

PROGRAM/INTERVENTION

Core Values and Corps Values: Transforming Character Development Training at the U.S. Coast Guard Academy

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ABSTRACT

In 2023, the U.S. Coast Guard Academy initiated a redesign of accession-level character education following senior leadership direction associated with Operation Fouled Anchor and the Accountability and Transparency Review. This article describes *The Shield*, a revised Core Values education program implemented during Swab Summer. Drawing on adult learning and social learning principles, the program shifts from a primarily lecture-based model to one centered on peer facilitation, guided reflection, and case-based discussion. Junior cadets are prepared and supported to lead small-group sessions with incoming freshmen (swabs), using recent administrative hearing cases to explore the Honor Concept and expectations for conduct. This article presents *The Shield* as a practice-oriented institutional case study, detailing the program's rationale, structure, and delivery,

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with the aim of informing character and Core Values education efforts at service academies and related institutions.

Keywords: military training, character education, honor education, core values education, peer facilitation, service academy, U.S. Coast Guard Academy, institutional case study

Introduction

Character development is commonly described as the comprehensive effort to bolster the ability to respond to adversity by favoring what is right. Character can be understood as the collection of dispositions and judgments that guide individuals to behave in accordance with their morals and virtues (Shubert et al., 2019). In this institutional context, character development is understood mainly as cultivating judgment and accountability through structured engagement with the Honor Concept and guided reflection. At the U.S. Coast Guard Academy (USCGA), cadets are expected to comply with the Honor Concept, which states “Who Lives Here Reveres Honor, Honors Duty” (United States Coast Guard Academy, 2025b). Furthermore, the foundational axiom of “Cadets neither lie, cheat, steal, nor attempt to deceive” is central to the Honor Concept as set out in cadet regulations (United States Coast Guard Academy, 2024b). Cadets are expected to live up to a higher standard, and the Honor Concept is a nuanced requirement introduced to incoming swabs during their initial accession training, Swab Summer.

The Honor Concept differs from a code in that failing to report an honor violation in the domain of lying, cheating, or stealing is not simply an honor offense, but rather a major offense that may lead to disenrollment from the Academy. Regimental Process Guide Six explicitly states that “violations of the Honor Concept are breaches of our Core Values and may result in disenrollment” (United States Coast Guard Academy, 2024b, p. 4). Moreover, Code 1235 in the *Cadet Conduct and Discipline Manual* details

that “a cadet commits this offense [not honor] when they fail to report a major offense of which they have personal knowledge to the appropriate authority,” and a toleration clause is not specifically spelled out in the conduct system (United States Coast Guard Academy, 2024a, p. 19). Cadets are expected to uphold high standards of academic and personal integrity—honor not only prohibits certain acts but also requires affirmative conduct in holding oneself and others accountable to a higher standard of behavior. The Honor Concept is intended to train prospective officers to live with integrity in preparation for service and to discern right from wrong in morally ambiguous situations where judgment is tested against loyalty to self, others, and the organization.

Swabs report to the Academy in late June. They represent a cross-section of American society bringing biases, values, virtues, and behaviors. Indeed, as of 2025, the Corps of Cadets was representative of all 50 states (United States Coast Guard Academy, n.d.a). Prior to entry, cadets complete a psychometric questionnaire using the Values-in-Action (VIA) Inventory of Strengths (United States Coast Guard Academy, 2025a). Among cadets completing the VIA inventory, the most frequently endorsed strengths were fairness, honesty-integrity, and teamwork (United States Coast Guard Academy, 2025a, p. 38). While cadets self-report that honor is important, they do not have a shared definition of honor as it relates to service expectations for prospective officers. Once sworn in, students undergo values alignment with service standards. This initial training and education help bridge

the gap between what students purport to believe are Coast Guard Core Values and how the service defines those Core Values according to doctrine. The program enables students to bridge the gap between their initial conception of the Core Values and how doctrine defines them by developing a shared definition, requiring affirmative conduct, and prohibiting certain behavior.

