



**U.S. Army Research Institute  
for the Behavioral and Social Sciences**

**Research Report 1831**

**Developing Adaptive Proficiency  
in Special Forces Officers**

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**February 2005**

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## **FOREWORD**

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In the current Global War on Terrorism, Soldiers may increasingly find themselves in quickly changing circumstances. It is critical to mission success that Soldiers are able to adapt to these changing environments. The U.S. Army Research Institute for the Behavioral and Social Sciences (ARI) has been involved in a number of basic research efforts to better understand adaptive performance and how to train it, as well as more applied efforts to develop training for adaptive thinking.

The objective of the present research was to provide officers who are in training for Special Forces (SF) with additional instruction in adaptability to increase their ability to handle changing situations. This report describes the development of a 3½-day course that provides tools and strategies for approaching situations that require adaptive performance. The effort was funded primarily by the U.S. Army John F. Kennedy Special Warfare Center and School (JFK SWCS) and the course has been implemented as part of the third phase of qualification training for Special Forces officers. Information about the course was briefed to the Commanding General of JFK SWCS prior to its implementation in January 2004. While the materials described in this report were developed specifically for officers in training for SF, the concepts and approach that are described are also being applied to other training programs at JFK SWCS and could be readily applied to numerous other personnel and units within the Army.

MICHELLE SAMS  
Technical Director

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We would also like to thank personnel from the U.S. Army John F. Kennedy Special Warfare Center and School (JFK SWCS), particularly personnel from A Co, 4<sup>th</sup> Bn, 1<sup>st</sup> Special Warfare Training Group (Airborne), including CPT Will Cotty, who were extremely helpful in providing reviews of the course materials.

Finally, we would like to thank the personnel at the 3d Bn, 3d Special Forces Group (Airborne) and JFK SWCS who served as subject matter experts for this project and provided highly useful materials for the training exercises.

# DEVELOPING ADAPTIVE PROFICIENCY IN SPECIAL FORCES OFFICERS

## EXECUTIVE SUMMARY

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### **Requirements:**

The U.S. Army John F. Kennedy Special Warfare Center and School (JFK SWCS) and the U.S. Army Research Institute for the Behavioral and Social Sciences (ARI) identified the need to enhance the adaptive skills of Special Forces (SF) personnel. Adaptive proficiency is critical for operating in the dynamic SF environment, and recent increases in mission tempo require that officers be proficient and operationally prepared immediately upon entering SF. This required that the Special Forces Qualification Course (SFQC) be modified to provide more direct training in the area of adaptive performance.

Toward this objective, JFK SWCS provided funds to develop a 3½-day introductory course on adaptability, specifically tailored to the SF environment. The course was developed with the intent of better preparing officers for the adaptability requirements they will face during later phases of the SFQC as well as in the field as SF officers.

### **Procedure:**

The framework of the adaptability course was carefully constructed from current knowledge and literature regarding the topic of adaptability. Specific lecture materials and exercise content were then tailored specifically to SF by reviewing written materials about SF, observing SF field exercises, and conducting surveys, interviews, and focus groups with SF, ARI, and personnel at the JFK SWCS Directorate of Training and Doctrine (DOTD).

### **Results:**

The adaptability course that was developed is currently held during Phase III of the SFQC, and is called the Officer Adaptive Thinking and Leadership course (O-ATL). The 3½-day course introduces the students to the meaning of adaptability in the SF environment, covering the myriad of ways in which SF officers are required to adapt. In particular, the course focuses on the topics of mental adaptability, interpersonal adaptability, and leading an adaptable team. The course provides the students with an understanding of each topic's relevance to their SF job, as well as tools and strategies for better navigating situations that require different types of adaptability. Case studies and scenario-based exercises are used throughout the course to provide students with learning experiences from which they can draw in the future.

The O-ATL Course was initially pilot tested with a group of SFQC officer candidates in April 2003. Subsequently, the course was refined and pilot tested again in January 2004. Final revisions were made to the course based on the results of the second pilot test, and final course materials were delivered in February 2004. The course has been permanently integrated into the SFQC.

**Utilization of Results:**

While the materials described in this report were developed specifically for officers in training for SF, the concepts and approach that are described are also being applied to other training programs at JFK SWCS. Currently new efforts at JFK SWCS are in progress to apply the concepts and materials developed for officers to SF Warrant Officers, SF Non-commissioned Officers, and Civil Affairs and Psychological Operations officers. The training principles and processes could also be readily applied to numerous other personnel and units across the Army.

# DEVELOPING ADAPTIVE PROFICIENCY IN SPECIAL FORCES OFFICERS

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# **DEVELOPING ADAPTIVE PROFICIENCY IN SPECIAL FORCES OFFICERS**

## **Introduction**

The U.S. Army John F. Kennedy Special Warfare Center and School (JFK SWCS) and the U.S. Army Research Institute for the Behavioral and Social Sciences (ARI) identified the need to enhance the adaptive skills of Special Forces (SF) personnel. Adaptive proficiency is critical for operating in the dynamic SF environment, and recent increases in mission tempo require that Soldiers are highly proficient, and that SF officers in particular, are proficient and operationally prepared immediately upon entering SF. This required that the Special Forces Qualification Course (SFQC) be modified to provide more direct training for officers in the area of adaptive performance.

JFK SWCS requested assistance from ARI to expand the role of adaptability in the training of Army Special Forces (SF) officer candidates. They provided funds to enable ARI to contract with Personnel Decisions Research Institutes, Inc. (PDRI) to develop an adaptability training course that would be integrated into the existing SF officer training program.

Currently, SF candidates progress through four phases of assessment and training before earning the SF tab. All four of the phases include elements of both assessment and training. Phase I is referred to as Special Forces Assessment and Selection (or SFAS), while Phases II-IV are collectively known as the Special Forces Qualification Course (SFQC). SFAS and the SFQC are regularly evaluated and modified to ensure that appropriate and high quality assessment and training methods are being used. In the current effort, the phases were evaluated for their emphasis on adaptive performance in part due to field survey results showing lower-than-desired adaptive proficiency from recent SFQC graduates (e.g., see Zazanis, Kilcullen, Sanders, & Litton, 2000). Given that adaptability has been rated as critically important for the jobs of SF Soldiers (Russell, Crafts, Tagliareni, McCloy, & Barkley, 1994), it was important for the SF training process to address this. It is now particularly important that officers develop their adaptive capabilities early in their SF careers because the recent increase in mission tempo often places these officers the field immediately upon leaving the SFQC and entering SF.

The course developed in this research addresses this need. First, we present our working definition of adaptability. Second, we describe the development of a 3½-day training course to enhance officers' adaptive performance, including a recommended plan for evaluating the course's effectiveness. While the 3½-day time frame appears to provide a sufficient initial foundation for later adaptive performance requirements in the course, a structured evaluation would be needed to determine this empirically.

The materials and design of the course were drawn extensively from the adaptability research literature, but also relied heavily on expert input from current and past SF Soldiers and knowledgeable personnel at ARI and the Directorate of Training and Doctrine (DOTD) at JFK SWCS to ensure that the course met SF's specific requirements.

# Defining and Predicting Adaptability<sup>1</sup>

## *Defining Adaptability*

Given an increased call for people to be *more adaptable* in their jobs, the first question to ask is, “What does it mean to be adaptable?” Several definitions of adaptability have been presented in the literature (e.g., Chan, 2000; Pulakos, Arad, Donovan, & Plamondon, 2000; Ross & Lussier, 1999; Smith, Ford, & Kozlowski, 1997; Zaccaro, 2001), and they can be summarized with the definition presented here: *Adaptability is an effective change in response to an altered situation.*

There are three main points to note about this definition. First, behavior change is at the core of the definition. Persisting in a course of action despite environmental changes is not adaptive -- even if it is effective. In other words, continuing to do what one has been doing is not a display of adaptability. Second, the change that is made must be effective. It is not adaptive to make a change that makes it more difficult to reach a goal or takes one further from a desired end-state. To be adaptable, the change that is made must work. Third, the change must be a response to some shift in the environment. Changing one’s behavior in a random or whimsical fashion is not adaptive. Rather, adaptation arises from situational and environmental changes.

