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SELECTING PROSPECTIVE SPECIAL FORCES INTELLIGENCE SERGEANTS:
A MULTI-CASE STUDY

By
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A DISSERTATION IN PRACTICE

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Fulfillment of the Requirements for the degree of Doctor of Education in
Interdisciplinary Leadership

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Abstract

The purpose of this Dissertation in Practice research study was to examine past and present selection processes for sending Special Forces (SF) operators to attend the SF Intelligence Sergeant course, while the aim was to help SF organizations determine ideal ways to identify the best candidates to send to the Special Forces Intelligence Sergeant course using deliberate identification, development, preparation, and evaluation.

Ultimately, this study should provide SF leaders with ways to identify those SF operators with the potential of succeeding as SF Intelligence Sergeants. This DIP research study was a qualitative study using a multiple-case study method of data collection and analysis. Thirty-nine participants from five active-duty SF Groups responded to a number of interview questions asking them to explain the importance of the SF Intelligence Sergeant and describe the ideal selection process for sending individuals to the SF Intelligence Sergeant course. The overall expectation from the participants was to improve their ability to identify knowledge, skills, and abilities, and attributes to help choose the best candidate to attend the SFISC. Implications facing the SF Groups during the implementation of the recommendations are (1) requirement for the researcher to assist with implementation of the recommendations, (2) the additional time required for SF leaders to implement recommendations, and (3) that identifying the “right” candidates will shrink the pool of available Special Forces operators available to attend the SFISC.

Keywords: US Army Special Forces, Special Force Operational Detachment – Alpha, Special Forces Intelligence Sergeant, selection process, transformational leadership, servant leadership, talent management, knowledge, skills, and abilities (KSA), attributes
Dedication

I would like to dedicate this DIP research study to the Special Forces Regiment. There is no other group of people dedicated to the mission of freeing the oppressed as it exists within their motto of “De Oppresso Liber.” Every Special Forces Operational Detachment – Alpha deserves to have the best people working as Special Forces Intelligence Sergeants in the most dangerous places around the world. All the time and effort put into this entire study was for those who depend on their Special Forces Intelligence Sergeants to protect them when they need them the most.
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This whole process started when I approached my organization’s leaders and asked them for support while I completed this DIP research study. So, I would like to thank my supervisor, CW4 Shawn Strub, and my Battalion Commander, LTC Scott White for the support they provided during the entire process. They backed me up whenever I ran into a road block to completing my dissertation. I appreciated their endorsement.

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CHAPTER ONE: INTRODUCTION

Introduction and Background

Special Operations Forces (SOF) have been used more than any other Department of Defense (DoD) element to perform a multitude of missions for the United States government (O’Connor, 2017). One of the busiest elements within the SOF community is an organization called the US Army Special Forces (SF) or more commonly known as the “Green Berets” (“Special Forces,” 2016). These “Green Berets” are organized into twelve-man teams called SF Operational Detachments – Alpha (SFODA), and assume one of twelve positions as SF operators (“Special Forces,” 2016). Those twelve positions on an SFODA are illustrated in Figure 1 and include a Team Leader (Captain), Assistant Team Leader (Warrant Officer), Team (or Operations) Sergeant (Sergeant Master Sergeant), two Weapons Sergeants (Sergeant First-Class, Staff Sergeant, or Sergeant) two Engineer Sergeants (Sergeant First-Class, Staff Sergeant, or Sergeant), two Medical Sergeants (Sergeant First-Class, Staff Sergeant, or Sergeant), two Communication Sergeants (Sergeant First-Class, Staff Sergeant, or Sergeant), and finally one position of an Intelligence Sergeant (Sergeant First-Class) who is responsible for managing and analyzing data and providing sound intelligence to leaders, so those leaders can make informed decisions (“Special Forces,” 2016).

Other than the team leader, assistant team leader, and team sergeant, the intelligence sergeant, because of his direct involvement in decision making and targeting of enemy forces, carries more responsibility and requires more experience than any other member of the SFODA (Special Forces assistant operations and intelligence sergeant, 2009). While there is significant responsibility on the SF Intelligence Sergeant and it
takes the right person to work as an intelligence analyst, there is no formal process for selecting SF operators to attend the Special Forces Intelligence Sergeant course (SFISC), which is the sole course that educates and qualifies SF operators as intelligence sergeants. In addition, unqualified and inexperienced personnel can be placed in the SFODA Intelligence Sergeant position with little to no training or preparation, and be expected to produce an SFODA’s intelligence during combat deployments (SFISC, 2018).

Figure 1. Special Forces Operational Detachments – Alpha (SFODA) positions.

This Dissertation in Practice (DIP) study examined the absence of a process or the use of unsystematic processes by SF organizational leaders for selecting SF operators to attend the SFISC; identified knowledge, skills, and abilities (KSAs), along with necessary attributes, for the ideal SF Intelligence Sergeant; and provided recommendations creating a deliberate and common process for selecting those who possess those KSAs and attributes to attend the SFISC. The SFISC faculty and senior leaders within the USA JFK Special Warfare Center and School (SWC; pronounced “Swick”) agreed that without choosing the “right” soldiers to attend the SFISC, the SFODAs might lack a quality, competent, and confident Intelligence Sergeant. Also, the culture within the SWC perpetuates the assumption that once a soldier attends and graduates from the grueling
selection and assessment course, passes the SF qualification course, is certified as a “Green Beret”, and they are accepted into the Special Forces regiment, leaders and instructors of advanced skills courses, like the SFISC, should do everything to help students pass so the SF operators can bring the advanced skills back to their SFODA’s (SFISC instructor, personal communication, May 10, 2018; SFISC instructor, personal communication, October 17, 2017). Some students lacking core analyst attributes, which could be identified prior attending the course, still graduate the SFISC to assume the position as the Intelligence Sergeant on an SFODA (SFISC meeting, personal communication, October 17, 2017). This is a result of a shortage of qualified Intelligence Sergeants on SFODAs, a limited number of course slots, and the current evaluation system.

Professionalizing the position of the Intelligence Sergeant by including a selection process and professional development after graduation could help bring the optimum soldiers to the SFISC. A critical element of intelligence analyst professional growth is the availability of mentorship in organizations (Marrin, 2009). Marrin (2009) wrote that the government intelligence agencies, including the Department of Defense (DoD) organizations, should introduce strict educational requirements, approve a common professional development program, and find ways to integrate knowledge management protocols throughout all organizations to insure critical experiences are transferred to the next generation of analysts. A lack of available mentors on an SFODA for recent SF Intelligence Sergeant Course graduates makes it difficult for them to gain confidence in a new, demanding position. A primary reason for addressing the selection process issue was a lack of direct guidance, coaching, and mentorship from senior, experienced SF
Intelligence Sergeants or SF leaders for potential SFISC attendees and “new” graduates after they return to their units. One reason this lack of guidance exists is because the SF Intelligence Sergeant is the only intelligence analyst (professional) on the SFODA.

The Federal Bureau of Investigation (FBI), Defense Intelligence Agency (DIA) and Central Intelligence Agency (CIA) all conduct similar hiring practices to evaluate and determine who they hire has the capability to perform well as intelligence analysts for senior leaders throughout the government. Critical thinking, intuition, inductive and deductive reasoning were all necessary attributes of future intelligence analysts (Mestayer, 1999). Specifically, the FBI tests potential employees applying for intelligence analyst positions by evaluating their critical thinking, logical reasoning, and personal experiences (“FBI jobs,” n.d.). This type of testing and evaluation is lacking for potential attendees of the SFISC.

Since, no deliberate, common processes exist that help leaders in Special Forces organizations identify, develop, prepare, and evaluate SF operators to attend the SFISC and return to their units as confident, highly capable intelligence analysts, unsystematic selection practices are used by those unfamiliar with intelligence requirements. The intelligence analyst profession, which includes SF Intelligence Sergeants, must continually look for ways to improve and select qualified individuals entering the profession, which could be the ideal starting point for examination (Marrin, 2009).

SFISC instructors (personal communication, February 7, 2018) expressed that success was not necessarily how students perform during the course, but how they performed using their knowledge, skills, and abilities (KSAs), along with possessing the necessary attributes, as intelligence analysts once they return to their SFODAs.
Highlighted by Heuer (1999), a career in intelligence is a life-long journey that cannot be taught to someone with the expectation of becoming a highly-competent analyst in a matter of months. In addition, Nemfakos et al. (2013) supported Heuer’s discussion about a life-long journey, by stating that intelligence analysts can take more than ten-years to receive suitable training and education, and gain enough experience to attain a high standard of competency. The weapons of mass destruction (WMD) commission recommended that the intelligence community restructure their policies and procedures for hiring the “right” people to work as intelligence analysts through a vigorous evaluation and selection process (Nemfakos et al., 2013).

As fresh Intelligence Sergeant graduates return to SFODAs and assume the responsibility to provide well-developed intelligence for their commander, they do so without any requirements to attend professional development education courses throughout the rest of their intelligence career. Also, it was identified during data collection with the SF Groups that the career of an SF Intelligence Sergeant was under five-years, thus making it quite difficult to identify the right candidate and manage the SF Intelligence Sergeant’s professional development program that includes selection (personal interviews, June-August, 2018). The SF regiment could benefit from a formalized selection process prior to soldiers attending the SFISC, potentially returning highly qualified and confident intelligence sergeants (analysts) to SFODAs (SFISC Instructor, personal communication, December 7, 2017). In addition, if organizational change does occur and the SF leaders accept the recommended changes, SFODAs could see better quality intelligence analysis from their Intelligence Sergeants.
Statement of the Problem

The problem started with a lack of an intentional selection process for sending SF operators to the SFISC. SFISC instructors asked each other (personal communication, February 7, 2018), “why do we constantly receive students unable to do even the simplest analysis, are not motivated, and are too senior to serve even a year as an SF Intelligence Sergeant?” According to past SFISC students, the selection processes are quite random and informal, and quite different in each SF Group (SFISC, 2018). The problem is that students arrive at the SFISC with no baseline of KSAs or the necessary attributes for intelligence work, which forces the SFISC cadre to evaluate and teach students on skills they should already possess, but frequently do not.

According to the Army Training Requirements and Resource System (ATRRS) web site, SF operators are eligible to attend the SFISC if they meet two criteria outlined by the Special Warfare Center and School, which are (1) possess a rank between Staff Sergeant and Master Sergeant and (2) hold a top-secret security clearance (“ATRRS,” 2018). A number of SF soldiers arrived as students to the SFISC lacking analytical competencies, under-educated, ill-prepared, and unmotivated to comfortably navigate the SFISC, which required the small group leaders (SGL) and course instructors to provide extended mentorship, which guided the students to complete the course, but ill-prepared them to assume the responsibilities as the Intelligence Sergeant on an SFODA (SFISC instructors, personal communication, February 7, 2018).

Due to a lack of deliberate preparation and selection, the SFISC focuses on basic classes to introduce or “re-introduce” subjects to the students, which could be taught or verified prior to attending the course. This restricts the SFISC from introducing more
advanced analytical subjects to its students (“SFISC task list,” 2016). This lack of any common selection process in SF organizations hinders future SF Intelligence Sergeants from reaching their true potential (SFISC leader, personal communication, October 17, 2017). Each SF Group has a unique culture, all quite different than their sister SF Groups, which includes how they prepare and evaluate individuals to attend the SFISC (SFISC leader, personal communication, December 7, 2017).

Purpose of the Study

The purpose of this Dissertation in Practice research multiple-case study was to determine the necessity of systematically identifying, developing, preparing, and evaluating Special Forces operators prior to selecting them to attend the Special Forces Intelligence Sergeant course.

Research Question(s)

It was important for this DIP study to focus all attention on the research question, and allow the data, as it was collected, to guide the questions asked of the participants. During data collection planning, the researcher used the main research question to determine the specific questions to ask the participants. The following research question guided this qualitative study:

In what ways might Special Forces leaders choose optimum SF operators within their organizations to attend the Special Forces Intelligence Sergeant course?

Aim of the Study

The aim of this study was to help SF organizations identify ways for its’ commissioned and senior non-commissioned officers to understand the knowledge, skills, and abilities (KSAs), along with the necessary attributes of successful intelligence
analysts and identify which SF operators possess those KSAs and attributes through deliberate identification, development, preparation, and evaluation prior to selecting them to attend the SFISC. The bottom line for this study was to provide SF leaders with ways to identify those SF operators with the potential of becoming highly competent SF Intelligence Sergeants, which should improve the commander’s ability to make operational decisions at the SFODA (tactical) level in Special Forces organizations.

**Proposed Methodology**

This DIP used a qualitative method, which allowed the participants to play a vital role in determining the best way to identify, develop, prepare, and evaluate SF operators prior to being selected to attend the SFISC. Specifically, a multiple-case study allowed the researcher to examine each case separately and then synthesize them into one complete case study (Yazan, 2015). As Yin (2017) explained, using multiple-case study works best in situations where the researcher looks for the participants to answer detailed “how” or “why” research questions. In addition, the case study method was useful when examining “complex social phenomena” (Yin, 2017, para. 799).

The participants for this study were from a variety of organizations, but all played an important role in the identification of KSAs and attributes, and provided valuable input for the development of recommendations to create a deliberate and common selection process for those aspiring to attend the SFISC. These participants included recruitment and hiring officials and intelligence professionals from the intelligence community, psychologists from SWC who assist in selecting special operations soldiers, along with SF leaders and current SF Intelligence Sergeants from the active SF Groups.
Definition of Relevant Terms

The following terms were used operationally within this study.

*Critical thinking*: Paul (1995) defined critical thinking as “purposeful thinking in which individuals systematically and habitually impose criteria and intellectual standards upon their thought” (In Popil, 2011, p. 204).

*Intelligence*: “The product resulting from the collection, processing, integration, evaluation, analysis, and interpretation of available information concerning foreign nations, hostile or potentially hostile forces or elements, or areas of actual or potential operations” (“Joint intelligence,” 2013, p. GL-8).

*Intuition*: It is the process of thinking that is based on knowledge and experiences through feelings for making decisions (Salas, Rosen, & DiazGranados, 2010).

*Leader*: A person who accepts responsibility, takes control of a situation, and shows direction to others by applying adaptability, love, understanding, self-awareness, innovation, expertise, service to others, interpersonal tact, and accepted risk to complete a task, accomplish a mission, or improve an organization (Lowney, 2003; US Army, 2012; Choudhary, Akhtar, & Zaheer, 2013; Wade, 2017).

*Leadership*: Taking the opportunity to influence people through “purpose, direction, and motivation” (p. 1-9) using “self-awareness, ingenuity, love, and heroism” (p. 9) to accomplish a task, mission, or improve an organization (US Army, 2012; Lowney, 2003).

*Selection process*: A deliberate process, which includes identifying, developing, preparing, and evaluating SF operators to attend the SFISC.
Special Forces Operational Detachment – Alpha (SFODA): A tactical element in US Army Special Forces. There are six detachments in each Special Forces Company, and each detachment consists of twelve Special Forces operators.

Special Forces Intelligence Sergeant: An SF operator serving in a military intelligence analyst position, usually on an SFODA, and responsible for providing decision makers (team commander) with verified and analyzed information in the form of intelligence products.

Special Forces (SF) operator: A US Army soldier who graduated from the Special Forces Qualification course and holds a military occupational specialty (MOS) within the 18-series (Special Forces).

Talent management: Ensuring the right person is in the right job at the right time by selecting the best candidate and using a well-established training/leader development program (Lewis & Heckman, 2006).

Unconventional Warfare (UW): Activities conducted to enable a resistance movement or insurgency to coerce, disrupt, or overthrow a government or occupying power by operating through or with an underground, auxiliary, and guerrilla force in a denied area (Department of Defense, 2017, p. 265).

US Army Special Forces: A specialized military organization commonly known as “the Green Berets” because of their distinctive headgear. This organization is tasked with five primary missions according to the US Army web site (2018), which are unconventional warfare, counterterrorism, direct action, foreign internal defense, and special reconnaissance.
US Army Special Forces organizations: The US Army Special Forces headquarters is the US Army Special Operations Command located at Fort Bragg, NC and under the command of a three-star general officer. Under this command are two organizations, one is responsible for operations and one is responsible for training and education. The operational unit is the First Special Forces Command, while the training and education organization is the US Army JFK Special Warfare Center and School. The US Army Special Forces Groups are under the command of the First Special Forces Command and consist of five active SF Groups located throughout the country. Each Group has four battalions, and each battalion has three companies consisting of approximately eighty-four personnel.

These definitions were specific to this study and introduced the reader to strictly military, special operations, and intelligence unique terms not normally seen in scholarly writing. As the reader continues through this research study, there is a better understanding of the problem, relevant literature, and why the methodology was selected to conduct the DIP study.

Limitations, Delimitations, and Personal Biases

The research study involving both the United States government and an intimate connection between researcher and topic brought with it some limitations, delimitations, and personal biases. There was never a guarantee that the military and government organizations would provide access, let alone unlimited access, to the necessary personnel required to help answer the research question.
There were a few limitations for this study. The primary limiting factor was the allotted time for this study and the researcher’s availability to the participants who were extremely busy professionals from a small number of elite units. This forced the researcher to be aggressive in keeping to the developed timeline, and immediate adjustments were made when there were issues. For this type of study and the ability to get access to the relevant individuals, a truly random selection of participants was not possible because the limitation was that all individuals were not available for the researcher due to the travel volume of these SF leaders. Data collection involved the interviewing of SF leaders and soldiers, intelligence analysts, hiring officials, and psychologists from the SF Groups, intelligence agencies, and SWC. The researcher and participants were able to keep restricted, sensitive, and classified data from entering the study, thus eliminating the limitation of the researcher’s ability to use all collected data to present suitable findings.

Twenty-Nine of the Thirty-Nine participants interviewed were SF leaders responsible for sending their soldiers to the SFISC. Even though the researcher used a multiple-case study method of research, he allowed the data to drive the development of the study. The researcher accomplished this by limiting any pre-conceived processes from entering the study by asking open-ended questions that relied on the participant to solely use their own knowledge and experiences. Finally, a limitation existed because the DIP was a qualitative study requiring data from military professionals that included their experiences, opinions, and feelings, instead of specifically relying on facts.

There were only a few delimitations because all attempts were made to include each active SF Group as part of the study. One delimitation identified is that the
participant pool did not include all SF leaders because the researcher only interviewed those SF leaders who were directly involved in selecting soldiers to attend the SFISC. In addition, a delimitation that became known at data collection was the limited availability of members of specific SF organizations. The few follow-up and additional interviews were conducted over the phone and through email to allow those who missed the face-to-face interviews to provide some input for the study and have a sense of inclusion.

As a leader and a former member of the SF regiment, the researcher carried personal biases about positively improving and changing the SF Intelligence Sergeant career field. Although the researcher did carry some personal biases towards the DIP study’s topic, there was an understanding of those biases and procedures were followed that limited the biases to creep into data collection, evaluation, and analysis. The potential existed that if the researcher did not see the expected results, he may try to influence the outcomes. To reduce this issue, the researcher removed those personal biases during data collection, evaluation, and analysis by keeping a private diary of his thoughts, reviewing the questions before each interview, asking open-ended questions during the interview, reviewing the transcripts and notes after each interview, then repeating this process before each interview. In addition, the researcher provided interview transcriptions to the participants for review, and used only the collected data to conduct analysis. The researcher stuck to the specific, open-ended questions and allowed the participants to speak without prodding to answer a specific way. Also, at the end of data collection and after transcription was completed, the researcher sent the transcripts to each participant for review and acknowledgment. Although not every participant
responded, they were afforded every opportunity to acknowledge that the transcripts did reflect their thoughts.

**The Role of Leadership in this Study**

The success of this study relied on strong and confident leadership through the SF organizations. The implementation of intelligence on an SFODA requires leadership from both the Intelligence Sergeant producing and presenting the intelligence, and the commander accepting it to make decisions. This DIP research study asked SF Group leaders at the SF Company and SFODA level to describe past selection processes used to send SF operators to the SFISC, and to explain what they believed made a highly competent SF Intelligence Sergeant. In addition, this DIP research study required SF leaders to take the responsibility to assist their organization in introducing the best qualified individuals to the intelligence sergeant career field. The acceptance of the study during data collection could result in changes in both culture and vision if the recommendations are implemented (Mintzberg & Westley, 1992).

Organizational change and transformational leadership behaviors were crucial to the success of this study and allowed the participants to openly discuss their experiences working with SF Intelligence Sergeants (Ring, Brown, Howard, & Van Ness, 2014). Transformational leaders have the unique ability to gain the support of the entire organization when it comes to making impactful organizational change that could be challenging and uninviting without those types of leaders (Shanker & Sayeed, 2012). Transformational SF leaders succeed because they are willing to accept changes and sell the change, but in this case, explain they place a great deal of trust in their Intelligence Sergeants and the intelligence products they produce.
The Army has seven core values that all leaders must follow, which include loyalty, duty, respect, selfless service, honor, integrity, and personal courage (“Army values,” n.d.). Of these seven values, duty, selfless service, integrity, and personal courage are vital for implementing organizational change. All the leaders who participated in this DIP research study and who may ultimately help with the implementation of a common selection process should be open to the possibility of change, willing to share ideas, and show a dedication to the regiment’s success.

