DPPS RESEARCH SUMMARY

ISSUE: COHESION AND MORALE

1. Cohesion and morale have long been considered essential to military effectiveness, especially the combat effectiveness of teams and units. It is widely held that reductions in cohesion and morale will diminish unit operational effectiveness, and it is contended that, by allowing homosexuals to enrol in the CF, their integration into cohesive units is likely to be met with resistance and hostility by heterosexual members. Hence, cohesion and morale in the CF will be undermined by the presence of known homosexuals.

BACKGROUND

2. For the purposes of this paper, the questions of critical importance are:

a. the relationship of cohesion/morale to performance; and

b. the possible effects of homosexuals on unit cohesion/morale.

Cohesion has been defined as "the bonding of members of a unit in such a way as to sustain their will and commitment to each other, the organization, and the mission" (Henderson, 1985, p. 9).

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Social scientists most often view cohesion as a structural characteristic of groups and hence as a determinant of group performance and processes. It has also been conceptualized as an indicator of a member's desire to remain in a group (Daily, 1977). Within the military, cohesion has been used interchangeably (often incorrectly) with many other terms including camaraderie, bonding, brotherhood, morale, esprit, and will-to-fight (Gal, 1986a; Stewart, 1988). However, military cohesion is not limited to relationships between peers (horizontal cohesion), but also includes relationships developed between subordinates and superiors (vertical cohesion) (Stewart, 1988).

3. As a concept, morale is closely linked to cohesion, and is typically defined as a willing, and often self-sacrificing, attitude of an individual towards the functions or tasks expected of him by a group to which he belongs. Although the terms are not synonymous, it has been argued that units with high cohesion have high morale, and that morale is a factor associated with cohesion (Stewart, 1988). (In Gal's (1986b) view, cohesion and morale are considered two aspects of a higher order factor, which might be labelled "unit climate.") Morale is not a singular

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concept, and it encompasses an array of concepts including authority, hierarchy, communications, sanction, status, social role, allocation, and integration (Janowitz & Little, 1974). It has a foundation in such factors as pride in the achievements and aims of the group, trust in the group's leadership, and a sense of devotion and loyalty to the other members of the group (Kellett, 1982). Within military units, the morale of troops has long been considered a crucial factor in ability to achieve missions. It has also been associated with combat readiness, battlefield effectiveness, susceptibility to combat stress reactions, motivation, and satisfaction (Gal & Manning, 1987; Motowidlo & Borman, 1978). Obviously, if cohesion is threatened, then unit morale is also placed in jeopardy, and with any deterioration in these human components of effectiveness, the achievement of unit/team goals or tasks becomes less probable.

4. The importance of cohesion to combat effectiveness has been extensively documented. Examples include: Tziner's and Vardi's (1982) study of command style, group cohesiveness and performance in Israeli tank crews; Moskos' (1975) assessment of the demoralization of American troops in Vietnam; Shils' and Janowitz's (1948) study of primary group relationships in the

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Wehrmacht during World War II; and Stewart's (1988) case study in military cohesion during the South Atlantic Conflict of 1982 (Falklands). Kellett (1982) also provides historical accounts of military conflicts where cohesion, or its absence, played an important role: the defence of Calais by the Thirtieth Brigade in 1940, where "regimental pride, more than any other factor, sustained the men of the Thirtieth Brigade in the face of overwhelming firepower" (p. 23); the 1944 Burma operations of Merrill's Marauders, in which high morale and esprit de corps gradually dwindled as a result of exhaustion, false promises, and increasing distrust of commanders; the 1951 prolonged resistance of the vastly outnumbered Gloucestershire Regiment against the Chinese during the Imjin battle in Korea; and the defensive and offensive actions on the Golan Heights in 1973 by the Israeli Seventh Armored Brigade where effective leadership proved to be a key factor in maintaining high morale despite a surprise attack by the Arabs, shortages of ammunition, mental and physical exhausted, and entrapment by the enemy.