While several researchers have provided definitions of adaptability in general, less work has been done on exploring the dimensions of adaptability in more detail. One model of adaptability that has been developed is that of Pulakos, Arad, Donovan, and Plamondon (2000). This model was developed from analyzing reports of effective and ineffective instances of adaptability, with many of the reports coming from military settings. Eight dimensions of adaptability emerged from this analysis, describing different kinds of adaptive behavior that might be displayed. These dimensions are as follows:

- Handling Emergencies or Crisis Situations
- Handling Work Stress
- Solving Problems Creatively
- Dealing Effectively with Unpredictable or Changing Work Situations
- Learning Work Tasks, Technologies, and Procedures
- Demonstrating Interpersonal Adaptability
- Displaying Cultural Adaptability
- Demonstrating Physically Oriented Adaptability

Certainly, some aspects of adaptability are less relevant for some jobs than others. For example, many desk jobs have low requirements for Demonstrating Physically Oriented Adaptability. The job of the SF Soldier, however, requires all of these elements of adaptability. Appendix A presents the definitions of each of the adaptability dimensions listed above, as well as examples that demonstrate their relevance to the SF environment.

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<sup>1</sup> More detailed information on defining adaptability and its predictors can be found in White and Dorsey (2002).

This 8-dimension model of adaptability provided us with a starting point for developing adaptability training materials; however, for simplicity's sake during training and development, these dimensions can be grouped into three overarching types of adaptability, each of which is important in the SF environment:

- *Mental Adaptability* – Being mentally adaptable means adjusting one's thinking in new situations to overcome obstacles or improve effectiveness. It includes things like handling emergency or crisis situations, handling stress, learning new things, and creative problem solving.
- *Interpersonal Adaptability* – Being interpersonally adaptable means adjusting what one says and does to make interactions with other people run more smoothly and effectively. This includes trying to understand the needs and motives of other people – especially people in other cultures.
- *Physical Adaptability* – Physical adaptability means adjusting to tough environmental states such as heat, cold, etc., pushing oneself physically to complete strenuous or demanding tasks, and adjusting weight/muscular strength or becoming proficient in performing physical tasks as necessary for the job.

For officers, it is not enough to be individually adaptable. They must also help develop adaptability in their teams by encouraging and rewarding adaptive behavior in the team and by ensuring everyone works together in a coordinated fashion. Therefore, we have added the concept of *Leading an Adaptable Team* to the above types of adaptability, and together these four concepts provide a framework for describing adaptability in the course.

### ***Predicting Adaptability***

It is important to understand personal characteristics that serve as antecedents to adaptive performance. Adaptability is often discussed as though it were a personality trait; that is, some people are simply adaptable to changes while others are not. However, while there are certainly personality components that contribute to people's levels of adaptability, several knowledge, skills, and abilities (KSAs) also contribute to adaptability. The personality traits and KSAs that have been associated with adaptability are described below.

First, adaptive performance has been related to several personality traits, including:

- *General Self-Efficacy* – Confidence in one's ability to succeed (e.g. Eden & Kinnar, 1991; Sherer & Adams, 1983; Sherer et al., 1982).
- *Resiliency* – The ability to recover quickly from change, hardship, or misfortune (e.g., Pulley, Wakefield, & Van Nestor, 2001).
- *Openness* – One's curiosity, broad-mindedness, and receptiveness to new environments and events (e.g. LePine, Colquitt, & Erez, 2000; Zaccaro 2001a; Pulakos et al., in press).

- *Achievement Motivation* – One's desire to achieve results and master tasks beyond others' expectations (Dweck, 1986; LePine et al, 2000, Pulakos et al., 2000; Schmeck, 1988).
- *Tolerance of Ambiguity* – Coping easily with environmental uncertainty (e.g. Pulakos & Dorsey, 2000; Zaccaro, 2001a).

In addition, several knowledge, skills, and abilities are also predictive of adaptive performance.

- *General Cognitive Ability* – Intelligence or “g” (e.g., LePine et al, 2000; Pulakos et al, in press; Zaccaro 2001a).
- *Metacognitive Skill* – Skill in monitoring and correcting one’s own thoughts, or “thinking about thinking” (e.g., Endsley & Robertson, 2000).
- *Problem Solving/Decision Making Skills* – Developing appropriate solutions to difficult problems and choosing appropriate courses of action (e.g., Klein, 1997; Endsley & Robertson, 2000).
- *Interpersonal Skills* – Communication skills, negotiation skills, conflict resolution skills, persuasion skills, collaboration skills (e.g., Pulakos et al., 2000; Zaccaro, 2001a).
- *Awareness* – Understanding how self and others relate to each other and fit into larger settings (e.g., Fernandez, 1991; Gardenswartz & Rowe, 1993; Zaccaro, 2001a).

In addition to the personality characteristics and skills described above, domain-specific knowledge is a key element in being able to respond adaptively (e.g., Ross & Lussier, 1999). For example, to determine a creative fix to a machine, one would need at least a basic knowledge of the machine. To respond effectively to a medical emergency, one would need specialized knowledge of medical treatment. As Cohen et al. (2000) stated, effective decision making “...requires extensive domain-specific knowledge, such as mental models that describe causal relationships among events in the domain” (pp. 32-33). For that reason, many training programs in critical or adaptive thinking are specifically geared toward a particular context so that domain knowledge can be assumed or trained (e.g., Ross & Lussier, 1999; Cohen et al., 2000; Endsley & Robertson, 2000).

Experience is another critical predictor of adaptive performance. For example, Pulakos, Schmitt, Dorsey, Arad, Hedge, and Borman (2002) empirically demonstrated a positive link between past experience in adaptive situations and adaptive performance. A key component of this research was that the experiences that were studied were those requiring adaptability. Gaining the same experience repeatedly may not aid performance in a novel situation, and it may even hurt performance if the individual insists on approaching the situation from a particular mindset that might not be appropriate (Smith, Ford, & Kozlowski, 1997; Zaccaro, 2001). However, experiencing a variety of situations requiring adjustments to the environment does appear to aid in the adaptation process.

## **Officer Adaptive Thinking and Leadership Course**

### *Overview*

The course developed for officers attending SF training is entitled the Officer Adaptive Thinking and Leadership (O-ATL). It is a 3½-day classroom-based course focused on the adaptability requirements of the SF officer. It is placed at the beginning of the third phase of training for the officers, and introduces them to various concepts related to adaptability, using a combination of training techniques. Brief lectures are used to introduce ideas to the students, examples and case studies show their relevance to the SF environment, and exercises increase student understanding of the topics and allow them the opportunity to practice performing adaptively in a controlled setting.

A classroom-based setting was chosen because the course was intended to provide the officers with the initial foundation for approaching adaptive performance in the higher-fidelity field training exercises in which they participate at later stages of training. Past research has shown that training is more effective if participants have a framework for understanding what they will encounter in training (e.g., Goldstein, 1993), and one of the goals of the O-ATL was to provide this framework. As such, the course was designed to set the students up for success in handling the adaptive performance requirements of their later SFQC training as well as their SF jobs.

### *Development Process*

To best meet the needs of SF, personnel from ARI and DOTD outlined certain requirements for the O-ATL course. These requirements were as follows:

- The course would be completely classroom based, and would therefore not include any field exercises or simulations.
- The initial course was to involve approximately 40 hours of instruction, including time dedicated to one-on-one sessions between the students and psychologists to allow for discussions and counseling regarding issues of adaptability.<sup>2</sup>
- The training materials would be designed or tailored specifically for the SF audience to be of maximum relevance to them.