These same leaders must be self-aware, confident, well focused and be willing to use all necessary decision-making steps to make sound decisions. Besides these typical leadership qualities, the researcher’s recommendations require a salesman, someone able to persuade without being overbearing, who is able to convince the regiment that an identified process will improve the process of identifying, developing, preparing, and evaluating their soldiers prior to selecting them to attend the SFISC (Hermann, 1995). SF leaders at all levels are selecting and sending SF operators to the SFISC without the relevant information as identified by former SFISC students (SFISC survey, 2018). In addition, there are expectations from the SF leaders that anyone they send to the SFISC has the capacity to pass the course and assume the position of the SFODA Intelligence Sergeant (Interviews with various participants, June - August, 2018). Lowney (2003) made a great argument that supports the idea that SF leaders should display the four traits seen within Jesuit leaders; self-awareness, ingenuity, love, and heroism. Leaders willing to place the lives of others well above their own shows a love and dedication needed in today’s military leaders (Lowney, 2003).
Significance of the Dissertation in Practice Study

This study is as important at this moment as it is important that SFODAs are prepared to deploy to dangerous places around the world. US Army SF military occupational specialty (MOS) producing courses use a formal process for selecting individuals for attendance except for the Special Forces Intelligence Sergeant MOS (“ATRRS,” 2018). No studies exist that have examined the possibility of formally selecting SF operators to attend the Special Forces Intelligence Sergeant course. This DIP research study was significant because it allowed SF leaders from all the SF Groups to participate in examining the problem of having no selection process. Making informed decisions, along with a leader’s intuition, as explained by most participants was key to the success of the unit’s operations because it had the potential to improve the selection and management of SF Intelligence Sergeants. Using face-to-face interviews for collecting data allowed those responsible for selecting SF operators to attend the SFISC to be the ones also examining, identifying, developing, and implementing any proposed changes.

The role of the Special Forces Intelligence Sergeant was placed right in the middle of this dilemma, because without well-qualified, confident, and skilled SF Intelligence Sergeants, the SFODA leaders lack essential information and intelligence (SFISC instructors, personal communication, December 7, 2017). In 2002, the current Special Forces Intelligence Sergeant MOS and course were created into an intelligence analyst skillset because of the shortage of SF Intelligence Sergeants experienced as intelligence analysts in the combat theater of Afghanistan (“Special Forces assistant operations and intelligence sergeant,” n.d.). The ability to develop a useful process that
assists SF leaders to evaluate and prepare individuals to attend the SFISC may even assist other career fields tasked with selecting personnel to attend courses or fill important job positions.

This study was the first of many possible future studies looking at examining other aspects of the SF Intelligence Sergeant position. By identifying KSAs, highlighting necessary attributes, and looking at deliberate ways to select individuals to attend the SFISC, one outcome of this study may be to improve the careers of the personnel selected to attend the SFISC. The researcher is hoping this can be accomplished through a formalized process, common to all SF Groups, which could build confidence of succeeding during the course, resulting in improving the confidence, motivation, and competency of the SF Intelligence Sergeant after they graduate. An accepted and useful process could have a big impact within each organization by revising their policy of managing SF Intelligence Sergeants within each company.

**Summary**

There existed a need to overhaul the unsystematic processes used to select future SF Intelligence Sergeants to attend the SFISC and assume the Intelligence position on SFODAs. SF operators assigned to SFODAs were selected, attended the SFISC, and returned to their SFODAs expected to perform as highly competent intelligence sergeants. The expectation of selecting SF operators was arbitrary and random at best, and was examined to decide what could improve the aptitude and preparedness of those selected to become Intelligence Sergeants. The purpose of this DIP research study was to evaluate formalizing the selection process for Special Forces operators attending the
Special Forces Intelligence Sergeant course through identification, development, preparation, and evaluation.

The ultimate aim of this study was to help SF leaders throughout the organization identify those SF operators who were the best fit to attend the SFISC. The researcher used multiple-case study and cross-case analysis to collect and analyze the data in order to let the SF leaders tell their stories, then used that data to determine the findings and provide recommendations (Charmaz, 2014). Finally, this study helped identify the current practices, evaluate all ideas, and determine practical methods that could work for all the SF Groups.
CHAPTER TWO: LITERATURE REVIEW

Introduction

Within this multiple-case study, the researcher applied a grounded theory methodology by researching deeper into the literature, not only before, but most importantly after conducting data collection (Charmaz, 2014). The researcher returned to the literature and examined the topics that emerged after data collection and analysis (Charmaz, 2014). This complete literature review synthesized the relevant sources available in the topic areas of US Army Special Forces (SF), military and civilian intelligence, intelligence analytical attributes, educational and intelligence agency selection methods and processes, case-study research, and transformational and servant leadership.

A limited number of studies looking into Special Forces intelligence existed, and none directly relating to the Special Forces Intelligence Sergeant military (18-Fox) occupational specialty (MOS) were discovered. During an in-depth search of a variety of peer-reviewed general and military research databases (Appendix A), no articles were found directly related to this Dissertation in Practice (DIP) research topic and identified problem. There were a few web sites (Appendix A) that offered explanations along with a historical perspective of US Army Special Forces and the twelve soldiers who formally make-up the Special Forces Operational Detachments – Alpha (SFODA). Although these web sites did provide a breadth of information, they were not peer-reviewed resources, and mostly just provided facts about the SF community.

Since there was limited literature that directly supported the DIP research topic and problem, a variety of searches (Appendix A) were conducted that resulted in suitable
sources indirectly linked to the research problem and possible solutions from the intelligence industry within the US government. This literature showed the necessity of the researcher to examine the need for developing evaluation and preparation programs for future analysts. The intelligence and leadership topics identified during the initial literature review related to the DIP research topic were intelligence analysis and hiring (Marrin, 2009; Wolfberg 2003; Berkowitz, 2001; Treverton & Gabbard, 2008; McConnell, 2007; Dhami, Mandel, Mellers, & Tetlock, 2015; Betts, 2002; Heuer, 2017; O'Brien, 2009), selection and evaluation practices (Dreyfus, 2004; Treverton, 2008; Moore, Krizan, & Moore, 2005), critical thinking (Norris, 1989; Gillespie, 2011; Wolfberg, 2003; Norris, 1989; Popil, 2011; Moore, 2015), transformational and servant leadership (Rice, Brown, Howard, & Ness, 2014; Kirby, Paradise, & King, 1992; Choudhary, Akhtar, & Zaheer, 2013; Shanker & Sayeed, 2012; Lowney, 2003; Ward, 2017; Mintzberg, & Westley, 1992; O’Connor, 2017), professional development within the intelligence industry (Marrin, 2004; Marrin, 2009; Wolfberg, 2006; Wolfberg & Pelley, 2009; Nemfakos, Rostker, Conley, Young et al., 2013), and case-study research (Charmaz, 2014; Yazan, 2015; Birks & Mills, 2015; Creswell, 2013; Hancock & Algozzine, 2016; Richards & Morse, 2007; Yin, 2017). After data collection, the researcher’s follow-up literature review produced some additional sources supporting the need to examine developing a process that purposely selects SF soldiers by identifying, developing, preparing, and evaluating them prior to sending them to the SFISC (Wolfberg, 2004; Bruce & George, 2015; Wardlaw, 2015; Wu, 2013).
US Army Special Forces Operational Detachment – Alpha (SFODA)

One of the busiest elements within special operations is an organization called the US Army Special Forces or more commonly known as the “Green Berets.” These “Green Berets” are organized into twelve-man teams called SF Operational Detachments – Alpha (“Special Forces,” 2016). There was a dearth of peer reviewed literature about the US Army Special Forces because Special Forces units do not openly share organizational data related to its sensitive operations around the world.

An SFODA consists of a team leader, assistant team leader, team sergeant, two weapons sergeants, two engineer sergeants, two medical sergeants, two communication sergeants, and finally one intelligence sergeant who is responsible for managing and analyzing intelligence, and providing sound products to commanders so they can make informed decisions (“Special Forces,” 2016). The Special Forces Intelligence Sergeant’s importance to the SFODA is displayed throughout the study and was especially highlighted during data collection from every SF Group.

Special Forces Intelligence Sergeant or 18F

The Special Forces Intelligence Sergeant is an SFODA team member responsible for intelligence collection, analysis, processing, and dissemination. The acronym, 18F or 18-Fox, refers to the MOS identifier for the SF Intelligence Sergeant and is commonly used to refer to a person holding that position by calling them the “eighteen-fox” (Operations Sergeant, personal communications, May 10, 2018). The primary purpose of the Intelligence Sergeant is to “plan, organize, train, advise, and assist indigenous forces during unconventional warfare (UW) in the collection and processing of data and the creation of intelligence products” (“Special Forces Assistant Operations and Intelligence
Sergeant,” 2009). Special Forces units usually work with indigenous forces, who are primarily paramilitary elements from the specified operational area (“Special Forces,” n.d.). The Intelligence Sergeant is required to apply logical reasoning and critical thinking to produce intelligence products, establish intelligence nets, and perform intelligence collection management for the SFODA (“Special Forces Assistant Operations and Intelligence Sergeant,” 2009). The intelligence products include formal and informal written documents for use in performing military operations. Intelligence nets are those human networks of people from a variety of sections of the local community with whom the intelligence sergeant establishes relationships to assist in conducting intelligence collection and dissemination (“Special Forces Assistant Operations and Intelligence Sergeant,” 2009). Intelligence collection management is a responsibility of the SF Intelligence Sergeant that helps the SFODA leadership keep track of intelligence data and intelligence collection relevant to their operations (“Special Forces Assistant Operations and Intelligence Sergeant,” 2009). All of this is important because there are times during UW operations when the only intelligence analysis comes from the Intelligence Sergeant without access to or support from any outside sources (Bingham, 1946). This also includes the necessity to be an intelligence advisor to the underground element and provide intelligence to the guerilla force (USASOC, 2016).

Several “key-word” searches of US Army Special Forces, evaluations, selection, history, intelligence, and analytical skills produced limited sources relating to the SFISC and the SF Intelligence Sergeant. The existing MOS 18-Fox skills manual fails to describe the various tasks required of the current SF Intelligence Sergeant MOS because of the outdated data provided within the manual. Unfortunately, while researching
Special Forces Intelligence Sergeant literature, the only available Special Forces Intelligence Sergeant skill manual was dated September 20, 1994, which happened to be eight-years before the “complete redesign” of the current Special Forces Intelligence Sergeant course (SFISC). This resource was somewhat irrelevant and missing important data for SF Intelligence Sergeants to reference. Even though there was an outdated skills-manual and a lack of available SF Intelligence Sergeant literature, there were ample peer-reviewed articles related to intelligence analysis, analytical skills, critical thinking, case study, selection methods and processes, research, and transformational and servant leadership that assisted the researcher during data collection and developing recommendations.

**Special Forces Intelligence Sergeant Course (SFISC)**

US Army JFK Special Warfare Center and School (SWC) conducts three SFISC classes each year with a maximum class size of forty-eight students. Each course runs fourteen-weeks, forty-hours per week, and culminates with the qualification and awarding of the military occupational specialty (MOS) of 18-Fox or Special Forces Intelligence Sergeant. The course is split into twelve teaching blocks where students are taught a specific subject and then are tested on that subject to show competency before moving to another subject (SFISC, 2018).

SFISC instructors use lectures, demonstrations, discussions, and practical exercises, to educate the students (SFISC, 2018). In addition, all students complete exams and practical exercises, and give student-briefings to show their knowledge and competency in the subjects of general intelligence, Special Forces operations, irregular warfare analysis, geo-spatial tools, link analysis, threat vulnerability analysis, evasion
plan of action, threat targeting, photography, Special Operations Forces site exploitation, military briefing, and intelligence preparation of the environment product development (SFISC, 2018). Students are allowed fail and retest one primary exam, but if the student fails a second exam, the student, under most circumstances, is not allowed a retest and is recommended for relief from the course (SFISC, 2018). But, there has been a need to graduate every student who attends the course because of the drastic shortage of qualified Intelligence Sergeants in each SF Company, which places the course committee in a peculiar predicament when it comes to failing students (Operations Sergeant, personal communications, May 8, 2018).

**Intelligence Analyst Literature**

Issues facing the intelligence community, including Special Forces leaders, from adopting a common selection process is, in part, due to the enormous differences in hiring practices within all the intelligence organizations (Bruce & George, 2015). Various intelligence journals, think-tanks, international and foreign relation journals, and the National Intelligence University suggest that well-established hiring practices are essential for creating strong analysts who are tasked with analyzing data and producing vital intelligence products for decision makers at all levels of the government (Marrin, 2009; Wolfberg 2003; Berkowitz, 2001; Treverton & Gabbard, 2008; McConnell, 2007; Dhami, Mandel, Mellers, & Tetlock, 2015). Marrin (2009) and Wolfberg (2003), both intelligence professionals and college professors, make compelling points about professionalizing the intelligence analyst career field by first conducting focused evaluations, testing, and interviews before any hiring in order to establish a high standard and to help reduce analyst turnover seen at most intelligence agencies. If these practices
were followed, the intelligence analyst education program could be rigorous and demanding, while developing attendees as intelligence experts or intelligence specialists (Marrin, 2009).

**Identifying the Analytical Attributes**

Wolfberg (2003; 2004), a former intelligence analyst at the Defense Intelligence Agency (DIA), discussed development of an employee screening process for incoming intelligence analysts. A few intelligence agencies actually identified ideal attributes needed in the people they hire to be intelligence analysts (Wolfberg, 2004). Specifically, the DIA, along with the Central Intelligence Agency (CIA), listed a number of essential attributes that would need to be identified prior to hiring an employee as an intelligence analyst.

According to the DIA, a potential intelligence analyst hire should have the following attributes; cultural intuition, pattern recognition, global thinking, imagination, risk taking, and inquisitiveness (Wolfberg, 2003). The CIA stated that their potential intelligence analysts should display the following attributes; innovation, synthesis, learning, questioning, pattern recognition, adaptation, visual thinking, asking “what if,” experimentation, and knowledge sharing (Wolfberg, 2003). In addition, according to renowned intelligence professional, Dr. Richard Heuer (1999), no matter what type of screening or hiring processes an intelligence agency used, every analyst must have reasoning and intuition to function within the world of intelligence.

**Intelligence Analyst Prerequisites**

Marrin (2009) suggested that the lack of a formalized program would make it difficult for intelligence leaders to comprehend the ability of new intelligence analysts to
perform even though the employees successfully completed an initial training program. Dr. Richard Heuer (1999) stated that the selection of a person who could think critically, was intuitive and imaginative, and could use reasoning skills to support assumptions and inferences improved the creation of intelligence. The Army Training Requirements and Resource System (ATRRS) web site listed only a few pre-requisites for those SF soldiers looking to attend the Special Forces Intelligence Sergeant course; soldiers must hold a specific rank and possess a top-secret clearance (“ATRRS,” 2018). According to the ATRRS web site, there is no requirement to possess any experience or analytical skills, or be evaluated, tested, or receive any preparatory classes prior to attending the SFISC (“ATRRS,” 2018).

The Federal Bureau of Investigation (FBI) had a few specific prerequisites that an intelligence analyst candidate must meet to be able to apply to fill an analyst position. Most of the FBI requirements were more in line with failures like not paying your taxes, or being a felon that would disqualify a person from working for the FBI (FBI Web site, 2018). Although it is not specifically a prerequisite, almost every intelligence analyst candidate for the FBI holds at least a bachelor’s degree and most have a master’s degree (FBI Web site, 2018). The Defense Intelligence Agency (DIA) made changes to their hiring practices and also went away from the traditional resume submission and interview process that you see in traditional organizations (DIA, 2018). The DIA changed their focus from hiring those possessing intelligence experience to college graduates who have proven an ability to write and the capacity to learn (DIA, 2018).

There was specific literature that demonstrated a justification for organizations developing screening procedures for persons wishing to enter the intelligence field.
(Wolfberg, 2003). The FBI, DIA, and CIA all hire large numbers of intelligence analysts for the purpose of gathering large amounts of data and analyzing it to provide senior decision makers with sound intelligence. Wolfberg (2003) explained how changes to the processes for screening potential analysts must involve a paradigm shift away from the past ways of just selecting individuals using resumes and interviews. He specifically said that there was a need for a systematic abilities-based pre-employment screening program when hiring intelligence analysts (Wolfberg, 2003). There were specific benefits of formalizing a screening process outlined by Wolfberg that include better analytical focus, success “connecting the dots,” and a more powerful analyst work force. The same thing could benefit the Special Forces regiment and the Intelligence Sergeants tasked with conducting analytical work for SF leaders. The FBI’s web site (2018) specifically outlined how a prospective intelligence analyst can enter the career field by going through a number of evaluations and tests to determine capabilities of critical thinking and logical reasoning, and possessing necessary and relevant experiences. Berkowitz (2001) discussed how intelligence organizations and analysts must professionalize by formalizing required qualifications, to include maintaining focus, and remaining efficient. In addition, there was a demand that intelligence analysts must speak as experts and understand their products, along with meeting a certain set of qualifications when they enter the career field (Berkowitz, 2001).

**Screening Potential Hires**

In the past few decades, fixing issues faced by the military’s intelligence community required a formal, specific selection process for those entering the intelligence analyst field. Sloman (2012) suggests including a systematic process for
selecting SF soldiers to become SF Intelligence Sergeants as part of this change. Wolfberg (2004) said it best, “we need people who can thrive in an analytical environment characterized by uncertainty, incompleteness, and surprise.” The next question was, “How do you screen potential intelligence analysts to have the best chance of thriving in the environment mentioned above?” (Wolfberg, 2004). Sloman (2012) followed that up by showing that the military has done an insufficient job selecting, training, and developing intelligence analysts. A variety of studies were completed by the Rand Corporation, the Marines, and the Army that discovered military analysts lacked the “aptitude to put pieces together to form a logical conclusion” (Sloman, 2012, p. 2).

Treverton and Gabbard (2008) identified intelligence analysts typically work without additional support, making selecting the “right” person prior to specialized training or education quite important. Although Special Forces Intelligence Sergeants are part of a team, they also work alone with no assistance or mentorship from experienced intelligence analysts. Treverton and Gabbard (2008), through their personal observations, even go as far to say that analyst education transitioning from the cold war to post 9/11 did not change as the “real-world” targets changed and multiplied. This resulted in analysts who lacked post 9/11 experience about the terrorist threat to provide senior leaders with inadequate intelligence; ultimately damaging the reputation of the intelligence community. Berkowitz (2001) identified that the failure to progress by not updating intelligence education and processes was a particular reason why there were intelligence failures from time to time, but he also discerned that the proper preparation and selection of future intelligence analysts would help mitigate mistakes or failures in the future. Within the DIA, Wolfberg (2003) believed that change should occur in how
intelligence analysts were selected to fill positions within the agency. In addition, there needed to be specific criteria for selecting those wishing to enter the intelligence field (Sloman, 2012). Wolfberg (2003) did not just suggest that the DIA develop an evaluation program, he almost demanded that a program be put in place to allow for proper screening of potential candidates, worthy of providing sound intelligence products to senior decision makers. It was important for analysts to deeply understand the professional practice problem to which they were seeking to design a solution (Wolfberg, 2003).

**Entrance Exams**

Wolfberg (2003) suggested that existing evaluation and preparation procedures used by other industries were successful in identifying those who showed the ability to succeed academically, which included medical, law, and business schools, along with those interested in entering the Foreign Service. Suitability was something that Wolfberg (2003) explained was important for those entering law and medical school, and it should be serious to intelligence leaders within the intelligence community. Most of these studies, and particularly McConnell’s (2007), spoke about the need to overhaul the intelligence field because it had outgrown past practices, including its hiring processes. Stephen Marrin explained that the intelligence community has been too slow to react to the need for changes in the selection methods used for bringing in talent (Bruce & George, 2015). A need exists to make changes, and starting at the beginning with who intelligence organizations hire seems logical (McConnell, 2007). Although McConnell drove that need forward for change within the intelligence enterprise, the industry still required a formally educated person with a unique set of skills and attributes.
Choosing the wrong person usually resulted in someone unable to use deductive or abductive reasoning to put the “puzzle pieces” together for the creation of intelligence (Treverton, 2008; Wanko, 2017). There was a need to identify those analytical characteristics or attributes that were innate and could not be taught during an intelligence course by developing an entrance exam or administering a standardized test (Bruce & George, 2015). Most individuals interested in becoming intelligence analysts within the intelligence community, must show an ability to think critically, ask questions, and solve problems, which could involve using a more involved selection process including an entrance exam for those wishing to become SF Intelligence Sergeants, (Wolfberg, 2003).