At 100 weeks into the 200-week experiential Leadership Development Program, Academy juniors are at a developmental crossroads and are expected to transition from leading self to leading others. At this stage, they also begin formally mentoring incoming swabs by facilitating Core Values and honor training, placing them at the center of the Academy's character development effort.

As a practice-oriented institutional case study, this article focuses on describing the rationale, structure, and delivery of *The Shield* as implemented during Swab Summer. Because *The Shield* is facilitated by juniors, we also briefly describe the preparatory training that supports its delivery. We do not attempt to assess program effectiveness or make causal claims about outcomes, given the program's early stage and the limits of available data. Any early observations are offered as context for ongoing refinement, with the expectation that more formal evaluation will require additional time and effort. Our descriptive account draws on program materials and de-identified instructional case examples approved for training use; we do not report identifiable cadet information.

Development of the Program

Background

Before 2024, the Core Values education provided to incoming freshmen, or "swabs," was facilitated over five blocks of instruction during the first 7 weeks of the 200-week practicum. Instruction consisted of introductory lectures from mid-grade officers (O-3 or O-4),

followed by breakout sessions for case-study review of honor offenses, suspected honor offenses, and administrative hearing results with faculty and staff. This model persisted through 2023.

In response to Operation Fouled Anchor's revelation of the generational persistence of sexual assault and general misconduct from the late 1980s through 2006, the former Commandant of the Coast Guard, Admiral Linda Fagan, directed the Accountability and Transparency Review (ATR). Following the ATR, the Coast Guard directed a comprehensive analysis of character development at every accession point (United States Coast Guard, n.d.), including the Coast Guard Academy. Specifically, those directed actions included a reorganization of the "Coast Guard Academy's Swab Summer to help cadets adjust to the military environment and align with the Service's Core Values" (United States Coast Guard, n.d.).

This direction prompted action at the Academy to review best practices in adult learning theory, benchmark approaches at other service academies and accession points within and beyond the Coast Guard, and engage stakeholders in developing a revised approach to initial character education.

Approach and Implementation

Positive personality traits, the role of the mentor-mentee relationship, reflection, and the integration of case study are critical elements for measurable results in character development (Mar et al., 2025). Following the ATR, the Commandant directed actions to "improve the cadet summer training program and increase the supervision of cadet leadership" and to "provide tailored training to help personnel, from the newest recruits to senior executives; better act upon the Service's Core Values, understand organizational expectations, and cultivate a positive workplace climate" (United States Coast Guard, 2023). The approach to reimagining the Core Values program was benchmarked against best

practices from other leadership programs, notably, the U.S. Military Academy (USMA) at West Point. The USMA's *Beast Book* is the doctrinal handbook and guide for junior-to-freshman conversations on character development, virtue, and acclimation to the Corps of Cadets during the new cadet training known as "Beast Barracks" (United States Military Academy, 2022). The Doerr Institute for New Leaders at Rice University was also leveraged as a near-peer institution in terms of character development. Academy staff borrowed techniques outlined in the Doerr Synthesis Group Coaching Program and Catalyst Leadership Workshops (Besozzi and Taylor, 2020). By benchmarking peers in both military and civilian domains, the USCGA developed a better understanding of how to elevate character education.

Through engagement with the Simon Center for the Professional Military Ethic and others at USMA West Point, the Coast Guard Academy team was introduced to a cadet-to-cadet approach in which juniors are tasked with providing initial character training to swabs. Building on this framework, the team at the Coast Guard Academy reviewed legacy case study material from previous Academy administrative hearings, injected new case studies from recent conduct cases, and thematically organized lessons within the different domains of honor. Building on the USMA model, all juniors who were expected to facilitate sessions for incoming swabs received structured training during sophomore year to prepare for the new Core Values education program. Unlike USMA or other near-peer institutions, 100% of the junior class was expected to participate in training incoming swabs, or trainees in other Academy summer programs, including rising high school seniors participating in the Academy Introduction Mission (AIM). In addition to their year-round military training curriculum, all juniors completed a 2-week cadre training program with an intensive focus on preparing them to lead swabs in a basic training environment as part of the leadership journey.