5. There seems to be a clear linkage between cohesion and performance, although the traditional view of the relationship tends to be a simplistic one. Admittedly, the presence of

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cohesion in a unit can enhance performance and the pursuit of organizational goals, but cohesion can just as easily jeopardize organizational aims as well. This is primarily because, although popular opinion focuses on the positive aspects, cohesion is not a unidimensional construct. The traditional emphasis on the positive aspects of cohesion is due in large part to the mystique developed by Shils and Janowitz (1948) in their discussion of the primary-group, and more recent dissertations such as Stewart's (1988) discussion of the Falklands War where the Argentine forces are described as lacking cohesion, and the British as being very cohesive. As Moskos (1975), Kellett (1982), Lang (1980, 1984), and Janowitz and Little (1974) have illustrated, cohesion is no guarantee for combat effectiveness.

6. Under certain circumstances, cohesive groups may pursue goals that are different from, or even antithetical to, those of their superiors, the unit, or of the larger organization. For example, it has been estimated that during the Vietnam conflict less than 20 percent of the fraggings of officers were carried out by individuals (Kellett, 1982; Moskos, 1975). The more common type of fragging in Vietnam was group engendered, involving covert knowledge and collusion on the part of other

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members of the group (Moskos, 1975). The Vietnam experience was also characterized by polarization between the races, and the "near mutinous actions of black servicemen in the early 1970s" (Moskos, 1975, p. 33). In point of fact, it has been generally stated that "mutiny is a more common occurrence than one might suppose from the number of mutinies officially reported" (Lovell, 1984, p. 66). In arguing that primary groups can be highly cohesive, yet impede the goals of a military organization, Janowitz and Little (1974) point to the defensive norms (which were incompatible with the requirements of the military) developed by segregated Negro units during World War II. Finally, Gal (1986a) admits that even the highly cohesive Israeli Defence Forces are not without problems of this nature. As an example, he describes a letter of protest sent to Prime Minister Menachem Begin by 350 officers and enlisted men, most of whom were employed with combat units. The letter warned of increasing difficulties in supporting the Israeli government's policy with respect to the occupied territories.

7. To understand these negative consequences of cohesion, the importance of distinguishing between hierarchical and peer cohesion becomes of critical importance. Hierarchical cohesion,

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defined as the positive affectual bond, or favourable sentiments, that a soldier has for his/her officers (Smith, 1983a), is the mechanism by which group goals are articulated with the goals of the larger organization. Hierarchical, or vertical, cohesion is fostered by exemplary leadership, which is characterized by a sense of fairness in superiors, and the willingness of competent officers to lead their men into combat and share equitably in the risk of death. This is referred to by Gal (1986) as the "follow-me" leadership characteristic which is imprinted in all junior Israeli commanders from their earliest training. As such, hierarchical cohesion positively affects fighter spirit, the willingness to seek success in combat regardless of the risk of injury or death (Smith, 1983a). In the absence of hierarchical cohesion, primary-group goals can be thrown out of alignment with those of command and result in combat refusals, mutinies, and even fraggings. When American involvement in Vietnam was being de-escalated, the perceived lack of legitimacy of Army authority peaked. As a result, hierarchical cohesion declined rapidly, peer influence worked against fighting in combat, and deviant behaviour such as fragging and mutiny was at it highest level of occurrence (Smith, 1983b).

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8. In his analysis of fighter spirit (using data collected from 1155 American soldiers following basic training in 1952), Smith (1983a) found that hierarchical cohesion had a much stronger relationship with fighter spirit than peer cohesion. Furthermore, exemplary leadership was shown to have both a strong effect on hierarchical cohesion and a moderately strong direct effect on fighter spirit. This is not to say that peer cohesion is unimportant; leadership and hierarchical cohesion are simply the key elements in combat motivation and effectiveness.