Inherent Analytical Skills

Wolfberg (2003) identified some of the inherent analytical skills a job applicant must display during a screening and evaluation process within the intelligence community. These skills or attributes are self-motivation, curiosity, creativity, awareness, literacy, and inquisitiveness (Wolfberg, 2003). Plus, requiring potential hires to possess a college degree showed an ability to read, write, and learn. Without implementing an evaluation and preparation program, the hope was that training and education would compensate for the lack of a proper, formal screening or selection process for new hires (Wolfberg, 2003). While organizations look for ways to identify quality individuals to fill the positions of intelligence analysts, Bruce and George (2015) discussed the necessity to examine potential hires experience and skills, which included their ability to write and brief well to all audiences before their hiring.
There was a suggestion by Betts (2002) to throw money at hiring competent people to fill analyst positions, but even though money may not be the best answer, finding ways to bring in competent people is vital for sound intelligence analysis. The CIA’s Kent School for Intelligence Analysis suggested that necessary analytical attributes of potential candidates were questioning, innovation, experimenting, recognizing patterns, thinking critically, and constantly asking “what if” (Wolfberg, 2003, p. 20-21). Spracher listed potential competencies suitable for Intelligence Sergeants as critical thinking, communications, collaboration, and leadership (as cited in Wu, 2013, p. 272).

**Critical Thinking**

Critical thinking could be by far the most mentioned and necessary skill required of those individuals seeking employment as intelligence analysts (Norris, 1989). Wolfberg (2003) backed this up by identifying that the perfect analyst would not only think critically, but also have strong “pattern recognition and reasoning” (p. 5) skills. Gillespie (2011) offered two definitions of critical thinking by stating first that it is “the correct assessing of statements” (p. 9) and second that “critical thinking is reasonable, reflective thinking focused on deciding what to believe or do” (p. 10).

Norris (1989) identified the abilities and dispositions for critical thinking, which included seeking reason, being informed, considering alternatives, searching for credible sources, and accepting other points of view. Sloman (2012) explained that within the military the difference between an intelligence specialist and an intelligence analyst is the analyst has the ability to use their experience, critical thinking and data manipulation skills to provide a variety of answers to complex problems, which the intelligence specialist lacks. Norris (1989) made a strong statement by proclaiming that critical
thinking evaluations within educational and hiring settings would continue to affect peoples’ lives, so it was up to intelligence leaders to make sure those evaluations were of high quality in order to bring in the best candidates. Being well-informed was vital to applying critical thinking as an intelligence analyst, and it should be expected of SF Intelligence Sergeants (Gillespie, 2011).

**Evaluate and Educate**

Bruce and George (2015) made a point that a proven way to “observe and evaluate” (pg. 20) an applicant is to allow them to perform under the supervision of an expert in that field similar to on-the-job training or shadowing someone with the necessary experience. A study involving state universities of New York (SUNY) displayed the strong need to evaluate students’ critical thinking abilities at various points of their educational journey (Mckitrick & Barnes, 2012). This research study suggested that professors should examine ways to evaluate their students’ critical thinking abilities prior to them attending a demanding educational course. This was such a strong issue with SUNY that the researchers requested all university’ leaders develop and implement critical thinking assessments throughout their programs (Mckitrick & Barnes, 2012).

There has been a dramatic increase in intelligence specific education in the public and private education sector, which has helped educate those wishing to enter the intelligence workforce or those already working as intelligence analysts looking for professional development choices (Wu, 2013). Wolfberg (2004) agreed that those looking to work as intelligence analysts would find success by showing up with some analytical knowledge. With more universities offering degrees, it would make sense for those wishing to enter the intelligence analyst profession to begin with taking intelligence
specific courses. It would be useful for those in the military wishing to work as intelligence analysts, like SF Intelligence Sergeants, to enroll in intelligence courses, since Sloman (2012) identified that many within the intelligence community view military intelligence analysts as under-educated, filling entry-level positions requiring little skills or training.

From this literature, it looked as though critical thinking was not just important for intelligence analysts, but for all students and employees. Wolfberg’s (2003) research showed that a lack of a formal screening program, similar to those entering the medical and law profession that hindered the intelligence field was still relevant in the intelligence community. In addition, evaluating someone’s critical thinking was an important tool for pre-attendance to almost any college level program that required students to apply that knowledge (Norris, 1989). Norris (1989) mentioned that there must be some evaluation if there is a need to know the students’ existing knowledge before starting an education course.

**Military Leadership Literature**

In the past, military leaders have been known to resist change within their organizations, but today’s military leaders have made attempts to disrupt past practices and looked for ways to bring about change through organizational transformation (Ring, Brown, Howard, & Ness, 2014). Kirby, Paradise, and King (1992) specifically researched leadership behaviors like charisma, intellectual stimulation, and the inspiration to motivate followers to strive for their best. Transformational leaders were a perfect fit for the conduct of this research study because leaders with those transformational attributes tended to look at change as positive, inspired followers to
approve of changes, and continuously looked for ways to improve their organizations (Kirby, Paradise, and King, 1992). Wardlaw (2015) explained how change management was needed within the intelligence community. It would take the right kind of leaders to implement any changes, because even those with the best intentions meet lots of resistance when it comes to change within "their" organization.

**Transformational Leaders**

Learning organizations that allow for change to occur and lessons-learned to drive those changes are needed throughout the Special Operations community (Bruce & George, 2015). Transformational leaders created the circumstances to bring about changes that would allow for improvements to organizational culture, including processes and procedures (Kirby, Paradise, & King, 1992). Again, Choudhary, Akhtar, and Zaheer (2013) explained that transformational leaders inspired followers. Leadership literature positively identified that both servant and transformational leaders were a direct part of "organizational learning" (p. 435), which also led to positive "organizational performance" (Choudhary, Akhtar, & Zaheer, 2013, p. 435).

Transformational leaders were ideally suitable to not only motivate their followers, they also served as coaches and mentors to them (Shanker & Sayeed, 2012). Military leaders must show a willingness to challenge the established norms, but not become reckless, which could result in the loss of support from their followers (Kirby, Paradise, & King, 1992).

**A Paradigm Shift in Military Leadership**

As mentioned above, the change of selecting persons wishing to enter the intelligence profession would take a paradigm shift, meaning it would take strong
leadership as identified and outlined by Lowney (2003). No rule book exists that
explains to SF leaders how to select soldiers within their organization to attend the SFISC
and fill vacant SF Intelligence Sergeant positions (Operations Sergeant, May 8, 2018).
Without any existing process that helps those leaders, it would take strong leadership at
all levels of the organization willing to bring about organizational change while at the
same time bring everyone on board to support the plan. Transformational and servant
leadership leans on education and leader preparation, and also requires a strong
understanding of self through self-reflection (Lowney, 2003).

In addition, “servants as leaders” was how Greenleaf (in Choudhary, Akhtar, &
Zaheer, 2013) explained how leaders place their subordinates above themselves, and this
included their subordinates’ personal success and professional growth. The power of
Choudhary, Akhtar, and Zaheer’s article suggested military leaders could show
competencies and attributes similar to transformational and servant leaders, and was
strengthened by Norman Ward (2017). In his military leadership smart book, Ward
explained that military leadership training promoted developing subordinates, which
included mentoring them to learn and advance professionally. Military leadership
training provided direction to those given the responsibility to make their organizations
better (Ward, 2017).

Summary

For this DIP research study, there was limited direct literature about Special
Forces Intelligence Sergeants. But, there was enough data that identified, outlined, and
asked leaders to look at professionalizing the intelligence analyst career field by
formalizing required qualifications and education requirements, administering analytical
tests, evaluations, and preparatory classes to potential intelligence analysts prior to selecting them to attend any training (Marrin, 2009). The Director of National Intelligence (DNI) prescribed a set of standards for education, training, and career development of intelligence analysts, which would be helpful for any intelligence organization or training program (Nemfakos et al., 2013). The literature did suggest some possible remedies for the evaluation and preparation of Special Forces soldiers to attend the SFISC, but it stayed away from specifically identifying ways to conduct evaluations or prepare those seeking employment as intelligence analysts, which will be explained in detail in chapters four (findings) and five (recommendations).
CHAPTER THREE: METHODOLOGY

Introduction

This section outlines the methodology used for both collection and analysis of data throughout this dissertation in practice (DIP) research study. The chosen methodology for this DIP research study was multiple-case study for the primary purpose of gathering and analyzing data from each active-duty Special Forces (SF) Group as single cases, which ultimately converged into one combined case-study with overall findings and supportive recommendations. Since data collection for this DIP was complex in the sense that there were a variety of participants from many organizations with contrasting experiences, collecting the data in a predetermined order of single cases helped the researcher collect, code, and analyze the data in smaller, understandable pieces before it was organized into a combined multiple-case study (Charmaz, 2014). Using case study not only allowed the flow to follow a logical path as themes emerged from the data, but it allowed the flow to diverge, as needed, after each phase of data collection (Birks & Mills, 2015). It took the researcher approximately three-months while traveling 6200-miles to complete the data collection process. Ethical considerations showed the importance of protecting all personnel, along with preventing sensitive and classified data from entering the interview discussion during the visits to all organizations.

The researcher’s plan for data analysis examined the collected data, identified initial codes and developed themes related to the creation of a selection process, and then identified KSAs, along with necessary attributes, and provided recommendations that directly addressed the identified research problem. In addition, the plan included using a
qualitative data analysis (QDA) program to assist the researcher in organizing and analyzing the large amounts of data collected from the interviews.

**Purpose of the Study**

The purpose of this Dissertation in Practice research multiple-case study was to determine the necessity of systematically identifying, developing, preparing, and evaluating Special Forces operators prior to selecting them to attend the Special Forces Intelligence Sergeant course.

**Research Question(s)**

It was important for this DIP study to focus all attention on the research question, which allowed the data, as it was collected, to guide the questions asked of the subsequent participants. During data collection planning, the researcher used the main research question to determine the participants and the specific interview questions. The following research question guided this qualitative study:

In what ways might Special Forces leaders choose optimum SF operators within their organizations to attend the Special Forces Intelligence Sergeant course?

**Research Design**

The research design for this DIP research study was a qualitative study using a multiple-case study method of data collection and analysis. The proposed design allowed the researcher to identify available participants from each Special Forces Group by allowing leaders within the organizations to determine those participants with a few restrictions for each participant. Once the researcher received the names of each participant and the interview location, then he conducted extensive and detailed face-to-face interviews. After gathering the data at each SF Group, the researcher conducted in-
depth analysis using a method similar to constant comparative analysis used in grounded theory, which included examining and analyzing the collected data, identifying relevant codes and categories through line-by-line analysis, and then preparing for follow-up sessions and follow-on interviews by reviewing and revising the interview questions (Charmaz, 2014). The researcher used a computer-assisted qualitative data analysis software (CAQDAS) program, Nvivo, to sort through the large amounts of data from the interviews, which allowed the researcher to visually identify any patterns across the entire thirty-nine SF Group interviews and five case-studies. This research design showed how the researcher gained access to SF leaders and Intelligence Sergeants, gathered data through face-to-face interviews, analyzed the data to identify codes and categories, and presented findings and provided recommendations for selecting soldiers to attend the SFISC (Yin, 2017).

**Research Method**

Qualitative research was well-suited to help answer the research question through data collection and analysis for this study. The choice to use a multiple-case study methodology was ideal because (1) the researcher conducted data collection from five different active-duty SF organizations, (2) there was a need for detailed data from each SF Group to help answer the research question, and (3) the collected data guided all the recommendations (Yazan, 2015; Hancock & Algozzine, 2016; Yin, 2017). In this field of study, the participants played the primary role in the development of all suggested organizational and procedural changes (Birks & Mills, 2015). By allowing the researcher unlimited access to all participants, the SF leaders were those who showed an openness to organizational change and trust in the researcher (Birks & Mills, 2015). The researcher
protected the participants’ identity by providing codes for each person identifying them as a “Participant” followed by a number, i.e. Participant #1, Participant #2, etc. In addition, the researcher coded each SF Group in no particular sequence of the interviews, i.e. Group 1, Group 2, etc…. After transcriptions were completed and saved, all recorded data was deleted from both the computer and the digital recording device.

**Data Transcription and Analysis**

The researcher collected data using a recording device and took detailed notes during the face-to-face interviews and then uploaded the recordings to a computer into an MP3 format. The researcher used a transcription Web based program (Transcribe) to assist in transferring the audio interview data into text files, so he could review, code, and theme each interview transcript. The researcher immediately began the line-by-line manual coding process by identifying themes within the data using selection process (identification, development, evaluation, and preparation), analyst attributes, and analyst KSAs to help begin the analytical process. The cases, along with the identified themes, were uploaded into the CAQDAS program. When this was complete, all digital recordings were deleted from the digital recorder and the computer. The Nvivo program assisted with pattern identification, additional coding across cases, and highlighting themes within the data by number of mentions throughout the cases (QSR International, 2018). The Nvivo program provided a useful tool to the researcher to analyze large amounts of qualitative data gathered from the thirty-nine interviews from phase-one (QSR International, 2018).

The CAQDAS program allowed the researcher to take all the interview data and easily add it to a project to display the codes and highlight themes for the researcher that
began during memoing and the manual coding process (Yin, 2017). The collected data was specifically needed for the multiple-case study because, as identified by Yin (2017), Creswell (2013), and Richards and Morse (2007), the data collected from participants was the driving factor for developing every recommendation.

**Participants/Data Sources**

The researcher initiated the recruitment of suitable participants through email and telephone calls to established points of contact within each Special Forces Group. Every SF Group responded and was openly supportive for the researcher to conduct the study, agreeing to provide the requested participants. Although the population was limited and specific, there was fluidity to each sample due to the rapidly changing availability of selected participants. Much of the available population changed from week-to-week until days prior to face-to-face interviews due to prior and emerging operational commitments. In addition, there were times during the interviews when participants identified additional candidates that they thought useful to the research study, which definitely strengthened its outcome.

**Population**

The primary population for this DIP research study was US Army SF leaders who had been or were currently responsible for selecting SF operators to attend the SFISC along with SF Intelligence Sergeants at the SFODA or company level assigned to one of the five active Special Forces Groups. Specifically, the SF leaders who participated were Battalion Operations Sergeant Majors and Sergeants, Company Sergeant Majors and Warrant Officers, and SFODA Team Sergeants, Assistant Team Leaders (Warrant Officers), and Intelligence Sergeants. In addition, the USA JFK Special Warfare Center
and School, and the Defense Intelligence Agency, Federal Bureau of Investigations, and
the Department of State participated in the DIP research study. The Special Warfare
Center and School psychologists, who provide testing and evaluation to students entering
the Special Forces field, provided input about the value of deliberately selecting
individuals to attend the SFISC. The intelligence agencies provided management
officials responsible for hiring intelligence analysts and senior intelligence analysts to
participate in the study. The intelligence agencies’ participants assisted with identifying
suitable evaluation methods, selection criteria, KSAs, and attributes to use for developing
recommendations for selecting SF soldiers to attend the SFISC.

Anticipated Sample

The researcher interviewed between five and fourteen available SF leaders and
Intelligence Sergeants from each SF Group who had directly participated in selecting and
sending SF soldiers to attend the SFISC or had previously been selected and attended the
SFISC. This included interviewing “highly competent” SF Intelligence Sergeants
assigned to SFODAs identified by participating SF leaders. Since these organizations
consistently travel all over the world, not all of these individuals were available, so the
researcher only recruited those who were available using a “convenience” sample, and
tried to keep the sample small by interviewing between four to eight individuals from
each SF Group (Babbie, 2017).

However, the researcher interviewed all participants that each SF Group provided,
knowing that the more participants within the identified pool would strengthen the data
collected from each group, help answer the research question, and provide support for the
suggested recommendations. Each SF Group provided at least one Company Sergeant
Major, one SF Warrant Officer, one SFODA Operations Sergeant, and one SF Intelligence Sergeant to participate in the study. It was then up to each SF Group’s leaders to decide how many participants would contribute to the DIP research study. In addition, the researcher interviewed one participant from the DIA, FBI, DoS, and three psychologists from SWC knowledgeable in hiring, evaluating, and selecting people for specific intelligence analyst and special operations jobs.

Permissions

Seidman (2013) explained how difficult it could be to get access to the proposed participants, even when they are members of your own organization. There was a need to identify the official “gatekeepers” (p. 47) within the organization in order to gain the necessary permissions for access to the participants (Seidman, 2013). The researcher requested permission for access to interview the selected sample and use the data they provided for this research study with the promise to share the findings and recommendations with them for potential organizational change. A requirement for conducting the study within the SF Groups required to allow the Judge Advocate General (JAG) officers (law advisors) within the participating organizations to review and approve release of the transcribed data collected from all the SF Group interviews (“US Army Judge Advocate General,” 2018). This is not true for the data collected from the intelligence agencies, which is immediately available for public release. No collected data was restricted from use in the DIP research study.

Data Collection Tools

The researcher as an interviewer was the primary data collection tool for this research study. For the researcher to collect relevant data, the researcher primarily used
the interview method and followed it up with memoing during every phase of the study. Since the researcher used interviews as the primary method of data collection throughout this study, there was a need to record the interviews. The researcher used a digital voice recorder throughout data collection, but was restricted to only note taking at the Department of State and the Defense Intelligence Agency because the interviews were held within classified areas. The researcher kept detailed notes by memoing using a personal journal to help him remain focused, provided immediate analysis, and allowed him to self-reflect (Yin, 2017; Charmaz, 2014). The researcher reduced any unanticipated biases by regularly reviewing his memos and immediately addressing any identified issues.

**Voluntary Survey**

At the completion of individual interviews, the researcher provided each participant the ability to offer additional thoughts at their convenience using a voluntary survey they accessed online using information provided by the researcher via business cards. This provided all participants access to a private venue in case they had information to provide that was not identified during the interviews (Seidman, 2013). Seidman (2013) suggests follow up interviews, but because it was not possible to conduct follow-up interviews in person, the researcher used e-mail communications.

**Data Collection**

Face-to-face interviews were the best and only method suitable for collecting data from the identified participants for this research study. Identifying specific participants before the interviews proved to be difficult until the actual data collection began. A Team Leader believed there was always the chance of the identified population being
deployed at a moment’s notice, which at times forced the researcher to rely on the available population at the time of data collection. Phase one of data collection provided quite a large sample pool, while the sample size for phases two and three were small and limited, but only required one participant from each intelligence agency and SWC (schoolhouse).

According to Babbie (2017), it was ideal to let the participants choose the site for the interview, but the researcher thought it would be worthwhile to suggest an off-work site that would minimize interruptions and helps the participants open up without their co-workers hearing their answers to questions. In the end, all interview locations were within the workspaces of the participants with one set of interviews conducted via video teleconference (VTC). It was fortunate that the few interruptions never hindered any of the interviews between the researcher and the participants. In addition, there were not any moments where the participants seemed to be uncomfortable with answering questions.

**Data Collection Procedures**

The researcher used a multiple-case study method of data collection with five single-case studies to individually examine each SF Group’s methods of selecting personnel to attend the SFISC. He combined and analyzed the data into an overall single case study showing the findings from all the SF Groups and presenting useful recommendations. The researcher constantly asked all the participants “can you tell me more?” while getting rich data that helped answer the research question (Richards & Morse, 2007). This helped the researcher understand the past and current selection methods, if any existed, and their thoughts on structuring the selection process, along
with identifying suitable KSAs that might improve the identification of candidates to attend the SFISC and become SF Intelligence Sergeants. In addition, Richards and Farrokhnia (2016) identified a “knowledge-building approach” (p. 2) as a key to gathering data due to allowing each case to build upon each other, which worked well for multi-case study research even though it is normally used within grounded theory. The case-study method looked at processes and was useful for conducting data analysis for problem solving and inquiry (Yin, 2017). Richards and Ferrokhnia specifically discussed why it was not all that important how much data was collected, but how practical and efficient the data that was collected, which made sense while interviewing each participant at the SF Groups. The data collection process specifically involved developing focused interview questions and keeping each participant on-topic.

Table 1

*Detailed Data-Collection Timeline*

<table>
<thead>
<tr>
<th>PHASE</th>
<th>ORGANIZATION</th>
<th>LOCATION</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>ONE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st Special Forces Group</td>
<td>Joint-Base Lewis-McCord</td>
<td>June 18, 2018</td>
<td>September 7, 2018</td>
</tr>
<tr>
<td>3rd Special Forces Group</td>
<td>Fort Bragg, NC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5th Special Forces Group</td>
<td>Fort Campbell, KY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7th Special Forces Group</td>
<td>Eglin AFB, FL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10th Special Forces Group</td>
<td>Fort Carson, CO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TWO</td>
<td>USA JFK Special Warfare Center and School</td>
<td>Fort Bragg, NC</td>
<td>August 27, 2018</td>
</tr>
<tr>
<td>THREE</td>
<td>Department of State</td>
<td></td>
<td>August 22, 2018</td>
</tr>
</tbody>
</table>
The data collection began immediately after proposal and IRB approval. As part of the data collection plan, the researcher finalized the participants for each phase/section of data collection, reviewed the initial questions to ask each participant, traveled to the identified interview location, interviewed the participants, transcribed the results, and initiated the analysis of the collected data. There were three phases to the data collection part of the research study, and included interviewing members from each of the five active-duty SF Groups, and one member each from the Department of State, Defense Intelligence Agency, the Federal Bureau of Investigations, and three psychologists from the US Army JFK Special Warfare Center and School (see Table 1 for phase breakdown). The researcher recognized data saturation was reached after interviewing eighteen participants, and according to Crouch and McKenzie (2006) and Guest, Bunce, and Johnson (2006), data saturation is usually reached between twelve and fifteen participants. Even though data saturation became evident, for the purpose of this study, the researcher had to interview each SF Group to validate the findings and recommendations.

