized activities going on that are impacting the operational realm and in force-wide policies, they have a duty to stand up against those kinds of politicized efforts no different than they have a duty to be apolitical. They also have a duty to stand up against the politicization of the military.”

Research participants expressed a shared sentiment that though they held personal views on matters of policy, those views were not to be expressed while they were active duty military members, even in a personal capacity. A noncommissioned officer said the prevalent perspective

was expressed in a subtle, but clear form of “leave that [expletive] alone.” The closest interpretation of what is meant by *apolitical* seems indicated by language of neutrality. As said by one lieutenant colonel, “I’m just supposed to walk right down the middle.” Consistently, military institutional norms seem to ascribe a negative connotation to politics and political things. A Marine noncommissioned officer said the general perspective among those he served with was “we don’t have nothing to do with those politics. We’re just warriors.”

Separation of personal and professional is another theme of the apolitical norm, in which one separates personal identity from identity as an institutional member in order to participate in civics. A lieutenant colonel with experience in direct presidential support said:

“As long as I’m wearing the uniform, my political opinions and my political involvement is inside only, and I put a mark on the ballot box and perhaps I make contributions in certain places. But that’s it, and it’s private.”

“You’re allowed to be a citizen, but they didn’t want you to,” said a noncommissioned officer. He went on to say that any association with politics “was frowned upon period.” Justification was reporting as having been communicated using terms like “selfless service to the nation,” and “support and defend the Constitution.” These terms come from the oath of military entry and creeds of military life, and are part of highly used creedal statements within military discourse, reflecting as value terminology. Such wording can be problematic because lack of clear definition enables an imagined cloak of infallibility for institutional actions that violate trust and undermine constitutional text (Pompeo, 2023; Smith, 2024).

The perception of institutional norms held both on and off duty, despite language in DoDD 1344.10 that allows significant political expression and participation when off duty. One officer reported a perception of shame associated with military members participating in political expression.

“We basically were told to just stay, don't dip into politics in your official capacity and don't let people, if you're going to dip into politics, you know, you're not in the military when you're dipping into it, because the military can't be political.”

This extended to family members as well, one officer reporting that he told his wife to limit her political expression due to his military affiliation.

“I do remember telling my wife on more than one occasion ‘Hey, sorry, no signs, no bumper sticker, none of that stuff, either pro or con.’”

Family members of mine expressed similar concerns about whether their political expression would be held against me during my term of military service. An Army Colonel echoed

Huntingtonian thought in justifying this norm, saying:

“I do believe that you certainly give up your right to represent a political candidate, a political party or a political view. Instead, you represent a revered institution that in order to protect the country has to be held in a bubble, preserved from politics, from political parties, from social views.”

Responses conveyed a shared belief that the military institutional norm on political expression (soft policy) is stronger than the formal regulation (hard policy). Based on insights on both military member understanding of official policy, and understanding of institutional norms, Proposition One is confirmed.

Perception of Military's Political Nature

Because those who served in the U.S. military understand that their former superiors wanted them to eschew politics does not mean that they are convinced that the Department of Defense is itself politically abstinent. One Army officer said “normally the military is pretty lockstep with the purpose of the government.” Interview sentiments reflect a perception that the military is a politically-involved and subservient national institution that—at least in part—

serves political interests that are not directly linked to national security purposes. A lieutenant colonel responded:

“If war is the continuation of politics or political discussion by other means, the military is a political tool of the first order.”

All but one veteran interviewed ascribed political action and intent to military decisions and operations. The other acknowledged that military officers work in political context and manage political situations. The political nature of the Department of Defense was explained using five lines of argument.

The first states a perception that military actions are part of national policy, that military objectives are decided based on desired political outcomes that include the removal and emplacement of governments in other nation states. A senior officer interviewed acknowledged the political aspects of war: “You live in them. You’ve got to understand them.” An Army officer with company command and combat deployment experience said he understood that “My mission is to do this for a political cause.” This echoes the perspective of 19th-century military philosopher Carl Von Clausewitz who wrote that “war is not merely an act of policy but a true political instrument, a continuation of political intercourse, carried on with other means” (Clausewitz, 1993, p. 99). Echoing that statement, an Army officer summarized the theme in saying:

“You know war is the continuation of politics by other means. Well, guess what? If the military itself is advocating for the continuation of war? They are now involved in politics.”

Economic factors were cited as the second proof point of the military being a political agency. Research participants argued that to lobby for and expend tremendous sums of taxpayer funding is an inherently political act. A major stated that military officials “have to be involved in politics in a democracy to get their own funding.” Two of those interviewed used the term

War is a Racket, which is also the title of a book written by General Smedley Butler in 1935. This short book conveyed an argument that war in the 20th Century became driven almost exclusively for purposes of economic gain (Butler, 1935). Another veteran stated that though he believes the military to be nonpartisan, he also believes that both parties use the military's image to their advantage.

“I think our senior leaders will take money from either side of the aisle if it means moving forward with their projects.”

The third line of argument reported a perception that the military is political because it advocates for conflict and the continuation of conflict abroad, absent from legitimate U.S. national security needs. Scholars might recognize this as *militarism*, a phenomenon in which military figures surpass civilian governing authorities in power and influence over the policymaking processes of state, especially as related to military affairs (Ekirch, 1956; Taylor, 1952). The resulting military actions require funding, which is gained by pressuring policymakers under the banners like ‘national security’ and ‘supporting the troops.’ Said one veteran interviewed,

“managing an ongoing conflict requires a nonstop flow of money, lots of it. That puts us in the position of advocating for the continuation of whatever conflict we’re trying to manage... Traditionally that is a political decision, whether or not to carry on a war, not a military decision.”

Nevertheless, there was a persistent theme among most research participants that senior military officials frame advice to shape policymaker decisions in ways that allow military commands to remain continually engaged in conflicts that preserve high defense budgets and enable further concentration of power within the defense department. A senior noncommissioned officer with high executive experience likewise expressed belief that senior military officials encourage use of military action for self benefit.

“I believe general officers will always want their own war to stamp their names to, and in some cases they may have pushed for boots on the ground in, during my tenure in the Army, places like Panama, Haiti, Africa, the DMZ between North and South Korea, Iraq, the totality of Afghanistan—instead of just the areas where this Taliban was. Everybody wanted their next star, and so because of that I believe that there were political persuasions that were pushed between the legislature and Army senior leadership.”

As Marine Maj. Gen. Smedley Butler wrote in 1935, “The professional soldiers and sailors don’t want to disarm. No admiral wants to be without a ship. No general wants to be without a command” (Butler, 1935, Chapter 5, para. 14). This observation also aligned with recent research conducted into the role of military elites in the creation of policy. “Control of vast resources and budget inherently make the military an incredibly powerful political interest group able to place exceptional pressure on presidential administrations” (Schmidt, 2019, p. 28).

Fourth, research participants tied the military’s support to elected officials as a political characteristic of the defense department. The framework of strategic documents on national defense posture offer a prescient background lesson. The vision framework and policy guidance within the *U.S. National Defense Strategy* (Department of Defense, 2022) descend from the president’s *National Security Strategy* (NSS) (Biden, 2022). In each administration, this document connects national defense actions to the president’s overall policy agenda, thus reflecting partisan influence. The NSS pivots primarily between two competing worldviews based on the policy agenda of the sitting president. Most often, these worldviews apply to strategic approaches categorized as *principled realism* and *liberalism*. For instance, the NSS under the Trump administration prioritized military strength and advancing American influence (Trump, 2017). In contrast, the Biden Administration’s NSS focuses on great power competition with China, global cooperation, and notes climate change as the top threat to world peace (Biden, 2022).

The military is caught in an adaptive challenge of grand scale when directed to pivot between opposing worldviews between presidential administrations, in which “different factions want different outcomes” (Heifetz et al., 2009, p. 52). A lieutenant colonel reported being told by a superior that:

“We support the office of the president. That is our job and our mission, regardless of who it is.”

This echoed other comments acknowledging that the military is responsible to advise the president, and respond to his orders. An Army officer said that his military education included an emphasis on the “constitutional basis of our duties as military members to support our civilian authority.” This includes supporting the policy agenda of elected civilian authorities, though in subdued fashion.

“We serve the president, yes. But we don’t serve his political agenda, to an extent... for the most part we’re not there to further his political agenda.”

Fifth, veterans interviewed cited perceptions of senior military officers taking sides on domestic political issues as an indicator that the military has a naturally political characteristic. For historical reference, in past U.S. and European history, military officers earned commissions based on social class, political connections, and financial ability to purchase an officership. Senior officers were selected by elected executives—as remains the case today—and unit commanders were elected by their men, a tradition going all the way back to the Athenian empire (de Jouvenel, 1963). This tradition continued throughout much of early American history as an indicator of the antimilitarism culture of the U.S. prior to the 20th century (Swart, 1970). Though that practice has been discontinued, a theme of overt political connection to the promotion of senior officers and senior command assignments remain a perceptual reality. An Army Captain said that senior military officers are

“just like politicians. They went to meals with congress people and lobbied for funding... and so they became like this nebulous, weird, political party. It’s like a military political party.”

Another senior military officer echoed that theme in a separate study. “Effective military elites cultivate close, personal, and persistent relationships with members of congress. These relationships are used to affect and influence policy changes favorable to the military” (cited in Schmidt, 2019, p. 126). Research participants also stated that the lower-level troops at ground level are not deliberate political practitioners in the performance of their military duties. “They just want to get the stuff done.” Chapter 4 will further explore this dynamic.

Perception of Military’s Partisan Role

Finally, when it comes to partisanship most research participants expressed personal belief that the basic structure of the military is a nonpartisan entity, or at least wanting to believe so. That said, concerns were expressed over the actions taken by former Chairman of the Joint Chiefs of Staff, General Mark Milley, to interfere with the military chain of command during the Trump administration, claims brought to light by Milley’s admission in numerous news and book interviews. A senior retired officer shared:

“Where I grew more concerned is when Pentagon press reporters that I know, that I trust, told me that General Mark Milley, the Chairman of the Joint Chiefs, spread out over about a month or two months, a full working week talking to book authors about his role in protecting the republic from the American president. That’s something we don’t want, the uniformed force involved in, serving as a hedge against an American president... I’m very critical of President Trump. He put sustained pressure on the institution of the United States military and the apolitical nature of it. Then our generals doubled down on that pressure.”

This parallels a concern shared by Jeffrey Goldberg in a piece published by *The Atlantic*, in which he argued against President Trump’s fitness for office, praised Milley’s performance, yet admitted concern that the general exceeded his authority.

Milley and other military officers deserve praise for protecting democracy, but their actions should also cause deep unease. In the American system, it is the voters, the courts, and congress that are meant to serve as checks on a president's behavior, not the generals. Civilians provide direction, funding, and oversight; the military then follows lawful orders (Goldberg, 2023, para. 7).

A small portion of responses demonstrated a theme of connecting the military's recent advocacy of policies that are the predominant perspective of one U.S. political party as a bridge to perceptions of military partisanship. A colonel with experience up to the Office of Secretary of Defense perceived a trend in which military senior leadership's political engagement favored one side of the partisan aisle.

“Army leadership seemed to rally around... what it felt to be the disenfranchised elements of military service, or the force against what it perceived to be the right wing. The Army never fully corrected for that.”

This was echoed by a lieutenant colonel who felt that the defense department had grown overly concerned with “social justice things that have emerged more lately,” noting a phrase that “is a euphemistic for progressive cultural politics” (Dreher, 2020, p. 73). A Major shared perspective that partisanship is revealed in the selection of which intersectional groups get officially-sponsored special observances, and which do not. An Army Captain with company command experience said

“I don't think we're nonpartisan... we're like a chameleon, and we absorb whatever our leading party's thought processes are.”

This appears to relate with findings from another recent dissertation study that found senior military officials reshape their manner of performance “according to the political party and policy preferences of the presidential administration in which they serve” (Schmidt, 2019, p. 88). Findings suggest proposition two is upheld.

Discussion

The purpose of this study was to explore how discursively-conveyed institutional norms shape perceptions about allowable political expression in the military cultural context. Insights suggest that the military's *apolitical* norm is transmitted primarily through verbal means in a mixture of briefings delivered as part of formal blocks of military training, and less formal verbal information distribution at the unit level. It also suggests that norms—which are more restrictive than the requirements spelled out in military regulation—are enforced mainly through social pressure within the military ranks. These insights infer that meanings of policy can be contested in the ranks, a topic to be further pursued in Chapter 4. Both mirror my experience in norm transmission and socialization over the course of a 20-year career in the U.S. Army.

