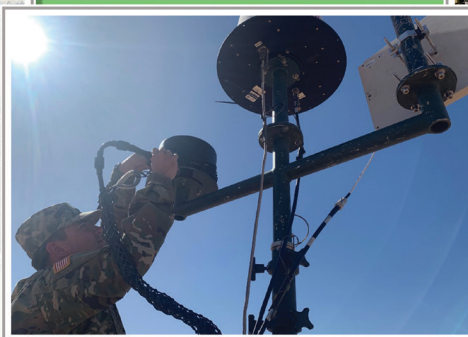


Special Operations Forces' Structured Readiness Model Makes Conventional Military Intelligence Unit More Effective

by Lieutenant Colonel Jesse Chace



Empowerment without context will lead to havoc.

—Alexis de Tocqueville

French philosopher and historian, 1805–1859

Introduction

As a U.S. Army Intelligence and Security Command (INSCOM) forward collection battalion aligned against U.S. Africa Command (USAFRICOM) requirements, the 307th Military Intelligence Battalion (MI BN) continuously deploys multi-disciplined intelligence collectors into austere and complex sociopolitical environments on a foreign continent to answer strategic intelligence requirements, sometimes with little notice. Fundamentally, these conditions are no different from those embraced by special mission units and their intelligence enablers—units that have learned that structured readiness models are critical to sustaining continuous operations of heightened sensitivity, urgency, and risk. These units rely on skilled and experienced military intelligence (MI) Soldiers who have long since mastered the fundamentals. While equally motivated, the majority of 307th MI BN collectors—human intelligence (HUMINT), counterintelligence (CI), and signals intelligence (SIGINT)—are on their first MI duty assignment. It is a population that continues to get younger and less experienced, particularly within CI, where nearly two-thirds of special agents were still on probationary status into 2020. Providing this population with ample time for focused training, as well as affording them a range of experiential opportunities, will be vital to future mission success. This makes structured readiness models all the more relevant and necessary to the 307th MI BN.

The Problem

Over the course of the unit's 4-year existence, 307th MI BN collectors have done their best to simultaneously bal-

ance lengthy training pipelines, language requirements, leave opportunities, garrison responsibilities, and preparation/support to ever-changing mission requirements in support of the Africa community of interest both at home and abroad. As an over-tasked and under-manned communal force-pool for USAFRICOM, the unit has struggled to reach optimal levels of readiness, response, technical/tactical proficiency, and command climate. Furthermore, collectors' inability to complete prescribed training pipelines in a 3-year assignment has undercut the value placed on professional competency, de-incentivizing Soldiers from extending their tour of duty at one of the United States Army's most requested duty stations, Vicenza, Italy. Failure to develop and retain experienced personnel who have mastered the fundamentals has directly affected credibility with USAFRICOM staff and key embassy officials throughout Africa. As a result, a habitual lack of permissions prevents collectors from maximizing their authorities on a continent that is presently serving as ground-zero for the convergence of global expansion. This creates opportunity for our competitors to "set the theater" in their own vision.

Perhaps more importantly, Soldiers have failed to obtain any semblance of predictability in one of the most notorious duty stations for "early return of dependents" in the United States Army (again, Vicenza, Italy).¹ Simply put, family and Soldier readiness has suffered in what should be a once-in-a-lifetime assignment inside the cradle of European civilization. We had to re-scope our operational design so that we could provide Soldiers and their families with the level of predictability they deserve, enable our higher brigade headquarters to prioritize a growing number of requirements, and meet our senior leaders' intent of mastering fundamentals and maximizing authorities.

The Solution

We chose the Joint Operations Readiness and Training System (JORTS) because of its inherent symmetry in balancing forecasted missions with rapid response requirements. The system is designed to “prepare forces for mission employment to sustain persistent [overseas] presence and provide for contingency response on a global scale.”² The JORTS cycle is typically found within certain special operations forces (SOF) units that not only maintain a similar persistent, high operating tempo forward presence, but have also proven that structured readiness cycles can help lead to occupational excellence and job satisfaction. Within this system, operational elements independently cycle through a variation of four phases:

- ◆ Training (individual and unit).
- ◆ Alert.
- ◆ Pre-Deployment (reconstitution).
- ◆ Deployment.