Juniors were provided with instructional materials 6 months prior to Swab Summer. They rehearsed lessons under the supervision of seasoned instructors, commissioned, noncommissioned, and retired officer mentors during the Mid-Grade Cadet Transition course at week 100 (of 200) in their cadet careers. Students provided peer-to-peer feedback in practice "teach-back" sessions and were coached by instructor mentors. Student-instructor training was scaffolded into the training curriculum, based on the Zone of Proximal Development concept, in which More Knowledgeable Others (MKOs) guide near-peers toward success (Vygotsky, 1978). Support for juniors in facilitating the Core Values program was gradually removed as they progressed and began to gain confidence and demonstrate proficiency. Specifically, juniors were taught a sample lesson by instructors, then presented a lesson to peers with coaching from instructors prior to receiving swabs. During the first few iterations, juniors were observed silently by instructors from afar and provided coaching. Over time, juniors were expected to develop the confidence and proficiency to facilitate the lessons without supervision, supporting growth in self-efficacy and leader identity.

Adult learning theory was introduced to each junior cadet facilitator, grounded in the principles of self-concept, prior experience, readiness to learn, and structured opportunities for reflection and dialogue (Knowles, 1984). In this context, adult learning theory functions as a framework for structuring sessions around reflection and facilitated discussion rather than lecture. A culture of infantilizing swabs was strictly prohibited in line with Commandant directives beginning in 2024.

Swabs read case study material, reflected on the content prior to discussion, and engaged in facilitated discussion with junior cadet facilitators in small groups (fewer than 10 participants). They synthesized their reflections daily in their confidential student guide. By leveraging adult learning theory as the framework for character education instead of the traditional

pedagogical approach used previously, the revised approach beginning in 2024 assumes cadets are adult learners capable of taking an active role in discussion rather than simply receiving lectures, weighing case-based scenarios against prior experience, and participating in smaller forums to discuss shared notions about the Honor Concept. Rethinking character education through the lens of Knowles (1984) marked a substantial shift in instructional emphasis, designed to encourage students to take a more active role and think more critically without relying solely on instructors for the “right” answers.

Social learning theory suggests that people learn, in part, by observing others (Bandura, 1977). Within *The Shield*, this framework helps explain the program’s emphasis on peer facilitation and small-group discussion. While the previous framework of Core Values training served as the Academy’s standard approach, placing the onus of instruction on juniors was intended to engage cadets in contemplating ethical dilemmas and revisiting Core Values that they had not considered in over 100 weeks since their respective accession point training. The revised framework requires engagement from both facilitators and swabs and is designed to support learning through repetition, participation, and guided discussion rather than lecture alone.

Bandura’s core observational-learning processes—attention, retention, reproduction (practice), and motivation—are reflected in the program’s design (Bandura, 1977). Swab learners are encouraged not only to receive instruction, but to weigh in by sharing their own perspectives, feelings, and judgment with one another and facilitators. This approach allows juniors to reflect on their own development as they approach commissioning, while instructing swabs who will inevitably become instructors for future swabs in less than 2 years. Juniors are scaffolded towards leading unsupervised and without a script as they approach commissioning in less than 100 weeks—there is no “instructor” or “handbook”

present when a newly commissioned officer is faced with a deadly use of force scenario, an ethical dilemma, or a complicated problem in the field. Bandura (1977) is cited here to clarify the theoretical rationale for this peer-based structure and repeated engagement with realistic cases, not to imply measured effects or demonstrated program outcomes.

Launch and Initial Feedback: 2024-2025

After discussion and deliberation, the revised approach to Core Values training was branded *The Shield*, derived from the symbol found on all Coast Guard uniforms—the gold shield with 13 stars and stripes. *The Shield* contained daily lessons where juniors participated in different groups and interacted with swabs other than those they were directly responsible for, unlike at other near-peer institutions. The tone of the military environment explicitly shifted to a classroom environment, with a more academic approach where swabs and juniors discussed lessons in the barracks. Deliberately changing facilitators to work with unfamiliar swabs and conducting the training in an academic tone was an important shift, intended to create a lower-stakes discussion climate during evening sessions, relative to the daytime training environment. In the spirit of change, the Academy sought to transform cadet trainers, challenging the juniors to shift from intense drill instructors during the day to thoughtful teachers, mentors, and leaders in the evening. This code-switching mirrors Coast Guard expectations that junior officers adjust their conversational pitch every day from directing others in stressful operations to looking out for others personally and professionally after the mission is complete.