The research question for this chapter asked how discourses about domestic politics and political participation of military members shape their perceptions on permissible political expression. The military regulation governing political speech technically specifies more liberty than constraint. However, the perception among military members is primarily one of restriction. Data gathered from this interview process suggest the answer to be that the *apolitical* discourse of high constraint is deeply anchored among military members, taking hold cognitively as if written in policy and law. In other words, sustained institutional discourses are spread from an early moment in military indoctrination, and culturally enforced over time to create a paradigm in which *soft policy* holds greater authority than *hard policy* among military members and stakeholders. In short, military members are told that political involvement is not allowed, and they believe it.

A question worth considering is how institutional norms impact civic right, in light of military service members being citizens first. In a sense, the ability of norms to overpower law

rings of a philosophy that is opposed to ordered liberty, as specified in the constitution to which each military member swears to uphold and defend. As John Locke wrote in the *Second*

Treatise on Government:

“Tyranny is the exercise of power beyond right, which nobody can have a right to. And this is making use of the power any one has in his hands, not for the good of those who are under it, but for his own private separate advantage—when the governor, however entitled, makes not the law, but his will, the rule, and his commands and actions are not directed to the preservation of the properties of his people, but the satisfaction of his own ambition, revenge, covetousness, or any other irregular passion” (Locke, 1997, p. 112).

The image of military officials pressuring subordinates to avoid civic expression that they are allowed by law and military regulation is reflective of an ongoing tradition of militarism, in which the institution holds more power than constitutional policy. Even the pre-revolutionary British monarch recognized the problem with such a precedent, King James 1 writing that “a king governing in a settled kingdom leaves to be a king and degenerates into a tyrant, as soon as he leaves off to rule according to his laws” (cited in Tanner, 1960, p. 16). Findings further inform a working theory that the modern U.S. military member is held to a standard that lessens his or her level of citizen agency beyond lawful requirements.

Suggestions for Further Scholarship

It has been roughly seven decades since Huntington’s theory of objective civilian control set the tone for today’s U.S. military cultural norms. In that time, civil-military scholarship has predominantly explored the *apolitical* norm and how it is borne out in the behaviors of military service members. There has not been a movement toward empirical research on how those in

military service self-perceive their citizen identities, and how they came to these beliefs. We have a body of public polling on levels of public trust in the military as a whole, but lack data on public expectations toward those in military service. These are areas ripe for further exploration, given a growing collection of polling data that indicates a perception of military politicization is negatively impacting the institution's level of public trust (Kennedy et al., 2022; Ronald Reagan Institute, 2021; Ronald Reagan Institute, 2022; Younis, 2023). "Scholars should likewise devote attention to how civil-military norms and perceptions have shifted within the current uniformed force and among their civilian counterparts over the last several years" (Schulman, 2019, The civil-military field section).

Definitions matter, especially when it comes to highly nuanced and emotional topics. There is a lack of scholarly work on what words associated with political terminology mean to military members among the body of civil-military research. Further investigation of this topic could productively contribute to understanding the nuance of how words that hold a controversial aura in an institutional context are perceived, internalized, and acted upon by institutional members.

Actions lacking an express political agenda can still have political consequences.

Officers, for example, might conclude that as long as they are not expressly acting politically, such as by advocating publicly for a particular policy agenda, they are conforming with apolitical norms (Brooks, 2020, p. 18).

At present, some officers take this a step farther and openly advocate for or against political causes that are official platform items of the political parties. They claim that doing so through a personal social media account, to meet authenticity expectations of their fan base, ensures that they are maintaining the apolitical requirement. Brooks (2020) argues that the Huntingtonian

model creates a loophole through which military members who violate the spirit of nonpartisan policy while claiming the contrary, echoing an assessment that the theory of objective civilian control increases the military's influence, bolstering its political power rather than removing it from domestic political processes (Schmidt, 2019).

Given that defense of the U.S. Constitution is cited as a justification of *apolitical* norms, researchers would do well to explore the literal meaning of that phrase, and how it is understood among military personnel. Every member of the military takes an oath that includes the lines 'I do solemnly swear to support and defend the Constitution of the United States against all enemies, foreign and domestic.' On the surface the meaning seems clear. But is it really? Actions taken on both sides of the predominant aisles are justified as fulfilling that defense of the nation's founding document. A question also exists as to whether defense of the constitution is at times cited by military officials whose interest is protecting the appearance of the institution by covering for wrongdoing (Green & Lee, 2024). At times, the statement *defending the Constitution* takes on the appearance of devolving into another piece of value terminology, due to its seeming overuse. Words or terms that are used frequently enough out of context or proper meaning eventually lose meaning (Lewis, 2001).

In my experience, the percentage of military service members who have read the U.S. Constitution, or conducted any kind of study on it, is very small. Scholarship on constitutional literacy among military members is sparse, and the courts have traditionally given deference to military decision-making on matters of impact to constitutional language. Over a 20-year military career, the sole training I received on the U.S. Constitution was a brief online video that unit members were expected to watch in 2016 to observe Constitution Day. The constitution itself was never required reading in any military course from basic training up through the U.S.

Army Command and General Staff College. A veteran interviewed for this study reported that duty to defend the constitution was a lecture topic in an ethics course at the U.S. Military Academy at West Point. Are these experience outliers, or indicative of trends across the force? It is a question worth putting to the test.

Finally, researchers would do well to further explore how an *apolitical* identity frame impacts institutions and members identified with them, as well as perceptions of those actors by external observers and stakeholders. Has this identity played a role in creating or perpetuating the civil-military divide? Does the idea of a societally-detached military institution support practices of strong institutionalism within the ranks? Where is the line between reasonable policy of professional conduct, and interfering with polity rights? Civil-military scholars are showing renewed interest in whether the force can be *apolitical*. Their work, however, has left it to the federal courts to investigate the impacts to citizenship for military members. Scholars would offer a public service by investigating the friction between the citizen and soldier by contributing to civil-military literature informed through a perspective on how publics interact with military *hard* and *soft* policymaking in the 21st century. Now on to Chapter 4, where we will explore how policy, and the perception of policy, on political expression affects the thinking and behaviors of military members.

Chapter 4 - The Impact of Civil-Military Norms on Military

Members

Background of the Topic

Those who serve in the U.S. military embrace a life of unique challenge that includes difficult training, long stretches of separation from loved ones, and the risk of deploying into deadly combat environments. Another challenge they encounter is the expectation of trying to orient one's life to the perceived expectation of an *apolitical* posture. This institutional expectation clashes with the political contexts of the U.S. citizenship held by most members of the U.S. military, and the role that the military institution plays among the instruments of governance. It contrasts with Aristotle's conception of the good life, in which politics is the "master art" (Aristotle, 1952a, p. 339) through which humans exercise government to satisfy their social instincts and to live well among society (Aristotle, Politics, 1952b). Modern institutional norms that use nuance to deny expressive participation in domestic political matters enable an inferior form of institutional politics that hinders individuals from seeking to increase their satisfaction as members of a collective civic polis (Shields, 2023).

U.S. Defense Department regulation protects the rights of military members to vote and participate in a wide array of domestic political expression, as discussed earlier in Chapter 2, but norms and culture often differ from policy. Writing specific to this topic notes that such norms are "unwritten—but often misunderstood or misapplied—customized rules that these parties seem to follow, providing form and expectations to their relationship" (Maurer, 2020, p. 354). As noted in Chapter 3, the pressure to act *apolitically* is not a requirement contained in any military policies, but is well understood among military members as an institutional expectation that is enforced through cultural means as if official policy. Military members seek to validate their

credibility as members of the epistemic community of the military institution by conforming to these norms (Schmidt, 2019). Where policy and norms conflict, a paradox appears. Military members are caught in the middle of the tension it brings.

Introduction

‘When you decided to become a public affairs officer, you gave up the right to have an opinion on political issues.’ As near as I can recall, this is what a higher-ranking military officer said to me in a frustrated response over a recently published commentary in which I discussed the political side of a military topic that was of high news interest at the time. Another officer pulled me aside afterward to follow up on that theme. My attempt to respectfully reassure him that my written expression was fully allowed by Department of Defense policies did not alleviate his concerns. What the policy allowed did not matter according to their thinking. ‘You just can’t do that,’ he responded. It was one of the clearest moments of my military career that there was a gulf between what is allowed according to the rules, and what is allowed according to organizational norms.

The context of the military’s institutional role in political processes is important to understand in light of how attempts to shape an organization’s collective identity transfer to those in such agency’s employ, who are thus under the shadow of its constructed identity frame. Words spoken by top military officials are often interpreted as a form of *soft policy* to their subordinates, even if informally. I define *soft policy* as the institutional expectations conveyed across an organization or institution, which are internalized by recipients. It is akin to a set of principles, and is often justified through appeals to a sense of ethical virtue. These expectations may be known by presumptive organizational or institutional members prior to their affiliation, but often are not. This differs from *hard policy*, which is the formally codified, written rules,

regulations, or laws that formally guide an organization, institution, or society. *Hard policy* spells out the rules established through a formal means—ie: the product of an officially sanctioned process of deliberation, legislation, or jurisprudence. In contrast, *soft policy* spells out expectations that originate as a doctrine of thought within a group context of varying scale. The tension between the two is well rooted in historical accounts of civilizations past. Biblical text refers to the practice of religious leaders substituting their personal preference of rule over established law in the sixth century B.C.: “teaching as doctrines human commands” (Christian Standard Version Bible, 2017, Matt. 15:9; Mark 7:7). MacArthur notes the contradiction in between formal rules in 1st Century Jewish law (ie: *hard policy*) and the discursive claims of the priestly class (MacArthur, 2020). In this era, ancient senior Jewish religious officials created norms that were not backed in the book of the law, known as the Torah.

The divisions the rabbis and scribes were creating and enforcing had no biblical basis whatsoever. In other words, they legitimized antipathy, enmity, and hatred for others by shoehorning it into their theological tradition... Through their reckless reinterpretation of God’s law, they could make a case for allowing a gentile to drown [on the Sabbath day of rest] (MacArthur, 2020, pp. 31-32).

Violations of *hard policy* tend to be enforced through a form of due process, based on regulatory wording. In contrast, *soft policy* is more vulnerable to uneven enforcement and disregard of formal rules. It is more likely to be enforced through varying means of influence or persuasion that can include peer pressure, shaming, or other forms of coercive influence.

Norms are not constant. They tend to change over time. In particular, “Civil-military relations are constantly being rewritten” (Schulman, 2019, para. 15). In the first chapter, I summarized historical detail that leads into modern day civil-military norms. The perspective

held by the military toward politics today is markedly different from the perspective held as recently as last century. Much credit for the expectations placed upon military members today is assigned to Samuel Huntington's theory of *objective civilian control* (Huntington, 1957), which theorized that society grants increased autonomy to the military institution in exchange for its abstinence from domestic political processes. This theory expanded over time from one in which military officers should voluntarily abstain from voting into an *apolitical* identity ascribed to the military institution and its members as a whole. Over time this way of thinking anchored as a form of *soft policy* that pressures military members to isolate from domestic political expression, whether it be related to candidates, causes, or principles.

This phenomenon of *soft policy* as holding greater weight than *hard policy* is the result of incorrect epistemological perceptions being viewed with greater weight than ontological policy realities. In military verbiage, this phenomenon is captured by the phrase 'perception is reality,' a widely used sentiment that has direct bearing among military members about what is—and is not—proper, regardless of the full facts of a situation and the associated rules. In 2020 the U.S. Army went a step further, adding language to Army Regulation 600-20: *Army Command Policy* that bars soldiers from sharing links to, or re-sharing posts from social media properties of a political party or affiliated candidate or cause (Department of the Army, 2020). This begs the question of “whether traditional norms have morphed into something undesirable” (Maurer, 2020, p. 355). The institutional norm reflected in this recent policy change exists as “a rule of thumb, a cultural expectation, about proper civil-military relations that imparts guidance to military leaders to accept policy decisions of their civilians principles as part of healthy and Constitutionally-demanded civilian control” (Maurer, 2020, p. 344). It is perpetuated discursively to the point that not only is it culturally believed as canon within the armed services,

but also among many elected leaders and much of civilian society. This presents a paradox in which a congressionally-funded, policy producing, federal cabinet agency that enforces policy as directed by presidential order is perceived to exist outside of political processes. This paradox extends to those who serve in the armed forces (Brooks, 2020; Dubik, 2020), a population who perceives expectations being placed upon them as a result of the discursive *apolitical* identity of the military, rather than policy requirements.