With these requirements serving as a framework, the first step was to thoroughly review the existing literature on adaptability (White & Dorsey, 2002). One of the main purposes of this review was to learn about commercially available adaptability training from which the O-ATL might draw. Our initial development strategy was to identify already-developed adaptability training and then customize it for the SF audience; however, the small number of acceptable

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<sup>2</sup> Note that following the first pilot, the number of hours of instruction, including counseling sessions, was reduced to approximately 30 hours to accommodate scheduling constraints. Given this reduction in classroom time, some of the work was shifted outside the classroom in the form of reading and other homework assignments.

training materials located in this search preempted this strategy. Rather, we found that most “adaptability” courses tended to focus on only certain aspects of adaptability (i.e., critical thinking/decision making, handling stress, interpersonal interactions, intercultural interactions) in isolation of the others. These products concentrated on particular pieces of the adaptability puzzle, but they failed to provide students with a broad, overarching framework for thinking about adaptability and approaching situations requiring adaptability. Because the O-ATL was intended to provide just such a broad, integrative view of adaptability, we revised our development strategy from customizing existing products to primarily developing original course materials. While we did draw from a few developed products, the vast majority of the O-ATL products were specifically developed for the SF officer candidates.

The second major goal of our review of the adaptability literature was to ensure that the content of the O-ATL represented the most up-to-date research and understanding of the topic of adaptability. Since our strategy was now to develop primarily original training materials, we drew heavily from this review to identify issues to cover in the course as well as training principles for the design of the course. We discuss both these design principles and the content of the course in more detail in later sections.

It is important to note, however, that our review of adaptability literature and products was just a starting point for the development of the O-ATL. To make the training materials relevant to the officers, we incorporated information about the SF environment, and the types of adaptive situations that SF Soldiers face, throughout the lectures, examples, and exercises of the course.

Extensive information about the SF environment was gathered through written materials on SF operations, observation of training and assessment activities, and interviews with numerous SF personnel. Furthermore, interviews, focus groups, and surveys with SF officers and NCOs provided stories and incidents for the exercise scenarios and lecture examples throughout the course. In addition, DOTD and SF personnel thoroughly reviewed the course materials, and provided feedback regarding relevance and appropriateness of the materials. For example, these reviewers would indicate when a scenario we had represented as ambiguous actually had a clear-cut solution, thereby requiring us to develop a new scenario. They alerted us to scenarios and examples that did not seem believable (even when they were based on actual situations), and helped us to revise or replace them. In sum, there was extensive involvement of SF personnel in the development of the course to help ensure that it was as relevant to the officer candidates as possible.

We now turn to a review of the training principles that guided the development of the O-ATL, followed by an outline of course’s content.

### ***Training Principles***

The best way to train adaptive performance is still in question, as people have only recently begun to examine this issue. As Kozlowski (1998) pointed out, the study of adaptability training is still “...in its infancy” (p. 120). However, there were several training principles followed in designing the O-ATL.

- *Advance Organizers.* The course begins with an overview of the concept of adaptability, and how it is displayed in the SF environment. This overview served as an *advance organizer*, or a set of materials (verbal, quantitative, graphic, conceptual, or other) presented at the beginning of training that helps students organize the information that is to be presented (Goldsmith & Kraiger, 1997; Goldstein, 1993; Howell & Cooke, 1989; Smith et al., 1997).
- *Mastery Orientation.* The O-ATL was designed to encourage students to adopt a *mastery orientation* toward the adaptability materials they were learning. When people hold a mastery orientation, they are more likely to look upon difficult training situations as learning experiences, rather than as situations to be avoided because they may interfere with performance. Furthermore, because a mastery orientation involves treating mistakes as opportunities to learn, people with mastery goals tend to get less frustrated in the face of failure. This may make them more resilient in maintaining performance out of the training context and under demanding conditions (Kozlowski, 1998). Given the focus of adaptability in performing in new and different situations, and the superior transfer of training that is thought to accompany a mastery orientation, it might be that a mastery orientation toward adaptability training improves adaptive performance (Smith et al., 1997; Kozlowski, 1998).
- *Discovery learning.* Discovery learning is an inductive method of instruction where students must explore and experiment with tasks to infer and learn the strategies for effective performance. Thus, rather than being told how to approach particular situations, students must determine these strategies for themselves. During this process, students to develop and test hypotheses about what they are learning, and this active processing of information can lead to knowledge that is better integrated with existing knowledge. For example, rather than instructing students on how to communicate with someone of a different culture, students would practice the task in a controlled setting and devise the principles associated with cross-cultural communication. Figuring things out for themselves tends to increase students' understanding of topics, and also improves the extent to which they can apply the concepts they have learned to new settings – a key to adaptability (Atlas, Cornett, Lane, & Napier, 1997; Lussier, Ross, & Mayes, 2000; Smith et al., 1997). Accordingly, the O-ATL includes many exercises and class discussions, allowing students to uncover key principles for themselves.
- *Deliberate practice.* Ross and Lussier (1999), in their development of the Adaptive Thinking Training Methodology, recommend a focus on deliberate practice. Deliberate practice involves a focus on practicing skills in an effortful fashion (approaching training as work rather than play) and receiving active coaching and feedback on one's results. The outcome is planned and structured activity rather than casual practice. Therefore, the O-ATL has been designed to incorporate several highly structured practice sessions for which participants receive structured feedback.
- *Feedback.* During training, individuals should have the opportunity to practice new skills, obtain feedback on their results, and apply what they learned from this feedback in subsequent practice sessions. In an adaptability context, individuals should have ample opportunities to practice their adaptability related skills in a

variety of settings and obtain feedback from a variety of sources. Therefore, the O-ATL has been designed so that students receive a substantial amount of feedback during the course from both the facilitators and their peers.

### ***Learning Objectives***

The purpose of the O-ATL was to provide the students with tools and strategies for increasing their adaptive proficiency throughout their SF training and their SF careers. In particular, the training had the following objectives:

- *Understand the meaning and necessity of adaptability in the SF environment.* The adaptability requirements of the SF officer job are very high and very diverse. While students realize this to some extent, the course is designed to make them more fully aware of the myriad ways in which their jobs will require them to adapt. This provides the students with more information about their jobs, and it also allows them to start thinking through how they might handle the situations described in the class if they were to encounter them. Thus, the course in a sense provides the students with vicarious adaptability experiences.
- *Use effective strategies for handling changes in the environment.* The O-ATL goes beyond describing adaptability situations and provides the students with strategies for how they might handle them. Students should emerge from the class with not only a clear understanding of adaptability, but also with strategies for approaching different adaptability situations.
- *Demonstrate interpersonal adaptability.* Demonstrating interpersonal adaptability was identified as a separate learning objective to emphasize to students that interacting with other people is an adaptive skill. In thinking about their adaptive proficiency, students need to keep in mind how critical interpersonal adaptability is for their success as an SF officer, given the high level of interpersonal contact (often with people from different backgrounds and cultures) that their job requires.
- *Demonstrate skills associated with leading and developing an adaptive team.* The students in the O-ATL are officers and will be responsible for an operational team if selected into SF. Therefore, they must recognize that it is not sufficient that they themselves are adaptable, but also that they do what they can to ensure that their teams are adaptable and operating as integrated units.

### ***Training Topics***

Using these training principles, the course was structured around the following topics: Introduction to Adaptability, Mental Adaptability, Interpersonal Adaptability, and Leading an Adaptable Team. We did not include Physical Adaptability, given the classroom nature of the course and the emphasis that Physical Adaptability receives elsewhere in the SFQC.

Brief descriptions of the content and exercises in each of the different course modules, are provided in the subsequent sections.