The Shield consisted of two books—a student guide and a facilitator guide. Once the learning period commenced, junior facilitators introduced themselves to the swab students and immediately prompted them to engage in the pre-reflection exercise, which posed the following questions to the students every day: “What did you do today that you were proud of?”

and “What could you have done better today?” Two additional questions were also posed each day, germane to the topic about to be discussed. For example, with regard to a lesson on balancing loyalty to service and loyalty to peers, the questions “How would YOU define loyalty?” and “Have you ever had to put a team’s interests ahead of a friend’s interests?” are usually posed. Following the silent, individual brainstorming warm-up, the facilitator reviews a case study introduction where a cadet engaged in misconduct, engages in guided conversation as outlined in the facilitation guide, and challenges the group to arrive at an answer about what they think happened, or what should have happened to the accused cadet. Then, the results of the administrative hearing are revealed, and the students are guided by the facilitator with follow-up questions, such as “Why do you think the command adjudicated this character violation as such?” or “Why or why not was the punishment justified?” or “Have you known someone in a similar situation in high school, and what was the outcome?” Students were challenged via the Socratic method as adult learners to draw their own conclusions and glean insight from prior misconduct and “near-miss” successes where a cadet encouraged a peer to self-report or a crucial conversation resulted in positive behavioral change. This placed the facilitator and the students in discourse rather than lecture, with the goal of helping students reflect on Core Values and character each night before “lights out.”

Case studies used in 2024 and 2025 were drawn from administrative hearings as recent as 2 years prior, refreshing the discussion and subject matter for the first time since the early 2010s. Case studies related to the use of artificial intelligence (AI) were introduced for the first time as well, based on feedback about cadet infractions and “near-miss” infractions with prohibited use of AI tools in the classroom beginning in 2021. Initially, swabs and junior cadre were presented with straightforward cases—clear-cut cases of lying, cheating, and stealing. Progressively, more complex lessons learned

from recent Core Values infractions were introduced, especially those related to ambiguous situations where no right or wrong answer was self-evident. This was intended to challenge both students and facilitators to think critically, tying subject matter to past and future behavior by presenting cases with no clear answers. Students were not evaluated based on whether they found the “correct” answer, but rather on how they reasoned through the case study and its alignment to the Honor Concept.

Following 2024’s inaugural run and feedback, *The Shield* was adjusted prior to 2025. To enhance reflective activities for facilitators, the team deliberately wove additional leadership training into the cadre-only evening sessions in 2025, led by senior-year cadets and supervised by Company Officers and noncommissioned senior enlisted members. Responding to student feedback, the frequency of training was reduced from daily lessons to a more balanced approach with guided discussion on even calendar days and personal introspection and guided reflection on odd calendar days.

In 2025, the first class of cadets to administer the new Core Values program via *The Shield* with the amended reflective exercises for juniors was the Class of 2027. This coming summer, the Class of 2029 will be the first group of students both to administer the program and to have experienced it themselves 2 years earlier. As the program evolves, further tweaks are in order for summer 2026, including further discussion on cadet culture, navigating “gray” areas in cadet regulations, and identity development in the domain of character as a prospective Armed Forces officer.

This article has described the development and implementation of *The Shield* as a revised approach to Core Values education at the USCGA. The focus has been on describing the program’s design, instructional methods, and the use of peer facilitation, guided reflection, and case-based discussion during Swab Summer. As the program

is in an early stage, this case study does not attempt to assess its outcome or effectiveness. Future work may be able to examine the effects of the program once additional time and evidence are available. For now, this account is offered as a descriptive institutional case study for readers interested in how character and honor education can be structured within a military training context.

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