Noted economist and Stanford University Hoover Center Senior Fellow Thomas Sowell wrote that “No institution in any society can possibly be nonpolitical in the ultimate sense of being hermetically sealed off from governmental authority” (Sowell, 1995, p. 92). Yet the U.S. military institution tries to present that image. Institutional discourse on this topic within the military force is interpreted to implicitly pressure military members to espouse a pseudo-stoic, disinterested tone with regard to all things that relate to *politics* in any form. These “non-partisan norms are akin to *civic norms* that impose upon servicemembers an *obligation* to the American people” (Lythgoe, 2022b, p. 83). Such cultural theory likely plays a role in the growing distance between the military and the people of the nation, a dynamic referred to more commonly as the civil-military divide. Both members of the military—and society at large—interpret defense policy on political expression as being more restrictive than it actually is. Thus the space between stated policy—and associated discourses on political expression by members of the U.S. military—is worthy of a deeper look.

This institutional paradigm presents an opportunity to explore the impact that institutional norms have on those under the regulatory control of the norm-establishing agency. Chapter 3 explored how institutional norms are communicated to military members. This chapter explores how those norms shape perceptions among military members as to what they can and cannot do

when it comes to political activity and expression, and the impact to their behavior on matters of political engagement. It seeks to understand how the military's *apolitical* norm shapes perception of military service members' political agency when off duty, as well as the contestation of meanings associated with military policy and practice. As in Chapter 3, every veteran interviewed for this exploratory study is no longer in military service. Yet, they will be attributed by rank held when they were active duty military members, ie: an Army Sergeant Major, a Marine Lieutenant Colonel, etc.

This study is based on surveying perceptions of human beings on political topics. Nearly all things political are highly contentious in our time. In tackling such sensitive topics, one must accept “that there are many questions either which have no single correct answer, or where solutions are thoroughly contested” (Giddens, 2013, p. 113). “Interpretivist inquiry is unabashedly and unapologetically subjective” (Green, 1994, p. 536). In like fashion, so is how people connect to the topic of whether the military is or is not a political institution. I accept the warning in topics of adaptive nature that “Making your interpretation public is itself an intervention and often a provocative one” (Heifetz et al., 2009, p. 35). There will be areas where some will agree, and others will disagree due to the philosophical nature of exploring norms (Pieper, 1952). Nevertheless, this exploration attempts to offer a view inside the human impact of military norms that is underexplored.

Theoretical Framework

This chapter makes use of three frameworks to contribute to understanding internal stakeholder perception of institutional norms. The *Discourse as Constitutive of Organizational Identity* framework—as discussed in Chapter 3—offers a lens through which to interpret how

language used to shape perceptions of institutional realities also shapes how members of those institutions can, and should, act. Second, *institutional theory* offers a useful frame to demonstrate precedent for, and the manner in which, institutional language affects individuals. Finally, the *interpretive* approach highlights experiences, to aid understanding of ways that organizational language is perceived by member stakeholders. These frameworks productively contribute toward achieving the following chapter objective and answering the research question.

Objective: To explore and document the perception of discursive norms related to expressive freedom of institutional members in military context.

RQ: How has the institutional use of an *apolitical* soft policy been experienced by military service members?

Within the borders of this exploration, I offer two propositions:

Proposition One: Military members perceive a stronger expression-regulating influence from institutional norms than from official policy.

Proposition Two: Perceptions of shifting expressive norms foment convictional friction within military members between fulfilling institutional expectations and fulfill to satisfy one's personal conviction in political context.

Framework 1: Discourse as Constitutive of Organizational Identity.

Discourse as Constitutive of Organizational Identity as a theoretical tradition is rooted in the Communicative Constitution of Organizations (CCO) framework, and Discourse scholarship. Study into discourse scholarship and CCO theory are complementary, as the spoken word creates a vision of the world and realities as communicated by agents of societal culture (Barrett, 2015), due to the excessive power granted to language to determine what is real (Barad, 2003). All

forms of communication have a level of constitutive force (McPhee & Zaug, 2008), meaning that they bring varying levels of persuasive effect based on effectiveness of the transmitter and cooperation of the receiver. Packaged within discourses, they weave through the complex network of relationships that contribute to organizational existence. “A constituted organization is not just a set of flows, but a complex relationship of them” (McPhee & Zaug, p. 42). Used well enough, discursive practices can overcome ontological reality in human minds, as the power of messaging trumps the power of observation among willing participants. How does this happen? “Why are language and culture granted their own agency and historicity while matter is figured as passive and immutable?” (Barad, 2003, p. 801).

People with a shared mission, resources, and aligned relationships create organizations. Discourses shape the aspirational identity of their efforts. The Biblical account of creation offers earliest example of the constitutive power of words—God *speaking* the world into existence (Christian Standard Version Bible, 2017, Gen. 1:1 – 2:3). Words have been used to convey, engage, and create since. At the fall of humanity recorded in the third chapter of Genesis, satan denied that eating fruit from the forbidden tree would lead to death; his words convinced Eve as a means of conventional (persuasive) communication, against the creative (constitutive) words of God (Christian Standard Version Bible, 2017, Gen. 3:1-5). Humanity has been using words in an effort to influence others and reshape the world since.

The power to wield the power of discourse effectively is to not only create, but sustain and transform organizational identities (Barrett, 2015). Discourses rely on the power of words to convey ideas authoritatively in order to achieve a persuasive effect (Wilson, 2014). The question is *which* words carry the greatest weight to influence actions when comparing words of *soft* versus *hard* policy. Discourses transcend the mechanics of currently available word choices and

create entirely new vocabularies that shape possibilities of human thought (Barrett, 2015). They have a powerful role in shaping the norms of organizations and institutions. Institutional communication affects how people “make sense of their ongoing, organized conduct” (Lammers, 2011, p. 174). That influence takes advantage of the “unexamined habits of mind that grant language and other forms of representation more power in determining our ontologies than they deserve” (Barad, 2003, p. 802).

We use conventional means of communication to share realities and opinions. When repeated often enough, those ideas can create a perception of reality, in line with the *constitutive approach* to communication, which states that “all communication has constitutive force” (McPhee & Zaug, 2008, p. 28). The constitutive approach infers that expression can precede ontology, and that words and shared values among organizational members evoke creative power. This theoretical lens suggests that humans in networks constitute “socially recognized agency” (McPhee & Zaug, 2008, p. 28), and create organizations and the cultures within “through interaction and conversations through communication networks” (Eddington, 2018, p. 2). Even in the organizational context, all communication is a human endeavor (McPhee & Zaug, 2008). Differences of background, word choice, and context of the moment are among a wide and complex array of factors that contribute to differences of understanding from one person to the next.

The ambiguity inherent in all human communication makes the interdependencies between members of a social system (i.e., among people) looser than those found in biology or those that connect the parts of a car. The fact that words are open to interpretation means that while we may think we understand one another, there may in

fact be a wide gap in interpretation of which we may not be aware (Eisenburg et al., 2013, p. 100).

As noted in previous chapters, policy interpretations are thus often left to the eye of the beholder.

A substantive part of the U.S. military's institutional identity is shaped by a web of discursive creeds, oaths, and value terminology that reflect an image of political agnosticism for the institution and its members. This discourse has taken hold across the force and offers an example of retrospective sense making in which "organizational members develop meta-stories or narrative in which groups of people identify with the organization or unit as a whole" (Putnam et al., 2008, p. 14). Words like *apolitical* or *nonpartisan* fit into what Gee (2015) refers to as *little-d discourse*. In stand-alone context, such terms shape an immediate expectation that off-duty military members have less a right to participate in political expression than their civilian counterparts. Repeated over time in larger narratives by senior officials, added to military discourses, and carried in news coverage and spoken by political office holders, these words convey the power of an institutional doctrine that has gained standing in broader societal thought. In that context, language pertaining to the *political* or *apolitical* identity of the U.S. military plays on the field of big-D discourse, and shapes the public belief that military members necessarily serve under severely limited rights of expression.

Institutions use discourses in attempts to change their stories, and distance from legacy identities and norms, moves that can be driven by convenience in order to appear in line with social trends. Such reversals can be challenging in this age of deep record, where previous brandings and positional markers are easily brought to light. The U.S. military has found itself in the midst of such practice in recent years as senior officials try to shift service identities from standards that appeal to a morally conservative base to appeal more toward a socially progressive

base as the political winds shift across the branches of government (Forsling, 2023; Hasson, 2019; Lohmeier, 2021; Mitchell, 2023; Ryan, 2023). This change effort itself falls under a discursive title of making the force *look like America* (Downey, 2021). Under that discursive banner, many senior military officials have reversed position on matters of moral salience, now attending celebratory observances for causes they once disciplined military members for, and disciplining service members who hold to personal convictions that were aligned with military policy until very recently.

Framework 2: Institutional Theory.

Institutional theory attempts to help scholars evaluate the ways in which organizations act in response to “taken-for-granted beliefs, schemas, and values that originate in larger institutional contexts” (Leicht & Fennell, 2008, p. 433). Throughout the history of humanity, there have been institutions that guided the way that people behave individually and collectively, most notably the bedrock institutions that include family, church and government (Thornton, 2002). More recently created institutions include corporations, customs, trade unions and the state, among others (Nureev, 2017). They encompass authoritative aspects of life, and serve as the keepers of standards, and bearers of discipline to maintain a sense of order and predictability across society. The Treaty of Westphalia was signed in 1648, setting the stage for the modern nation state. In following centuries, borders became more formalized and nations industrialized, paving the way for new forms of institutions to emerge, including multinational corporations that hold tremendous presence and influence in our daily lives (Munir, 2014).

Modern banks are often referred to as financial institutions. Universities are considered to be institutions. In most countries around the world, militaries take on an institutional nature.

Institutions have been defined over the last century as something as simple as a basic concept, to the socially constructed habits of thought, rules and norms across society (Berthod, 2016; Phillips and Malhotra, 2008). Institutional research intersects communication scholarship, in that “Communication is a process through which collective forms such as institutions are constructed in and through interaction, instead of being merely a conduit for enacting discourses” (Cornellissen et al., 2015, p. 14). They hold such an all-encompassing presence that most everyone in the world is living in and through institutions (Bellah et al., 1991).

Institutions project power over their members and the public through systems of sanction and reward (Clemente & Roulet, 2015; Lawrence, 2008), create enforceable rules to control the behavior of their members (Berthod, 2016; Meyer, 2008), and make policy choices to deliberately enable certain action while constraining others (Amenta & Ramsey, 2010). As Cornelissen et al. observe, “Institutions are all around us” (Cornelissen et al., 2015, p. 10). “They label, classify, and order. They think for us” (Dzur, 2019, p. 28). These institutions bring with them a sense of permanence, which ascribes them with tremendous power (Palmer et al., 2008), a reality heightened when talking about a large, well-armed institution such as the U.S. military.

New institutionalism evaluates how institutions change, rather than how they remain the same (Berthod, 2016), and contends that institutions are significant power brokers in society (Rothstein & Stolle, 2008). Within this framework, societal actors—both internal and external to institutions—have the power both to create and shape institutions through communicative means, as well as the power to undermine the legitimacy of institutional identities, purposes, and practices through strategic use of rhetoric (Clemente & Roulet, 2015; Glynn, 2008; Harmon et al., 2015; Schneiberg & Lounsbury, 2008). Dzur (2019) puts the responsibility of holding institutions accountable for their actions squarely on the public, in line with an observation that

institutional theory tends to hold to a non-critical view of scholarship (Munir, 2014; Willmott, 2015).

Inevitably, institutionalism is linked to power (Munir, 2014; Schneiberg & Lounsbury, 2008). Institutions and organizations coerce norms through institutional practices that socialize “institutional actors into a set of beliefs that define specific organizational arrangements as the ‘best and customary’ way of organizing specific activities” (Leicht & Fennell, 2008, p. 433). With power comes political factors, even when entities claim to abstain from such. Nevertheless, most scholarship “on institutional agency is explicitly political in its accounts of how actors create, transform and disrupt institutions” (Lawrence, 2008, pp. 182-183).

Framework 3: The Interpretive Approach.

There is an interpretive and experiential nature to studying the theories of politics. (Roberts, 2021). Military policies are enforced through local chains of command, which often interpret policies unevenly (Peyser, 2022). Thus, this study approaches the examination of institutional norms through an interpretive framework. The interpretive approach focuses on how things are experienced, which is key to explaining where and how institutional narratives impact associated stakeholders. Studies using institutional theory often make a connection to the interpretive approach, which focuses on contextualized meanings that are highly individualized (Green, 1994; Olsson, 2007). “At root, interpretivism is about contextualized meaning” (Green, 1994, p. 536). Interpretive methods merge seamlessly with the insider academic approach used throughout this dissertation.