## ***Introduction to Adaptability***

The introductory section of the O-ATL is intended to (1) emphasize the importance of adaptability in SF, (2) introduce the basic concepts of adaptability, and (3) provide students with information and guidance for continued self-development in the area of adaptability. Elements of this section include:

- *Importance of Adaptability in SF.* While the students in the O-ATL are generally familiar with the types of work performed in SF, they may not have a clear appreciation of the extent to which their jobs will require them to adapt. The course therefore begins with exercises and examples designed to emphasize to the students the numerous ways in which they, as SF officers, will be required to adapt to their surroundings. The students engage in a planning exercise that was developed to illustrate these points and was based on the real world experience of an SF Operational Detachment-Alpha (ODA). They also discuss a case study of how an SF ODA adapted to its surroundings during a surveillance-reconnaissance mission.
- *Basic Adaptability Concepts.* The course reviews some basic concepts associated with adaptability so that the students will have a clear understanding of what is meant by adaptability and what will be covered in the remainder of the course. For example, this section of the training course reviews the different types of adaptability (mental, interpersonal, physical, leading an adaptable team). Additionally, students are presented with a set of “Adaptability Rating Scales,” and they are encouraged to use the scales to periodically measure their own adaptability skills.
- *TAIS Workshop.* The TAIS (Test of Attentional and Interpersonal Style) Workshop is delivered by Winning Minds. During the workshop, students receive feedback on their TAIS scores (the TAIS is administered to all the students prior to the O-ATL). Students also receive guidance on how to interpret their scores and how their individual attentional and interpersonal style may relate to their performance.
- *Guided Self-Development.* As was mentioned above, adaptive proficiency is likely to be driven in part by one’s personality and intelligence, which are fairly stable. However, while certain people may be more prone to being adaptable than others, everyone can improve his/her level of adaptability through structured developmental opportunities. For example, people can learn to manage personality traits that might inhibit adaptability, even if they cannot change the trait. Consistent with this line of reasoning, students are presented with a planning guide to help them develop and record goals for improving their adaptive performance. The students complete the guide on their own, and they are also encouraged to engage in developmental activities upon leaving the course to meet their personal adaptability goals.

## ***Mental Adaptability***

The second module of the O-ATL focuses on mental adaptability, or the ways in which people must adjust their thinking to handle situations effectively. This module of the course focuses on (1) being willing and able to recognize and adjust to changes, switching mindsets as necessary, (2) thinking critically and solving problems, and (3) making decisions/choosing

courses of action. In essence, this section is concerned with how problem solving and decision making skills can be applied to achieve adaptive performance, and how the students can improve their skills in those areas. An overriding theme of this module is that the students should always be monitoring their own thought processes to respond adaptively to new situations. By thinking about their own thinking, students are more likely to catch errors in their judgment and therefore to be better problem solvers and decision makers. This module also heavily emphasizes the importance of experience in honing mental adaptability skills, and it encourages students to acquire as many experiences as they can and to draw from the experiences of others around them. This message is particularly important for the O-ATL audience, because new team captains are often the least experienced members of their operational teams. Elements of this section include:

- *Switching Mindsets.* Mindsets are ways that people mentally frame or represent situations so that they can understand them and approach them appropriately. For example, an SF Soldier might react differently to a man approaching the camp depending on whether he adopted a “peacetime” or “wartime” mindset. From an adaptability standpoint, people need to be able to adopt new mindsets toward situations when circumstances change. Switching mindsets, or looking at situations through different lenses, can sometimes bring overlooked solutions to light. Switching mindsets entails recognizing the need for change and being willing to change when change is appropriate. These concepts are illustrated with an exercise.
- *Tools and Strategies for Critical Thinking.* Since mental adaptability is concerned with the ways in which people cognitively approach changing situations, the O-ATL provides information on thinking critically about dynamic situations and solving the problems that emerge from them. First, the course reviews common errors that people make in their thinking (e.g., identifying the wrong problem; jumping to conclusions; not evaluating the information received for consistency; taking information on faith; ignoring information in favor of personal feelings). To illustrate this concept, students read a case study of a historical situation. Next, the course reviews active problem solving strategies that the students might use to solve a difficult problem (e.g., breaking a problem into parts; restating a problem in different terms; using prompting questions to guide analysis of the problem; taking different perspectives toward the problem). The students then engage in an exercise in which they watch a video of four SF Soldiers solving a problem. As the Soldiers discuss the problem, the students identify critical thinking errors and the use of problem solving strategies. An instructor-facilitated discussion of the video highlights the effective and ineffective examples of critical thinking and problem solving.
- *Decision Making.* In addition to providing problem solving strategies to the students, the O-ATL also provides the students with information on different decision-making approaches. The course reviews the standard Military Decision Making Process (MDMP) and emphasizes that it is an appropriate approach when time pressure and stress are low enough to allow someone to develop and evaluate alternative courses of action (COA). However, many SF environments are characterized by time pressure, stress, poor information, ill-defined and/or shifting goals, and changing circumstances. For these types of situations, the students are encouraged to consider

a naturalistic approach, in which someone chooses a likely course of action, “wargames” it in his mind, and implements it if it seems like it will work. This approach to decision making rests on having the experience needed to properly assess a situation and identify an appropriate course of action. Therefore, the O-ATL emphasizes to students that they should build up their store of experiences to more easily assess situations, and that they should learn from the way that experienced SF officers assess situations. The students then watch a video of experienced SF officers describing how they assessed different situations and the COAs that they chose in carrying out actual SF missions. Students compare their own approach to that of the Soldier on the video and an instructor facilitates a discussion.

### ***Interpersonal Adaptability***

The third module of the O-ATL focuses on interpersonal adaptability, or the ways in which people adjust their behaviors depending on the social demands of a situation. In interviews with current SF NCOs and officers, the need for training in interpersonal adaptability emerged as particularly strong because it is critical to building rapport and communicating with others. This module of the course focuses on (1) understanding social settings, including an awareness of oneself, others, and the larger social system, and (2) strategies for more effectively negotiating with others to obtain desired outcomes. The interpersonal adaptability module addresses interactions with others in a general sense, where the others might be Soldiers on the officer’s ODA, host nation personnel, personnel from higher commands, etc. An important concept in this module is that adjusting one’s own behaviors to accommodate others will enable them to accomplish their tasks more effectively. That is, interpersonal adaptability is not about being nice and getting along with others – it is ultimately about interacting with others effectively in order to be productive. Elements of this section include:

- *Understanding Social Settings.* Interacting effectively with others often requires adjusting one’s approach to a situation based on the perspectives, beliefs, personalities, etc. of the other parties involved.
  - *Understanding Oneself:* A starting point for interpersonal adaptability is understanding how one is viewed by others in interactions. Someone may think that he is acting deferentially, but others actually see him as timid and passive. To this end, the O-ATL provides the students with feedback on how they are viewed by others. The students interact in small groups to solve a problem then rate their teammates on a variety of attributes and behaviors. The ratings are exchanged so that each student can see how he is viewed by his teammates in these areas.
  - *Understanding Others:* After addressing the importance of understanding oneself, the course addresses the importance of understanding others in social interactions. The key to interpersonal adaptability is to be able to see the world through someone else’s eyes, and the students are provided with strategies for finding out about the perspectives of others. To practice these strategies, the students engage in a role-playing exercise.
  - *Understanding the Social System:* Another piece of understanding social settings is seeing how they fit in with the larger environment. For example, most social

settings are characterized by rules, norms, regulations, an historical context, etc. These characteristics constrain what sorts of behaviors might be appropriate, and they must be understood to achieve effective interactions with others. This is particularly important for SF officers since their success is often dependent on their ability to understand and adapt to the larger cultural setting in which they are operating. The instructor leads the students through a discussion of how elements of social systems are likely to influence their interactions with others.