Phase-One

Phase one, with five individual segments, included detailed, in depth interviews with SF leaders responsible for selecting and sending SF soldiers to attend the SFISC and current SF Intelligence Sergeants recommended by the SF leaders. During phase one, the researcher interviewed thirty-nine participants. The breakdown of the number of participants from each SF Group is shown in Table 2. The researcher used the data
collected during phases two and three (explained in detail below) to examine each individual case, and then the researcher synthesized all cases into one multiple-case study to present findings and recommendations (Yin, 2017). In addition, several opportunities presented themselves allowing the researcher to expand the participant pool at the suggestion of the SF Groups and Intelligence Agencies. The researcher used memoing as a method of personal data collection and reflection during all phases of data collection as a way to develop an audit trail for proof of decision making, help identify findings, examine any personal biases, and helped develop intellectual assets (Birks & Mills, 2015).

Table 2

<table>
<thead>
<tr>
<th>Phase</th>
<th>Case-Study</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>One</td>
<td>Group 1</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Group 2</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Group 3</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Group 4</td>
<td>14</td>
</tr>
<tr>
<td></td>
<td>Group 5</td>
<td>7</td>
</tr>
</tbody>
</table>

During each phase of data collection, the researcher provided each participant an information paper about the study and their rights as participants (Appendix B). Then, the researcher began the interview by introducing himself, explaining the purpose of the study, and establishing rapport with the participants. He then asked a few initial, scripted, biographical questions to allow each participant to get comfortable speaking. After the participants were relaxed, they were asked about the processes they use for selecting soldiers to attend the SFISC, to include their thoughts on what makes an outstanding SF Intelligence Sergeant. The interview protocol (Appendix C) outlines each
phase’s interview processes and initial questions. Phase-one involved the researcher traveling to each SF Group throughout the United States to interview the participants about current processes and highly competent SF Intelligence Sergeants, which included the identification, development, preparation, and evaluation of soldiers selected to attend the SFISC.

**Phase-Two and Phase-Three**

Phases two (Intelligence Agencies) and three (SWC) of data collection allowed the researcher to gather data from those professionals who recruit, evaluate, and hire personnel to fill intelligence analyst positions to analyze, strengthen, and support the data he collected during phase one (SF Groups). Phase-two and phase-three looked at how other intelligence and education organizations identify, evaluate, and select future intelligence analysts, and future special operations soldiers. After asking initial questions, the researcher used probing questions to get the participants to elaborate on specific topics relevant to selecting soldiers to attend the SFISC, and identifying the knowledge, skills, and abilities (KSA), and attributes they see in “highly competent” SF Intelligence Sergeants (Charmaz, 2014). After transcribing the data from each SF Group, completing the analysis, and identifying the findings, the researcher emailed all participants the interview transcription and relevant findings for their specific case-study for concurrence and comments to help validate the findings.

**Ethical Considerations**

Even though organizations participating in this study have access to classified material, all the participants work for the government, have secret and top-secret clearances, and understand how to protect that data. The Special Forces Intelligence
Sergeant course has a pre-requisite for all students to have a top-secret clearance, but this study did not use any sensitive or classified data, nor did the researcher classify any data during the conduct of this study. The researcher asked all participants to refrain from disclosing any classified information, especially while recording, during the interview process. The researcher was only interested in identifying the best way to select individuals to attend the SFISC. In addition, the intelligence office, public affairs office, and the Judge Advocate General (JAG) reviewed all data gathered during interviews and determined that none of the collected data was restricted for public release. Finally, the researcher sent the findings from their case-study to each participant for review, comments, and allow them to acknowledge correctness. This ultimately added a second layer of protection by removing researcher biases and from accidently releasing sensitive and personal information from participants without permission. These steps were taken for each case-study.

Since the researcher used a multiple-case study method that told the story of selecting SF operators to attend the SFISC, there was a need to stay away from forming any preconceived notions that could fog the researcher’s ability to interpret the collected data (Charmaz, 2014). The researcher did not sway the participants, especially by trying to convince the SF leaders to use a theory or process that the researcher identified as the “best” fit for a selection process. Herr and Anderson (2015) reminded researchers to address and plan how to inform the participants about the true purpose of the study, but at the same time establish the best chance to collect the needed data without compromise. First, the researcher did this by being honest about the purpose and importance of the study for the SFODA and the regiment, and provided each participant with a copy of the
research participant’s bill of rights, which is included in Appendix E. The researcher established common ground with the participants by explaining his experiences as an SF officer, and then he asked all participants to answer each question honestly and truthfully using their own knowledge and experiences.

Deliberate planning and honest reflection allowed the researcher to present the findings as participants provided them throughout the data collection and analysis (Herr and Anderson, 2015). Herr and Anderson (2015) discussed how the researcher needed to collaborate with the community that benefited from the research study, thus getting “buy-in” from those who benefited the most from the research. Biases were minimized by (1) using the case study method to collect and analyze the data and (2) allowing those leaders responsible for selecting individuals to attend the SFISC to have every opportunity to participate in this study. In addition, the researcher understood it would be impossible to solve all problems related to the SF Intelligence Sergeant MOS within this study, so logically the study began with examining what has happened, what is currently happening, and what might happen before selecting SF operators to attend the SFISC.

The risks involved with doing this DIP research study were evaluated, especially potential risks to the participants of the study. Overall, the risks to the participants were low because the topic was not sensitive in nature and their personal identifiable information (PII) was well protected due to coding their PII, while the organizations’ intelligence and public affairs office reviewed all data collected prior to public release, which prevented any unauthorized disclosure. This extra layer of scrutiny helped the researcher feel comfortable about releasing the DIP research study for public consumption.
Summary

This DIP research study was a qualitative study using the multiple-case study methodology for data collection and analysis involving five individual cases. It allowed the researcher to examine each case separately, and then looked for commonalities within each individual case using cross-case analysis that synthesized the cases, answered the research question, and provided a variety of recommendations (Yin, 2017). The participants for this research study were SF leaders with direct responsibility for selecting SF operators to attend the SFISC, along with some recommended SF Intelligence Sergeants. The participants in the study provided their honest perspective to bring about organizational change. To help the researcher analyze the data about those perspectives, the large amount of interview data was organized, transcribed, and analyzed with the assistance of a CAQDAS program called Nvivo (Babbie, 2017). Finally, the timeline used allowed the researcher to complete the study in a reasonable, predetermined time.
CHAPTER FOUR: FINDINGS

Introduction

This entire dissertation in practice (DIP) research study is based on how all the participants from all five active-duty Special Forces (SF) Groups responded to the interview questions about the SF Intelligence Sergeant (18-Fox) and the importance of a deliberate and common selection process for sending ideal candidates to the SF Intelligence Sergeant course (SFISC). The participants provided provocative data while answering the interview questions. When the participants were able to just speak openly and when it seemed more like a conversation than a formal interview, they provided the most useful information. In total, the researcher interviewed thirty-nine participants from the five active-duty SF Groups. Each interview took between thirty-minutes and one-hour.

Because the researcher was a former Special Forces officer and a member of Special Operations community, he had the ability to get each participant talking about things that normally would not be shared with a researcher from outside the SF community. The participants responded in detail to the interview questions, which ultimately answered the research question, allowing the researcher to present relevant findings. The researcher was able to glean data from the interviews that answered the research question and supported the purpose and aim of the study. The researcher’s analysis included manual coding to identify the initial codes from all interview transcripts, and then followed it up by reviewing the created themes within Nvivo to help verify or identify new themes.
The participants were all seasoned SF leaders who had experience working with and selecting SF soldiers to attend the SFISC and ultimately becoming qualified SF Intelligence Sergeants. These soldiers all had at least ten-years of military experience and had deployed on both combat and non-combat overseas deployments. These SF leaders were SF Sergeant Majors (Co SGM), SF Operations (Team) Sergeants (Tm/Ops SGT), Company and SFODA Warrant Officers (Co/Tm WO), and experienced SF Intelligent Sergeants (Intel SGT) within one of the five active-duty SF Groups.

**Purpose of the Study**

The purpose of this Dissertation in Practice research multiple-case study was to determine the necessity of formally identifying, developing, preparing, and evaluating Special Forces operators prior to selecting them to attend the Special Forces Intelligence Sergeant course.

**Research Question(s)**

It was important for this DIP study to focus all attention on the research question, and allow the data, as it was collected, to guide the questions asked of the participants. During data collection planning, the researcher used the main research question to determine what should be observed and the specific questions to ask the participants.

The following research question guided this qualitative study:

In what ways might Special Forces leaders choose optimum SF operators within their organizations to attend the Special Forces Intelligence Sergeant course?
Presentation of the Findings

Phase One: SF Group Case Studies

In this section, the findings are presented as five case studies, one for each SF Group. Each case is a synthesis of information/opinions provided by the participants during the interviews. The case studies include the primary results of each separate interview phase and include the top six themes presented from each SF Group. The themes identified in each case study show the primary topics discussed by the participants relating to selecting SF soldiers to attend the SFISC. In addition, selected demographics of each participant are displayed in tables within each case study. Each case study shows the past ways and future ideas of selection processes, which included highlighting those attributes deemed important to the participants. The researcher completed each case study by outlining each step of the selection process.

Case Study One

Primary results. Group one provided five participants for the study consisting of a variety of leaders at the company and Special Forces Operational Detachment – Alpha (SFODA) level, including experienced SF Intelligence Sergeants (18-Fox) (see Table 3). The top-six themes, highlighted by Group One participants during the interviews, were (1) SF Intelligent Sergeant attributes, (2) the development step of the selection process, (3) experiences of potential 18-Foxes, (4) the identification step of the selection process, (5) the evaluation step of the selection process, and (6) selecting the “right” person.
Table 3

*Demographics of Group One*

<table>
<thead>
<tr>
<th>Position</th>
<th>18-Fox</th>
<th>Years in SF</th>
<th>Deployments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Co SGM</td>
<td>No</td>
<td>18</td>
<td>10</td>
</tr>
<tr>
<td>Tm SGT</td>
<td>Yes</td>
<td>11</td>
<td>9</td>
</tr>
<tr>
<td>Tm SGT</td>
<td>Yes</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>Intel SGT</td>
<td>Yes</td>
<td>16</td>
<td>11</td>
</tr>
<tr>
<td>Tm SGT</td>
<td>Yes</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Average</td>
<td>80%</td>
<td>12.40</td>
<td>8.20</td>
</tr>
</tbody>
</table>

*Note.* The SF positions held by the DIP research study participants from Group One are SFODA Team Sergeant (Tm SGT), SFODA Warrant Officer (Tm WO), SFODA Intelligence Sergeant (Intel SGT), and SF Company Sergeant Major (Co SGM).

**Selection Processes.** When it comes to selecting the “right” soldiers today, an SF Sergeant Major stated it is all about timing because you may only have SF Intelligence Sergeants for a few years after they graduate the SFISC and before they are reassigned or promoted. This limits the time available for leaders to develop or evaluate those they see as potential 18-Foxes on their SFODAs. In addition, selection was commonly based on choosing soldiers already possessing a top-secret clearance because the management of selecting SF soldiers to attend the SFISC was inefficient at best, and the clearance process was taking too long. An SFODA Team Sergeant believed that the company and battalion leaders just trust that their SFODA Operation Sergeants will select the “right” SF soldiers to attend the SFISC and fill slots as SF Intelligence Sergeants. Table 4 below highlights the Intelligence Sergeant attributes identified by the participants during the interviews.

**Identification.** Finding or identifying the “right” person was difficult when the operational tempo (Op-tempo) was incredibly high within the SF Groups. According to a Team Sergeant, most of the time, SF leaders were stuck choosing a person who was available over a person who was the best fit for that position. Counselling was the
method of choice used within Group One to help identify the soldiers who showed interest in becoming 18-Foxes. An SFODA Team Sergeant used counselling as his preferred method for identifying potential 18-Foxes to determine a soldier’s interest in the Intelligence Sergeant job, allowing the potential Intelligence Sergeant to begin the development process for attending the SFISC. A majority of the participants agreed that it made everything easier if the person volunteered to go to the SFISC, which sped up the selection process. In addition, a Team Sergeant and Intelligence Sergeant agreed that even if a person volunteered, the leader should still determine if the soldier is the right fit for doing analytical work.

Table 4

*Intelligence Sergeant Attributes for Group One*

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Participant Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trustworthy</td>
<td>&quot;The 18-Fox must be trusted to provide the most reliable information to the commander to make decisions.&quot;</td>
</tr>
<tr>
<td>Hard Worker</td>
<td>&quot;You need someone who cares enough to look at the details and it's willing to put in all the work no matter how long it takes.&quot;</td>
</tr>
<tr>
<td>Responsible</td>
<td>&quot;He always seems to want more and that included more responsibility.&quot;</td>
</tr>
<tr>
<td>Proactive</td>
<td>&quot;He must be a guy that is willing to take charge and knows exactly what his job is and needs little to no guidance.&quot;</td>
</tr>
<tr>
<td>Mature</td>
<td>&quot;It must be a mature guy that is ready to take on a lot of responsibility. It could be a staff sergeant but it must be a Specially selected staff sergeant.&quot;</td>
</tr>
</tbody>
</table>

*Development.* Although not ideal, participants felt that putting untrained SF soldiers into SF Intelligence Sergeant positions was not ideal for the success of the SFODA, but was usually beneficial for the development of those who might go onto the SFISC. During the interviews, the participants made a point to express an important detail about developing SF soldiers prior to their attendance at the SFISC, which required them gaining valuable experience through some type of immersion into the intelligence
field. By far, the participants expressed that mentorship from their leaders and experienced SF Intelligence Sergeants was necessary to the development of those identified to attend the SFISC and assume the 18-Fox position.

An SF Company Sergeant Major consistently mentioned that mentorship was not only consequential, but a must for those identified to attend the SFISC and should specifically involve guidance from an experienced 18-Fox, when available. The Sergeant Major even went as far to say that in some circumstances it took the entire team mentoring each other in what he called a “Team Synergy.” Every participant from Group One mentioned either mentorship, shadowing, or on-the-job training (OJT) as a must for development of a future 18-Fox.

**Preparation.** In response to a rise in failures in the SFISC, Group One created a SFISC pre-course for those selected soldiers to gain confidence before they began the course. This took place due to the number of students from the unit who had failed the course. The leaders felt this would be the best way to target those who were not prepared for the course by introducing them to some of the tougher subjects they would experience in the SFISC. As stated by an SFODA Operations Sergeant, the only reason the pre-course exists is because of past failures of students from their unit, and not necessarily to make sure every future 18-Fox was prepared to successfully tackle the course.

**Evaluation.** An evaluation phase would be a useful way to test the SF soldiers’ ability to complete specific tasks that students would experience while in the SFISC. Participants from Group One consistently pointed out the importance of establishing a quality evaluation step for the success of an overall selection process. Every participant provided examples of what evaluation meant to them, but stopped short of providing a
detailed account of what an evaluation would look like to them. A Team Sergeant specifically explained an evaluation by using the following example: The current 18-Fox or SFODA Warrant Officer gives the identified soldier a list of simple intelligence related tasks that would need to be successfully completed in order for the person to be recommended to attend the SFISC. All participants agreed that an evaluation should be required prior to someone being selected to attend the SFISC.

Case Study Two

**Primary results.** Group two provided six participants for the DIP research study. The demographics of this group are presented below in Table 5. During the initial introduction between the researcher and the participants, the participants were surprised someone cared enough to look into how to improve the SF Intelligence Sergeant selection process. The participants were all leaders serving at the battalion, company, or SFODA level. All the participants answered each question and were open to going into detail about the SF Intelligence Sergeant and the processes for selecting SF soldiers to attend the SF Intelligent Sergeants course and assume the position as an SFODA 18-Fox. Throughout the interviews the top-six themes highlighted by the participants were (1) knowing analysis, (2) attributes of an SF soldier to attend the SFISC, (3) the identification step of the selection process, (4) the selection process, (5) the development step of the selection process, and (6) the consequences of sending the “wrong” person to the SFISC.
Table 5

Demographics of Group Two

<table>
<thead>
<tr>
<th>Position</th>
<th>18-Fox</th>
<th>Years in SF</th>
<th>Deployments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intel SGT</td>
<td>Yes</td>
<td>13</td>
<td>5</td>
</tr>
<tr>
<td>Intel SGT</td>
<td>Yes</td>
<td>14</td>
<td>6</td>
</tr>
<tr>
<td>Tm SGT</td>
<td>No</td>
<td>12</td>
<td>7</td>
</tr>
<tr>
<td>Tm WO</td>
<td>Yes</td>
<td>14</td>
<td>6</td>
</tr>
<tr>
<td>Co SGM</td>
<td>Yes</td>
<td>15</td>
<td>6</td>
</tr>
<tr>
<td>Ops SGT</td>
<td>No</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Average</td>
<td>67%</td>
<td>12.33</td>
<td>5.67</td>
</tr>
</tbody>
</table>

Note. The SF positions held by the DIP research study participants from Group One are SFODA Team Sergeant (Tm SGT), SFODA Warrant Officer (Tm WO), SFODA Intelligence Sergeant (Intel SGT), SF Company Sergeant Major (Co SGM), and SF Company Operations Sergeant (Ops SGT).

Selection Processes. The problems with blindly sending soldiers to the SFISC without determining if they are the right fit for working as SF Intelligence Sergeants are routinely expressed by the participants of Group Two. The thoughts, expressed by the participants from Group Two, were to develop and implement a method of selecting team members to attend the SFISC, along with establishing some pre-requisites that must be met before someone attends the course. An SF Warrant Officer mentioned that SFODAs should nominate personnel and the company leadership should approve them to attend the 18-Fox course. Also, noted by the Warrant Officer was the idea that there should be “minimum time in Special Forces requirements” to make sure the selectee understood SF operations, received some development, and received his top-secret clearance before attending the SFISC. Group Two’s participants knew there were issues with ways some leaders selected people to attend the SFISC. In the past, volunteers from the SFODA were solicited and simply sent to the course with no screening or evaluation at all.

An SFODA Team Sergeant identified a way to help send the “right” people by suggesting that a relationship must be established between the SF Groups and the 18-Fox
committee, which administers and provides the instructors for the SFISC. This may include the 18-Fox committee providing the SF Groups with a quarterly newsletter or something similar that would inform the SF Groups how to prepare their incoming students for better success within the SFISC. Ideally, a selection board could be held at the SF Company level, which would determine those ready to attend the course and could be used within the evaluation phase. A few Group Two participants did mention the negative part of the past selection processes by stating that if someone was solely selected because of their seniority or in order to help them get promoted, it usually did not ultimately provide the SFODA with a motivated or highly competent 18-Fox.

Some participants highlighted talent management as a suitable way to select the right persons to attend the SFISC and work as Intelligence Sergeants. It was strong enough for an SF Company Operations Sergeant to say that talent management is the best way to select people to be 18-Foxes if done properly. SFODA leadership could select individuals who show the potential to work as Intelligence Sergeants, but the practice to select the “right” team member should be the same across all SFODAs. Table 6 highlights the attributes identified by the participants during the interviews.
Table 6

*Intelligence Sergeant Attributes for Group Two*

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Participant Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Worker</td>
<td>&quot;The 18-Fox must be ready to work very hard and be ready for long hours.&quot; He is the one guy on the team that must work all the time. I must know as an 18-Fox that there's a lot of responsibilities included and doing the job right.&quot;</td>
</tr>
<tr>
<td>Motivated</td>
<td>&quot;It must be a guy who has the drive and is motivated to be an 18-Fox.&quot;</td>
</tr>
<tr>
<td>Responsible</td>
<td>&quot;The 18-Fox has a lot of responsibility and does a huge amount of work on a team. He is responsible to get started the find, fix, and finish aspect of what an SFODA can do. He provides atmospherics for what is going on in the area of operations.&quot;</td>
</tr>
<tr>
<td>Proactive</td>
<td>&quot;He must be able to work with minimal guidance.&quot;</td>
</tr>
<tr>
<td>Mature</td>
<td>&quot;Again, I just want to add it all goes back to that maturity that experience that expertise mastering his craft in his current job.&quot;</td>
</tr>
</tbody>
</table>

*Identification.* Early identification is necessary to have enough time to develop, prepare, and evaluate that person to attend the SFISC, and determine if they are the “right” person to assume the position of the 18-Fox on an SFODA. The idea across Group Two’s participants was to identify candidates early, either through volunteering or counselling, and immediately move on to development if they are found to show the potential of working as an Intelligence Sergeant. An SFODA Intelligence Sergeant thought that a way to initially identify an individual as a potential 18-Fox was by reviewing his administrative records and past evaluations. Early in the process, you must find a person who is motivated to be an 18-Fox or they may not be willing to put in the hours an 18-Fox commonly puts in on a daily basis. Every participant stated the person selected must be willing to work hard and put in the time. An SFODA Warrant Officer and Intelligence Sergeant, along with an SF Company Operations Sergeant believed that counselling was vital to the early identification of a team member’s interest in going to
the SFISC. Again, this would allow for the team leadership to begin the development phase of the selection process early in an SF Operator’s career. Finally, it is finding those volunteers who seem to fit into that mold of an 18-Fox.

