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Psychological Intangibles (PI): Squad-Level Assessment and Development Resources

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14. ABSTRACT Psychological Intangible (PI) refers to a multi-dimensional construct consisting of variables that contribute to small unit mission readiness across the human dimension. Ad hoc squad PI variables were identified and validated (Aude et al., In Press) using the research products described within this report. Products include an assessment instrument to measure PIs during ad hoc squad training exercises. The assessment was refined across several data collections based on statistical analyses as well as user feedback. Methods to improve ad hoc team performance via feedback and development were also a focus of this research. Consequently, sports psychology and feedback best practices literatures were reviewed to determine the optimal approach for delivering brief feedback in the midst of a training exercise. The approach employed is termed squad huddle. A squad huddle job aid was developed and refined based on instructor feedback and implemented to facilitate consistent huddle application. This report details the development of the PI assessment instrument, the squad huddle job aid, and the training guide to help instructors accurately observe and assess PI, complete the instrument, and effectively execute the squad huddle.					
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PSYCHOLOGICAL INTANGIBLES (PI): SQUAD-LEVEL ASSESSMENT AND DEVELOPMENT RESOURCES

EXECUTIVE SUMMARY

Research Requirement:

The Army is interested in going beyond training tangible skills such as marksmanship to identifying and training intangible psychological constructs (e.g., psychological intangibles [PI]). The PI refer to the psychological constructs that contribute to Soldier mission readiness across the human dimension and include variables such as initiative and perseverance. The overarching research objective was to identify a set of variables reflecting these constructs, which were likely to be predictive of ad hoc squad performance in austere environments characteristic of Multi-Domain Operations (MDO). This research generated a number of products, including a valid and reliable measure of PI variables and associated performance criterion. Feedback and development resources were also developed to test the ability of on-the-spot changes and adaptations to improve ad hoc team performance. The creation of these products is the focus of this research product (RP) report. A separate technical report documents PI measure development and validation in depth, as well as the quasi-experiments conducted and their results.

Method:

A review of past research, current literature, and expert interviews were used to identify candidate PI. A series of research team ratings and discussions reduced the candidate PI for field use at a Medical Simulation Training Center (MSTC). Items were developed to assess the PI and compiled into an instrument for instructors to use in their training setting. Instructors were subsequently asked to review and provide feedback on the measures. These measures were then field-tested, using criterion measures to provide evidence of validity. A training guide was also developed to teach instructors how to accurately and effectively complete the instrument. For feedback and development resources, the sports psychology literature was searched to determine a strong approach for delivering brief but impactful PI feedback. Termed *squad huddle*, an instructor facilitated its implementation at a key transition point in the training exercise. A job aid was also developed and implemented to facilitate consistent huddle application.

Findings:

The three research products proved to be effective in their designated role supporting the PI research objectives, including the accurate and reliable assessment and feedback of ad hoc team PI and performance. A companion technical report provides details on ad hoc team PI research methods and findings (Aude et al., in preparation).

Utilization and Dissemination of Findings:

The products herein, designed to assess and develop ad hoc team performance at a MSTC, could be applied (with slight modification) to crew, team, squad, and other small unit training exercises. The training guide can be used to orient and train instructors, unit leaders,

and/or Observer-Coach-Trainers (OCT) on how to accurately assess the psychological aspects of a small unit's performance. The squad huddle aid may be employed in tandem with the guide during live training. The assessment and development of ad hoc team PI is also applicable to dispersed, fragmented small teams expected to proliferate in MDO. Dissemination of these findings should be to training doctrine developers who may find useful, research-based information to help guide revisions to Army doctrine such as FM 7-0, *Training*, as well as ATP 6-22.6 *Army Team Building*. Army operational units could also (with slight modification) use the research products to add an additional dimension (i.e., psychological) to small unit assessment and development. Combat Training Centers (CTC) may also want to equip OCTs with these products to enhance their effectiveness at small unit assessment, feedback, and on-the-spot development. The products were provided to the Clarence E. Sasser MSTC for their use.