Unlike many U.S. Army Forces Command (FORSCOM) models, the JORTS cycle eliminates the inherent planning fratricide that occurs when attempting to balance continuous operations with short-notice missions—something most FORSCOM units do not have to balance. The unit can actually support more missions by separating the available force pool for short-notice, limited-duration requirements (i.e., the alert team) from the available force pool for continuous long-term requirements (i.e., the deployment team). Ironically, the alert phase also improves overall predictability by narrowing the timeframe in which Soldiers know they will have no predictability at all.

How to Apply the JORTS Cycle. Cloaked by a doctrinal-sounding name, the JORTS cycle is simply a common-sense way of maintaining peak readiness while supporting a unique set of mission requirements. It does not actually exist in doctrine. As a team-centric approach to organization and mission effectiveness, it has withstood the test of time in organizations for which a frenetic pace of operations depends on strong systems.

Most conventional units are not conducive to this cycle without significant modifications to their task organization. Adjustments were relatively easy for the 307th MI BN because the battalion deploys individual collectors based on mission-requirements, not necessarily in accordance with its modified table of organization and equipment (MTOE)

structure. Reducing our overall number of teams by simply increasing the size of each team enabled more capacity spread over each phase of the cycle. It also limited the number of required team leaders to only those most qualified for the job and enabled teams to better absorb short-term personnel losses caused by unpredictable events such as Noncommissioned Officer Education System courses, surgery, and emergency leave.

Selecting Team Leaders. It is important to select team leaders who have the maturity to avoid the five dysfunctions of a team: absence of trust, fear of conflict, lack of commitment, avoidance of accountability, and inattention to results.³

Five Dysfunctions of a Team

- ❖ **Absence of trust**—unwilling to be vulnerable within the group
- ❖ **Fear of conflict**—seeking artificial harmony over constructive passionate debate
- ❖ **Lack of commitment**—feigning buy-in for group decisions creates ambiguity throughout the organization
- ❖ **Avoidance of accountability**—ducking the responsibility to call peers, superiors on counter-productive behavior which sets low standards
- ❖ **Inattention to results**—focusing on personal success, status, and ego before team success



Photo courtesy of PublicDomainPictures.net

Though they should be skilled at their craft, the best team leader may not be the most talented collector on the team. In fact, it is more important for them to be the best planner, problem solver, and administrator—capable of holding the team together in garrison *as well as* holding their own downrange. By enabling stronger relationships at work and promoting greater feelings of safety, protection, and belonging, the team-centricity of JORTS has a significant impact on unit culture, climate, and productivity. This was on full display during the initial coronavirus disease 2019 (COVID-19) outbreak in Northern Italy, when there was no template for how military organizations would absorb the impacts of such prolonged restrictions on travel and manning. Individual and unit success during this time was predicated on team leaders who found ways for their members to remain engaged and productive despite a variety of circumstances that often made physical collaboration impossible (i.e., quarantine location and restriction-level).

As depicted in Figure 1 (on the next page), the JORTS cycle demands that specific team-level expectations be set within each phase. Focusing each team’s efforts provides maximum predictability, improves readiness, builds expertise, and optimizes mission execution.