- *Negotiation Strategies.* Interactions involving negotiations are particularly relevant to SF officers. They must negotiate with the Soldiers on their own teams, with others in their Battalion, Group, or higher, with host nation personnel, and others to allow the ODA to operate effectively in different situations. Different approaches to negotiations are presented and specific strategies for conducting effective negotiations are provided. The students practice these skills by negotiating in pairs and in a larger group setting (simulating an ODA's interaction with another group).

### ***Leading an Adaptable Team***

The last major training module of the O-ATL is dedicated to providing information to the students about leading an adaptable team. Because the officers will not be operating independently, but rather as leaders of ODAs, it is critical that they gain an understanding of what they can do to enhance their team's capacity to adapt as an integrated unit. The module emphasizes (1) communication and leadership styles that have been effective in the SF ODA environment, and (2) the importance of effective feedback for improving individual and team skills. Elements of this section include:

- *Communication/Leadership Styles.* There are certain ways of leading that have been associated with more effective and more adaptive teams (e.g., see McIntyre & Salas, 1995; Zaccaro, 2001b; Axtell, Holman, Unsworth, Wall, & Waterson, 2000; Edmondson, 1999; West & Wallace, 1991). Students are led through a discussion of effective leadership strategies in the SF environment. Following this discussion, students read descriptions provided by SF NCOs that describe effective and ineffective characteristics of their previous team leaders. All of this information is intended to guide the students in adopting a leadership style that is conducive to an effective and adaptive team.
- *Effective Feedback.* Feedback can be a powerful tool both for improving individual performance and team performance. A frank examination and discussion of a team's past performance, coupled with concrete suggestions for improvement, can be instrumental in developing a high performance team. In this section, the students are presented with guidance on delivering effective feedback in a team setting. The students practice delivering team feedback by engaging in a scenario-based exercise.

### ***Summary***

The O-ATL concludes with a brief summary of the major points of the course. The students are encouraged to continually evaluate their own adaptive performance and seek continual improvement. The final activity is a course evaluation.

## Pilot Evaluation

The description provided of the O-ATL should not suggest that the development process has stopped. Two pilot courses have been conducted to obtain feedback from students and instructors regarding modifications for greater effectiveness. The intent of the pilots was to determine which activities in the course led to appropriate learning and positive student reactions, and which ones did not.

The first of these pilot administrations took place from 31 March 2003 through 4 April 2003. The instructors were two SF officers (both of the rank of Major), and the students were 16 SF officer candidates preparing to begin Phase II of the SFQC. Personnel from PDRI observed the administration of this course and gathered feedback from the instructors, DOTD staff who were observing the course, and from the students themselves, via daily surveys and a focus group at the end of the course. After making changes to the O-ATL, a second pilot administration was held on 6 January 2004 through 9 January 2004. The students in this second pilot consisted of 34 officer candidates preparing to begin Phase III of the SFQC. Again, personnel from PDRI observed the administration of the course and obtained feedback from the students and instructors.

Information from these pilot administrations provided useful feedback regarding both the topic content of the course and the course lessons and exercises.

*Topic Content.* Both the instructors and the students in the pilot course largely agreed with the relevance of the topics covered by the course. They clearly saw the links between the information presented in the course and the jobs of SF officers. Because there was variation in the experience and proficiency levels of the students, some students felt that they did not need training in certain areas, while others were unfamiliar with even the basic concepts in these areas. Differences among students will continue to arise in future administrations of the O-ATL, and the instructor(s) should encourage the more knowledgeable students to share their expertise with the others.

*Course Exercises.* During the pilots, each exercise was carefully evaluated to ensure that it was teaching appropriate lessons, that students responded positively to it, and that the exercises were properly tailored to the students' skill levels. Most of the exercises in the training course met these criteria, although some adjustments needed to be made. Below is a summary of points of discussion and potential areas for future modification.

- Students found that the SF case studies that were presented in the course very useful. Not all students reacted positively to the use of historical non-SF case studies. In some cases students did not clearly see a link between the situations of the historical case study and current SF operations. Ensuring students recognize the parallels between the historical case study situations and those they might encounter in their SF careers is critical to the successful incorporation of these in the course.
- The video exercises that were included in the training were well-received by the students. This element of the course could be expanded by increasing the complexity of the problems presented in the video and providing greater detail regarding the consequences of decisions.

- Students responded very positively to the lecture and exercise components of the negotiations unit, although they requested that more time be spent on negotiation theory. This may not be the appropriate location to add information on negotiation theory, as the intention of this unit is to focus on the adaptive performance requirements entailed in negotiations.
- Some students felt that they did not need additional training in leading an adaptable team and felt comfortable with their abilities to lead small teams in SF environments. Course instructors should encourage those with more leadership experience and proficiency to share their knowledge with the other students in the class. In addition, an exercise could be incorporated into this section that involves a role-play of the first meeting between a Captain and his Team Sergeant and/or Warrant Officer. Soldiers playing the role of Team Sergeant or Warrant Officer would follow scripts that would present the Captain with unexpected interactional styles or approaches.
- The students generally preferred discussions, activities, and exercises to lecture, and they believed that the amount of time spent on lectures during the first pilot course should be decreased. In the second version, almost all lecture components of the course were redesigned to take no more than 20-30 minutes. It is not clear that the lecture content could or should be substantially reduced beyond this level, without eliminating important concepts. The instructor should make every effort to keep the class engaged during the brief lectures through enthusiastic presentations and the use of examples to illustrate key concepts.
- Another lesson learned from the pilots of the O-ATL was the importance of providing feedback to the students. They responded very positively to the parts of the course that provided them with direct feedback on their adaptability performance. Accordingly, the instructor(s) should continue to provide the students with guidance on interpreting and applying the feedback obtained in the course.
- The qualifications of the course instructor(s) are critical. Optimally the primary instructor would have both a behavioral science background and experience in that specific performance domain - in this case the SF environment. The behavioral science background enables the instructor to have a more thorough understanding of the subject area and its theoretical foundations, and having experience with SF enables him to supplement the course materials with his own examples. To be maximally effective the instructor also needs a detailed understanding of the SF training pipeline as well as excellent facilitation skills. Ideally, guest instructors or guest speakers with operational experience would be used to cover certain topics. These could be current team sergeants, team leaders, or warrant officers who have recently returned from deployments.
- In addition to choosing the right instructor, the pilot course highlighted the importance of instructor training. Instructors must dedicate the necessary time to learn the training content, then tailor the materials to his own style and preferences.

Overall, the reception of the course was positive. While there were a number of changes recommended by students and instructors, all parties believed that the course was valuable and

taught important lessons. Future versions of the O-ATL will likely allow for further enhancement of the course. We now turn to a discussion of an evaluation plan for the O-ATL to enable regular course evaluation and improvement.

### **O-ATL Evaluation Plan**

The O-ATL has been carefully designed to enhance officers' adaptive proficiency. However, to ensure that it is having the maximum possible impact, it should be continually evaluated to identify its strengths and weaknesses. Evaluation data will provide the necessary diagnostic information to ensure that the course remains up-to-date, effective, and integrated with rest of the SFQC. In this section we provide a recommended plan for evaluating the O-ATL.

#### ***Background***

In the training literature, the dominant model of training evaluation is based on the work of Dr. Donald Kirkpatrick (cf. Kirkpatrick, 1998). According to this model, training evaluation can be arranged in the following four hierarchical levels:

- *Level 1:* Participant reactions to the training.
- *Level 2:* The extent to which participants acquire new knowledge or skills or change their attitudes.
- *Level 3:* The extent to which training results in a positive behavior change in the work environment.
- *Level 4:* The extent to which training has an impact on organizational results such as mission accomplishment, productivity, cost savings, etc.

The recommendations for the O-ATL evaluation draw from Kirkpatrick's model where appropriate and are tailored to the unique environment of SF.