9. Peer cohesion refers to the positive affectual bonds, or favourable sentiments, that link members of a group to one another (Smith, 1983a). The major effect of peer cohesion seems to be on a group's ability to withstand the stresses of isolation and threats to survival. Moskos (1975) expresses the basic ideas extremely well:

> It is suggested that the intense primary-group ties so often reported in combat units are best viewed as mandatory necessities arising from immediate life-and-death exigencies. Much like the Hobbesian description of primitive life, the combat situation also can be nasty, brutish, and short. To carry the Hobbesian analogy a step further, one can view primary-group processes in the combat situation as a kind of rudimentary social contract which is entered into because of advantages to individual self-interest. Rather than viewing soldiers' primary groups as some kind of semimystical bond of comradeship, they can be better understood as pragmatic and situational

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> responses . . . derivative from the very private war each individual was fighting for his own survival. (pp. 36-37)

As explained by Tziner (1982), cohesiveness can be described as being of two different types, depending upon the forces acting on the individual to remain in the group:

a. Cohesiveness on the basis of interpersonal attraction between members of the group. The group is able to satisfy social needs, and affiliation with the group is a goal with its own value.

b. Cohesiveness based on the potential of the group to enable the achievement of goals not attainable through individual means.

Daily (1977) notes that cohesion is not essential for teamwork. Groups can be collaborative, and work towards the achievement of group goals, without necessarily being cohesive.

10. One of the primary benefits of peer cohesion is its potential for fostering social support, in times of extreme stress. The positive stress-buffering effects of social support networks and groups have been extensively documented (e.g., Atkinson, Liem & Liem, 1986; Cohen & Wills, 1985; Sarason & Sarason, 1981; Sarason, Sarason, Hacker & Basham, 1983; Sarason,

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Sarason & Lindner, 1983; Shirom, 1976; Williams & House, 1985). The Israeli Defence Forces have also investigated the buffering effects of peer cohesion on combat stress. Gal (1986a) states that studies conducted following the 1973 war found that 40 percent of the men diagnosed with battle shock reported minimal group cohesion and identification with their units, as compared with only 10 percent of a control group (men not suffering battle shock) reporting the same. Obviously cohesion is not only important for the achievement of group and organizational goals, but it also plays a crucial role in the amelioration of the negative consequences of extreme stress and, consequently, in the overall well-being and operational effectiveness of the unit.

11. How can we summarize the relationship between cohesion and performance? In her review of the literature, and qualitative analysis of the Falklands War, Stewart (1988) noted five consequences of military cohesion. Specifically, the higher the level of military cohesion:

a. the less non-battlefield casualties in combat;

b. the more soldiers will fire their weapons in combat;

c. the less desertion in time of war;

d. the more valiantly soldiers will fight;

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e. the less AWOL, drug addiction, alcoholism and sick calls in peacetime.

The first clearly seems to reflect the stress-buffering effects of peer cohesion. The other four are clearly the consequences of hierarchical cohesion, with strong leadership resulting in higher levels of fighter-spirit, greater loyalty, and fewer disciplinary problems.

12. To quantify the relationship between group cohesion and group performance, Oliver (1988) employed meta-analytical procedures (a statistical method for combining data from several studies) to integrate the results from 14 codable cohesion-performance studies. The correlations between cohesion and performance for the 14 studies ranged from -.04 to .90, with a median correlation of .36. To answer the question of what effect an increase in cohesion would have on performance outcome, Oliver (1988) also analyzed these data using the binomial effect size display (BESD). On the basis of this analysis, it was concluded that when cohesion rises from low (below the median) to high (above the median), success rate (high performance) increases from 34 percent to 66 percent. Hence, regardless of the modest average correlation, it is obvious that small differences in

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capability can translate into large differences in outcomes. The implications of this finding for the military are especially noteworthy.

13. In combat, where there are no prizes for finishing second, a small competitive advantage (e.g., in technology, training, or human dimensions such as leadership and cohesion) can mean the difference between mission success and failure, unit survival and destruction, few battle-shock casualties and many stress casualties. It follows that there is considerable risk in giving up any advantage, no matter how small. What Oliver's (1988) analysis demonstrates is that modest shifts in unit cohesion can augment or diminish competitive advantage.