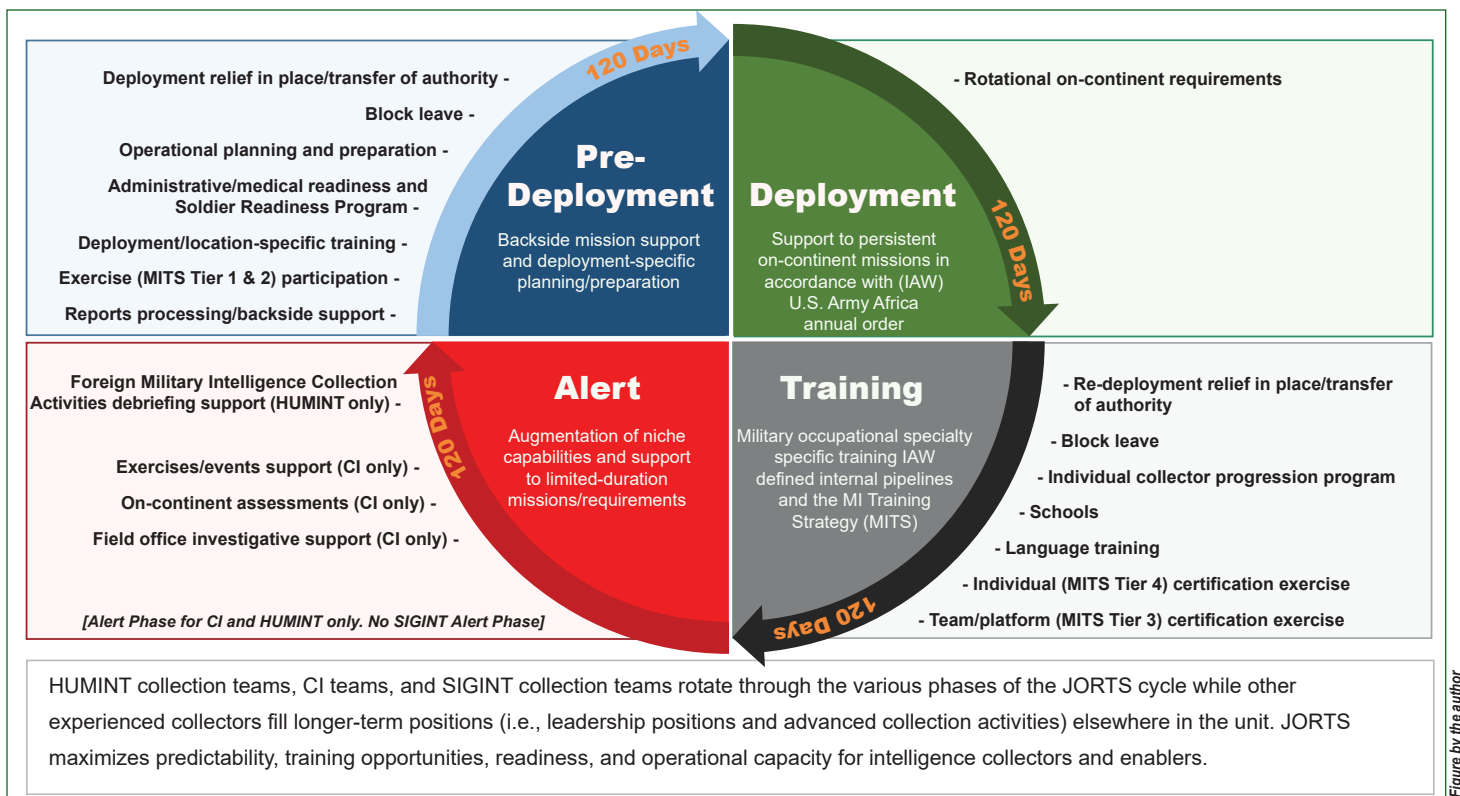


Figure 1. The JORTS Model Adopted by the 307th Military Intelligence Battalion (Forward Collection Battalion)

Quoting 19th century French philosopher and historian Alexis de Tocqueville, retired GEN Stanley McChrystal writes in *Team of Teams*, “empowerment without context will lead to havoc.”⁴ GEN McChrystal elaborates on this concept:

*This is the risk run if traditional, hierarchical organizations just push authority down, ceteris paribus [i.e., if all other relevant things, factors, or elements remain unaltered]...An organization should empower its people, but only after it has done the heavy lifting of creating shared consciousness.*⁵

With this in mind, the 307th MI BN model meshes mission command and technical control in a manner that provides clear, reliable, and predictable oversight, as well as knowledgeable guidance and direction to empowered team leaders. While company commanders retain mission command of their teams throughout the cycle, technical control rotates between subject matter experts who provide clear purpose and well-understood deliverables in each phase. Meanwhile, team leaders provide precision leadership to Soldiers they know completely. This includes managing relationships, ensuring team members are employed in the most effective way possible, providing continuous counseling and mentorship, and administratively accounting for their people. In a career field where true leadership opportunities lack below the sergeant first class level, these positions are critical to promoting personal and organizational growth for our staff sergeants. Besides, team leaders who are hyper-focused “down” on their personnel and equip-

ment better enable every echelon of leadership above them to think and influence “two levels up.”