**Development.** Building a candidate’s critical thinking and analytical skills better prepares students to attend the SFISC, and provides them with a necessary confidence to assume the position as an SF Intelligence Sergeant. An SFODA Intelligence Sergeant shared that having the opportunity to develop and gain valuable experience prior to attending the course enabled him to be a more effective Intelligence Sergeant once he returned to his unit. The participants explained that development was an ideal scenario for preparing someone to assume the SF Intelligence Sergeant position by allowing them to shadow or receive mentorship from an experienced 18-Fox.

Those SF soldiers who were mentored before they attended the SFISC are also the SF Intelligence Sergeants, after gaining experience as Intelligence Sergeants, who searched for their replacements and began the process to develop those future 18-Foxes using mentorship. More than any other method of development, all the participants agreed that the ability to provide mentorship to future 18-Foxes by experienced Intelligence Sergeants made all the difference. The idea was to proactively ensure the SF soldier received all available opportunities to gain valuable intelligence experience through a well-planned development step of the selection process. The Group Two participants listed mentorship, OJT, and shadowing as the priorities for developing the future SF Intelligence Sergeants. They also believed that a well-run development step could eliminate sending the “wrong” person to the SFISC.
Preparation. A participant from Group Two suggested that a group of individuals going to the same SFISC class should prepare together prior to attending the course. As mentioned above, a good preparation plan for all the SF Groups should include an established relationship with the 18-Fox committee at the USA JFK Special Warfare Center and School (SWC). As long as it is carefully created, a preparation course to help those navigate through the SFISC with a little more confidence and education could improve the quality of students attending and graduating from the course. Although most participants felt a preparation course would be rewarding for potential SFISC students, one SFODA Intelligence Sergeant felt that there was no need to prepare those attending the SFISC because the course should teach what is necessary and there is always a chance that potential students could develop bad habits from a pre-course prior to attending the course.

Evaluation. The participants from Group Two expressed that it is best for future 18-Foxes to be evaluated prior to being selected to attend the SFISC. This would involve a variety of strategies to evaluate whether an identified person had the capacity to do intelligence work. The participants mentioned that a good way to evaluate future SF Intelligence Sergeants is to give them intelligence related tasks to complete during training exercises or deployments while under the guidance of an experienced 18-Fox. An SF Warrant Officer even went as far to say that creating a checklist that Team Sergeants could use to evaluate someone they identified as suitable to fill the 18-Fox position would be useful. In addition, every participant knew that enough time was not always available to allow for a detailed, deliberate, and common selection process for selecting the “right” person and evaluating if it was the right choice. An evaluation
process should not be forced upon the teams, but there needs to be something for the
team leadership to use as a tool to evaluate those identified as future 18-Foxes, according
to an SF Sergeant Major.

Case Study Three

Primary results. Group three provided seven participants for the DIP research study. Each participant volunteered to sit with the researcher and was eager to answer the interview questions for the researcher. Each interview was held in the same location within a Battalion conference room, which included taking detailed notes, using a digital voice recorder, and providing the participants with the list of interview questions for them to follow along. The participants were all leaders at the Battalion level and lower with most of them currently assigned to the company and SFODA. Each participant answered the questions and did not mind going into detail about the SF Intelligent Sergeant and the processes for selecting SF soldiers to attend the SF Intelligent Sergeants course. The top-six themes were highlighted by the participants during the interviews consisting of (1) the attributes of an SF soldier to attend the SFISC, (2) 18-Fox management, (3) the development step of the selection process, (4) consequences of sending the “wrong” person to the SFISC, (5) identifying the 18-Fox position as a critical position, and (6) the identification step of the selection process. All participants admitted that no formal process existed for selecting SF soldiers to attend the SFISC and become Intelligence Sergeants. Table 7 displays the demographics of all participants within group three.
Table 7

Demographics of Group Three

<table>
<thead>
<tr>
<th>Position</th>
<th>18-Fox</th>
<th>Years in SF</th>
<th>Deployments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tm SGT</td>
<td>No</td>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>Tm WO</td>
<td>No</td>
<td>12</td>
<td>7</td>
</tr>
<tr>
<td>Tm SGT</td>
<td>No</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>Tm WO</td>
<td>Yes</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Ops SGM</td>
<td>No</td>
<td>11</td>
<td>12</td>
</tr>
<tr>
<td>Intel SGT</td>
<td>Yes</td>
<td>14</td>
<td>9</td>
</tr>
<tr>
<td>Intel SGT</td>
<td>Yes</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>43%</strong></td>
<td><strong>9.86</strong></td>
<td><strong>7.71</strong></td>
</tr>
</tbody>
</table>

Note. The SF positions held by the DIP research study participants from Group One are SFODA Team Sergeant (Tm SGT), SFODA Warrant Officer (Tm WO), SFODA Intelligence Sergeant (Intel SGT), and SF Battalion Operations Sergeant Major (Ops SGM).

Selection Processes. Again, the consensus between the participants was that they were not exactly sure how a specific selection process should look, but there must be something in place to help with selecting the best personnel. Group Three participants thought it would be useful to provide potential 18-Foxes the ability to gain valuable experience before receiving the responsibility as the Intelligence Sergeant. While developing and implementing a selection process for sending SF soldiers to the SFISC, there must be a way to determine if the future 18-Fox can critically think, conduct basic analysis, and write and brief well. Most of the participants expressed the need to select “senior” SF soldiers to attend the SFISC, but said they could not be too senior or you would lose them to promotion, reassignment, or retirement too soon after they graduated the course. An SF Warrant Officer and Sergeant Major both felt that a selection process should remain at the company or SFODA level because no one else knows the SF soldiers better than the leaders who work with them every day. Table 8 highlights the attributes identified by the participants during the interviews.
Table 8

Intelligence Sergeant Attributes for Group Three

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Participant Support</th>
</tr>
</thead>
</table>
| Motivated    | "18-Fox must be driven and have the passion to do the job."
               | "If he is motivated and possesses some of those traits then that's the perfect guy."                                                                |
| Hard Working | "I could not have asked for anything more but for him to work very hard, do his work without being told, be trustworthy, smart inquisitive, and has passion." |
| Proactive    | "He knows what has to be done and does not have to be told."                                                                                       |
               | "Whatever Mission we are doing, not having to give him specific guidance because he is a self-starter."                                            |
| Trustworthy  | "The most important thing is I want trust in that person."                                                                                         |
| Adaptable    | "So, the first thing I would look for is adaptability intelligence and the other things I spoke about earlier."                                      |

Identification. While an SF Master Sergeant felt SF leaders needed to identify those younger soldiers who might lack the SF experience but display a knack for intelligence work so they could begin the development process, an SF Warrant Officer thought performance counselling or volunteering were the best ways to identify those interested in intelligence. Part of the identification step would involve finding out why a person wished to work as an SF Intelligence Sergeant and determining if their answers were suitable for assuming the position. The SFODA leaders play an important part of the selection process by speaking with their subordinates to determine who may have thoughts about becoming an SF Intelligence Sergeant. Finally, the simple part of the identification step is getting those who are motivated or have the drive to be an 18-Fox step forward as volunteers.

Development. The participants from Group Three thought that the development phase was vital to those identified to go to the SFISC and work as 18-Foxes. A few
participants thought it was beneficial for SF soldiers to attend intelligence related courses taught by agencies within the intelligence community, which may have the ability to pique the interest of those thinking about becoming SF Intelligence Sergeants. Even if those who attend those intelligence classes find out the intelligence work does not interest them, it still provides them with a valuable education, while at the same time eliminates the consequences of sending the “wrong” person to the fourteen-week SFISC. In addition, the participants identified that quality development was through shadowing, mentoring, or OJT. Decisions made by the SF leaders depended on the time available for the development phase. It is ideal to have enough time to see how the potential 18-Fox handles working with an 18-Fox on a deployment or training exercise.

The entire development phase should be a learning process for those hoping to get the chance to attend the SFISC. An SFODA Intelligence Sergeant made a point that it is a great idea to groom SF soldiers before they assume the 18-Fox position, especially if a unit only gets a trained and educated 18-Fox for a few years. Every participant spoke about the importance of an established mentorship program to help develop SF soldiers into future SF Intelligence Sergeants. Plus, providing the future 18-Fox with OJT from a highly competent SF Intelligence Sergeant during a “real-world” deployment is invaluable for that person when he does attend the SFISC.

**Preparation.** Some of the issues brought up during the interviews with the Group Three participants highlighted that, although preparation was not completely bad, if the potential students do not receive the right information, then it could hurt them when they attend the SFISC. However, some participants thought if done right, it would give those students an advantage in the course and a leg up on those students who did not prep
before the course. Some participants thought potential preparation could be a two-week prep-course with experienced intelligence personnel, which could help students succeed during the course. But, there should be an interaction between the 18-Fox committee and the SF Groups about preparing incoming students to give them confidence during the course. An SFODA Operations Sergeant said, “the preparation course must come from the 18-Fox course!” In addition, an SF Sergeant Major thought any preparation course at the SF Groups must be tied to what is being taught in the SFISC at the time of attendance. Supporting a preparation course for the SFISC, an SF Sergeant Major brought up a point about the SF Groups sending SF soldiers to train-ups and preparation classes for courses much shorter than the SFISC. An SFODA Warrant Officer felt that requiring incoming students to have experience is not always necessary for them to succeed as SF Intelligence Sergeants.

**Evaluation.** It is important to determine how the person handles failure and learns from mistakes during the evaluation step to help determine if they are suitable for increasing responsibilities as an 18-Fox. A useful, but quite easy, evaluation could be to conduct a board, similar to a military promotion board, chaired by a Company Sergeant Major that includes former or current SF Intelligence Sergeants to determine a candidate’s aptitude for doing intelligence analysis. A Team Sergeant believed that all identified future 18-Foxes should take a written aptitude test that helps measure a person’s ability to comprehend and analyze reports, and write at a specified grade-level. Other options of evaluating SF soldiers identified to attend the SFISC would be to give them homework assignments involving simple 18-Fox type tasks. Another unobtrusive way to evaluate future 18-Foxes would be to assign them to a mentor (experienced SF
Intelligence Sergeant), who tests and evaluates them, and then provides the results to the Team Sergeant. In addition, any future 18-Fox should show during the evaluation that they are comfortable briefing a variety of audiences from team members to the Group Commander.

Case Study Four

Primary results. Group Four provided fourteen participants for the DIP research study. Each interview was held in each Battalion’s conference room. Each participant took the time out of their busy schedule to participate in the study. They all volunteered and were more than willing to answer the interview questions for the researcher. The participants were all leaders at the Battalion level and lower with most of them currently assigned to the company and SFODA. All the participants were open to going into great detail about the SF Intelligent Sergeant and the processes for selecting SF soldiers to attend the SF Intelligent Sergeants course, thus assuming the position as an SFODA 18-Fox.

Throughout the interviews, the top-six themes were highlighted by the participants consisting of (1) the attributes needed for potential SFISC students, (2) development step of the selection process, (3) necessary 18-Fox tasks, (4) the overall selection process for sending SF soldier to the SFISC, (5) 18-Fox management, and (6) consequences of sending the wrong guy to the SFISC. Table 9 displays the demographics of all participants within Group Four.
Table 9

Demographics of Group Four

<table>
<thead>
<tr>
<th>Position</th>
<th>18-Fox</th>
<th>Years in SF</th>
<th>Deployments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intel SGT</td>
<td>Yes</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>Tm SGT</td>
<td>No</td>
<td>12</td>
<td>7</td>
</tr>
<tr>
<td>Co WO</td>
<td>No</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>Ops SGM</td>
<td>No</td>
<td>15</td>
<td>11</td>
</tr>
<tr>
<td>Tm SGT</td>
<td>No</td>
<td>14</td>
<td>8</td>
</tr>
<tr>
<td>Intel SGT</td>
<td>Yes</td>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>Co SGM</td>
<td>Yes</td>
<td>18</td>
<td>10</td>
</tr>
<tr>
<td>Ops SGM</td>
<td>No</td>
<td>17</td>
<td>10</td>
</tr>
<tr>
<td>Intel SGT</td>
<td>Yes</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Tm SGT</td>
<td>Yes</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>Tm SGT</td>
<td>Yes</td>
<td>11</td>
<td>6</td>
</tr>
<tr>
<td>Ops SGM</td>
<td>Yes</td>
<td>17</td>
<td>12</td>
</tr>
<tr>
<td>Tm SGT</td>
<td>Yes</td>
<td>14</td>
<td>8</td>
</tr>
<tr>
<td>Tm SGT</td>
<td>No</td>
<td>12</td>
<td>8</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td>57%</td>
<td><strong>12.71</strong></td>
<td><strong>8.00</strong></td>
</tr>
</tbody>
</table>

*Note.* The SF positions held by the DIP research study participants from Group One are SFODA Team Sergeant (Tm SGT), SFODA Warrant Officer (Tm WO), SFODA Intelligence Sergeant (Intel SGT), SF Company Sergeant Major (Co SGM), SF Company Warrant Officer (Co WO), SF Company Operations Sergeant (Ops SGT), and SF Battalion Operations Sergeant Major (Ops SGM).

**Selection Processes.** Group Four participants all support the use of a selection process to improve the ability of SF leaders for sending the “right” people to the SFISC who come back to the SF Groups and perform the duties of an SF Intelligence Sergeant. According to a few of the participants, the selection process should remain at the company and team level, but those selected to attend the SFISC should return to their respective companies to support any team needing an SF Intelligence Sergeant. A few participants described an overall process that should remain more informal, but structured, rather than becoming a formalized, somewhat restrictive process for selecting persons for attendance at the SFISC. They added that it could be a guidebook that would outline a variety of suggestions for selecting someone to attend the SFISC instead of
directing how an SF leader would administer a selection process. But, those few participants thought, even though it should be informal, it must be a “serious” process that is used to assist those responsible for selecting SF soldiers to go the SFISC. One suggestion by an SF Sergeant Major was that the SFODA leadership selects the individuals while the Company Sergeant Major manages who attends the SFISC and assigns them to an SFODA after they graduate.

Those graduating from the SFISC and qualified to work as SF Intelligence Sergeants should be willing to support the regiment for assignment. An issue faced by most companies is the shortage of SF Intelligence Sergeants and the shortage of SF soldiers with a top-secret clearance willing and able to attend the SFISC. It forces the SF leaders to choose a less suitable person over the ideal candidate because the ideal candidate does not hold a top-secret clearance. A few Group Four participants discussed the idea that the entire selection process could be completed solely using a selection board that determines if the potential candidate has the right attributes or credentials to succeed as SF Intelligence Sergeants. The selection process requires someone to be responsible for the management of the 18-Foxes. Those who seem suitable to attend the SFISC are those who understand and have SF operational experience. This would also suggest a high level of maturity, as mentioned by an SF Team Sergeant and Warrant Officer. Table 10 highlights the attributes identified by the participants during the interviews.
Table 10

*Intelligence Sergeant Attributes for Group Four*

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Participant Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Working</td>
<td>&quot;If the 18-Fox is not a go-getter, a hard worker, or proactive, then you're not going to get any of that information that you really need to be aware of your situation and to conduct operations.&quot;</td>
</tr>
<tr>
<td>Intelligent</td>
<td>&quot;A highly competent 18-Fox is intelligent and obviously has to have the attention to detail to dig into all the information and figure out what is going on.&quot;</td>
</tr>
<tr>
<td>Mature</td>
<td>&quot;So, a guy needs maturity and a good work ethic. And mature in his actions not necessarily his age or time in service.&quot;</td>
</tr>
<tr>
<td>Proactive</td>
<td>&quot;Instead of a guy that just wants to be there and be told what to do. It has to be that self-starter...&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;It is really important for you to have a guy that takes the initiative.&quot;</td>
</tr>
<tr>
<td>Motivated</td>
<td>“Guy must have a great work ethic and be motivated to do the job, and interested in the Intel analysis.”</td>
</tr>
</tbody>
</table>

**Identification.** First, the identification step should remain at the SFODA level because the people who know each other the best are those who work together every day.

It would be useful to find a way to identify those with the skills and attributes early in their SF careers. There seems to be a serious lack of a mentorship program for those striving to attend the SFISC and assume the position as the SFODA Intelligence Sergeant. Each participant repeated the sentiment that as part of an 18-Fox management program those potential candidates to attend the SFISC and serve as SF Intelligence Sergeants must be identified as early as possible. They explained that once identification happens, then the rest of the selection process must commence. It is a way of figuring out the best possible candidates to attend the SFISC and fill those vacant 18-Fox positions through a well-developed identification step that is part of a larger selection process.
But, a Team Sergeant mentioned that identification should be fluid or a process that offers a variety of ways to conduct the identification step. It should be conducted at the SF Company and SFODA levels involving the team’s leaders and taking from six to twelve months to allow them time to identify those potential candidates to attend the SFISC. That same Team Sergeant believed that for early identification to work it might be useful to determine the ways to identify the knowledge, skills, and abilities (KSA), or attributes of personnel to conduct analysis or critical thinking while they are still in the SF Qualification course, and before they arrive at their first SF Group. Group Four participants said volunteers were welcomed and did help with the overall identification step, but those volunteers would be treated the same as the ones identified by the SFODA leaders using various identification methods like counselling, interviewing, or observation techniques.

**Development.** The idea is to create a good mentorship program for setting-up the future SF Intelligence Sergeants to assume that position on an SFODA. There are a variety of ways to develop the people waiting to advance their careers as SF Intelligence Sergeants by allowing them to shadow an experienced 18-Fox or work with a Military Intelligence specialist at the Battalion or Group level. What the Group Four participants saw in their SF Group was a good number of SF soldiers assuming the position as the SF Intelligence Sergeant on their SFODA before stepping foot into the SFISC. Some were able to self-navigate the job and complete required tasks to help their SFODAs, while some struggled to grasp the job and were slow to learn what was expected of them.

Most participants knew that placing an untrained person in the 18-Fox position was not the best way to develop future SF Intelligence Sergeants, but that the experience
they gained usually helped them as Special Forces Operators. The best procedures seen by many Group Four participants for developing potential 18-Foxes was to allow them to shadow or receive OJT from a highly competent Intelligence Sergeant, and even better if it happened during a combat deployment. Any OJT that educates the person about the intelligence field and the expectations of the SF Intelligence Sergeant position is invaluable. A Team Sergeant explained that during times when an Intelligence Sergeant is unavailable it is especially important to put the most suitable person in the 18-Fox position and provide them some intelligence training if that person is unable to attend the SFISC before a deployment.

An idea mentioned by more than one participant was the creation of a junior or assistant SF Intelligence Sergeant position, as an additional duty, on an SFODA that would be filled by someone identified as a future 18-Fox, but required some development before attending the SFISC. The junior 18-Fox would receive some basic intelligence education to become “certified” to work in that capacity as mentioned by an SF Sergeant Major and Team Sergeant. It is probably best to look at the weaknesses each future SF Intelligence Sergeant has and figure out ways to turn them into strengths, which the participants stated could be accomplished through mentorship, shadowing, or OJT.

**Preparation.** Some participants from Group Four thought that the preparation step was critical for the advancement of those wishing to attend the SFISC and fill the position as the SF Intelligence Sergeant on an SFODA. It is a benefit for the person looking to attend the SFISC to prepare for the course by allowing him to gain confidence and an understanding for navigating through the classes. The SFISC course is important and the SF Intelligence Sergeant position even more important that the person should get
the opportunity to prepare before stepping into the classroom. This is usually required for other, much shorter courses that, according to the participants, are far less important in comparison to the SF Intelligence Sergeant position.

*Evaluation.* It is important that through the entire selection process that a person’s weaknesses are identified and then used to help the person improve before they attend the SFISC and are put into the SF Intelligence Sergeant position. The evaluation step should be a continuous step conducted throughout the entire selection process, and finalized prior to the final selection being made. A Company Sergeant Major agreed that the evaluation should be used throughout the selection process, and most importantly during the development step that shows whether the development worked with producing the anticipated results. In addition, an SF Warrant Officer believed that giving the process an entire deployment would benefit the person going to the SFISC. One specific evaluation method mentioned by Group Four participants was the use of a writing test to allow future SF Intelligence Sergeants to show their writing skills because of the criticality of writing required of an intelligence analyst. In addition, it could be useful to let intelligence professionals evaluate the analytical or critical thinking abilities of those identified to attend the SFISC and fill 18-Fox positions.