PSYCHOLOGICAL INTANGIBLES (PI): SQUAD-LEVEL ASSESSMENT AND DEVELOPMENT RESOURCES

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PSYCHOLOGICAL INTANGIBLES (PI): SQUAD-LEVEL ASSESSMENT AND DEVELOPMENT RESOURCES

Introduction

The Army's emerging multi-domain operations (MDO) doctrine emphasizes the significance of small semi-autonomous units operating on, above, and below the surface of the earth to achieve land warfare dominance (Department of the Army, 2018). Thus, it is important to fully enable squads and other small Army teams and crews to be optimally effective tactically, technically, and psychologically. Traditionally, the Army has excelled at preparing Soldiers tactically and technically for the rigors of deployment and combat. However, the Army has identified maximizing Soldier, leader, and team human potential as key to MDO success (Department of the Army, 2018). Thus, in addition to tactical and technical skills, the assessment and development of the psychological intangible (PI) aspects of small unit performance is needed to maximize Soldier and small unit readiness and effectiveness. An "intangible" has been used to describe these "psychological concepts that contribute to Soldier mission readiness across the human dimension" (Vowels & Aude, 2019, p. 2) and includes constructs such as adaptability, self-awareness, warrior ethos, confidence, and resilience.

A series of studies were conducted from 2010 to 2013 to identify and measure psychological intangibles relevant to individual Soldier mission readiness (Aude et al., 2015; Aude, Bryson, et al., 2014; Aude, Keller-Glaze, et al., 2014). That research included an extensive review of the literature, data collections from active-duty Soldiers, and development of field-valid measures. After assessing the most critical intangibles for Soldier readiness and training needs, measures of initiative and perseverance were developed for use by Army units and piloted at a Medical Simulation Training Center (MSTC). During MSTC training, composite squads conduct combat field medical tasks under demanding and realistic field settings (e.g., downed aircraft, injured Soldier [training manikin] within a tank turret). The MSTCs are optimal settings for pilot testing measures because they operate Army-wide at key unit locations/installations and participating Soldiers are drawn from every squad in the Army (primarily enlisted and junior noncommissioned officers [NCOs]) due to the requirement for Tactical Combat Casualty Care (TCCC) certification (DoDI 1322.24).

The purpose of the present research was to extend this work on individual PI to teams training for the MDO environment. To accomplish this, we leveraged teams theory and research to determine how to define, measure, and model PI at the team level. Thus, we refer to and use the word "teams" when citing the literature and its associated models but apply the research to the Army squad. We also adapted known indicators and measures to identify a set of variables likely to be predictive of squad performance during the targeted training exercises. The present research also included the validation and delivery of an assessment, feedback, and developmental toolkit designed for use by instructors observing or otherwise working with squads during training. This report describes the process undertaken to perform these tasks and showcases the products developed as a result of this research.

Overview

The research products were iteratively refined over two phases. **Figure 1**

Research Product Timeline depicts the flow of development and refinement across those two phases, which are described in the remaining sections of the report. The products are:

- PI Assessment Instrument – used by instructors to rate squad PI behaviors during a training exercise, to formulate ideas about which behaviors were helping or hindering squad performance, and to rate overall squad performance;
- Squad Huddle Job Aid – used by instructors to execute a brief feedback session with the squad members focused on PI behaviors (versus tactical performance) during brief, naturally occurring pauses in the training; and,
- PI Assessment and Squad Huddle Training Guide – used by designated instructor(s) to deliver a training session to other instructors on how to use the PI assessment instrument and how to execute the squad huddle during a training exercise.

Figure 1 breaks the two phases of data collections into four anchors on the development timeline, since the products were refined between data collections in both phases. Entries in *italics* represent logistical adjustments made to support data collection execution. The other adjustments were intended for product refinement and based on statistical analysis, lessons learned, and/or instructor feedback. More in-depth descriptions of product development, refinement, and finalization follow in subsequent sections.