Platoon-Level Management. While companies within a forward collection battalion are small, the requirements they must simultaneously balance across multiple intelligence disciplines necessitate platoon-level management between the company commander/first sergeant and individual team leaders. Platoon leaders are ideal for managing the entirety of the JORTS cycle. They ensure teams are prepared to deploy, training is forecasted and executed consistently, personnel are counseled regularly, and gaps are accounted for and filled. In other words, platoon leaders and platoon sergeants are the lynchpins to ensuring the cycle works as designed, highlighting the value of MI second lieutenants within a forward collection battalion. Unfortunately, this unique excess capacity within the 307th MI BN is not cemented in its MTOE, and therefore it is only preserved sporadically through a close working partnership with our neighbors in the 173rd Infantry Brigade Combat Team (Airborne). The empowerment, leadership, education, and training opportunities afforded to these officers within the context of an INSCOM forward collection battalion JORTS cycle arguably surpass that of FORSCOM MI companies. Their presence also allows warrant officers to maximize their skillsets through training development and operations rather than filling leadership positions.

JORTS in a Non-SOF Environment. The utility of a JORTS cycle in a non-SOF environment sparks several commonly asked questions.

First, is the JORTS cycle flexible? Yes. Although maintaining team integrity is ideal, leaders may swap collectors between teams based on the situation, for example, an impending permanent change of station, pop-up Basic Leader Course or Advanced Leader Course dates, and pregnancy. For instance, if a HUMINT collection team (HCT) member exiting their deployment cycle is making a permanent change of station in 4 months, leaders may elect to shift him/her to the HCT entering the alert phase. This would provide more capacity to a higher-priority mission such as home station Foreign Military Intelligence Collection Activities debriefings, rather than “wasting it” in a way that will no longer benefit the unit. Platoon leaders may also adjust “transition” dates between teams based on the needs of the team or the mission. However, one must keep in mind that the intent of the JORTS cycle is to provide and enforce structure and processes that allow training and predictability to take root; if it is flexed too much and too frequently, it becomes meaningless. Proper planning, forecasting, and prioritization are crucial to making the JORTS cycle work, not its inherent flexibility.

Second, does the stove-piped nature of the JORTS cycle prevent the unit from training and operating as cross-functional teams? No, it does the opposite. The JORTS cycle enables teams to better plan and integrate with “sister teams” from other platoons that are in the corresponding phase of their cycle. For example, HCTs from Alpha Company and CI teams from Bravo Company are able to—

- ◆ Train and certify together at home station in one phase.
- ◆ Conduct mission preparation and engage with analytical counterparts together in another phase.
- ◆ Deploy to the African continent together in yet another phase.

For our organization, it offers an unprecedented level of collaboration, integration, and relationship building between disparate yet complementary capabilities.

Third, why use only 120-day deployments? Because it is much easier to sustain a high pace of operations over 120 days than, for example, 180. With teams conducting multiple deployments over a 3-year tour, 120-day deployments are more sustainable for the force and provide better flexibility should Soldiers need to extend downrange. Not only does this help prevent individual gaps in mission coverage, but it also provides flexibility in the event of sudden and unforeseen restrictions in and out of theater, such as



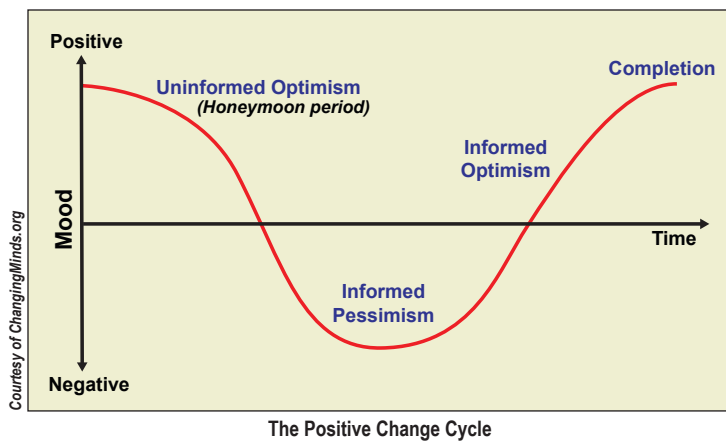
U.S. Army photo

A 307th Military Intelligence Battalion Soldier in civilian attire engages with a key partner of the Ugandan military while forward deployed to East Africa.