**Case Study Five**

*Primary results.* Group Five provided seven participants for the DIP research study. Each interview was held within a company conference room, while the researcher used a notepad, digital voice recorder, and printout of the interview questions for participants to follow along. Each participant was a volunteer and was motivated to answer the interview questions for the researcher. Each participant was a leader at the
Battalion level and lower with most of them currently assigned to the company and SFODA. Table 11 displays the demographics of all participants within Group Five.

Table 11

Demographics of Group Five

<table>
<thead>
<tr>
<th>Position</th>
<th>18-Fox</th>
<th>Years in SF</th>
<th>Deployments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tm SGT</td>
<td>Yes</td>
<td>15</td>
<td>7</td>
</tr>
<tr>
<td>Ops SGT</td>
<td>No</td>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>Tm WO</td>
<td>Yes</td>
<td>14</td>
<td>10</td>
</tr>
<tr>
<td>Tm WO</td>
<td>No</td>
<td>12</td>
<td>8</td>
</tr>
<tr>
<td>Ops WO</td>
<td>Yes</td>
<td>13</td>
<td>5</td>
</tr>
<tr>
<td>Intel SGT</td>
<td>Yes</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Ops SGT</td>
<td>No</td>
<td>15</td>
<td>8</td>
</tr>
</tbody>
</table>

Average 57% 12.00 6.71

Note. The SF positions held by the DIP research study participants from Group One are SFODA Team Sergeant (Tm SGT), SFODA Warrant Officer (Tm WO), SFODA Intelligence Sergeant (Intel SGT), SF Company Warrant Officer (Co WO), and SF Company Operations Sergeant (Ops SGT).

All participants openly answered each question and provided great detail about the SF Intelligent Sergeant and the processes for selecting SF soldiers to attend the SF Intelligent Sergeants course. The participants identified six themes during the interview consisting of (1) the identification step of the selection process, (2) the importance of knowing analysis before attending the SFISC, (3) the negatives for sending the “wrong” person to the SFISC, (4) strong communications (both oral and written) skills, (5) the development step of the selection process, and (6) 18-Fox management.

Selection Processes. An SFODA Warrant Officer explained how being selected lacked any development, preparation, or evaluation personally, even though it worked for him because he was a former US Army military intelligence specialist. In addition, the Warrant Officer said the absence of a deliberate selection process should not be the norm for choosing people to attend the SFISC. The Warrant Officer insisted that instead
selection should follow some type of deliberate and common process that in the end identifies the best people. The past processes were ineffective for identifying quality people to work as intelligence analysts on SFODAs because at times the only formalized part of a selection process was to compile a list of SF operators with top-secret clearances and send them to the SFISC, as explained by an SFODA Warrant Officer. That process removed the SFODAs from the selection process and forced those on the top-secret clearance list to attend the SFISC. Creating a selection process requires patience and should take into consideration the drive and motivation to do the intelligence analyst job. Many times, SF operators graduate a course, including the SF Intelligence Sergeant course, but lack the KSAs, attributes, qualities, or motivation to do the job. Table 12 lists the Intelligence Analyst attributes identified by Group Five participants.

Table 12

*Intelligence Sergeant Attributes for Group Five*

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Participant Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mature</td>
<td>&quot;Maturity is huge and I don't know how to verbalize this but someone who's going to take the job, understand it, and fulfill it in a way that is not spelled out specifically.&quot;</td>
</tr>
<tr>
<td>Trustworthy</td>
<td>&quot;If the 18-Fox does his job and is trusted to do his intelligence job, then the information he provides to the team is very important for missions and operations.&quot;</td>
</tr>
<tr>
<td>Common Sense</td>
<td>&quot;One thing is common sense, one guy who can take that information <em>common sense wise</em> can explain about the enemy.&quot;</td>
</tr>
<tr>
<td>Intelligent</td>
<td>&quot;The perfect package is a guy who talks intelligent, can read and explain things back to the team, he sounds educated, presents himself professionally, he can think on his feet, and can answer those difficult questions.&quot;</td>
</tr>
<tr>
<td>Proactive</td>
<td>&quot;I think someone that displays some independence or ability to work on his own without somebody looking over their shoulder.&quot;</td>
</tr>
</tbody>
</table>
An SF Company Sergeant Major said if people wish to attend the SFISC and work as SF Intelligence Sergeants, then they should be willing to compete for the slot and be willing to leave their SFODA to fill SF Intelligence Sergeant positions wherever needed for the good of the regiment. In addition, most of the Group Five participants agree that the selection process should stay within the SF Companies and be managed by the SFODA Operations Sergeant with support from the Company Sergeant Major.

**Identification.** Group Five participants pointed out that identification was the most important step in the selection process because if you do not ID the right person time and resources are likely wasted if the person turns out to be “wrong” for the position. Two Participants agree that identifying the SF soldiers who truly want to do the intelligence analysis work on the SFODA is important. It is the maturity and experience of the Team Sergeant to use his counselling skills to identify the “right” person as early as possible. In addition, it is ideal if those suitable to be SF Intelligence Sergeants are identified when they first arrive at their SF Group out of the SF Qualification-Course (Q-Course).

One participant witnessed his Company Sergeant Major take one of his soldiers aside and interview him for an SF Intelligence Sergeant position. Although the Sergeant Major may have been slightly out of line for not including the soldier’s Team Sergeant in the process, it looked to be a suitable way to find out if that soldier had some of the necessary attributes to do the analytical job and wanted to be an 18-Fox. The Group Five participants discussed that for someone to be identified for possible SFISC attendance, they would require SF experience, need thirty-six months of SFODA time, be proficient at their current job, and display leadership qualities like diligence, initiative, integrity,
responsibility, maturity, trustworthiness, and good communications. According to an SFODA Warrant Officer, an ideal way to get the whole selection process started using the identification step would be for the current SFODA Intelligence Sergeants to actively search for their replacements. Another way to start the process early would be to look at educating the future Special Forces community during recruiting visits, throughout the qualification course, and immediately upon arrival at their first SF Groups.

**Development.** Development for a future SF Intelligence Sergeant should be the introduction to the job position covering both the good and the bad. The SFODA Team Sergeant must be involved in this step of the selection process by becoming the lead mentor for a candidate’s development. Then, it is likely for the Team Sergeant to hand him over to an experienced SF Intelligence Sergeant for direct intelligence mentorship. It would be useful to send the candidate to the Military Intelligence (MI) section for an intelligence education. Part of the candidates’ development, as discussed by a Team Sergeant, could involve the SF organizations creating an interim SF Intelligence Sergeant course charged with preparing future 18-Foxes to either work for a current SFODA Intelligence Sergeant as a “junior 18-Fox,” or to fill a vacant SFODA Intelligence Sergeant position prior to attending the actual SFISC.

According to some of the more senior participants, it seemed beneficial for some of the future SF Intelligence Sergeants to gain valuable experience working as Intelligence Sergeants while deployed. So, it seemed logical to deploy those identified SF soldiers as often as possible to work as junior SF Intelligence Sergeants prior to them attending the SFISC. Along with mentoring, if a senior SF Intelligence Sergeant was available, the potential 18-Fox would shadow him during a deployment or training
exercise. A Group Five participant saw firsthand how allowing a potential SF Intelligence Sergeant shadow an experienced 18-Fox during a deployment can lead to a successful Intelligence Sergeant career. Finally, it would not hurt at all to have those identified to attend the SFISC and work as SF Intelligence Sergeants to get as much practice by briefing and speaking in a public forum in front of senior military or civilian leaders.

**Preparation.** The Group Five participants did not say a lot during the interviews about the preparation step to the selection process, but what they did say pointed to a very detailed and important preparation-step for setting those attending the SFISC up for success. A few participants noted that since the current SFISC focused on the Intelligence Preparation of the Battlefield/Environment (IPB/IPE) process, then the future SFISC students should focus their preparation time on getting familiar with that complex process. According to the group, it would involve direct participation by the 18-Fox committee located at SWC, who are directly responsible for teaching the SFISC. They would either come out to the SF Groups in the form of a mobile training team (MTT) and teach a preparation course, or they would create a training schedule and curriculum that could then be taught by the intelligence personnel within the SF Groups. This way the SF soldiers attending the SFISC would receive updated and relevant instruction that aligns with the current course and properly prepares them for the rigor of the fourteen week SFISC.

**Evaluation.** Group Five participants provided a list of KSAs and attributes necessary to work as intelligence analysts for a prospective 18-Fox to display during the evaluation-step of the selection process. Each participant from Group Five contributed to
the list, which was (1) intelligence, (2) comprehension and analytical skills, (3) briefs well, (4) presents himself professionally, (5) thinks on his feet, and has (6) both a depth and breadth of Special Forces knowledge. All participants were in agreement that the evaluation could be started on the SFODA once the identification step was complete and the prospective Intelligence Sergeant entered the development step with the Team Sergeant taking the lead. The SFODA leadership could give 18-Fox candidates intelligence tasks as tests and evaluate them based on their answers. An Operations Sergeant explained how an evaluation board could be used to determine if the person identified for the SF Intelligence Sergeant position displayed necessary KSAs, attributes, and the motivation to attend the SFISC.

**Phase Two: Intelligence Agency Support**

The DIA uses an extensive process that resulted in them conducting in depth interviews with those they found suitable to be hired as intelligence analysts. In addition, a senior DIA official identified six attributes necessary for those who wished to work as intelligence analysts, shown in Table 13. Recent college graduates who show an ability to think critically, write well, and display a capacity to learn are wanted.

Table 13

<table>
<thead>
<tr>
<th>The DIA’s list of intelligence analyst KSA/attributes for hiring practices</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DIA Intelligence Analyst KSA/Attributes</strong></td>
</tr>
<tr>
<td>Grammar</td>
</tr>
<tr>
<td>Rhetoric - communicate clearly</td>
</tr>
<tr>
<td>Logic</td>
</tr>
<tr>
<td>Intellectual humility and personal determination</td>
</tr>
<tr>
<td>Engagement and teamwork</td>
</tr>
<tr>
<td>Persuasive</td>
</tr>
<tr>
<td>Insight - complete the puzzle</td>
</tr>
</tbody>
</table>
The Federal Bureau of Investigation (FBI) recently changed how they hired individuals to fill intelligence analyst positions within the Bureau. A senior analyst from the intelligence community believed that the changes made by the FBI was to allow the Bureau to control the training and education of the analyst by hiring people who displayed the ability to learn, along with a variety of common KSAs and attributes that would make them easy to mold into intelligence analysts shown in Table 14. In the past, the FBI, just like other government intelligence organizations, would hire people solely based on their experiences. Although this usually filled a void within the intelligence analyst field, a number of them did not stay in their positions very long for various reasons. The FBI is testing their method of bringing in young talent, developing them into intelligence analysts, and then hoping they stay for extended periods of time. Some of these methods could be helpful for the SF community looking to get longevity out of their SF Intelligence Sergeants.

Table 14

*The FBI’s list of intelligence analyst KSA/attributes for hiring practices*

<table>
<thead>
<tr>
<th>FBI Intelligence Analyst KSA/Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical thinking</td>
</tr>
<tr>
<td>Good oral/written communications</td>
</tr>
<tr>
<td>Open minded</td>
</tr>
<tr>
<td>Flexible</td>
</tr>
<tr>
<td>Life-long learner</td>
</tr>
<tr>
<td>Self-motivated</td>
</tr>
<tr>
<td>Comfortable briefer</td>
</tr>
</tbody>
</table>

An Intelligence community hiring officer discussed how the DoS conducts hiring of intelligence analysts, especially those with no prior intelligence analyst experience. According to the hiring officer, although the DoS was still hiring those with specific
skills and experience related to intelligence analyst, the Intelligence and Research Division (INR) was leaning towards bringing in younger candidates already possessing the verified education requirements, which usually satisfied the critical thinking and communications skills wanted of a potential intelligence analyst. Table 15 outlines the KSA/attributes of a potential intelligence analyst hire at the Department of State.

Table 15

*The DoS’s list of intelligence analyst KSA/attributes for hiring practices*

<table>
<thead>
<tr>
<th>DoS Intelligence Analyst KSA/Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
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<tr>
<td></td>
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<td></td>
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<td></td>
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<tr>
<td></td>
</tr>
</tbody>
</table>

Phase Three: Psychologists Suggestions

The psychologists from the USA JFK Special Warfare Center and School were asked to discuss the best methods for identifying the attributes and skills that would make SF soldiers the ideal candidates to perform as SF Intelligence Sergeants. The discussion involved creating and administering IQ/personality tests to identified candidates during the selection process. Since written communications is critical for intelligence analysts for them to present intelligence products that makes sense to the decision makers, the psychologists suggested developing a requirement for potential SF Intelligence Sergeant candidates to complete a writing sample that not only tests their ability to write well, but also requires them to think critically for them to successfully complete the test. Finally, the psychologists completed the interview by volunteering their services, if necessary,
and identifying the possibility for SF Group psychologists support when creating selection processes within each of the SF Groups.

**Analysis and Synthesis of Findings**

Each SF Group, to include every participant, participating in this DIP research study expressed the immediate need to have a more structured and specific selection process available to use while examining the potential of someone to attend the Special Forces Intelligence Sergeant course and assume the position as an SF Intelligence Sergeant on an SFODA. Each Group identified a variety of priorities that involve the establishment of a selection process. These priorities will be discussed in chapter five of this DIP research study. Table 16 displays the demographic totals across all groups and participants with an average level of experience above twelve-years of Special Forces service and almost eight deployments for each participant.

Table 16

*Combined Participant Demographics*

<table>
<thead>
<tr>
<th>Participants</th>
<th>Position</th>
<th>% of 18-Fox</th>
<th>Avg Yrs in SF</th>
<th>Avg Deployments</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Intel SGT</td>
<td>100%</td>
<td>10.3</td>
<td>6.2</td>
</tr>
<tr>
<td>16</td>
<td>Tm/Ops SGT</td>
<td>44%</td>
<td>10.9</td>
<td>6.7</td>
</tr>
<tr>
<td>7</td>
<td>Tm/Ops WO</td>
<td>57%</td>
<td>12.7</td>
<td>7.7</td>
</tr>
<tr>
<td>7</td>
<td>SGM</td>
<td>43%</td>
<td>15.9</td>
<td>10.1</td>
</tr>
<tr>
<td>39</td>
<td>Total</td>
<td>61%</td>
<td>12.45</td>
<td>7.68</td>
</tr>
</tbody>
</table>

This level of experience from all the participants demonstrated their depth and breadth of knowledge about the need within their organizations for the use of a common selection process, which would be utilized by all SF leaders regardless of the SF Group affiliation. Some common themes from data collection included possible mechanisms for identifying good candidates, the necessity of particular attributes for Intelligence
Sergeants, the consequences of selecting the wrong individuals, the needs for SF experience, the importance of communication skills, and ways to manage the 18-Fox career field. This data provides strength for the creation and implementation of a specific selection process available to SF leaders at all levels within the SF Groups. Table 17 outlines the top attributes combined from all the SF Groups.

Table 17

*Combined SF Intelligence Sergeant Attributes*

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Participant Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Working</td>
<td>&quot;That person [18F] will probably work twice as hard as everybody else.&quot;</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&quot;[The] guy must have a great work ethic, be motivated to do the job, and interested in Intel analysis.&quot;</td>
</tr>
<tr>
<td>Motivated</td>
<td>&quot;He is the type of guy that comes into work and instantly jumps on the computer and starts looking at information, doing research, and putting stuff together.&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;He must have drive to do his job.&quot;</td>
</tr>
<tr>
<td>Trustworthy</td>
<td>&quot;He was able to explain it very well to the command that helped gain their trust and confidence of his abilities.&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;He could be trusted and he would let the team know exactly what the information was saying and not try to embellish anything.&quot;</td>
</tr>
<tr>
<td>Proactive</td>
<td>&quot;He must be able to work with minimal guidance.&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;When I ask him to do something he would complete the task with no issues and go above and beyond.&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;If I have to tell him to do something and that is not the right guy.&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;Need a self-starter because there is no junior 18-Fox and the 18-Fox has to be counted on to keep the machine rolling.&quot;</td>
</tr>
<tr>
<td>Intelligent</td>
<td>&quot;As an 18-Fox, you must have a good level of intelligence.&quot;</td>
</tr>
</tbody>
</table>
"… looking for those traits that show he has the intelligence, he has the education, he has the capability of doing those things like critical thinking and problem-solving."

Mature

"We need Intelligence Sergeants who act like senior, experienced leaders."

"There is a need for an Intelligence Sergeant who shows the maturity to put in the longs hours and know when to ask for assistance."

Responsible

"There is a need to have Intelligence Sergeants that are not afraid to step up and take responsibility, but also accept and learn from their mistakes."

"It's important to pick the right guy because the 18-Fox has a lot of responsibilities and has a lot to say during combat operations."

**Being Leaders; Selecting Leaders**

The researcher identified that leadership, as defined in chapter one, was vital for both those responsible to select the candidates to fill vacant SF Intelligence Sergeant positions, and for those selected to attend the SFISC and take on greater responsibilities as 18-Foxes. For the purpose of this study, it took transformational leaders to step forward and allow the researcher to come into their communities and collect data from their future senior leaders to gain an understanding for creating improvements for selecting their personnel to attend the SFISC and work as SF Intelligence Sergeants.

Now, it will take SF leaders with those same transformational leadership skills, behaviors, and attributes at all levels of the SF community willing to bring about purposeful change to convince both superiors and subordinates how important it is to implement suggested changes and recommendations. In addition, it is just as important to give serious consideration to conduct future research for identifying and addressing other problems facing the SF Intelligence Sergeant. Some participants thought managing the SF Intelligence Sergeant position through constant examination and improvement was the critical piece for SF leaders responsible for selecting individuals to attend the SFISC.
Future challenges would include keeping the position filled with an SFISC graduate, identifying future candidates, developing those identified, and looking for professional development opportunities for both the current 18-Fox and future candidates.

While SF leaders use their transformational leadership skills, behaviors, and attributes to select the future 18-Foxes, they must also look at the leadership potential of those they are selecting to become the future Intelligence Sergeants. A majority of participants identified that future SF Intelligence Sergeants should possess strong leadership attributes, which include diligence, initiative, integrity, responsibility, maturity, trustworthiness, and good communications before attending the SFISC, which include some of the same requirements as an intelligence analyst. A Company Sergeant Major replied that the importance for choosing the “right” person to be SF Intelligence Sergeants is that those selected are “willing to take charge.”

**Summary**

The researcher described the results of five individual case studies in detail specifically outlining how the “right” individuals could be selected to attend the SFISC and work as SF Intelligence Sergeants. The five individual case studies listed the demographics of each participant, explained the top attributes mentioned by the participants, and described each step of the selection process including identification, development, preparation, and evaluation. All participants agreed there was a need for a deliberate selection process and presented ideas for a suitable selection process that could be combined to produce solutions for each SF Group.

The participants from all the groups agreed the selection process should be used at the company and below level in the hands of those who would best know those
individuals selected to attend the SFISC. The participating SF leaders suggested, in one form or another, the planning, creation, and implementation of a structured, deliberate, and common process that includes the identification, development, preparation, and evaluation of all candidate wishing to or identified to attend the SFISC. Identification was shown to be the vital step of the process because once someone was selected to attend the course, they were often pushed to attend even if it looked as though they may not be suited to work as SF Intelligence Sergeants. It shows from speaking with the SF leaders that it is important for future Intelligence Sergeants to be hard workers, great at their current jobs, and overly interested in intelligence work as starters before looking at the skills they possess.

The research question asked for the participants to share past and future ways of selecting individuals to attend the SFISC. In addition, the participants agreed it was more important to put the “right” person into the position than it was to graduate anyone from the Special Forces Intelligence Sergeants course and be stuck with the consequences of choosing the “wrong” person. The researcher also interviewed four experts from the intelligence community at the Department of State (DoS), Defense Intelligence Agency (DIA), and the Federal Bureau of Investigation (FBI). Even though all of these agencies had their pick of the cream of the crop, they still felt that it was necessary to hand pick those wishing to enter the intelligence field because it took a special type of person with a specific set of skills that make those selected understand analysis and have a motivation to do intelligence analysis. The researcher was able to use the valuable information provided by all the participants, along with the intelligence community professionals and put together a number of recommendations that will undoubtedly assist those responsible
to select those who will be the next individuals to conduct intelligence activities on an
SFODA.
CHAPTER FIVE: CONCLUSIONS AND RECOMMENDATIONS

Introduction

It became obvious from the participants during this research study that not all Special Forces (SF) operators were meant to work as SF Intelligence Sergeants. Too much time and effort goes into training and educating an SF Intelligence Sergeant to not continually look for ways to make improvements. The absence of a deliberate and common selection process, the hesitancy to dismiss underperforming students, and the short length of time graduates may spend working as 18-Foxes makes it even more important that a process is created and the best candidates are selected to attend the SF Intelligence Sergeant Course (SFISC). Despite the approximate 20-30% shortage of SF Intelligence Sergeants on SF Operational Detachment – Alphas (SFODA), which includes those Staff Sergeants who graduated the course, but currently do not hold the 18-Fox military occupational specialty (MOS), quality of graduates from the course is still more important than quantity (SFISC, 2018).