EVIDENCE/ARGUMENTS SUPPORTING THE CF POSITION

14. Stewart (1988) states that military "cohesion is part of and embedded in the society's norms, mores and cultural ethos" (p. 29). Similarly, Gal (1986) argues that the high levels of cohesion prevalent in the Israeli Defence Forces' units are not just a result of the military organization, but are a reflection of the educational and societal values in Israel, a group

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oriented society. Finally, Henderson (1985) states that units drawn from a heterogeneous society are more likely to be cohesive if they are:

a. ethnically similar and share other major cultural characteristics;

b. integrated and socialized to the degree that minorities are able to communicate effectively, share and adhere to group norms, and are not from autonomous minority groups with norms incongruent with military norms; and

c. are of the same sex, or are filling a role normally associated with their sex.

Because heterosexuals and homosexuals have diametrically opposing sexual orientations, as well as moral standards that are perceived as being radically different, the successful integration of known male homosexuals into a predominantly (male) heterosexual unit may be difficult. By definition, cohesion involves positive affectual bonds and favourable sentiments towards other members of one's group. If the requirements for cohesion are indeed as outlined by Henderson (1985), Gal (1986), and Stewart (1988) above, then the lack of shared norms and mores, as well as other characteristics would suggest that known homosexuals would only be afforded marginal status by the

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heterosexual members of the unit.

15. Support for the CF position can also be found in the results of the Charter Task Force Survey (Zuliani, 1986). Survey results indicate that both heterosexual males and females would react negatively to sharing living and working facilities with same-sex known homosexuals, and this reaction was slightly stronger in the heterosexual males than in the heterosexual females. If performance is the issue of interest, then we should be primarily concerned with working relationships. The zero-order correlations between the attitudinal measures and the Working With Same-Sex Homosexual variable are contained in Table 1 on the following page. For male respondents, the scores obtained on the Working With Same-Sex Homosexuals scale were strongly associated with attitudes towards homosexuals related to personal anxiety (r = 0.69), equal rights (r = 0.61), moral reprobation (r = 0.61), and the degree to which homosexuals were viewed as being dangerous or repressive (r = 0.60); moderately related to the degree to which homosexuality was viewed as a mental disorder (r = 0.55) and reactions to past contact with male homosexuals; and modestly related to the lack of confidence that existing policies would protect heterosexuals from

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Table 1

Zero-order correlations between predictor variables and working with same-sex homosexual variable.

Predictor Variables	Working with Same-sex Homosexuals
PA	0.69 (0.62)
ER	0.61 (0.55)
MR	0.61 (0.62)
DR	0.60 (0.55)
MD	0.55 (0.50)
Q 78	0.28 (0.24)
Q 120	0.57
Q 122	(0.48)

Note: Figures contained in brackets represents female responses
- PA = Personal Anxiety
- ER = Equal Rights
- MR = Moral Reprobation
- DR = Dangerous/Repressive
- MD = Degree to which homosexuality is viewed as a Mental Disorder
- Q 78 = Confidence in CF Harassment Policies
- Q 120 = Reaction to past contact with male homosexuals
- Q 122 = Reaction to past contact with female homosexuals

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harassment from homosexuals (r = 0.28). The reactions of female heterosexuals on these aspects were in a similar direction. In general, heterosexual members of the CF are unwilling to work with same-sex homosexuals, and this can only be viewed as a barrier to unit cohesion. As stated by Zuliani (1986):

> Given that CF heterosexuals on average selected "protest" when asked about their willingness to work with known homosexuals; that a considerable number of heterosexual servicemembers indicated that they would refuse to work with homosexuals, especially be supervised by homosexuals; (e.g., 45% of male respondents indicated that they would refuse) and, that a major basis for this reaction was anxiety or discomfort associated with situations of direct or indirect personal contact with homosexuals. There should be severe problems integrating known homosexuals into the CF, particularly in the Land and Sea operational units, with a resulting adverse impact on cohesion. (p.36)

The Cameron, Cameron and Proctor (1988) study of the American population also showed that heterosexual members would react negatively to the presence of homosexuals in the workplace and under close living conditions.