Interpretive knowledge requires the professional to involve him- or herself in the modes of thought and learning of everyday life, that is, the local knowledge of the ordinary

citizen... To be meaningful for the world of decision and actions, such variables have to be interpreted in the situational contexts to which they are to be applied... In this process, the inquirer, as part of a community, is an agent in the social context rather than an isolated, passive observer (Fischer, 2000, p. 253).

This framework attempts to make sense of how words are interpreted within discourses to achieve perceptions of reality (Sutherland, 2018).

Interpretive frameworks encompass qualitative methods that bring a sensitivity to how experience shapes perspective and knowledge, and acknowledges that beliefs can vary based on a complex array of factors. Given the wide difference of understanding on what does and does not constitute the *political*, the interpretive approach offers an ideal scholarly framework to evaluate topics of deep social salience that cannot be easily quantified (Green, 1994; Olsson, 2007; Roberts, 2021; Sutherland, 2018; Yanow, 2000). This approach also compliments CCO theory. “Interpretation, through sensemaking perspectives, can aid in providing communicative construction of organizations (and their activities) by engaging texts in interactions known as conversations... Text and conversations, then, serve as building blocks for organizations” (Eddington, 2018, p. 2).

Building on the insights from the previous two studies of this dissertation, I ask if the *apolitical* identity discourse tied to the U.S. military institution enables a question of whether military members perceive a perception of equal right to political expression—in their personal lives—compared to their civilian counterparts. Put another way, this exploration aims to shed light on how military members perceive their rights to participate in the processes of creating policies by which they are governed and expected to defend at potential cost of life.

Method of Exploration

This article uses the same method as the previous study in Chapter 3: qualitative, semi-structured interviews, with insights aided through an insider academic research approach (Schmidt, 2019). The nine (n=9) interviews conducted for the Chapter 3 study were continued through a second, separate set of open-ended questions immediately following dialogue related to the study contained in Chapter 3 (see Appendix B). The sample size target was 5-10 interviewees, given the phenomenological nature of this exploration (Guetterman, 2015; Marshall et al., 2013). When it seemed potentially useful, I followed up on certain responses with related open-ended questions to gain deeper insight per the parameters approved by the institutional review board for this project. Interview time for the second portion of the interview script lasted 16 minutes on average. Select responses from questions asked for the study contained in Chapter 3—of relevance to the objective and RQ for this study—were included in analysis for this research article. The veteran research participants served in the military over a range of 10-43 years. Two served as enlisted members, achieving the senior noncommissioned officer ranks of Gunnery Sergeant and Sergeant Major. Seven served as officers, their final ranks spanning Captain through Lieutenant General. I repeated the three-phase process of open, axial, and selective coding used for the previous study in Chapter 3 (Strauss, 1987). A process of iterative selective coding added a focus on Discourse as Constitutive of Organizations framework and Gee’s Politics-Building tool, which defines political actions based on the granting or withholding of social agency to individuals and groups (Gee, 2014). Data was sorted, and key quotations extracted according to four criteria (see Table 4.1).

Table 4.1. Sorting Categories for Interview Data

-Directly Address RQ and Proposition
-Incentives and Risks associated with Adherence to Norms
-Common Experience of Norms Enforcement
-Commonality of Experiential Theme

All remaining interview considerations and parameters remain unchanged from the Chapter 3 study. Analysis resulted in identification of three objective and RQ-linked categories through which insights were categorized (See Table 4.2).

Table 4.2. Key Insight Topics

-Perception of Need to Self-Censor
-Shifting Norms: From Discouraging ‘All’ Political Expression to Discouraging ‘Some’
-Friction of Identities

Finally in the discussion, I connect personal examples and insights from my 20-year experience as a military member that correlated to interview findings, as an insider scholar, or auto-ethnographer (Denzin & Lincoln, 2017; Flyvbjerg, 2006; Jensen et al., 2020; Schmidt, 2019; Tracy, 2013). Personal experience on this topic inspired curiosity to explore the impact of institutional norms on stakeholder perceptions. Previous research asserts that personal experience with a topic allows for a deeper evaluation of subject matter and crystallization (Denzin & Lincoln, 2017; Ellingson, 2011; Flyvbjerg, 2006; Jensen et al., 2020; Tracy, 2013). “Some people call this ‘baggage;’ I prefer to call it wisdom” (Tracy, 2013, p. 2). The researcher cannot separate oneself from personal perspectives on the topic (Yanow, 2000). Including the author as a character in the first person makes research reports more relatable (Denzin & Lincoln, 2017).

Insights from Current Study

The predominance of insights garnered through this interview process confirm the pressure felt by institutional members to conform not only to expectations of behavior and conduct, but also expression and even thought. This manifested in a tension among research participants between doing what they perceived as congruent with institutional expectations, in contrast with what they felt to be morally correct on a personal level. Most reported a perception of partisan causality to those tensions, and expressed a negative impact to trust in the chain of command as a result.

The purpose of this exploration was not to do a study on worldview, ideological tones, or shifts in the military institution—topics with their own reflections in literature (Gutman, 2000; Hasson, 2019; Lohmeier, 2021). My interest in civil-military norms—inspired by personal experience—drove this work. Nevertheless, in a political institution that exists within a political context—to conduct political affairs—the political element of institutional norms came up as a point of awareness among respondents. Research participants were not asked to share their political perspectives or partisan affiliation, as the purpose of this exploration was not about worldview identity. Unprompted, one self-identified as holding to conservative worldview, and denied sensing an in-party effect. Another inferred holding to a more liberal, or progressive, worldview. He felt strongly that there is an in-party effect. Another spoke of holding conservative commitments on some issues, and progressive commitments on others. Another inferred conservative worldview, but did not clearly self-identify as such. Research and polling in recent decades consistently indicated that more military members hold to traditional than progressive worldview. However, data specific to worldview leaning was not captured in this series of interviews. Without confirmation from each veteran interviewed on worldview identity,

I hesitate to contextualize these findings as indicative of a purely conservative point of view. To do so would be an assumption on my part and risk breach of ethics by inadvertently misrepresenting participants on a subject they were not asked to speak on. That said, comments shared strongly suggest that worldview considerations are top of mind for military members when they think of experiences in which they perceive speech having been limited. Any theory that findings might suggest correlation with standpoint epistemology would need further testing.

Perception of Need to Self-Censor

Previous research notes that military members self-censor in light of reporting immoral uses of military force (Magal, 2017) and memoir writing (Kleinreesink & Soeters, 2016). The first insight of this study confirms the existence of a perception of *soft policy* at work across the military ranks that weighs heavier than military regulation when it comes to culturally acceptable political expression for military members in personal, off-duty capacity. Research participants consistently reported feeling pressure to self-censor their perspectives on political topics even in their personal capacity. The general belief reported is that you can have personal opinions, but should not share them or be seen making them known in any form. One officer summarized the expectation to “Be careful what you say, and remember, we’re not talking about our political views in public.” He went on to say

“I have an opinion, but it's mine and mine alone, and I don't need to share it with anybody nor support one or the other, because if I am seen, what if I'm there wearing this? [referring to a Marine Corps Hoodie he wore during the interview] Now I'm endorsing something, and that is not okay.”

In continuing conversation after recording stopped, one respondent went on to say that there is an invisible gag order in effect across the military today. An Army captain answered that when

asked his personal opinion on a policy matter, he simply said “it doesn’t matter what I think.” A high-ranking officer reported

“I’ve always had pretty strong political views. I’ve been critical privately of the last four administrations and their use of military force. I just didn’t express it outside of a very small group of trusted agents.”

Another officer who worked at the strategic level of U.S. national defense said that because he accepted military norms as part of his identity when entering the service, “It wasn’t hard for me to self-censor and just kind of keep my mouth shut.” Echoing that sentiment, a noncommissioned officer said “I just kind of put the blinders on to the political expression part, didn’t think of it.”

Roughly half of the veterans interviewed cited fear as a motivator for self-censorship.

First is a fear of retributive action from supervisors.

“The expectation of us was so tight that I don’t believe many people felt comfortable going to political rallies or support political candidates openly without the fear of some sort of negative action toward them if senior leadership found out.”

One veteran reported a belief in certainty of punishment for sharing political perspectives.

Another said to disagree out loud with a matter of ideology presented in military training “would be my ass.” The second motivation for self-censorship was a fear of being labeled in negative fashion. One officer said that for a military member to have “an alternating thought from what the approved response is” risks being labeled in derogatory fashion. “You can’t fully voice your opinion without being labeled as some random phob or ist,” referring to suffixes used in accusatory language. In a deeper analysis of this concern, journalist and social commentator Rod Dreher wrote that those who dissent from the prevalent social doctrine of the moment “are pushed out of the public square, stigmatized, canceled, and demonized as racists, sexists, homophobes, and the like. And they are afraid to resist, because they are confident that no one will join them or defend them” (Dreher, 2020, p. 8). Another officer who served in a presidential

support unit reporting feeling a strong pressure to be seen as holding to a doctrine of *political correctness*, which is defined as

1. Of, relating to, or supporting a program of broad social, political, and educational change, esp. to redress historical injustices in matters such as race, class, gender, and sexual orientation. 2. Being or perceived as being over concerned with such change, esp. in the avoidance of giving offense (Webster's II, 2005, p. 875).

This officer expressed belief that *political correctness* was bureaucratic term that gained negative connotation due to fears of expression associated with its appearance in communicative engagements.

“That term, political correctness, came to be used more and more particularly through the 80s and into the 90s. What it meant to me quickly became well, I can't tell the truth because I'm going to offend somebody, and I don't really know who it is, and I don't know why it's going to be offensive. But I would hear leaders use that term on a regular basis in the context of ‘hey, to make sure I'm being politically correct here.’”

Comments presented an understanding among respondents that military members are expected to refrain from discussing political topics, in contrast with formal—*hard*—policy that allows significant civic participation. This points to a sense of social coercion to regulate expression of organizational employees that extends to their personal time. This contradicts the classical, liberal approach to expressive freedom central to the traditional concepts of Western governance, bringing into question the regard for constitutional practice in contemporary times.

Wherever the power that is put in any hands for the government of the people and the preservation of their properties is applied to other ends, and made use of to impoverish, harass, or subdue them to the arbitrary and irregular commands of those that have it, there it presently becomes tyranny (Locke, 1997, p. 113).

Shifting Norms: From Discouraging all Political Expression to Discouraging ‘Some’

The second primary insight is a sense that restrictions on political expression by military members is taking on a selective nature. Those interviewed generally agreed that there was an understood norm that they were not to discuss political topics due to their status as military members, both on and off duty. Several comments, however, pointed to a perception that norms traditionally restricting political speech in general are evolving to not necessarily restrict political speech entirely across the force, but instead discourage speech aligned with a traditional or conservative perspective more than expression of a progressive, or left-wing, perspective. This is where we come to what many might consider a gray area of politics versus principles, a challenge of exploring political topics noted earlier in Chapter 1. Matters of culture war are matters of politics, because they impact peoples’ civic rights and agency (Gee, 2014). Given the high level of control that is exerted over military members, they tend to feel the effects of political schism on a deep level when military policy changes result. In a break with recent tradition, polling demonstrates that heightened political tension across the nation is now reflected among military members as well (Shane, 2018). Several pointed to changes in recent years that challenged norms they were socialized when entering military service. An Army sergeant major with senior Pentagon experience said

“People tended to be very careful about criticizing senior leadership, both in uniform and elected leaders for the most part of my career. I think that changed over the last 10 years.”

Within similar timespans, several shared of feeling pressured to conform to changing beliefs and norms that anchored as institutional canon across the force. According to an Army captain, “You had to toe the line a lot, especially with the rapid changes that were occurring.” Echoing that sentiment, a lieutenant colonel felt that his freedom to

“speak my mind on issues along the political spectrum and to act according to my conscience... was increasingly threatened as the military shifted during my 25 years far away from the values it espoused when I joined.”

Another officer interviewed said of this:

“As I was getting out in 2020, there was a lot of changes in the military, and you couldn’t [say what you thought] because of the nature of America” [referring to the heightened state of political friction of recent years].

A senior officer interviewed expressed concern over the potential institutional fallout if the public perceives the military as an agency politicized by partisan interests.