#### ***Level 1 Evaluation***

Level 1 evaluation is by far the most popular type of training assessment. According to a recent survey by the American Society of Training and Development, 78% of courses are evaluated by some sort of reaction measure at the conclusion of training, and the vast majority of organizations stop at this level (Van Buren & Erskine, 2002). Typically, level 1 evaluation consists of directly surveying training participants at the conclusion of a course. The surveys usually include questions about how well people liked the course, facilities, instructors, etc. Participant reactions can provide valuable insights on the quality of training, particularly if the right questions are asked. However, participant reactions should be interpreted in light of the fact that they provide a limited view of training effectiveness. Before making major revisions to a course or even canceling it altogether, information beyond reactions is needed.

With this caveat in mind, level 1 evaluation should be conducted at the conclusion of the O-ATL, but the results of these reactions should be interpreted with some caution. Based on the relevant research, the contents of the surveys should include questions from the each of the following areas (see the Appendix B for a sample questionnaire):

- The extent to which the training increased the participant's knowledge of and confidence in meeting SF adaptive performance requirements;
- The perceived usefulness of various parts of the course and the course materials;
- Logistics:
  - Reactions to the course instructor;
  - Course length (i.e., was the course too long or too short given the material that needed to be covered);
  - Difficulty level of material/instruction (i.e., was the level appropriate to the audience – not too easy or difficult), and;
  - Facilities.

Note that this type of evaluation will serve two purposes. The first is to diagnose and remedy potential problems with the course and identify ways that the course could be improved. The second is to provide information regarding whether the course actually helps students develop knowledge of adaptive performance requirements, some basic skills for performing adaptively, and strategies for applying what they have learned on the job. The first purpose can be evaluated directly – negative ratings or comments would indicate a problem, although the absence of negative comments does not mean there are no problems with the course. Moreover, participants can offer valuable suggestions for improvements. The second purpose, however, would be evaluated indirectly. Because new knowledge and skills acquired in training often take time to develop fully on the job, evaluation at this level is focused on assessing attitudes and beliefs, which are necessary prerequisites for actual behavior changes on the job.

Data analysis at this level is likely to be purely descriptive. For example, the percentage of people who felt the course was useful, who felt the instructor was effective, etc. could be reported. These ratings could be tracked over time to see if they increase or decrease. Specifically, these results, coupled with summaries of the written comments could then be used in a variety of ways, such as:

- To identify activities in the course which are off the mark in terms of level, focus, difficulty, etc.
- To identify instructors who may be ineffective.
- To gather suggestions for course improvement.

### ***Level 2 Evaluation***

The intent of the O-ATL is to ensure that officers understand and are prepared to meet the broad range of adaptability requirements they are likely to face both in later training phases and

on-the-job. As such, the course should have an impact on the students' knowledge, attitudes, and beliefs about their ability to be adaptable. Therefore, a level 2 evaluation should be conducted to assess the extent to which the course had a positive impact on the students' understanding of SF adaptive performance requirements, related strategies for adaptive performance, and their confidence in their ability to be adaptable.

This evaluation could be done using a pre/posttest within group comparison. The pre/posttest within group comparison would entail administering a survey to the students both before and immediately following the training (see Appendix B for a sample survey). To preserve anonymity and confidentiality, the survey could be coded with a random ID number to facilitate matching. If the posttest scores were significantly higher than the pretest scores, this would be evidence that the training improved knowledge and self-efficacy.<sup>3</sup>

Additional evidence for the positive effects of the training could be gathered through a comparison between a group that received the training and a control group who did not receive the training. While this strategy may not be possible with the officer course, given that course administrators will likely want all officers to receive the training, it may be a strategy that could be used in applications of this course to other training venues. If the course was being applied to Soldiers in a new setting, this technique could be used to compare Soldier's knowledge and confidence in the class prior to implementation of the course and following the implementation of the course. Surveys would be given to members of both classes at the same point in the course. Significantly higher scores for the group that received training would provide evidence that the training improved knowledge and self-efficacy.

### ***Level 3 Evaluation***

Because of its relatively early placement in the SFQC, the impact of the O-ATL on subsequent performance is probably best measured during future training rather than waiting until the students are assigned to an actual ODA. Evaluation of behavior in training could be assessed by the cadre (and perhaps through peer evaluations) during hands-on exercises in the final phase of SFQC training (e.g., the Unconventional Warfare Practical Exercises or Robin Sage). The scales presented in this report could be used as tools for these assessments (See the rating scales in Appendix C). It would be important that any measure used to evaluate the effectiveness of the O-ATL be focused on adaptability and not a measure of general performance, because a general performance measure would most likely be too broad to capture any improvements in adaptive performance.

As with level 2 evaluation, comparisons could be made between the performance of individuals who have completed the course and a control group of individuals who entered

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<sup>3</sup> The anonymity of the data will need to be emphasized particularly strongly with the students in the SFQC since they are so accustomed to being assessed in the SFQC. They may not be willing to admit to any deficiencies in their knowledge or their confidence. As such, the students' answers to the pretest survey might be so high that there would be no room for improvement in the posttest survey following the course. Therefore, it is critical that students believe that their survey answers are not going to be used for evaluating their personal performance. Furthermore, if administrations of pretest measures consistently indicate that students rate themselves extremely high in all categories, other evaluation methodologies may need to be considered.

training before this course was offered. Again, while this would probably not be possible with members of the O-ATL course, it would be a useful technique for future applications of the course. If individuals who completed the training demonstrated more adaptable behaviors in subsequent training than individuals in the control group, this would be evidence for the effectiveness of the course in changing behavior. Additionally, the evaluators could note any barriers to adaptive performance that are outside of the students' control (e.g., rules that prohibit implementing novel solutions to problems). Once identified, steps can be taken to reduce or eliminate these barriers.

#### ***Level 4 Evaluation***

Because the O-ATL is only one part of an extensive training program, its long-term impact on force readiness or mission success would be difficult to assess. Therefore, while evaluation targeted at levels 1-3 addresses the effectiveness of the O-ATL in particular, level 4 evaluation is better suited to assess the effectiveness of adaptability training across the entire training pipeline.

One way to accomplish this evaluation would be to appoint an independent task force to evaluate the extent to which adaptability training in the SFQC has been effective. Gathering data for this evaluation should come from multiple sources, such as:

- Interviews and focus groups with recent SFQC graduates and their commanding officers.
- Reviews of AARs from ODA missions.
- Observations of selected operations.

Data gathered from these sources could be summarized and evaluated against SF standards for performance and goals for mission success. Gaps between what is observed and what is expected would indicate a need for changes to training and development in the SFQC.

#### **Conclusions**

This report provided a summary of the research and processes that were used to develop the O-ATL Course. It also described lessons learned from the pilot courses and provided a plan for continued evaluation and improvement of the course contents. While the materials developed in this effort were developed specifically for officers in training for SF, the concepts and approach provide a road map that can be used to establish adaptive performance training for other personnel as well. In fact, course materials based on the O-ATL have already been developed and implemented for students attending the SF Warrant Officer Basic Course, and work is in progress at JFK SWCS to apply the concepts to the SF Advanced Non-commissioned Officer Course, and the qualification courses for Civil Affairs and Psychological Operations officers. In addition, the training principles and processes could be readily applied to numerous other Soldiers and units across the Army. Personnel at DOTD, JFK SWCS have been in coordination with other Army units to discuss the potential application of these materials for the training and development of their personnel.

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## Appendix A: Linking Adaptability Dimensions with SF Critical Incidents

### Handling Emergencies or Crisis Situations

- Reacting with appropriate urgency in threatening, dangerous, or emergency situations.
- Reacting appropriately in emergency situations, quickly analyzing options for dealing with danger or crises and their implications.
- Making split second decisions based on clear and focused thinking.
- Maintaining emotional control and objectivity during emergencies while maintaining focus on the situation at hand.
- Taking initiative in emergencies and/or in dangerous situations as appropriate.