The researcher highlights how critical the SF Intelligence Sergeant job position is to the SFODA by showing how each participant rated all the job positions minus the three leadership positions shown in Table 18. This chapter shows the priorities as identified by the participants for creating a selection process. Recommendations for improving the selection of prospective SF Intelligence Sergeants is presented in detail with a variety of possibilities supporting the aim of the DIP research study. An ideal selection process introduced and the researcher wraps up the chapter by suggesting the future avenues of research for the SF Groups and US Army JFK Special Warfare Center and School (SWC) to further develop the SF Intelligence Sergeant career field.
Purpose of the Study

The purpose of this Dissertation in Practice research multiple-case study was to determine the necessity of systematically identifying, developing, preparing, and evaluating Special Forces operators prior to selecting them to attend the Special Forces Intelligence Sergeant course.

Aim of the Study

The aim of this study was to help SF organizations identify ways for units’ commissioned officers and senior non-commissioned officers to understand the knowledge, skills, and abilities (KSAs), along with the necessary attributes of successful intelligence analysts and identify which SF operators possess those KSAs and attributes through deliberate identification, development, preparation, and evaluation prior to attending the SFISC. The bottom line for this study was to provide SF leaders with ways to identify those SF operators with the potential of becoming highly competent SF Intelligence Sergeants, which should improve the commander’s ability to make operational decisions at the SFODA (tactical) level in Special Forces organizations.

Research Findings

There were 39 participants from the Special Forces Groups, three intelligence experts from the national intelligence community, and three military psychologists from the Special Operations community. The primary participants from the SF Groups were experienced within the SF community with an average of 7.5 deployments per person. Initially, there was a shared opinion from the majority of all participants that there was a
need and positive purpose to create a deliberate selection process to send ideal candidates to the SF Intelligence Sergeant course.

Each participant provided a list of attributes and skills needed for a potential candidate to likely successfully navigate the SFISC and perform well as Intelligence Sergeants on their SFODA. The attributes mentioned most often by the participants within each SF Group were hard worker, motivated, trustworthy, proactive, intelligent, and responsible. The intelligence experts provided attributes and skills necessary for potential hires before any intelligence training begins by looking for those who are critical thinkers, strong communicators, persuasive, driven, self-motivated, determined, team players, and possess insight. Only two participants felt there necessarily was not a need to establish a deliberate selection process as long as the Team Sergeant has control over choosing who attends the SFISC.

**Proposed Recommendations**

The participants responded in a manner that illustrated the necessity for creating and implementing a formalized selection process for sending individuals to the SF Intelligence Sergeant course. The overall expectation from the participants, which included the future senior-leaders from all five active-duty SF Groups, was to optimize their ability to choose the best candidate to attend the SFISC and take control as the SF Intelligence Sergeant on an SFODA.

**Ranking SFODA Positions**

The researcher asked each participant how important the SF Intelligence Sergeant position was to the SFODA for conducting not only combat operations, but working in an unconventional warfare (UW) environment, the primary mission of US Army Special
Forces. The majority of the participants said that the importance of SF Intelligence Sergeants being competent intelligence analysts was critical for operational success. More than a few times, participants explained how SFODAs with a highly competent 18-Fox were the ones constantly experiencing operational success. Table 18 shows how critical the SF Intelligence Sergeant position was to all the participants. Participants felt the Intelligence Sergeant was one of the most important positions on the SFODA, which placed the position at the top of the list. The 18-Fox position was only challenged by the SF Medic and Communications Sergeant because of their operational importance for the SFODA. Several participants said that the 18-Fox prevents potential catastrophe, thus saving lives, while the SF Medic saves lives after a catastrophe displaying a critical need for both positions to be filled by highly qualified people.

Table 18

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Job Position</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SF Intelligence Sergeant</td>
<td>1.93</td>
</tr>
<tr>
<td>2</td>
<td>SF Medical Sergeant</td>
<td>2.19</td>
</tr>
<tr>
<td>3</td>
<td>SF Communications Sergeant</td>
<td>2.35</td>
</tr>
<tr>
<td>4</td>
<td>SF Engineer Sergeant</td>
<td>4.16</td>
</tr>
<tr>
<td>5</td>
<td>SF Weapons Sergeant</td>
<td>4.45</td>
</tr>
</tbody>
</table>

*Note: Position rankings are between 1 and 5 with the lower the average score the more important the job position is on the SFODA as identified by the participants.*

**Prioritizing Selection Process Suggestions**

The participants identified a number of priorities for selecting the best candidate to attend the SFISC and work as Intelligence Sergeants on SFODAs. These priorities covered a variety of subjects all related to how an SF leader could choose the best SF soldiers at the right moment in their careers to allow them the necessary time to learn,
develop, and provide critical intelligence analysis to their SFODA. Table 19 highlights the top-five priorities for the development of a deliberate, common, and detailed SF Intelligence Sergeant selection process.

Table 19

*SF Intelligence Sergeant Selection Priorities*

<table>
<thead>
<tr>
<th>18-Fox Priority</th>
<th>Participant Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytical Skills</td>
<td>&quot;I know when we help select 18-Foxes on the team we look at problem solving skills and analytical skills.&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;But again, there must be something in place to identify if that guy has those analytical skills.&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;He must be a critical thinker and that must be identified before he goes to school.&quot;</td>
</tr>
<tr>
<td>Consequences</td>
<td>&quot;When the SFODA does not have a competent Intelligence Sergeant, the team suffers by not receiving the sought-after missions.&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;… cannot analyze the data, so the leaders do not receive good intelligence products to make sound decisions.&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;...not choosing the person with the drive and motivation to work as an Intelligence Sergeant could put the SFODA at great risk.&quot;</td>
</tr>
<tr>
<td>Special Forces</td>
<td>&quot;Think it takes a guy with a lot of SF and operational experience to understand the intelligence needed to support SF operations.&quot;</td>
</tr>
<tr>
<td>Experience</td>
<td>&quot;I don't think it's feasible not to send a guy with SF experience.&quot;</td>
</tr>
</tbody>
</table>
18-Fox Management  "This is the one school and MOS that the groups have the choice of sending the right guy to the course."

"At that point, you are managing 18-Foxes at the company-level and one team has three good candidates then that team is not getting their guys back."

"I think it should be more of looking at the guys across the board who are suitable to be 18-Foxes instead of waiting for the vacancy to pop up before we fill the slot."

Communications  "The 18-Fox must be able to brief and speak intelligently."

"He was also able to brief the command with great breadth and depth of knowledge on the subject."

"He has to be able to communicate with not only the commanders but with the other assets available to help with the intelligence picture."

"The 18-Fox needs to be able to write competently..."

**Proposed Selection Process**

This section outlines the entire proposed selection process based on the findings from this study. It includes suggestions from SF leaders and experienced Intelligence Sergeants of each SF Group along with professional input from participants within the intelligence community. Proposed selection processes were expressed throughout this DIP research study, and especially highlighted by the participants in Chapter Four, but now an integrated selection process will be outlined as a part of the recommendations.

The proposed selection process includes the identification, development, preparation, and evaluation of SF soldiers prior to their selection and attendance at the SFISC. Most participants recommended a selection process that provided a method for choosing the best individuals to attend the SFISC. Even the psychologists agreed that a selection process consisting of identification, development, preparation, and evaluation
would be useful for selecting individuals to attend the SFISC. Figure 2 below shows the outline of a proposed SF Intelligence Sergeant selection process beginning with the identification step first, then the development and preparation steps follow with evaluation conducted concurrent with the development and preparation steps. Ultimately selection would be conducted during the identification or development steps and only those tentatively selected to attend the SFISC move to the preparation step.

**Identification (ID).** As was mentioned throughout Chapter Four, identification was pinpointed as critical to the selection process for choosing and sending individuals to the SFISC. The participants, especially the SFODA Operations Sergeants, felt the consequences of choosing the “wrong” person hurt the operational capability of the SFODA. There is a need to methodically conduct identification that allows an SF leader find a suitable candidate who shows the capacity and motivation of being an 18-Fox, thus moving the best candidate into the development, preparation, and evaluation phases.

![Figure 2. The proposed SF Intelligence Sergeant selection process](image-url)
Participants from the USA JFK Special Warfare Center and School and US Intelligence Agencies suggested that it would be worthwhile to interview potential 18-Fox candidates asking them scripted questions to identify those suitable to continue through the selection process. SWC psychologists agreed to provide assistance with developing those scripted questions, and assisting in making sure the questions would help identify whether a candidate was suitable to continue in the selection process.

**Development.** As critical as identification is for the success of the selection process to identify the “right” person to attend the SFISC, development is the tool available for SF leaders to equip future 18-Foxes with quality experiences and education about the SF Intelligence Sergeant position. The development step brings together senior, experienced SF Intelligence Sergeants with the next generation of 18-Foxes to help prepare them to assume the position as SF Intelligence Sergeants on SFODAs. Some participants suggested creating and running a development/preparation course at the SF Groups that would not only develop potential 18-Fox candidates, but also provide an opportunity to evaluate prospective candidates prior to selecting them to attend the SFISC. Another suggestion was to have SF Group psychologists administer IQ/personality tests to the students, while the 18-Fox committee create the education classes. The use of mentorship, shadowing, or on-the-job training (OJT) seemed critical to the participants, and is useful only if the mentors, coaches, or teachers are quality Intelligence Sergeants.

**Preparation.** An active-duty SF Group created and used a preparation course to help individuals selected to attend the SFISC succeed during the course, graduate, and return to their SFODA ready to assume the SF Intelligence Sergeant position.
Participants expressed their thoughts that preparing potential students about the basic requirements of the SFISC would be positive, and could also allow the course managers, administrators, and instructors in SWC to push basic course requirements into a possible preparation course, allowing the actual SFISC to focus on the advanced subjects. It was identified during data collection that the SF Groups would require assistance from the SFISC committee to create a relevant preparation course that helps SFISC candidates become comfortable and ready to attend the course. A key aspect of the preparation step is for the SF Groups’ leaders and the SFISC instructors to work together to help future students arrive prepared for the rigors of the SFISC.

**Evaluation.** It was clear participant interviews that during the selection process, SF leaders should look for ways to evaluate candidates before they are ultimately selected and sent to the SFISC. Although the evaluation does not guarantee candidates would graduate the SFISC, it would allow those conducting the evaluations to examine the candidates for their analytical, critical thinking, and communications skills. US Intelligence Agency participants agreed that an effective way to measure or identify if potential candidates possess the KSAs and attributes of capable intelligence analysts was by having them complete a writing or job sample, along with an oral interview in front of a panel of experts.

**Support for the Solutions**

The participants’ specific suggestions, along with the advice provided by intelligence agency experts and psychologists, are provided within the detailed explanations of each recommendation. Each step of the selection process has specific recommendations that help support that step and the recommendations that strengthen
each step are outlined in Table 20. The recommendations will be discussed in further
detail in the following sections.

Table 20

*Selection Process Recommendations by Step*

<table>
<thead>
<tr>
<th>Selection Step</th>
<th>Recommendation(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identification</td>
<td>18-Fox Management, Interview/Counselling, Guidebook</td>
</tr>
<tr>
<td>Development</td>
<td>Junior 18-Fox position, Mentoring/Shadowing/OJT, Guidebook</td>
</tr>
<tr>
<td>Preparation</td>
<td>SFISC Prep-Course, SFISC distance learning, Guidebook</td>
</tr>
<tr>
<td>Evaluation</td>
<td>Questionnaire, IQ/Personality Tests, Writing Sample, Guidebook</td>
</tr>
</tbody>
</table>

**Improve 18-Fox Management.** 18-Fox management is the systematic control of
placing quality personnel into SF Intelligence Sergeant positions on SFODAs, monitoring
their professional development, and deliberately selecting individuals to attend the
SFISC. There has been a struggle to manage the Intelligence Sergeant position within the
SF Groups. There have been times when individuals were informed they would attend
the SFISC one-day prior to the course start date without any development or preparation.
The mismanagement included sending individuals to the SFISC who were selected for
promotion while attending the SFISC, thus being promoted out of the SF Intelligence
Sergeant position before they even graduated the course (SFISC instructor, personal
communication, October 1, 2018). During one SFISC Class more than 23% of the
student body graduated the course only to work in their new job for less than a year
(SFISC instructor, personal communication, October 1, 2018).

In other instances, SF Groups allowed individuals who had previously failed the
SFISC to return only to fail the course again (SFISC instructor, personal communication,
October 1, 2018). Rarely was there a conversation between the SF Group and SFISC
leaders regarding a past failure’s ability to successfully complete the course if they were to return (SWC leader, personal communication, October 1, 2018). There were also times when individuals getting ready to retire were sent by their units knowing they would not work as SF Intelligence Sergeants on an SFODA (SFISC instructor, personal communication, October 1, 2018). A deliberate and common selection process, particularly development and preparation, would help improve the management of future SF Intelligence Sergeants and build student confidence during the course. A Team Sergeant stated that it was critical to figure out ways to keep SF Intelligence Sergeants for more than a year by stating, “for a guy to go 14-weeks to a course and only be used for one year doesn’t seem … [wise]. That is probably something that should be reviewed for improving the management of the 18-Fox MOS.”

During the data collection process, it became evident that the SF leaders wanted to send the best candidates to the Special Forces Intelligence Sergeants course and admitted that they were not always knowledgeable or capable of selecting the “right” individuals. But, some of the participants explained that it would be useful to implement a more fluid process instead of producing a strictly formal process so that the SF leaders could make changes as necessary without violating the goal of the process – identify and send the best candidate to the SFISC. Some participants felt that improving the selection of their next Intelligence Sergeant would be the results of a deliberate process for SF Operational Detachment – Alpha (SFODA) and SF Company leaders. Numerous times the participants stated that identifying the most qualified and skilled person for the Intelligence Sergeant position, talent management, must be utilized for selecting the best candidates. Improving talent management could be accomplished by providing a simple,
but detailed guidebook that would outline SF Intelligence Sergeant management, including selection processes, which would include the identification, development, preparation, and evaluation leading to the soldier attending the SFISC. The creation of a guidebook for SF leaders to use to inform them about selecting those to be SF Intelligence Sergeants could be helpful in a time-stressed environment. The guidebook would include details about each step of the selection process, to include the methods to use in a variety of situations to include satisfying the pre-requisite of holding a top-secret clearance, what to do when time is not available, or how to handle a deployment. The layout of the guidebook could begin with introducing the SF Intelligence Sergeant to the responsibilities of the position. Primary chapters of the guidebook could include selection process timelines, identification, development, preparation, evaluation, professional development, and references. As suggested by a number of participants, the guidebook must be created with support from the 18-Fox Committee (SFISC leadership and instructors) and input provided by the SF Groups.

**Establish Needed Relationships.** Nothing seemed more important for the SF Groups than the establishment of a strong relationship with the 18-Fox Committee (SFISC cadre and leaders). This could begin with a formal or informal contract between the SF Groups and the 18-Fox Committee to help the SF Groups develop and prepare their soldiers to attend the SFISC. Any assistance to develop and prepare future SFISC students for the SF Groups should include updating course and job position material, providing refresher training, and determining professional development for their current SF Intelligence Sergeants. Although the 18-Fox Committee is not required to provide direct assistance to the SF Groups and does not have the instructor base to perform a lot
of these duties, it is likely that they are the best option to provide assistance to the SF Groups. It would be most beneficial if there were people within the 18-Fox Committee directly appointed as the points of contact (POC) with an SF Group by region of expertise. One participant suggested that the 18-Fox Committee create a web site that allows all SF Intelligence Sergeants access to references, information, and intelligence products. In addition, this web site could provide materials to assist with an SF Group’s selection process.

The suggestion within this DIP research study is for the 18-Fox Committee to reach out to each SF Group and begin building relationships that would ultimately help them select their best SF soldiers to be SF Intelligence Sergeants. An SF Warrant Officer discussed that there is an established relationship between the SF Groups and those who teach the 18-Delta (medic) refresher course, which directly helps with managing the SF Medic. This relationship involves the refresher course instructors providing a student report card to the leaders within the SF Groups so they know the quality and capabilities of the SF Medical Sergeant who are working on the SFODAs. This method of leadership involvement could be used to help the SF Groups improve the knowledge, education, and experience of their SF Intelligence Sergeants.

Create Preparation Course. It was highlighted by more than one SF Group that a preparation course would help selected individuals before they attend the SFISC. A number of former SFISC graduates expressed their wish for such a course when they were preparing to attend the 18-Fox course. A Master Sergeant and Sergeant Major, both SF leaders, felt that preparation for the SFISC was in direct relation with the success and future development of SF Intelligence Sergeants. One major reason for having a
preparation course was to minimize student failures during the course. A worry from the participants was that creating a preparation course using outdated material may establish bad habits and make the SFISC even more challenging.

**Introduce Junior 18-Fox.** A follow-up question asked of some of the participants was if the Special Forces regiment would ever actually expand the current number of positions on an SFODA, which could allow for a second SF Intelligence Sergeant position being added to the team. Each participant replied that by the time that happened they would be long retired. For change to happen, it would have to use the current resources available to the SFODAs, along with any available resources from the SF Groups and the 18-Fox Committee. These conversations with the current and future SF leaders who are in positions to make decisions within the SF Groups suggested that implementing a junior SF Intelligence Sergeant course that takes identified SF operators and places them into an *abbreviated* SF Intelligence Sergeant development course and educates them to assist a current SF Intelligence Sergeant or in some instances assume a vacated position before attending the SFISC would be beneficial for both the development of the future Intelligence Sergeant and the SFODA.

The SFODA and SF Company leaders should examine the idea of placing a future Intelligence Sergeant in an “unofficial” position as the junior 18-Fox, which would allow that person to be identified, developed, prepared, and evaluated all while serving the SFODA as an assistant Intelligence Sergeant. Even if people, who serve as junior SF Intelligence Sergeants do not ultimately attend the SFISC, they still receive a great education and some useful experiences that would help them throughout their SF career.
Stakeholders, Supporters, and Resources

To implement the recommendations presented by the researcher, it will take support from the SF regiment’s leaders, along with the motivation and willingness from the SFISC committee to assist with providing resources in the form of time, personnel, and knowledge to the SF Groups to put in place a suitable selection process. The stakeholders who have the most to gain from a new selection process are the younger SF leaders who are presently at the SFODA and SF Company levels, but in the next few years will move to more senior positions.

In addition to those SF leaders, other stakeholders are future SF Intelligence Sergeants who will benefit from a selection process, and from the outcomes of future studies that may provide them with a better education and quality professional development. There are resources currently available to the SF community to use if necessary that could speed up implementation, these include intelligence analyst experts, former and current experienced SF Intelligence Sergeants, SFISC instructors, and SF leaders with relevant experience to assist with the creation of an SF Intelligence Sergeant development program inside a deliberate selection process.

Potential Barriers and Obstacles to Proposed Solution

At times during the research study, the researcher faced some opposition from a few people expressing there is no need for change or that there were no problems with selecting individuals to attend the SFISC. Some potential barriers to the proposed solution may include the same resistance encountered by the researcher. One such barrier could be that the recommendations are rejected by leaders who believe the current processes are good enough. As much as it will take transformational and servant leaders
to help implement the recommendations, there will be some SF leaders who do not approve of the changes and may emplace barriers to the implementation of a selection process.

The best way to remove the potential barriers to implementation is by normalizing the recommendations throughout the SF community by getting the transformational leaders directly involved with positively presenting the recommended changes throughout their organizations, along with identifying and involving those younger SF leaders as the next generation of transformational leaders in each of the SF Groups. The sooner the recommendations are accepted and implemented, the sooner an examination can begin looking into the suggestions for future research.

**Implementation of the Proposed Solution**

The implementation of the recommendations from the DIP research study will require a team of leaders from each of the SF Groups. The implementation should consist of both a creation and development phase, followed by the implementation phase. The teams of leaders from each SF Group should consist of not only transformational leaders open to change, but also those with a clear understanding of the SF Intelligence Sergeant position and the implementation of the selection process. A majority of the creation and development phase could be completed by the researcher, if that is how the First Special Forces Command would like to proceed. If not, then all recommendations could be provided to the First Special Forces Command, along with all the SF Groups, for them to use during the creation, development, and implementation phase. It would then be placed in the hands of the First Special Forces Command to determine a time frame for complete implementation of any accepted recommendations.
Factors and Stakeholders Related to the Implementation of the Solution

Implementation should involve the same stakeholders discussed during the recommendation section of this chapter. Those stakeholders, who would benefit from the recommendations, are the same ones who would be responsible to implement the selected recommendations. Implementation requires SF leaders throughout the regiment, along with existing and future SF Intelligence Sergeants, to take the lead for proper, successful, and seamless integration within each SF Group.