“I do feel like over the last six years, I think there's been some real damage done to the institution, and I'm not sure it will ever fully recover. I'm afraid for what that would mean for coming generations for the Army, and for coming generations of potential soldiers who would turn away from military service because they perceive it to be aligned with a specific view that they find that unacceptable or just don't appreciate. I think it's a real problem for the country.”

Comments also pointed to social media expression by certain high-ranking military officers in recent years as indicative of standards that appear to favor certain political viewpoints and movements over others. Speaking of a previous unit commander who openly aligned with political causes in his off-duty time, an Army Major remarked:

“When a colonel feels perfectly open and free to post pictures of BLM flag and still get promoted to general, then I would say there’s almost no friction between being yourself, no matter how controversial that opinion might be and the expectations you feel. Now, how would my Trump sign have gone over if I was trying to get promoted to a one-star general? I don’t know. Good question. Didn’t test that one.”

As noted in Chapter 3, the U.S. Office of Special Counsel tacitly approved government employee advocacy for BLM during work time. Similar determinations have not been made for political movements hailing from a conservative position.

Some comments indicate a perception that military members are expected to keep thoughts that disagree with current elected leadership to themselves, even in their personal

capacity. An Army lieutenant colonel who served as a professor at a service command and general staff college said

“For the rank and file, the mandate is to follow one’s (politicized) leaders while keeping one’s own opinions to oneself if they diverge from the current politically correct thought.”

Interactions on this topic bolster the vision of paradox in which the narrative of the military as *apolitical* is contradicted by institutional actions that signal taking sides in issues of heated domestic political debate. One major interviewed said

“The military is required, just like all federal organizations, to follow certain civil rights legislation, laws, things like that. However, the way the military implements some of these laws and regulations goes way beyond nondiscrimination.”

A lieutenant colonel said

“I wouldn’t say that I ever got direct mentorship on the topic, it was mostly in the form of emailed policy memos. The higher-ranking officials’ talking points on TV emphasized the nonpolitical nature of the military, although recruiting videos, DEI classes, LGBT policy and other things gave the opposite message. The perception I ended up with was that it was okay to be publicly left but any opinions of the right were best kept to oneself or to one’s circle of friends.”

The political linkage of this institutional pivot in communication is rooted in the transition of norms that until recent years shunned all social policy expression to norms that allow certain expression and discourage competing civic advocacy in pursuit of what social justice theory defines as “more equitable (just) power relationships” (Dreher, 2020, p. 61).¹⁰ A captain felt this tendency demonstrated military partisanship, saying one

“way that the military would be *partisan* would be the fact that commanders could express leftism in their personal life, but not a lot of right wingism.”

¹⁰ See Baucham (2021) and Strachan (2021) for further treatment of social justice theory in contemporary institutional context.

In essence, this appeals to a transfer of civic agency within the ranks. There were references as well to a push for senior military officials to actively engage among the confederation of military-affiliated personalities colloquially known as #miltwitter (Kim, 2021; Lipsky, 2021) as an example of decreasing resistance to certain instances of partisanship in the ranks. A captain whose service included commanding a field artillery company said:

“We've seen it a lot of times with miltwitter, where commanders, junior officers, senior enlisted people”... get “deep in the politics and very controversial stuff that I don't think is helping build a cohesive team.”

A colonel with experience up to the office of Secretary of Defense remarked observed a push across the force for more senior officials to engage in political conversations over social media.

“It seemed like there was a push for generals to... go, starting on Twitter... and maybe elicit responses, and engage with troops about issues... it seemed just over time to cater towards social issues and then to cater towards issues that were championed liberal social causes.”

To that end, research conducted recently at Duke University found that “politically interested officers express more politically liberal sentiments than conservative sentiments” in social-media expression (Kim, 2021, p. iv). Washington Times military reporter Mike Glenn observed “If your only interaction with the military is on social media, you might think the armed forces are mostly of the progressive-left political orientation (including the officers) and they’re not afraid of criticizing their C-in-C [Commander-in-Chief]”¹¹ (Glenn, 2020). A retired U.S. Navy officer and military affairs writer who uses the pseudonym of Commander Salamander expressed similar observations.

¹¹ President Donald Trump at the time.

The ratio here versus reality is more than flipped. There is almost zero downside to being openly left-wing here by a GOFO.¹² GOFO on the right, as I've discussed with them privately, do not have that freedom. They don't have the cover (cdrsalamander, 2020).

This perception degraded comfort in open dialogue between military co-workers in context of both personal conversation during the duty day and during off-duty engagements. One lieutenant colonel put it this way.

“In many DEI classes, water cooler conversations, in meetings, or with soldiers, it was clear that it was acceptable to voice an opinion that was in agreement with the progressive shift of culture but was unacceptable to voice opposition.”

An Army major shared from a conversation with a colleague in an off-base, off-duty context.

“I was downtown and I ran across one of my fellow EO classmates. We spoke for a minute, and both of us kind of humorously rolled our eyes about some of the crazier aspects of the EO world. But neither one of us would expressed exactly what we were talking about, and so I'd say, both of us self-censored in that conversation because you couldn't say certain things without the fear of... You just couldn't say it to somebody. Even if person agreed with you, you couldn't say it, some 1984 level self-censorship right there anyway.”

The changing norms extend also to how senior military officials conduct themselves in their official capacities. In 2021 several senior military officials took to the platform then known as Twitter to criticize then Fox News opinion personality Tucker Carlson for a segment in which he asserted that recent social changes in the military detracted from fighting readiness (Zeitvogel, 2021). This was followed by the then Sergeant Major of the Army Michael Grinston—who served as the U.S. Army's highest enlisted soldier—making an appearance on CNN from the Pentagon, in uniform, as a follow up to his own condemnatory tweet directed at Carlson (CNN Business, 2021). One colonel who worked at the highest levels of the defense department

¹² GOFO refers to general officers and flag officers.

expressed concern that norms are shifting to enable and encourage senior military officials to criticize conservative media commentators.

“I felt like it got worse after the Biden administration, and where I really thought we had a problem was when... Tucker Carlson was actively criticizing military policy, and actively serving generals had no qualms with going after that, attacking him for that. I've always felt that, and I felt this before I was a soldier, that we want a free and aggressive press, to include political pundits, to actively, and where appropriate, harshly criticize military policy, because that has always made the military better. That kind of response that I'm talking about, this over the top response that targeted a specific individual and a specific outlet, I've never seen that for liberal criticism of military policy.

Furthermore, where we really ran afoul of this is when the Sergeant Major of the Army, within several days, and it might have been the next day, went on CNN to criticize Fox News, essentially picking favorites in terms of a news outlet against another news outlet; whereas, the Sergeant Major of the Army through his authority, or by proxy his authority to the Chief of Staff of the Army, has access to the entire Pentagon Press Corps. Furthermore, as you probably know, a Fox news booth in the Pentagon right where he works. If you have a specific criticism of Fox, that's probably the place to go to address it.

If he felt this policy was somehow being misrepresented by Fox, the two options open to Army leadership are you go to the Fox news correspondent and say, ‘This is the way this is represented. This is really what this policy represents and how it's intended,’ or you'd say it to the entire Pentagon Press corps. But to go to one outlet and say, ‘I'm opposed to this outlet,’ then you've taken a side in this matter. We lost our way with that.”

Friction of Identities

Most veterans interviewed reported feeling friction between their identities as both military members and individual civilians, who they are when on-duty / in uniform / marked by rank and position, in comparison to who they are at home / off duty / with friends and loved ones / engaged in personal interests. There is a dominant narrative across the force that military members are never off duty. This includes a cultural expectation held among many that you can be called on in for work with no notice, and be expected to devote time to late-notice work tasks—even when on leave. A senior officer interviewed stated:

“The military does not have a difference between on duty / off duty. You’re held to the same standards, whether you're on duty or you're off duty, and you're held to the same levels of character and integrity whether you're on duty or off duty. So whatever you're going to do off duty is going to certainly be what you're going to do on duty.”

This extends to social expectations communicated toward military members online. In recent years there has been a trend of military-interested civilians tagging members of military members’ chains of command, and even service branch social media accounts, with negative comments directed toward military service members for sharing something in their off-duty time. This is a technique I refer to as digital shaming. A sergeant major remarked that when it came to personal social media expression,

“I surely felt constrained and had to self-center all the time with the fear of repercussion regularly. I never felt confident in sharing my opinion on political or hot button cultural issues of the time, and the few times that I strayed from that I was quickly reminded of getting back in the box.”

This risk concern related to military member social media engagement was also noted among senior U.S. Army officials in a recent dissertation conducted at the University of Florida (Vielledent, 2022). Adding a personal anecdote, this is a pressure I felt strongly during my time in the U.S. Army. Many military colleagues from years past and present have shared feeling the same tension to avoid saying anything in their personal capacity that online antagonists might attempt to use against them because of their association with the military.

Mindset of each person correlated with “how strongly the actor has internalized the norm in question” (Maurer, 2020, p. 358). There is a visual ideal ascribed to military members to be disciplined, expert, fit, ethical, and tough, among other character attributes such as disinterested in political affairs. Identity frictions were categorized first by pressure to primarily reflect a representation of stalwart warrior as one’s preeminent personality attribute. One military officer

reported feeling the need to depart from his personal interests and take on an institutionally-aligned identity once he became an active-duty military member:

“When I became active duty, I had a pretty good idea about the delineation, and completely gave up, deleted my political website, unposted all my shows and became nonpolitical.”

This is congruent with traditional American military tradition that downplays individuality in order to promote teamwork. A Marine noncommissioned officer said of this that he was expected “to be perfect and pretty” in spite of the hard realities of combat tours. This matches another sentiment expressed by a senior Army noncommissioned officer of over 30 years who said:

“I think, as an NCO, the Army expected me to be just made out of iron: unfeeling, objective, robotic, and that's just not me. I'm caring. I am subjective at times, and I'm not afraid to show emotion and pull people up, give people second chances, and I don't believe that's what the Army expected a Senior NCO to do. Thankfully I had leaders who were okay with who I was, because ultimately I wasn't going to change who I was for anyone.”

The second categorization of friction was reported as being between personal conviction and institutional expectations in an increasingly politicized force. An Army officer said:

“Having valid concerns for political changes was really kind of a no-no... Where does my morals and ethics come in? You had to balance it, and it was, it's really hard.”

Interactions generated a theme among several research participants that changing expectations for military members conflicted with their personal sense of morality. A Marine officer said:

“To develop myself morally, mentally, and physically, I always thought that morally part was pretty important. Some of the social expectations that were thrust upon me, and I saw coming down the pipe, offended my sense of morality, and that generated friction between who I believed I am and was, and what my convictions are, compared to what I was potentially being ordered and expected to do.”

He went on to say that several colleagues shared similar concerns with him during his period of military service. A few weeks after this interview, Pew Research released the results of a nationwide poll that reports that 48% of Americans feel a conflict between the predominant

culture and their religious beliefs, an increase of six-percent since 2020 (Rotolo et al., 2024). A captain interviewed pointed to the personal reality of having opinions as part of the human experience, juxtaposed against social expectations that are placed on members of the military in current societal context.

“That was always a kind of the crux of that for me was personal politics don’t matter, but at the same time they still do. We’re human. We can’t just turn it off. We’re not robots.”

The aspiration for members of institutional communities to be entirely detached from political spheres of a nation “is a difficult, if not impossible, task because of the challenges of separating one’s core internal beliefs from one’s external behaviors” (Schmidt, 2019, p. 51). The pressure to *turn it off* over many years can diminish one’s interest in political topics, said a Marine gunnery sergeant.

“It’s like as if you have a volume dial in your political expression and... they kind of click it just little by little. So you don’t even hear the music getting lower until it’s gone.”

Those who reported not feeling such frictions said that they fully embraced the identity of military member as primary when they joined. One said “I embraced the idea of a ‘soldier’ as my own identity,” with another noting:

“I never saw the friction between the social expectations of myself because I bought into them.”

However, these particular respondents pointed to a friction they now feel carrying their military identity into the civilian realm.

“They put me in the Marine box. They need me to stay there because that’s comfortable for them. So I have to [expletive] talk like a Disney princess.”

A senior officer said:

“People hated me because of my military background. They thought I was some right-wing, conservative, crazy person.”

“We think ‘thanks for your service, thanks for your service’ that America loves the military. Oh no! There’s people that hate us.”

This is consistent with historical trends of military members being considered akin to damaged goods after periods of war, and of facing unique challenges in adjusting to life back in the civilian realm from which they lived prior to joining the armed forces.