COVID-19. As depicted earlier (in Figure 1), 120-day deployment phases do not include relief in place and transfer of authority, which extend actual boots-on-ground timelines to about 140 to 150 days.

Creating Experienced Collectors. In addition to the valuable experience Soldiers gain through a wide variety of on-continent missions, adherence to the JORTS cycle should allow even the most junior MI Soldiers to complete their prescribed training “pipelines” after two iterations through the cycle (32 months). This creates a more seasoned and experienced population of collectors to fill key leadership positions or work dedicated mission sets, depending on their strengths and career goals. On the operational side, these include CI investigations and advanced HUMINT collection operations. On the leadership side, these include the team leader, the operational management team’s noncommissioned officer in charge, and the platoon sergeant. Based on a 36-month length of tour, these opportunities incentivize extension out to 48 months for those exceptional Soldiers who qualify.

Transition and Application. The transition to a JORTS cycle, like any workplace change, required a patient and deliberate approach in order to ensure maximum buy-in and an optimal structure. For the 307th MI BN, the process took roughly 4 months, which involved identifying the need for change, communicating the change, developing a cadre of change



agents, building the implementation plan, and shepherding unit members through the “positive change cycle.”⁶

After an additional 45 days to allow teams to “gel” and forecast their training calendars, the unit kicked off the cycle in February 2020. The JORTS had several significant and immediate impacts. First, it allowed platoon sergeants to easily forecast team-level training calendars beyond 12 months at the name-tape level. This significantly improved both predictability and focused training. Second, the separation of limited-duration and long-term missions into separate phases enabled the unit to maximize its capacity, resulting in an increase in the number of operational requirements we are supporting for U.S. Army Africa/USAFRICOM. Third, the transition benchmarks inherent to JORTS were instrumental in keeping teams focused on specific readiness timelines and objectives amidst the chaos brought on by the initial COVID-19 outbreak from February through April 2020. As a result of the continued pandemic, this paradigm has continued to instill the necessary feelings of hope and change throughout wave after wave of new and/or extended restrictions that cause Soldiers to be left with little light at the end of a monotonous tunnel. In other words, established yet flexible transition dates between JORTS phases have continued to provide a stabilizing 300-meter target in a time filled with more unknowns than knowns.

In August 2020, the battalion conducted a comprehensive review of the JORTS experiment in order to ensure the cycle was meeting the unit’s operational needs. While deliberate analysis identified the need for minor modifications to the cycle, commanders and mission managers throughout the organization agreed that the JORTS cycle should be pro-

tected at all costs and re-evaluated after at least one complete cycle (June/July 2021). In fact, the unit found that its new operational design had enforced a level of planning at the company level and below that now outpaced and out-matured its planning, prioritization, and orders processes at the battalion and higher levels.

JORTS could fail outside of its natural SOF environment. To prevent this from happening, two things must occur:

- ◆ Tactical-level leaders must properly plan and forecast individual timelines in order to prevent excessive shifting of personnel.
- ◆ Operational-level leaders must ruthlessly prioritize requirements in a way that guards dedicated training and preparation windows.

Conclusion

The JORTS cycle has withstood the test of time for organizations with a frenetic pace of operations. Not only does the JORTS cycle lead to more efficient and effective training and operational support, but it also leads to better junior leaders and command climate. Overall, it maximizes predictability, training opportunities, readiness, and operational capacity for intelligence collectors and enablers. 🌟

Epigraph

Alexis de Tocqueville, quoted in Stanley McChrystal, *Team of Teams* (New York: Penguin Publishing Group, 2015), <http://community.vitechcorp.com/breaking-systems-engineering-and-three-ways-to-bind-the-fractures/>.

Endnotes

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4. McChrystal, *Team of Teams*.
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6. “The Positive Change Cycle,” Changing Minds website, accessed 22 January 2020, http://changingminds.org/disciplines/change_management/psychology_change/positive_change.htm.

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