- *En route to a meeting in a small village, one of the detachment vehicles struck a mine. Two men were seriously injured and the detachment medic was mortally wounded. The team sergeant was initially stunned and disoriented due to his injury. This detachment commander ensured that medical treatment was initiated, and that communication was established with higher headquarters, and that medical evacuation was requested. The wounded Soldiers were quickly stabilized and helicopters were on their way as soon as possible.*
- *During OCONUS (Outside Continental US) military operations in urban terrain (MOUT) training, this 18B saw an explosion in an indigenous Soldier's hand. The 18D was on another range and this 18B did not have any bandages. This 18B used an indigenous Soldier's T-shirt to stop the bleeding. The bleeding was stopped until the 18D arrived to suture the wound and treat it for infection.*

### Learning Work Tasks, Technologies, & Procedures

- Demonstrating enthusiasm for learning new approaches for conducting work.
- Doing whatever is necessary to keep knowledge and skills current in a rapidly changing environment.
- Quickly and proficiently learning new tasks and/or methods, inquiring about and obtaining training for unfamiliar tasks/methods, adjusting to new work processes and procedures.
- Anticipating changes in work demands and then searching for and participating in assignments or training that will prepare oneself for these changes.
- Taking action to improve work performance deficiencies.

- *The HN post commander curtailed routine communications with the SF team leader because the team leader could not speak the language. This team leader made no attempt to improve his language capabilities, even though he was in an ideal learning environment where many would have volunteered to help him. The HN personnel tactfully ostracized the team leader.*
- *An 18E right out of the Q-course was assigned to an A-team without the benefit of a senior commo sergeant to mentor him. He realized he was not trained on the radio equipment at the team level, nor was he familiar with the base operating procedures for the battalion. On his own, this 18E inventoried team radio equipment, identified equipment he was not familiar with, and asked for and then received classes on all radios and equipment he was not familiar with. He became familiar with all team radio equipment, all company and battalion radio procedures, and all SOPs.*

### Handling Work Stress

- Remaining composed and cool when faced with difficult circumstances or a highly demanding workload/schedule.
- Not overreacting to unexpected news or situations.
- Managing frustration well by directing effort to constructive solutions and not blaming others.
- Demonstrating resilience and high levels of professionalism in stressful circumstances.
- Acting as a calming and settling influence that others look to for guidance.

• *While assigned as the senior US advisor to a host nation battalion on a border screen mission, this SF officer was told the unit was under attack. The host nation battalion commander panicked and was ready to evacuate the area of operations. This SF individual lit a cigarette, asked for a cup of coffee, and sat down. After making a humorous remark to a host nation officer, this officer methodically questioned the host nation staff to ascertain the exact situation. Addressing US Soldiers present, he calmly issued instructions to prepare ODA reaction forces and an ODA level of base security. Observing the SF officer's leadership style, the host nation battalion commander began issuing complementary orders to his staff. The battalion responded efficiently to the limited attack and maintained its position on the border.*

• *During a vehicle movement on a major highway in a host nation, a group of SF Soldiers came upon an accident scene; two regular Army medics were upset, running around and alarming the victims. This SF medic assigned onlookers to be litter bearers, splinted the fractures, initiated IVs and talked to victims and onlookers to calm them down. The host nation troops felt confident in the SF medic's abilities.*

### Demonstrating Interpersonal Adaptability

- Being flexible, open-minded and cooperative when dealing with others.
- Listening to and considering others' viewpoints and opinions, and altering ones own opinion when it is appropriate to do so.
- Being open and accepting of negative or developmental feedback regarding work.
- Working well and developing effective relationships with diverse individuals.
- Demonstrating keen insight of others' behavior and tailoring own behavior to persuade, influence, or work more effectively with others.

• *A composite team was preparing for deployment to Africa; this new team leader who had just graduated from the Q-course was placed in charge of the core team. This team leader did not ask for help from the experienced 180A on the team, was threatened by criticism, and voiced his anger once by shouting and raving in front of HN personnel.*

• *This junior NCO was given duties as a team sergeant even though another member of the team outranked him. This junior NCO used the input of the senior NCO at all times. The senior NCO felt his opinions were important and the team's morale remained intact.*

### **Solving Problems Creatively**

- Employing unique analyses, and generating new, innovative ideas in complex areas.
- Turning problems upside down and inside out to find fresh, new approaches.
- Integrating seemingly unrelated information and developing highly creative solutions.
- Entertaining wide ranging possibilities others may miss, thinking outside the given parameters to see if there is a more effective approach.
- Developing innovative methods of obtaining or utilizing resources when insufficient resources are available to do the job.

- *The ODA was short of food and still a few days away from exfil. With the food supply low, this 18E ran an antenna lead to a nearby tree noted to harbor a hefty squirrel population. He placed a small amount of peanut butter on the wire to attract the squirrels' attention, then keyed the transmitter and shocked the squirrels when they had the peanut butter in their mouths, stunning them long enough to have someone hastily retrieve the squirrels. The ODA was able to have sufficient food for a couple of extra days.*
- *An SF ODA was tasked with teaching a foreign SF unit technical mountain climbing skills. Although the US SF team had several hundred thousand dollars worth of high speed equipment, they knew the other SF team would never see such equipment. This SF Soldier taught the foreign students using cheap, fabricated equipment such as large nuts and bolts on ropes as pieces for protection. The fabricated equipment was cheap, easy to obtain, and very effective, making the technical mountain climbing techniques applicable to these foreign students.*

### **Displaying Cultural Adaptability**

- Taking action to learn about and understand the climate, orientation, needs, values, etc. of other groups, organizations, or cultures.
- Integrating well and being comfortable with different values, customs and cultures.
- Willingly adjusting behavior or appearance as necessary to comply with or show respect for others' values and customs.
- Understanding the implications of one's actions and taking steps to maintain positive relationships with other groups, organizations, or cultures.

- *While in Africa, this team sergeant was told to meet with the indigenous colonel at 0530. This team sergeant, upon arriving at the colonel's tent, was informed that it was the host nation's tradition that the eldest in the village eat goat's eyes; the team sergeant was the oldest and was to receive this great honor. This team sergeant ate the goat's eyes. The indigenous colonel was pleased and impressed as he knew this was not something Americans usually ate, particularly before coffee.*
- *An SF team was given the task of teaching specific skills to an indigenous force. In this country the leadership does not like to associate with the enlisted personnel. This 18C explained to an English-speaking officer that the enlisted team members of his team actually did the teaching, but that they could work something out if this was not acceptable to his staff. He met with the officer separately to determine classes to teach, times, numbers, etc. The host nation officer was able to save face and the Soldiers learned the necessary skills.*

### **Dealing Effectively with Unpredictable or Changing Work Situations**

- Taking effective action when necessary without having to know the total picture or have all the facts at hand.
- Readily and easily changing gears in response to unexpected events and circumstances.
- Effectively adjusting plans, goals, actions, or priorities to deal with changing situations, and doing whatever is necessary to get the job done.
- Imposing structure for self and others that provides as much focus as possible in dynamic situations.
- Not needing things to be black or white, and refusing to be paralyzed by uncertainty.