Discussion

We now return to the research question: How has the institutional use of an *apolitical* soft policy been experienced by military service members? First, veterans interviewed for this study reported experiencing this institutional phenomenon through nuanced and tacit means that made them feel compelled to self-restrict expression beyond formal policy requirements. Motivations include a desire to avoid perceived risks that are not clearly spelled out in *hard policy*, but were authoritatively implied through *soft policy*. Second, there is a sense in which institutional expectations changed around research participants. This resulted in modified social norms that favor certain viewpoints, disfavor others, and add complexity to fears that motivate a tendency among military members to maintain personal silence on political matters. The third takeaway is that tensions between norms and rules manifest in social pressure for military members to modify basic expressive indicators of their personalities. There is also a sense of friction felt by many between being obedient to institutional expectations, and following conscience. Under pressure from congress in 2020, the Department of Defense created DoD Instruction 1300.17: *Religious Liberty in the Military Services* (Department of Defense, 2020a). This brought military policy formally in line with the Religious Freedom Restoration Act, which has been law since 1993. Time will tell if this policy is engrained into military operating culture.

Summarizing the findings above in context it appears that 1: there is a *soft policy* at work that governs perceptions of what can be expressed based on a sense of fear, and 2: that the culturally-accepted rules are conveyed through a combination of nuance and increasingly specific, verbal, discursive communication. Both Propositions One and Two are upheld. The theme most consistently referenced, even if in nuanced terms, among the generality of comments is a fear of stepping outside the bounds of what the institution considers acceptable in the cultural and political context of the moment. The fear is not akin to civilian fear of being laid off by one's employer. Military members are not simply laid off. They can be dismissed for serious misconduct. Yet even that can take weeks or months. This fear is instead based on the unique amount of control that is placed on one's life as a military member. These fears encompass multiple angles, and include fear of being shamed, fear of a negative performance report, fear of not being selected for promotion, fear of being excluded from consideration of key jobs needed for career progression, among others. "Officers know that in a politically correct military, promotion can be dependent on meeting politically correct goals, or at least toeing the politically correct line" (Hasson, 2019, p. 129). Military members work hard and sacrifice much to be accepted as members of the profession of arms. The thought of losing such hard-earned status in a closed community is highly emotional. If rejected by one's peers and subordinates, there is not an option to simply quit and find another job. Such fears are amplified through the sizeable autonomy granted to military commanders by elected officials and the public to manage military personnel through shades of gray in military regulation. Military members have very limited recourse within the institution. When wronged even on a matter that military regulation and law speak to with great clarity, military members often require external legal assistance in order to remedy injustices committed by commanders. However even in the legal realm, federal courts

traditionally grant tremendous deference to the chain of command (Beaumont, 2023; Sherman, 1971).

A final takeaway is that there is perception of growing balkanization within the force. This brings to mind very similar wording among a list of topics I saw written out on the white board in a military chaplain's office in 2021. Concern of fractures between people across the force placed predominantly among a list of topics he was thinking through with fellow military religious leaders in an effort to stay current on how to best serve soldier needs. Comments from research participants in this study suggest perceptions of there being institutionally-protected *in-groups* and marginalized *out-groups*, based on personal conviction and level of alignment—or misalignment—with predominant political mores. While the military has long been a diverse organization with people from all walks of life, the force has long signaled an ethos of unity, in which one can trust the person to the right or left with his or her life regardless of background or belief. It appears cracks may be forming in that foundation.

Returning to the issue of how worldview may impact perceptions that affect decisions on whether to speak out or self-censor for a moment. A recent quantitative study reports that people who perceive themselves to be set apart from the predominant social position on major topics are likely to self-censor (Norris, 2023). Similarly, a survey of participants mirroring the U.S. Census found inverse trends of self-censorship based on people's political commitments (Burnett et al., 2022). Similar trends are reported on university campuses (Foundation for Individual Rights and Expression, 2024). There is reason to suspect that cultural tides across one institution are likely at work in others.

Suggestions for Further Scholarship

This topic is applicable in a wider civic institutional context. Scholars have a field ripe for exploration across the institutions and industries of government, corporate, and non-profit to explore if norms differ from formal policies, and—if so—how those norms are socialized and enforced in the context of civilian workers who are at more immediate liberty to sever membership, or terminate their employment relationship than military members. More specific to ethics studies, there is an opportunity to survey what level of expressive right people are willing to cede for varying levels of employment and wages. Future work could also attempt to shed light on if such arrangements bring risk of moral injury (Litz et al., 2009). The fields of civil-military and leadership studies would also benefit from further exploration of how norms are experienced by institutional members on wider scale using both qualitative and quantitative means that includes more in-depth data gathering on how worldview impacts perceptions of norm enforcement.

Chapter 5 - Consequences, Implications, and Conclusion

Restating the Purpose

We now return to the original purpose of this collection of studies into military norms and how they are realized in the lives of American military service members. As noted earlier, this work is not value-neutral scholarship. It explores philosophical topics related to institutional expectations, discursive transmission, and varying levels of nuance, emotion, and context that are inevitably debated. Unlike the hard sciences, “A philosophical question... can never be finally answered and disposed of—for instance ‘what *is* this, ultimately?’ or ‘what is illness?’ or ‘what is knowledge?’ or ‘what is man?’” (Pieper, 1952, p. 110). The inspiration for this exploration was born of experience observing linkages between desired ends on the part of military officials, and the intercourse of political actions they engaged to achieve policy, fiscal, and perceptual ends deemed to be of benefit to the military institution. The higher level my exposure, the less shielded and wrapped in *apolitical* rhetoric these actions became.

Though there is a body of literature on post-WWII civil-military norms, the impact of the military’s theoretical norm of being an *apolitical* institution—on those who serve—is less explored. Most contemporary civil-military scholars begin from a place of commitment to the *apolitical* norm as a sort of settled social science, and explore how military members align with, or depart from, it. This work instead challenges that epistemological foundation and begins from a place of wondering how a political entity such as the military came to adopt and enforce *apolitical* norms upon its citizen members in their personal lives. It is into that focused space within a much larger dynamic of civil-military scholarship that this exploration treads.

Within that context, the purpose of this chapter is to first reflect on findings from the three scholarly articles comprising Chapters 2-4, and highlight points at which the data intersects

or diverges in ways that lead to additional overall insight from this combined, multi-method work. Second, I consider findings through a grouping of contemporary leadership frameworks in order to propose potential implications and identify additional niche pockets within the broader body of civil-military scholarship where researchers who focus on leadership might also tread. Third, this chapter discusses potential implications of findings within each research article to consideration of civil-military norms in future scholarship and societal discussion. Fourth, in this chapter I propose a theoretical lens for future research into the realms of institutional theory and civil-military relations.

Review of Study Insights

Three separate research articles comprise the backbone of this dissertation. The first, in Chapter 2, explored specific meanings conveyed in official governing policy, and notes conflict between policy wording of specified *allowance* and *constraint*, compared to discourses that enable military authorities to apply eisegesis and bring flexible approaches to interpretation of formal rules. The second article surveyed military members' basic understanding of speech-restricting policy and the means by which they arrived at such understanding. It found that norms have stronger impact than rule. Finally, the third research article explored how speech-limiting norms affect aspects of life among military members, and found that there is a sense of fear-induced submission to institutional expectations that do not necessarily align with official policy.

Reflecting on First Study

In Chapter 2: Exploring Institutional Expectations of Military Members through *Hard Policy*, a discourse policy analysis demonstrated that the U.S. Department of Defense's policy on authorized political expression for military members is one of both allowance and constraint. In

contrast with perceptions noted in the third study, DoD policy speaks to matters of expression that are *allowed* more than matters that are *restricted*. Yet the subsequent studies indicate that the wording of official defense department policy (*hard policy*) is of secondary importance for military officials in comparison to institutional norms (*soft policy*). For instance, Chapter 3 demonstrated that military members generally have no knowledge of the actual policy document that addresses right of, and limitation on, political expression—DoDD 1344.10: *Political Activities of Members of the U.S. Armed Forces*—and are instead motivated to abide by discursively-conveyed norms of high constraint. Examples of cases in which military members engaged in public political expression offer indications of unique policy interpretation by commanders when adjudicating high profile cases of military member political expression. There are many other such recent cases not included in this work that are worthy of further scholarly attention.

Similar confusion stands out among some members of the public. The Hatch Act sometimes comes up as a point of reference when discussing limits to military member expression. Passed in 1939, the Hatch Act applies to civilian government employees, rather than military members. While a military member, an uninformed military-issue reporter who specializes in defense coverage once challenge my freedom of expression on political matters by referencing the Hatch Act, which does not govern active-duty military members. Throughout my career, I observed several incidents in which this civilian-applicable rule came up in conversations on allowable expression during my time in military service. In contrast, the regulation that applies to military members' political expression—DODD 1344.10—did not come up once.

Reflecting on Second Study

In Chapter 3: How Civil-Military Norms are Communicated and Perceived, we see that military members are socialized to the *apolitical* norm via narrative rather than through a reading of—or receiving formal instruction on—the governing defense department policy. That in itself is not unusual as a societal tendency. “Ninety-nine percent of the things you believe are believed on authority... The ordinary man believes in the Solar System, atoms, evolution, and the circulation of the blood on authority—because the scientists say so” (Lewis, 2001, p. 62). Yet when restricting the rights of fellow citizens, wording of the applicable law or policy matters. Findings of this analysis indicate that military members accept norms because they receive them through institutional discourses and are pressured to conform to institutional norms. In a sense, this is the continuation of epistemic transmission that philosophers have noted before as a part of human learning and socialization.

The nature of the military institution is one of an epistemic community that exists around a framework of shared missional understanding among its members (Schmidt, 2019). Part of this missional understanding includes that the modern military operates separately from society, according to its own policies up through an entirely distinct legal system. This reflects in the aforementioned institutional requirement for military members to ‘check the regulation’ in order to know the official standards. Yet the characteristics of epistemic community also revolve around shared norms, which can differ from governing policies—an insight backed in findings on how military members are socialized to norms on political expression, rather than informed on the affective policy. Negative perceptions toward political topics expressed by military members align with contemporary literature referenced in Chapter 2, indicating a continuing socialization within the ranks to regard politics and political expression in negative terms.

Reflecting on Third Study

Insights from Chapter 3: The Impact of Civil-Military Norms on Military Members indicate that military service members feel pressured to live according to far greater restrictions on their personal rights than they agreed to in the contracts of service they signed when joining, through a sort of post-oath social contract. This aligns to how military members are socialized into institutional norms (Chapter 3), and the flexibility given commanders according to military culture and open-ended language within the guiding regulation (Chapter 2). Findings also convey a perception of differing standards when it comes to expressive rules, based on whether one's expression aligns or diverges from the narrative dominant among the social and political power class. "Those who disagree with the prevailing vision are seen as being not merely in error, but in sin" (Sowell, 1995, p. 3). Recent congressional testimony echoed this trend. "It's politically partisan if you disagree with the party line. It is not politically partisan if you toe the party line" (as cited in Subcommittee on National Security, the Border, and Foreign Affairs, 2024). Such a perception of dual standard introduces a risk to trust between military members and their chains of command. That trust relationship is central to the cohesion and effectiveness of military formations.

Insights suggesting a link between perceived discordant standards on allowable political expression, and concerns of an increase of visible partisanship in the ranks, align with recent reporting on negative sentiment toward the force expressed by veterans (Kesling, 2023). Public polling research has shown a drop in trust of the military institution over the course of this decade (Gallup, 2023; Ronald Reagan Institute, 2021; Ronald Reagan Institute, 2022). Findings from this work indicate that there is risk of the same occurring within the force, which brings increased risk of undermining esprit de corps and codes of conduct. This concern undergirds

Huntington's justification for the model of *objective civilian control*. "The real problem was the ideological one, the American attitude of mind which sought to impose liberal solutions in military affairs as well as in civil life. This tendency constituted the gravest domestic threat to American military security" (Huntington, 1957, p. 457).