Leader’s Role in Implementing Proposed Solution. The leaders within the SF community play a huge role in implementing any or all of the proposed recommendations for creating a selection process for those attending the SFISC. Without the support of the SF leaders as mentioned above, none of these recommendations would find their way into the normal operations of the SF Groups and ultimately down to the SF Companies and SFODAs where selection is made. SF leaders who have the foresight to assist with implementation will be those leaders who believe in and are comfortable with organizational change. In addition, they will be those who identify as transformational leaders because they are the type of leaders who specifically support success through organizational change and the development of their subordinates. In order for the recommendations to be implemented, the SF leaders must (1) not view the recommendations as an obstruction and (2) know they do not have to do it alone. These types of leaders within the SF Groups would understand that the recommendations are beneficial for the success of their SFODAs.

Building Support for the Proposed Solution. The researcher was able to get buy-in from both SF leaders at the SF Company and SFODA level, along with support
from those currently serving as SF Intelligence Sergeants on SFODAs. Upon completion of this DIP research study, the researcher hopes to provide direct assistance with the implementation process, first, by sitting down with the senior leaders of the First Special Forces Command where the approval to conduct this study started more than ten-months ago. Hopefully, a meeting with the First Special Forces Command will begin the implementation process of some or all the recommendations to create a selection process and education program. A possible suggestion to the First Special Forces Command leaders could be to begin with a pilot program within one of the SF Groups before complete implementation. If approved by the First Special Forces Command, the researcher plans to volunteer his time to present his findings, recommendations, and help with the implementation at all the SF Groups. In addition, it would be practical to get those who participated in the DIP research study to help with the implementation of those recommendations that each SF Group deems good for the success of the SF Intelligence Sergeant selection.

**Additional Considerations for Implementation and Assessment.** An important part of the implementation of this DIP research study’s recommendations is the role of the 18-Fox (SFISC) committee. These leaders and course instructors possess immense intelligence and SF operational experience. Their direct input will be helpful during the creation and development phase of the process, hopefully continuing into the post-implementation phase when the selection process is actually put to use throughout the SF Groups.
Timeline for Implementation and Assessment

The complete timeline for implementation, initially, relies on which recommendations the First Special Forces Command’s and the SF Groups’ leaders identify for implementation, and how each recommendation is implemented at the SF Groups. There are four primary recommendations and the initiation of the implementation process starts with a face-to-face meeting at the First Special Forces Command in April, 2019 to determine how implementation should proceed at the SF Groups. Figure 3 below outlines the proposed implementation timeline.

Figure 3. The proposed implementation timeline for approved recommendations

The entire implementation, which includes each recommendation, would take at least eighteen-months to complete. The suggestion for implementation would include a phased process that begins with a brief to the leaders of the First Special Forces Command. After the brief, the researcher or selected representative would likely travel to each SF Group and both educate the SF leaders about their SF Group’s SF Intelligence Sergeant selection process and begin the implementation process. This phase would
culminate with each SF Group’s initial Junior 18-Fox course that would begin the development (long-term) process of the future SF Intelligence Sergeant position.

Each visit to an SF Group would take approximately one to two weeks. There would be informational briefings with the Team Sergeants, Company Sergeant Majors, all current SF Intelligence Sergeants, and then finally two separate courses for future SF Intelligence Sergeants. One of the courses would be the preparation course for those getting ready to attend the SFISC and the second course would be the Junior 18-Fox course for those recently identified as future SF Intelligence Sergeants. Then, it would take approximately 30-45 days to prepare for the next SF Group.

**Implications**

**Practical Implications**

There were both positive and negative implications identified during the conduct of this DIP research study. Most of the implications were identified during data collection. An obvious implication was that being selective when choosing the best candidate to become SF Intelligence Sergeants seems advantageous for the position, but at times face a limited pool of candidates. Other implications for implementation are (1) the additional work to implement recommendations, (2) the desire of the researcher to assist with implementation of the recommendations, and (3) the available pool of suitable candidates available to attend the SFISC may shrink by disqualifying individuals. In addition, this DIP research study’s recommendations may bring positive changes to other ways of doing business in the SF Groups, SWC, and the intelligence community. This may include other courses adopting the approved methods of selection for sending personnel to the SFISC.
Implications for Future Research

This DIP research study was only the Tip of the Spear of the research needed to examine and possibly improve the Special Forces Intelligence Sergeant military occupational specialty (MOS) 18-Fox. This DIP research study started with examining the beginning of an SF operator’s career as an Intelligence Sergeant, which is the most logical point along the process of becoming and working as an SF Intelligence Sergeant. Now that the researcher has looked at what happens at the beginning, before a person attends the SFISC, future research could address SFISC prerequisites, determine a need for a distance learning (DL) phase of the SFISC, examine the SFISC requirements, create an 18-Fox refresher course, and determine suitable professional development for the SF Intelligence Sergeants once they graduate the course and return to their SFODAs.

Currently, the only prerequisites to attend the SFISC is for the potential candidate to hold a top-secret clearance and to be within the military rank of Staff-Sergeant to Master Sergeant. The recommendations presented would not become prerequisites but selection criteria that can be used to select ideal candidates in order to help improve the quality of SF Intelligence Sergeants. Prerequisites must be recommended through official US Army channels in order to be added to the official requirements for course attendance, which could take years to put into place (Special Forces Intelligence Sergeant course information, 2018).

Implications for Leadership Theory and Practice

The more the researcher focused on how leadership played a role during the successful execution of various organizational practices, the more it became evident that leadership would most likely play an important and primary role in the successful
implementation of the accepted recommendations. Ideally, from the researcher’s examination of the problem throughout this study, it took transformational leaders to be open to identifying the problem(s), and looking for suitable solutions, and will also take servant leaders to approve and implement the suggested recommendations. The researcher, for the purpose of military organizations, saw servant leadership as vitally important to implementing change within organizations that are normally resistant to change. This potential resistance to change is why it took both transformational and servant leaders to participate in the DIP research study, and will take those same leaders, or leaders like them, to successfully implement the suggested recommendations for each SF Group. Transformational leaders strive to bring changes to organizations when it is specifically for the benefit and advancement of the unit, while servant leaders make all attempts to bring about critical changes when it strictly helps strengthen the people around them for everyone’s benefit (Shanker & Sayeed, 2012).

**Summary of the Study**

For this DIP, the problem was identified as unsystematic procedures and the lack of a purposeful selection process for sending SF operators to the SFISC. This became more apparent when past SFISC students, on numerous occasions, shared stories about how they were uncommonly identified and selected to attend the SFISC (SFISC, 2018). At no time during the creation or conduct of this study was the purpose identified as a way to improve the graduation rate of the SFISC, it was to make the selection process more deliberate. As expressed throughout this DIP research study, the purpose of this study was to determine the necessity of formally identifying, developing, preparing, and evaluating Special Forces operators prior to them attending the Special Forces
Intelligence Sergeant course in order to help SF leaders improve those who graduate the SFSC and work as SF Intelligence Sergeants on SFODAs.

The researcher used a multiple-case study method of data collection and analysis to allow for individual SF Group examination before conducting a combined case study analysis. This method allowed the researcher to observe any SF Group anomalies in the collected data that might not have been identified during a combined case study, which included the use of preparation and development courses at separate SF Groups. This allowed the researcher to present not only findings from the individual groups, but also present individual recommendations, if necessary, to certain SF Groups. The researcher collected interview data from thirty-nine participants, three SWC Psychologists, and three intelligence professionals from the DoS, DIA, and FBI. Collecting this data provided enough evidence to help answer the research question and provide well-developed, relevant, and useful recommendations that, if implemented, would improve the quality of SF operators attending the SFISC and assuming positions as SF Intelligence Sergeants on SFODAs.

Directly from the findings came a number of relevant and needed recommendations for the US Army Special Forces community to use for selecting individuals to attend the SFISC. There should always be people from the community looking at ways to make the SFODA a better unit based on what the senior leaders expect when they deploy them to the most dangerous places in the world. The recommendations the First SF command, along with each SF Group, will examine, approve, and possibly use to improve the SF Intelligence Sergeant are 18-Fox management, relationship building, creating a preparation course, and constructing a junior 18-Fox course/position.
In the end, there are many worthwhile recommendations that could improve the ability of the SF Groups to choose the best to attend the SFISC and become SF Intelligence Sergeants, but it is completely up to the SF leaders in the SF Groups if they wish to take the time to implement any of the recommendations, and bring change to their organizations.
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Appendix A

List of Research Web Sites

Armed Forces Journal; http://armedforcesjournal.com

Army University Press; http://www.armyupress.army.mil/

EBSCO Information Services; https://www.ebsco.com

Go Army Online; https://www.goarmy.com (not peer-reviewed)

Google Scholar; https://scholar.google.com

Journal of Military and Strategic Studies; http://jmss.org

JSTOR Online; https://www.jstor.org

Military Archives; https://www.archives.gov (not peer-reviewed)

Proquest Online; https://proquest.com

Small Wars Journal; https://smallwarjournal.com

Society of Military History; https://www.smh-hq.org

Special Warfare Magazine; http://www.soc.mil/SWCS/SWmag

Taylor and Francis Online; https://www.tandfonline.com

US Army Online; https://www.army.mil (not peer-reviewed)
Appendix B

Interview Information Sheet

TITLE OF STUDY

SELECTING PROSPECTIVE SPECIAL FORCES INTELLIGENCE SERGEANTS: A MULTI-CASE STUDY

PRINCIPAL INVESTIGATOR

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Doctoral Student
Creighton University
(910) 689-7583
bjf97334@creighton.edu

PURPOSE OF STUDY

You are being asked to take part in a research study. Before you decide to participate in this study, it is important that you understand why the research is being done and what it will involve. Read the following information carefully. Please ask the researcher if there is anything that is not clear or if you need more information.

The purpose of this Dissertation in Practice research multiple-case study is to determine the necessity of formally identifying, developing, and evaluating Special Forces operators prior to them attending the Special Forces Intelligence Sergeant course.

STUDY PROCEDURES

1. Review of past literature
2. Determination of methodology
3. Proposal submission and approval
4. Institutional Review Board (IRB) submission and approval
5. Data collection will involve face-to-face interviews. A digital voice recorder and hand-written memos will be used to gather a majority of the data when location allows for a digital voice recorder. When a digital voice recorder is not authorized because of an interview conducted in a classified location, then information and answers to questions will be annotated using hand-written notes. There are three phases to data collection
   - Data collection with the Special Forces Groups
   - Data collection with DIA and CIA
   - Data collection with USA JFK Special Warfare Center and School
6. Data transcription and analysis between each individual case and data collection phase
7. Review findings and develop recommendations
8. Complete and defend dissertation

RISKS

The risk level for this study is low and only involves providing information from your experience and opinion regarding the SF Intelligence Sergeant course. Your personal information will be protected and you will remain anonymous throughout this study.

You may decline to answer any or all questions and you may terminate your involvement at any time if you choose.

BENEFITS

There will be no direct benefit to you for your participation in this study. However, we hope that the information obtained from this study may help improve the quality and success of SF Intelligence Sergeants through the examination of selecting those to attend the SF Intelligence Sergeant course.

CONFIDENTIALITY

For the purposes of this research study, your comments will not be anonymous. Every effort will be made by the researcher to preserve your confidentiality including the following:

- Assigning code names/numbers for participants that will be used on all research notes and documents
- Keeping notes, interview transcriptions, and any other identifying participant information in a locked file cabinet in the personal possession of the researcher.

Participant data will be kept confidential except in cases where the researcher is legally obligated to report specific incidents. There are no indications at this time that the researcher would be required to report any potential incidents.

CONTACT INFORMATION

If you have questions at any time about this study, or you experience adverse effects as the result of participating in this study, you may contact the researcher whose contact information is provided on the first page. If you have questions regarding your rights as a research participant, or if problems arise which you do not feel you can discuss with the Primary Investigator, please contact the Institutional Review Board at (402) 280-2126.

VOLUNTARY PARTICIPATION

Your participation in this study is voluntary. It is up to you to decide whether or not to take part in this study. If you decide to take part in this study, you will be asked to sign a consent form. After you sign the consent form, you are still free to withdraw at any time and without giving a reason. Withdrawing from this study will not affect the relationship
you have, if any, with the researcher. If you withdraw from the study before data
collection is completed, your data will be returned to you or destroyed.
PARTICIPANT ACKNOWLEDGEMENT

I have read and I understand the provided information and have had the opportunity to ask questions. I understand that my participation is voluntary and that I am free to withdraw at any time, without giving a reason and without cost. I understand that I will be given a copy of this consent form. I voluntarily agree to take part in this study.

Participant's signature ______________________________ Date __________

Investigator's signature ______________________________ Date __________
Appendix C

Interview Protocol

**Introduction:** The researcher will introduce self to the participant and offer each individual thanks for participating. Each participant will be informed of the goals of the study, the duration of the study, and the topics to be discussed during the interview:

Good _____________ [morning, afternoon, or evening], I hope you are doing well and I am not taking you away from anything overly important. I will ask you a series of questions and you are free to answer as you wish in as great of detail as you can. You are also free to decline to answer any of my questions at any time, and you are also free to stop the interview at any time. If you require any breaks throughout the interview, please let me know and we can take a break. I expect the interview to last approximately an hour depending how in depth your answers.

You are being asked to take part in a research study. Before you decide to participate in this study, it is important that you understand why the research is being done and what it will involve. Please read the following information carefully. Please ask the researcher if there is anything that is not clear or if you need more information.

The focus of this study is to examine your current processes for selecting individuals to attend the Special Forces Intelligence Sergeant course, and figure out who is the optimum candidate to attend the course.
Consent: The participant will be asked to review consent form and will be asked if there are any questions regarding the content. After any questions are addressed, the participant will be asked to sign two copies of the consent form. One will be given to the participant and the other will be retained by the researcher.

As you know, you have a consent form in front of you. Please take a few minutes to review this consent form. [Participant will be given time to read/ review the form.] Do you have any questions regarding the terms outlined in the consent form? [If there are questions, they will be addressed.] I will now ask you to sign both copies of the consent form. I will sign them as well. You will retain one copy and I will keep the other. Thank you. Now, if you are ready, we will begin with the interview questions.

Phase one interview questions (Senior SF leaders and SF Intelligence Sergeants from the Special Forces Groups).

Section 1 (Personal Questions)

1. Please tell me a little bit about yourself, include any 18F-specific experiences. [Researcher can tell participant to start by providing him with name, unit, current position, and professional background (past jobs, schools, deployments), and add any specific 18F related experience]

Section 2 (SFODA Intelligence Sergeant Position)

1. In your opinion and experience, what makes an 18F position important to an SFODA?

2. Please explain in detail your vision of a highly competent SF Intelligence Sergeant? (Researcher will ask probing questions to get the participant to
provide as much detail as possible along with examples of “highly competent” SF Intelligence Sergeants, i.e. what are your expectations of performance from a quality (highly competent) 18F?

Section 3 (Selecting 18F Students)

1. Please walk me through your organization’s process or processes for sending guys to the Special Forces Intelligence Sergeant course (18F course).

2. In as much detail as possible, please explain any part you may have played in selecting individuals to attend the 18F course. [Probing questions may ask for more detail pertaining to the selection process of identification, evaluation, preparation, and selection. Also, if participant does not mention volunteers, then a probing question might ask, “so, how would you treat a volunteer?” Plus, if participant is a former or current 18F, then ask what process was used to select and send him to the 18F course.]

3. Now, please provide in detail your idea of the perfect or ideal selection process for sending individuals to the 18F course. (Researcher may introduce the four-step selection process (identification, development, preparation, and evaluation) of a potential student for approval to attend the 18F course.)

Section 4 (Wrap-up)

1. Rate in order of importance the military occupational specialties on the SFODA excluding the leadership positions (18A, 180A, and 18Z).
2. Is there anything at all you would like to add about pre-selection 18F course processes, or the development of the 18F that you were not able to provide during your previous answers?

Phase two interview questions (Senior intelligence analysts from the Department of State, Defense Intelligence Agency and Federal Bureau of Investigation).

1. Please tell me what you can about the hiring process for those applying for intelligence analyst positions. Is there a specific process for those with no past intelligence training or experience?

2. What attributes or traits do you look for when hiring someone with no prior intelligence experience?

3. As part of the hiring process, what analytical or critical thinking questions are asked during the interview process?

4. What types of tests or evaluations are given to prospective analysts during the hiring process prior to attending any formal training or education classes?

5. What, if anything, makes potential hires stand-out from those who are not hired? Anything you look for in a potential hire that cannot be taught?

6. Is there anything you see that separates exemplary analysts from average or below-average analysts throughout their development?

7. What are some ways of selecting suitable candidates who likely can excel as intelligence analysts? [Consider identification-development-preparation-evaluation as the selection process.]
Phase three interview questions (Psychologists from the USA JFK Special Warfare Center and School).

1. Are soldiers within SWC at any time during their SF careers evaluated on their analytical or critical thinking skills? If so, how?

2. Do any existing IQ or personality tests/evaluations measure analytical or critical thinking abilities? If so, which ones are the best that can be utilized by SF leaders within the groups?

3. In your professional opinion, how should leaders in the SF Groups select their soldiers to attend the SF Intelligence Sergeant course (SFISC)?

4. If you are working at the SF Groups with those SF leaders responsible for selecting guys to attend the SFISC, how would you advise them to develop a selection process (identification, development, preparation, and evaluation)?

5. Is there anything you would like to add or think is relevant for SF leaders as they look at how they select and send soldiers to the SFISC?

**Conclusion:** Each participant will be thanked for volunteering their time for the interview and will be told that they will be receive an e-mail acknowledging their participation and advising them instructions for reviewing their interview transcript. If the participant has any additional questions regarding the study or what will happen next, these will be addressed at the conclusion of the interview.

Thank you for your time. I appreciate your thoughtful participation and I hope you are satisfied with the information you provided. I am providing you with a business card and on the back of the card
is a web site that allows you to complete a survey and allows for you to rate the interview and provide any last details related to this interview. You will receive an e-mail in the next seven-days that will give you an opportunity to reflect on and review your answers to the questions during this interview. You will be able to make any corrections or provide me with any additional information you believe is necessary. Do you have any questions about the study or what will happen next? [If there are questions, these will be addressed before closing the interview.]

Thank you, again, for being part of this study. I look forward to connecting with you soon, and if you have questions in the meantime, please feel free to contact me whenever it is convenient for you.
Appendix D

Sample Letter

Request for Permission to Interview Participants

Date:

Organization Address:

To Whom It May Concern,

I am writing to request permission to interview selected participants within your organization for a dissertation in practice (DIP) research study I am conducting to satisfy the requirements for my educational doctorate (EdD) with Creighton University in Omaha, Nebraska. I am currently an employee and instructor at the US Army Special Forces (SF) Intelligence Sergeant course (SFISC) at the US Army JFK Special Warfare Center and School. My DIP study will examine the ways that Special Forces leaders identify, select, and send SF operators to the SFISC to be qualified as SF Intelligence Sergeants. With your permission, I would like to come to your location and interview three to five SF leaders at the company level that are responsible for sending SF operators to the SFISC. Each interview should take no more than approximately an hour.

Every effort will be made to protect the personally identifiable information (PII) of all participants and to prevent the release of sensitive and classified information during the course of collecting data from the volunteers. The idea is to take the data provided by each participant and examine, evaluate, and analyze it to determine a possible need for a purposeful process that will help those leaders to select optimum candidates suited to succeed in the SFISC and function as highly competent SF Intelligence Sergeants on their SF Operational Detachments. I appreciate your assistance with this research study, and
hope to hear from you in the near future. If you have any questions about my project, please feel free to contact me at the number provided.

Sincerely,

Barton Jay Fischer-Steinkraus
Doctoral Candidate, Creighton University
Appendix E

Bill of Rights for Research Participants

As a participant in a research study, you have the right:

1. To have enough time to decide whether or not to be in the research study, and to make that decision without any pressure from the people who are conducting the research.

2. To refuse to be in the study at all, or to stop participating at any time after you begin the study.

3. To be told what the study is trying to find out, what will happen to you, and what you will be asked to do if you are in the study.

4. To be told about the reasonably foreseeable risks of being in the study.

5. To be told about the possible benefits of being in the study.

6. To be told whether there are any costs associated with being in the study and whether you will be compensated for participating in the study.

7. To be told who will have access to information collected about you and how your confidentiality will be protected.

8. To be told whom to contact with questions about the research, about research-related injury, and about your rights as a research subject.

9. If the study involves treatment or therapy:
   a. To be told about the other non-research treatment choices you have.
   b. To be told where treatment is available should you have a research-related injury, and who will pay for research-related treatment.