EVIDENCE/ARGUMENTS REFUTING THE CF POSITION

16. The first argument that can be used to refute the CF position is the fact that the evidence presented is not based on behavioural data; it is merely predicted behaviour. Although we

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are able to speculate on possible outcomes if homosexuals are allowed to enrol in the military, we are unable to offer hard evidence that cohesion and morale will be undermined if current policies are changed. Due to ethical and other reasons, empirical research has not been conducted that would allow this question to be answered with any certainty.

17. A second, and related, argument is that even if cohesion and morale are undermined by the enrolment of known homosexuals, we are unable to assess the magnitude of this potential effect. Once again the available research does not permit an accurate analysis of the impact (positive or negative) of employing homosexuals in military units. It should be noted, however, that the effects of any policy change will also depend on the resources and leadership support dedicated to implementing and regulating policy change. In other words, most heterosexuals' behaviour toward homosexuals will be regulated to a large degree by the norms established by leadership and the consistency with which they are enforced.

18. Critics of the CF position could also point out that the military is the organization best suited to effect changes in

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behaviour and attitudes toward homosexuals. By virtue of its formal hierarchical structure, code of service discipline, intensive socialization practices, and extensive supervisory network, the military is ideally suited to exercise social control over member behaviour. The essential element of traditional military discipline is the social control of subordinate behaviour. However, effective management of any change in CF policy with respect to the employment of homosexuals would require:

a. unequivocal willingness to support the policy among superiors at all levels;
b. an effort to persuade CF members that the policy is fair and that homosexuals must be accepted as equals;
c. a clear policy statement on the consequences of harassment of any kind;
d. continual monitoring/surveillance of behaviour; and
e. strict enforcement of the equity and harassment policies.

It might not be possible to satisfy all of these conditions.

19. A final criticism that may be offered is that sexual behaviour and orientation are irrelevant to job performance. The

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past success of homosexual members in the military clearly supports this view (Harry, 1984; McCrary & Gutierrez, 1979-80). If previous members were able to serve with distinction, then future members should be able to as well. One possible major difference pursuant to a policy change is that the sexual orientation of homosexual members may be known to their peers. In the majority of past cases, the sexual orientation of homosexuals was not known. Nevertheless, barring any requirement to publicise their sexual orientation, it is quite likely that homosexuals will govern their behaviour in accordance with prevailing group norms. If they read their peers as being hostile toward homosexuals, then most homosexuals will continue to be discreet in their behaviour. Otherwise they run the risk of drawing attention to their difference and being ostracized, harassed, or persecuted by their peers.

CONCLUSION

20. In summary, cohesion and morale have long been considered important to both military performance and other forms of group performance. However, group cohesion has also been shown to have negative consequences when the goals of the group are at odds

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with those of the organization and hierarchical cohesion is weak. Within the military this has been manifested in refusals to fight, fraggings and disciplinary problems; within civilian organizations a similar effect can be observed in mass walk-outs, strikes, work stoppages, and other employee organized activities directed against employers. Nevertheless, research has demonstrated that the positive aspects of cohesion generally outweigh the negative features, and group cohesion is a desirable goal for any organization (Stewart, 1988; Oliver, 1988).

21. Within military units, where so much depends on teamwork and the consequences of diminished capability can be extraordinarily high, hierarchical cohesion is clearly vital to mission motivation and success, while peer cohesion is equally important to group survival under conditions of extreme stress. Whether or not the presence of known homosexuals in the military will have an adverse effect on unit cohesion is a question for which there is no definitive answer. The evidence to support the CF position with respect to the erosion of cohesion and morale can only be described as very weak. Balanced against this consideration are the potential consequences of policy error should the admission, and retention, of known homosexual members

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actually undermine unit cohesion/morale and, ultimately, military effectiveness.

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