Merging Experience with Scholarship

The friction between the U.S. military's identity rhetoric, and the fundamental political elements of its existence, became a forefront issue for me 2019 when the *Modern War Institute* published an essay I penned about military-media relations (Spears, 2019). The piece cited the case of how national news organizations misrepresented Nick Sandman, a high school student who found himself inadvertently in the middle of a highly-charged media firestorm for being at the Lincoln Monument in Washington, D.C. at an unfortunate time. News coverage of his momentary encounter with an elderly Native American man framed Sandman as a disrespectful partisan actor (Beauchamp, 2019). The resulting maelstrom of media-driven attention caused credible concerns for Sandman's safety, forcing the high school he attended to close temporarily over security concerns. Multiple retractions by major news organizations, apologies, and financial settlements followed. This event was one observation in a larger essay, which argued that lapses in journalistic ethics tend to discourage military commanders from engaging with reporters on the record. That point was aggressively misrepresented as an attack on freedom of the press by many who work in defense media and military public affairs, rather than debated as an observational commentary that argued both the defense and journalistic communities can—and should—earn trust by demonstrating good faith efforts in vocational practice. That experience offered a lesson that "Transforming questions of fact into questions of intent has

become the greatest achievement of twentieth-century totalitarians..., and has become a hallmark of much of Western intelligentsia” (Sowell, 1995, p. 244). A topic of professional principle was perceived by some as being instead *political*, even *partisan*. Accusations of making such allegedly forbidden speech—published in an official military journal—were mixed among generally harassing comments and even calls for my execution. This experience reinvigorated my curiosity on what is truly meant by words like *political* and *apolitical* in the military context.

Issues of moral salience and human rights came about before the creation of the parties of political affiliation in the United States. Yet in civil-military relations theory, the two are often intertwined. I had the chance to reflect on that during another learning moment in 2019, when U.S. House Representative Joaquin Castro posted a provocative tweet (Touchberry, 2019) that elicited harassment toward members of his own constituency who had donated to the Trump presidential campaign (Smith, 2019). That evening in my home—while on leave—I criticized Castro’s actions. A fellow military officer sent me a direct message saying that I cannot criticize elected officials as a military officer, that I must be *apolitical*. I thanked him for well-intentioned concern, then reminded this colleague of what defense department regulation states on the matter of allowable political comment by military service members. He responded that ‘the optics are bad regardless of the regs.’ This engagement offered another indicator that cultural expectations—ie: *soft policy*—hold greater influence than *hard policy* in military context. His perspective mirrored the catch-all paragraph in Department of Defense Directive 1344.10, which states that activities that could be loosely *inferred* as supporting a *partisan* perspective should be avoided. The discursive excuse often given within the ranks for this preference is based on an institutional assumption that civilians cannot recognize the difference between a personal opinion and an official defense department position. Further observation of this phenomenon

over time amplified my interest in this tension between norms and rules. I do not claim that my experiences are representative of every member of the armed forces in contemporary context. Yet they contribute to setting the context of this exploration.

Briefings and statements by superiors across the first 14 years of my career led me to believe that personal expression was severely more curtailed by regulation than is true according to the policy text. Of the policies that military members are encouraged to become familiar with, DoDD 1344.10 is not among them. Over time, I observed that rules and practices often differ across the defense department. Additional examples beyond the story of Space Force Lt. Col. Matthew Lohmeier, and other high profile cases shared earlier in this work, exist. One more for our consideration involves U.S. Marine Lt. Col. Stuart Scheller. In 2021 Scheller was relieved of command for publicly criticizing the manner in which the war in Afghanistan was brought to a conclusion. His comments offended norms on political expression by military members, but did not violate military regulation. Scheller was nevertheless relieved of battalion command almost immediately for the traditional ‘loss of faith and confidence’ of his superiors. It turns out the Marine Corps was not the only service sensitive to critique of the collapse of Kabul. In 2021 my supervisor at the U.S. Army Combined Arms Center took unlawful action to delay me from seeking publication of an essay I wrote about the manner of U.S. withdraw from Afghanistan, despite it being cleared by the Pentagon’s Office of Prepublication and Security Review. Among his excuses was that Afghanistan was a political issue that veterans of the war should not share any thought on. That same week, however, he concurred with a lower-level public affairs official who cleared an openly partisan article written by a faculty member at the subordinate U.S. Army Command and General Staff College. That piece was highly critical of former President Trump. This kind of selective censorship is not an infrequent occurrence. Years earlier, acclaimed U.S.

Army officer H.R. McMaster's career was slow-rolled in response to publication of his book that was critical of military leadership during the war in Vietnam decades earlier. Over the years I encountered many other examples among military colleagues and veterans of similar pressure to conform one's personal speech toward institutional agenda. At a minimum, the theory of *soft policy* as preeminent appears viable.

The U.S. has not had a steady record of success militarily in the age of this *apolitical* discourse. The local and international theaters in which the force operates are shaped by system complexities on grand scale. Succeeding in these complex geopolitical environments requires a level of creative and unimpeded thinking that current military culture, inspired by the *apolitical* discourse, discourages. This culture that demands its citizens in uniform to portend a sterile ideology that shuns politics (Bass, 2018) inspires risk aversion, and a desire to avoid the political fallout of effective uses of force. I propose three outcomes from this way of thinking that contributes to a canon of risk aversion that impedes institutional success.

First, the *apolitical* institutional mindset stifles the kind of conversations and critical thinking that military leaders must have in order to gain a holistic understanding of the political factors at play both among the populations they serve, as well as U.S. adversaries, and the political end state that American military forces are deployed to achieve. Classical manners of education were once somewhat common among military officers, but have been replaced with emphasis almost solely on the technical functions of combat operations (Roennfeldt, 2019). Military officers are trained to think almost exclusively at the tactical level over the course of their careers; the military war colleges are proving inadequate as technical solutions to adjust military officer thinking to the strategic level (Schmidt, 2019). This leaves military officers lacking in what Roennfeldt argues is the most important competence needed for their role:

“knowing in which way military means can achieve political ends” (Roennfeldt, 2019, p. 64).

Military officers must master sociopolitical wisdom, which is defined as

knowing in which way military forces are best used in a specific context taking into consideration several, potentially conflicting, political ends and concerns; in other words, knowing what is the right thing to do with military forces to best contribute to a good political outcome... to understand their task in a broader socio-political context (Roennfeldt, 2019, p. 68).

The second fallout is that the U.S. military’s efforts to brand as civically neutral creates distance between it and the society it was created to defend. This is more commonly referred to as the civil-military divide. A significant portion of those who join the armed forces come from families that have a history of military service. This enables public misperceptions, ambivalence to the cost of U.S. regional engagement around the world (Foster, 2020), and adds to recruiting challenges for an all-volunteer force as military families lose confidence in those running the institution (Kesling, 2023). This leads directly into the third outcome: an emerging social doctrine of military service members as lesser citizens. Those who enter military service know that certain rights are ceded during their time in the force. However, norms-based social and institutional understandings relegate them to being perceived as lacking civic freedom beyond what law and military regulation specify in word. This often manifests in arguments that military members—even in their personal capacity—should not have voice in discussing pressing societal issues because it is assumed that they are to remain at all times *apolitical*, thus excluded from voice in matters of state. Oftentimes, the outcomes of these policy debates impact the lives of those who serve, as well as their families—whose citizenship rights are not in question—in deeply-personal, and potentially life-long ways that are unfathomable to most of the public. The

excuse often given to justify such exclusion is that we ‘know what we’re getting into’ by joining. That dismissive proves a less compelling rhetorical line of late.

Finally, more specific to my experience as a career public affairs soldier, the *apolitical* mindset inhibits public engagement between the military services and the public. The Department of Defense *Principles of Information* (Department of Defense, 2000), and all subordinate service public affairs regulations, requires a level of transparency that—by *hard policy*—should only be limited by matters of operational security and classification. In practice, however, information release at the operational and strategic levels are frequently limited, delayed, obfuscated, or entirely avoided because of political considerations. When certain topics gain a higher level of interest in the news cycle, there is a strong tendency to limit engagement on those topics out of a misunderstanding that high levels of attention is what makes the topic political, rather than the substance of the topic that is *political* as a matter of its fundamental attributes. A mindset that acknowledges the inherent *political* realities of routine military processes would enable a higher level of comfort for military officials to productively engage on military affairs in all contexts, as DoD policy requires.

Insight Considerations through Contemporary Leadership Frameworks

Application to Situational Leadership

We now turn to a brief application of overall dissertation findings to a selection of contemporary leadership frameworks. Findings across the three research articles are deeply intertwined with discursive transmission, perceptions of norms, and pressure to adhere to cultural expectation—all matters with direct implications for leader study and development. The first of three frameworks for consideration is *situational leadership*, a style in which those charged with

influence and command over others necessarily bring different approaches to the leadership of unique individuals and contexts. Situational leadership theory is based on leaders matching style not only to the competence of subordinates, but also the level of commitment they bring to the task and organization (Northouse, 2019). This leadership approach starts from the perspective of followers. “A leader must be aware of which follower needs heavy coaching, which follower needs to be supported, which follower responds best to praise, who needs to be pushed more forcefully, and who will perform well with minimal guidance or oversight” (Gronski, 2021, p. 57). This framework has relevance to the issue at hand because one might argue that examples of different outcomes for military members who make public expressions on political topics might be explained as instances in which situational leadership was applied

Situational leaders understand that subordinates want to be treated uniquely, according to their capabilities. This approach can work to great results when followers are granted appropriate levels of trust and autonomy based on their maturity, talents, and capabilities. However, situational leadership techniques can negatively impact trust when applied to the granting of participation and expression rights guaranteed in law and applicable institutional *hard policy*. Right of expression under the U.S. Constitution’s First Amendment offers an example in which inconsistent application of situational leadership technique could be counterproductive and reduce trust across a team or organization at large. Considering situational leadership in the context of institutional norms offers a reminder that situational leadership is itself situational, and must be applied with philosophical consistency to achieve beneficial effect.

Application to Cultural Considerations in Leadership

Given that the military ranks reflect a cross section of society, needs arising from cultural dynamics among members of the force offer a second area of contemporary leadership consideration within this study's reflection. Northouse defines culture as "the learned beliefs, values, rules, norms, symbols, and traditions that are common to a group of people" (Northouse, 2019, p. 434). The military is a diverse organization, and has long represented the ethnicities, cultural backgrounds, and religions of the national populace. Its ability to align diverse groupings of people to a shared dedication of service beyond self has made it a particular example of the statement on American currency *E Pluribus Unum*—Latin for 'out of many, one.' This was likely in large part to an acceptance among military members of joining a unique culture as part of an epistemic community (Schmidt, 2019), or resonant group in which "people find their meaning in their connection and in their attunement with one another" (Goleman et al., 2013, p. 218). In this organizational setting, it is understood that leadership starts with a focus on aligning groups of diverse individuals into cohesive teams. Where situational leadership starts with the individual in mind, a military perspective on cultural leadership begins with the end state in mind, and works back from a collective to the individual. Individual personalities are minimized in order to draw organizational members into a sense of shared identity. This is viewed with high importance in the military, and begins in the first few minutes of basic training. "A culture of results without values quickly devolves into selfish individualism and dysfunctional behavior which will doom the organization to hostility and strife" (Kolenda, 2001, p. 88).

Going beyond the internal ranks, cultural leadership in the military is a critical capability to enable effective operations in foreign environments. Scholarship on cultural competency in leadership states that effective leaders must be capable of successfully engaging with other

cultures (Adler, 1992), a reality pressed through extensive cultural awareness training for troops who deploy. That capability is needed internally for leaders to better understand team member motivations, meet the trust needs of subordinates, and direct energies to a shared purpose and team identity. Part of that discipline for high trust team leaders is ensuring that subordinates feel “they can reach for the organization’s dream without compromising their own dreams, their own beliefs, and their values” (Goleman et al., 2013, pp. 220-221). As senior military officials feel pressure to conform the ranks culturally based on political guidance from the top, they must be cautious to implement directives in a manner that does not risk perceptions of exclusion based on viewpoint.

Application to Adaptive Leadership

As noted in Chapter 3, the pivot between strategic worldviews, as expressed by drastic changes in the *National Security Strategy* by presidential administrations that have increasing ideological gulfs between them, creates significant adaptive challenges for the military institution and its members to navigate. Adaptive challenges impact all members of an organization, and demand “three very tough, human tasks: figuring out what to conserve from past practices, figuring out what to discard from past practices, and inventing new ways that build from the best of the past” (Heifetz et al., 2009, p. 69). As expectations—expressed in directives from the White House and congress—change, military policies and norms resultingly adjust, and impart friction between what was valued before and what is directed now. These are topics that elicit emotion due to deeply-ingrained belief systems held by every stakeholder. Such adaptive challenges are “grounded in the complexity of values, beliefs, and loyalties... and stir up intense emotions rather than dispassionate analysis” (Heifetz et al., 2009, p. 69).