- *A platoon-type raid was planned to snatch a prisoner. The plan called for a large force to hit the objective and grab the prisoner under cover of darkness. The enemy force size was unknown, but was thought to be squad +. This reconnaissance team leader set up his surveillance team at the objective and saw that the prisoner had been brought out with only two guards far from the camp. This team leader decided to rescue the prisoner there and then. The prisoner was rescued; this mission would probably have failed if it had been executed as planned.*
- *During an actual combat mission, the UH-1D was receiving heavy ground fire. It was relayed to the air crew that friendly indigenous troops were in the field of fire. The order was given to the gunner to ignore this and provide fire. This 18B heard the order and asked for it to be repeated to be sure that he was in fact being told to fire on friendly troops. This 18B shifted his fire in the mean time so that it affected no one. The order had in fact been a mistake.*

### **Demonstrating Physically Oriented Adaptability**

- Adjusting to tough environmental states such as extreme heat, humidity, cold, etc.
- Frequently pushing self physically to complete strenuous or demanding tasks.
- Adjusting weight/muscular strength or becoming proficient in performing physical tasks as necessary for the job.

- *An SF team spent two to three hours a day preparing for its high alpine ski trip with foreign troops that trained in that environment all the time. This SF individual prepared by spending the previous two months running four to six miles a day on mountain trails, doing ski exercises, swimming, and doing ruckmarches. Even though the trip was extremely physically demanding, this individual sustained no injuries.*
- *During team mountain training, an SF Soldier was unable to physically climb a training platform without aid. He knew basic mountain climbing techniques but he was physically unprepared. He modified his PT program to improve his physical condition and didn't quit. On the next mountain training exercise, he easily climbed and maneuvered around the training platform.*

## Appendix B: Sample Training Evaluation Questionnaires

### *Sample O-ATL Adaptability Course Participant Reaction Questionnaire*

**Directions:** Please take a few moments to provide your reactions to the O-ATL. Your answers will be completely **anonymous and confidential** and will be used to continually improve the course. If you have additional questions, please contact XXXX. Thank you for taking the time to complete this survey!

	Strongly Agree		Agree		Strongly Disagree
1. As a result of this course, I feel more confident in my ability to be adaptable.	5	4	3	2	1
2. As a result of this course, I feel better prepared for the rest of the SFQC.	5	4	3	2	1
3. I think the information covered in this course will be relevant to my future job as an SF officer.	5	4	3	2	1
4. The instructor was knowledgeable about the subject matter.	5	4	3	2	1
5. The instructor effectively facilitated the course.	5	4	3	2	1
6. The instructor presented information in a clear, easy-to-understand manner.	5	4	3	2	1
7. The materials used in this course helped me to understand the topic of adaptability.	5	4	3	2	1
8. The facilities for this course were satisfactory.	5	4	3	2	1
9. Overall I think this course was valuable.	5	4	3	2	1

10. The length of the course was: <input type="checkbox"/> Too long for the material covered <input type="checkbox"/> Too short for the material covered <input type="checkbox"/> About right	11. The lectures and discussions in this course were: <input type="checkbox"/> Too academic <input type="checkbox"/> Too basic (mostly common sense) <input type="checkbox"/> About right	12. The exercises in this course were: <input type="checkbox"/> Too difficult <input type="checkbox"/> Too easy <input type="checkbox"/> About right
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What did you like best about the course? \_\_\_\_\_  
 \_\_\_\_\_

What did you like least about the course? \_\_\_\_\_  
 \_\_\_\_\_

Please provide any additional comments and suggestions for improving the course. Please be as specific as possible:  
 \_\_\_\_\_  
 \_\_\_\_\_

## **Sample O-ATL Adaptability Course Participant Evaluation Questionnaire**

**Directions:** Please take a few moments to complete this survey. The results will only be used for research purposes and will be completely **anonymous and confidential**. Therefore, it is very important that you respond to these questions openly and honestly. If you have additional questions, please contact XXXXXXXXXXXX. Thank you for taking the time to complete this survey.

I am completing this survey at the beginning of the Officer ATL course.

I am completing this survey at the conclusion of the Officer ATL course.

Evaluate each item presented below in three different ways:

1. Rate how well you understand what is involved in effectively performing in each of the listed activities in an SF environment. For example, considering the first item, how well do you understand what it takes to conduct a successful negotiation in SF settings?
2. Rate how strong your knowledge is of specific strategies for carrying out the activities listed below. For example, considering the first item, how strong is your knowledge of specific strategies for conducting negotiations?
3. Rate how confident you are in carrying out the activities below. For example, considering the first item, how confident are you that you could successfully conduct a difficult negotiation at this time?

	Understanding of What is Involved in Successfully Performing Activities in the SF Environment						Knowledge of Specific Strategies for Carrying out Activities						Confidence in Successfully Performing Activities				
	Strong Understanding	Average Understanding			Weak Understanding		Strong Knowledge	Average Knowledge			Weak Knowledge		Very Confident	Confident			Not at all Confident
1. Conducting difficult negotiations.	5	4	3	2	1		5	4	3	2	1		5	4	3	2	1
2. Adjusting your behaviors to effectively interact with and persuade others.	5	4	3	2	1		5	4	3	2	1		5	4	3	2	1
3. Handling emergency or crisis situations.	5	4	3	2	1		5	4	3	2	1		5	4	3	2	1
4. Solving difficult problems creatively.	5	4	3	2	1		5	4	3	2	1		5	4	3	2	1
5. Maintaining situational awareness and accurately assessing situations to make decisions.	5	4	3	2	1		5	4	3	2	1		5	4	3	2	1
6. Avoiding critical thinking errors.	5	4	3	2	1		5	4	3	2	1		5	4	3	2	1
7. Communicating and listening effectively as a leader.	5	4	3	2	1		5	4	3	2	1		5	4	3	2	1
8. Providing timely, instructive, and motivational feedback as a leader.	5	4	3	2	1		5	4	3	2	1		5	4	3	2	1
9. Leading a team to be more adaptable.	5	4	3	2	1		5	4	3	2	1		5	4	3	2	1
10. Identifying and learning from past mistakes.	5	4	3	2	1		5	4	3	2	1		5	4	3	2	1
11. Accurately monitoring/evaluating performance.	5	4	3	2	1		5	4	3	2	1		5	4	3	2	1

## Appendix C: Sample Adaptability Rating Scales

### Demonstrating Interpersonal Adaptability

- Demonstrates flexible, open-minded, and cooperative behaviors when dealing with others.
- Is extremely skilled at “reading” others, and demonstrates keen insight into others’ motivations and behavior.
- Takes action to understand the needs of other cultures and individuals.
- Understands even the subtle implications of own actions on others of different backgrounds.

- 4** —————> Excellent – always or almost always acts this way
- 3** —————> Satisfactory – usually behaves this way
- 2** —————> Needs some improvement – sometimes behaves this way
- 1** —————> Needs much improvement – rarely or never behaves this way

## Demonstrating Mental Adaptability

- Maintains emotional control during threatening or dangerous situations.
- Adjusts plans/actions to remain highly effective when dealing with changing situations.
- Deftly adjusts to new situations and changes of plan, incorporating knowledge and experience to achieve success.
- Remains calm and focused on the task at hand, even when faced with an extremely demanding workload.
- Arrives at solutions to complex problems by entertaining a wide range of possibilities that others may miss.

**4** → Excellent – always or almost always behaves this way

**3** → Satisfactory – usually behaves this way

**2** → Needs some improvement – sometimes behaves this way

**1** → Needs much improvement – rarely or never behaves this way

## Leading an Adaptable Team

- Models adaptive behavior for team members by learning from experience and seeking self-improvement in weak areas.
- Provides accurate, timely, motivational and constructive feedback to subordinates
- Helps team members learn from mistakes in order to be more adaptable in the future.
- Involves team members in decisions and keeps them informed of consequences of their actions.
- Provides opportunities for subordinates to gain experience in new areas and helps draw "lessons learned" to transform experience into knowledge.
- Encourages shared understandings of situations among team members through appropriate communications to facilitate coordinated responses.

**4** → Excellent – always or almost always behaves this way

**3** → Satisfactory – usually behaves this way

**2** → Needs some improvement – sometimes behaves this way

**1** → Needs much improvement – rarely or never behaves this way