Solutions for adaptive challenges require collaborative efforts that unite people with differing talents to seek solutions for cultural and system-based shortcomings across an institution, rather than updating tactics solely for local preference or convenience (Kakabadse & Kakabadse, 2002). Especially within institutional contexts, “People gravitate toward technical solutions, especially those that have worked in the past, because they reduce uncertainty and are easier to apply” (Heifetz et al., 2009, p. 71). These attempts at ‘easy’ fixes resist adaptability and fail to remedy issues that are grounded in organizational culture and norms. People and creativity are at the heart of adaptive leadership. Adaptive leaders

can juggle multiple demands without losing their focus or energy and are comfortable with the inevitable ambiguities of organizational life. Such leaders can be flexible in adapting to new challenges, nimble in adjusting to fluid change, and limber in their thinking in the face of new data or realities (Goleman et al., 2013, p. 254).

The attribute of adaptability is well documented in military doctrine, as the force needs commanders who can “successfully adapt to the perilous and unpredictable conditions of battle” (McMaster, 2008, p. 216). This trait is a key tenet of American warfighting doctrine and a focus area of military leadership training. Yet when it comes to how military officials must navigate the political environment that drives military actions, adaptive understanding is undermined by thought doctrine that the military is entirely removed from the political realm (Schmidt, 2019). The defense department has long used adaptive leadership techniques at ground level thinking. The same model can apply at the higher operational and strategic levels where it has no choice but to navigate rapidly-changing political and social environments.

Traditional thinking on the topic of military professionalism says the institution must be perceived as *apolitical*, without acknowledging the inherently political realm within which it

operates and the purposes it serves under the direction of elected officials. Defenders of this position believe that the *apolitical* perception must be preserved for the good of maintaining public trust, but do not address whether the claim is grounded in fact. In doing so, they overlook the potential trust value that could correspond to 1. acknowledging the political trappings of military functions to the citizens who fund and enable the institution, and 2. working to hold the military on a plane that is less susceptible to domestic political infighting of the moment. Properly implemented adaptive leadership techniques offer a potential means through which military commanders can manage required social changes within the military in ways that reduce risks of disruption and alienation among committed stakeholders.

Theorizing Frameworks for Further Exploration

Culture inevitably overcomes rules within institutional contexts. In light of increasingly heated political rhetoric in recent years, those serving in the military feel the friction between rules that protect most of their rights to expression, and institutional expectations that contrast with policy. The idea that those in military service are divorced from the civic process that they are expected to defend presents a paradox of social doctrine on what level of citizen one is when employed as a member of the U.S. armed forces. Citizens are inevitably political because the contexts of society—the give and take of rights, agency, and access to social resources—are political (Gee, 2014; Mohler, 2022). Military members are required to temporarily cede a certain level of individual sovereignty in order to serve, but do not fully lay aside their constitutional rights when taking the oath of enlistment or commissioning. George Washington summarized the sentiment by saying that one does not lay aside the citizen to become the soldier (Washington, 1775). Following that lead, U.S. District Judge Reed O’Conner recently wrote that “Our nation asks the men and women in our military to serve, suffer, and sacrifice. But we do not ask them to

lay aside their citizenry and give up the very rights they have sworn to protect” (U.S. Navy Seals v. Biden, 2022). Yet a strong counter perception remains in which institutionalism defeats constitutionalism across the Department of Defense.

Based on insights identified through this exploration of norms, I propose a *predominance of soft policy theory* model. That social and organizational norms convey power has been long known. The potentially novel takeaway from this exploration is that civil-military norms reflect *soft policies* that carry higher perceptual weight and enforcement than *hard policies*. The result of this dynamic carries into mainstream social thought and creates misperception on matters of citizen right for those who serve in the military today.

Societal and Scholarly Significance of the Topic

The topics explored in this work have significant relevance for the role of public institutions in civic life and for how members of those institutions are either enabled to participate in the polis in which they live, or excluded from it. There is a clear ethical dilemma of a nation spending approximately \$800 billion dollars annually in recent years (Statista, 2022) for an armed institution to carry out political will around the world, while denying the role its members can lawfully play in the execution of U.S. policy domestically and abroad on their personal time. A similar dilemma exists for an institution that orders men and women into dangerous environments on behalf of state, while inferring they should feel forced to abstain from lawful expression in the society they are expected to represent as agents of armed power. “Whoever gets into the exercise of any part of the power by other ways than what the laws of the community have prescribed has no right to be obeyed” (Locke, 1997, p. 111). Consider that a fundamental of armed forces training encourages military members to question orders that they

perceive to be illegal; however, institutional culture enforces non-legal norms upon them. Such a condition of paradox risks planting seeds of doubt in the integrity of the chain of command.

Exploring assumptions about knowledge helps humanity not only to gain new insights, but illuminates additional areas in which we need to learn (Lind, 2019). In this dissertation, I explored the origins of the discursive *apolitical* norm, how it is communicated and socialized across the force, and how it affects military service members on a personal level. The topic of how an institution positions itself perceptually, in contrast to operational identity, brings with it substantive trust implications: if, how, and in what contexts internal and external stakeholders might align personal trust in an organization that wields tremendous power. It is also a topic ripe for extrapolating insights on methods of influence and leadership, as viewed through how military members perceive a requirement to cede more personal sovereignty than is required according to official policy. The implications extend far beyond the military context and likely impact everyone in some way given the contexts of institutions they associate with.

Suggestions for Future Scholarship

The three studies presented here propose recommendations for future research that range from how the wording of regulation reflects in organizational training to the potential risks of moral injury for institutional members caught in the midst of changing social context. In wrapping up, I propose three additional areas in which civil-military and leadership scholars might contribute to a deeper understanding of the dynamics associated with civil-military norms. The first is to investigate if institutional adoption of ideological change initiatives impacts the reputational capital of the military institution. In this third consecutive year of recruiting deficit for the U.S. Army, an ongoing argument is underway about primary causes. Many blame social policy changes within the ranks as a significant cause, and recent polling research lends support

to that assertion (Ronald Reagan Institute, 2022). Is this claim reflective of substantive public sentiment? If so, how big a piece of the pie are concerns about social policy changes in the ranks when it comes to a trend of decreasing trust in the military among veterans and the public?

Second, researchers would do well to explore if it is feasible for the military to attempt retaining a brand communication strategy based on the concept of political neutrality, as institutional realities and actions are perceived to contrast with the claim. As noted in earlier chapters, civil-military scholars increasingly doubt the legitimacy of the military's *apolitical* posturing, as do many in the ranks. Has the 20th-century trend of institutions presenting themselves as neutral arbiters in society run its course?

Finally, scholars could contribute significantly to contemporary institutional research by further exploring the proposed theoretical lens through which *soft policies* overtake *hard policies* across institutional settings. In particular, there is an increasing gulf between protections from infringement of constitutional right by governmental actors, and infringement of expressive right by corporate organizations and institutions, a tendency aligned to *soft totalitarianism* (Dreher, 2020). A basic observance of associated events in the news and courts in our time indicates that the dynamic of *norms* versus *rules* is at work across a spectrum far wider than the military institution. An observance of history offers that this has been an issue since well before the present. Yet it appears little explored compared to its widespread impact.

Conclusion

This work in the realm of civil-military norms is made unique by its personal interaction with the socialization and impact of norms. It is not by any means a final word, but aims to serve as a place from which others can join in further investigating how the military arrived at this

point of discursively-infused identity belief, and what we can learn from it about human thinking, communication, and behavior in institutional contexts. The hyper partisan atmosphere in which the military exists is unlikely to calm in the short term. Knowing how to operate effectively either as part of—or in spite of—it is going to be a must for military leaders moving forward.

The thought experiment of the *apolitical* military echoes in a deeply-rooted institutional identity construct. Returning again to the genius of C.S. Lewis, we find that his sentiments from long ago ring relevant still.

The laws of the universe are never broken. Your mistake is to think that the little regularities we have observed on one planet for a few hundred years are the real unbreakable laws; whereas they are only the remote results which the true laws bring about more often than not; as a kind of accident (Lewis, 1996, p. 368).

As they have for centuries, the true laws—often referred to as *the permanent things*—indeed are the ones that govern the realms of great power competition that the military partakes in. To be competitive in that space, the nation needs military officers who can think in the four dimensions of “military skill, military wisdom, sociopolitical skill, and socio- political wisdom” (Roennfeldt, 2019, p. 66), the kind of thinking too often weeded out by the modern military institution (Schmidt, 2019). To imbue those skills among military officers will require acknowledging Huntington’s assertions on civil-military relations as one theory among many worthy of study, rather than assuming this one perspective as fully proven societal canon. It is no longer adequate for military officials to hold to hope that their work is clear of political connection or connotation, especially given that U.S. military fighting doctrine says the opposite. They must acknowledge and seek education in that realm in order to function most effectively toward a

national defense that functions in acknowledgement of its place among the other primary instruments of national power: diplomatic, informational, and economic (Department of Defense, 2018).

Those who serve in the military are surrounded by norms and institutional expectations at all times, on-base and off-base, on-duty and off-duty. There is a lifestyle of unique challenge for all the reasons that members of the public often thank the troops for their service. The pressure of institutional norms is a particular challenge well-known to those who have spent time among the ranks, but is a distant concept to those who have not. Now over two decades into the span of time that the military gated itself off from the public it serves, in the continuing wake of 9/11, understanding between American society and those it entrusts national defense to is fading. A military estranged from the national citizenry has long been considered a risk to free peoples. That reality must not be forgotten in our time. It is my hope that this work will contribute productively to the renewed debate over the role of the military institution and its members in the civic politic, and encourage a reinvigoration of conversation on the unique factors pertaining to civic agency associated with the military lifestyle.

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Appendix A - Interview Script

1. What was your time period of military service?
2. What rank did you attain?
3. During your term of service, were there moments in your career that shaped your perception of how you might have been expected to define terms such as *political* or *nonpolitical*?
4. What was your perception of the meaning of words such as *political* or *nonpolitical* before your term of military service, and what do they mean to you now?
5. During your term of service, what were you taught to be the role of military members in regard to domestic politics when off duty?
6. During your term of service, what did higher-ranking officials convey to you about the nature of the military as it regards the political sphere of societal function? Did those communications shape your perceptions about what is and is not permissible for off duty military members?
7. What words or terms describing the military's relation to politics did you most frequently hear, or read, during your time in military service? How did they shape your perceptions about what is and is not permissible for off duty military members?
8. How do you perceive the military as a *political* or *apolitical* organization? What moments in your career were essential to shaping your perception?
9. Do you perceive the military as a *nonpartisan* organization? If so, what moments in your career were essential to shaping your perception?
10. Based on things communicated to you either directly or indirectly during your term of service, did you perceive that military members should avoid political activity? If so, was a specific meaning given to what constitutes *political* activity?
11. Did you perceive an expectation of reflecting an *apolitical* identity during your term of service? If so, do you remember the context?

Appendix B - Interview Script

1. Did you ever perceive a friction between being yourself and the social expectations one feels for being a military member?
2. Did you ever perceive a stigma related to the words *political* or *partisan* while in the military?
3. If you perceived an *apolitical* military norm, did you perceive any alignment or discrepancy between it and the doctrinal and historical references to the political aspects of war?
4. Did you ever perceive the need to self-censor your expression—whether on or off duty—because of concerns that others might accuse you of engaging in political expression?
5. If, based on your perceptions of the expectations of military members, you communicated expectations for political expression to peers or subordinates during your career, how did you do so?
6. Do you have additional thoughts on this topic that you would like to share?

Appendix C - IRB Approval Letter



University Research
Compliance Office

TO: Brandon Kliewer
Leadership Studies
Manhattan, KS 66506

Proposal Number IRB-11881

FROM: Lisa Rubin, Chair
Committee on Research Involving Human Subjects

DATE: 10/26/2023

RE: Approval of Proposal Entitled, "Exploring the Discourse Theory of the U.S. Military as an Apolitical Institution."

The Committee on Research Involving Human Subjects has reviewed your proposal and has granted full approval. This proposal is **approved for three years from the date of this correspondence.**

APPROVAL DATE: 10/26/2023

EXPIRATION DATE: 10/25/2026

In giving its approval, the Committee has determined that:

No more than minimal risk to subjects

This approval applies only to the proposal currently on file as written. Any change or modification affecting human subjects must be approved by the IRB prior to implementation. All approved proposals are subject to continuing review, which may include the examination of records connected with the project. Announced post-approval monitoring may be performed during the course of this approval period by URCO staff. Injuries, unanticipated problems or adverse events involving risk to subjects or to others must be reported immediately to the Chair of the IRB and / or the URCO.