Figure 1

Research Product Timeline

	Phase I Data Collections Part 1 <i>Initial Pilot Testing</i>	Phase I Data Collections Part 2 <i>Product Refinement</i>	Phase II Data Collections Part 1 <i>Experimental Testing & Additional Product Refinement</i>	Phase II Data Collections Part 2 <i>Product Finalization</i>
PI Assessment Instrument	Instrument contents and format refined based on statistical findings and instructor feedback	Instrument contents refined based on statistical findings and instructor feedback	<i>Added an Instructor # to track instructor ratings across data collections*</i> <i>Added C and T indicators to distinguish between Control and Treatment cohorts for the squad huddle experiment *</i>	No further changes made to the instrument
Squad Huddle Job Aid	- Included first as part of the PI instrument - Squad huddle process followed a "keep doing, start doing, stop doing" format	- Removed from PI instrument and placed into a separate job aid - Squad huddle process refined after reviewing sports science literature—now included "sports event timeout" features	- Added a step into the squad huddle process aligned with the Advocacy/Inquiry approach <i>Experimented with use of squad huddle (some squads received it, others did not)*</i>	Job aid transferred to a small card with reminders on front and space to write huddle talking points on back
Training Guide	Instructor training on how to use instrument and perform squad huddle consisted of a short, informal briefing	- Instructor training on how to use instrument consisted of a short, informal briefing - Instructor training on how to perform squad huddle consisted of a short, informal briefing and review of the job aid	- Training guide was created for a more formal instructor training on how to use the instrument and perform squad huddle (longer session) - Squad huddle training included role play activities	Squad huddle training included how to complete squad huddle job aid card

** Logistical adjustments made only for purpose of research project and not intended for product refinement*

PI Assessment Instrument Development

In this section, we summarize the development of the PI assessment instrument, including initial development followed by adjustments made after its use during data collections. The development of an ad hoc team-level PI assessment instrument was a primary research task occurring prior to the Phase I data collections. The PI assessment instrument in its final form is located in Appendix A. Its development is described in a separate ARI technical report (Aude et al., in preparation). As described in that report, candidate ad hoc team PI were identified via previous PI research (Aude, Bryson, et al., 2014 and Aude, et al., 2015) and from a review of relevant literature. Candidate PI and item pools were then rated by the research team. Team performance criterion was also identified. The MSTC instructors reviewed and commented on a draft PI assessment instrument followed by the creation of a pre-Phase I data collection version of the instrument.

Initial Assessment Testing

Preliminary item level descriptive statistics, together with reliability and correlation analyses, helped to identify items midway through Phase I that were not performing well. Adjustments were made to a few items prior to resuming Phase I data collections. Based on instructor feedback, the assessment was reduced to a single front and back side form to facilitate its field use.

Assessment Refinement

Statistical analyses of the entire Phase I dataset helped to identify preliminary issues in the preliminary testing. One performance criterion statement was permanently removed due to lack of relationship with PI ratings. The brief squad huddle guidance provided on the assessment instrument during Phase I was also removed to be replaced later by a more extensive guide.

Quasi-experimental Testing and Additional Assessment Refinement

During part 1 (quasi-experimental testing and additional product refinement), an instructor number was added to the top of the form because this allowed the research team to track ratings from repeat instructors across data collections. Additionally, two versions of the form were created to test the potential impact of the squad huddle on subsequent performance. The treatment group (designated with a T on the form) participated in the brief squad huddle, whereas the control group (designated with a C on the form) did not. During part 2 (product finalization), no further adjustments were made to the assessment instrument.

Squad Huddle Job Aid Development

In this section, we summarize the development of the Squad Huddle Job Aid, including initial development followed by adjustments made after its use during data collections. Upon completion of ad hoc team PI item level ratings, instructors were trained to quickly review assessment ratings and formulate a summary of which PI behaviors were helping or impairing squad performance. The intent was to then use that summary to formulate a brief feedback session with the squad members focused on PI behaviors (referred to as the squad huddle). The squad huddle was intended to be a quick debrief or “hotwash” and not meant to serve as a more

formal after-action review (AAR); it was executed during a pause between the outdoor (initial) and indoor (subsequent) segments of the training exercise. The Squad Huddle Job Aid in its final form is located on page Appendix B-8.

Initial Job Aid Testing

On original versions of the assessment instrument used in earlier data collections, a space was provided for the instructor to write down feedback in its simplest form—what should the squad “keep doing, start doing, and stop doing?” to guide the squad huddle. The goal for the squad huddle was to improve PI behaviors important to squad performance. After further discussion with the MSTC instructors and their Noncommissioned Officer In Charge (NCOIC), it was determined that a long pause in the action (via the huddle) would defeat the purpose of ramping up Soldier stress and fatigue making for a less than realistic combat casualty scenario. It was an instructor norm to hold a brief After-Action Review (AAR) with each squad at the conclusion of the training. It was also inferred by some instructors that formally rating the squad and its Soldiers on PI represented an additional task and burden, potentially taking time away from the more important task of assessing medical, and to a lesser extent tactical competence. Therefore, the squad huddle was reframed in a way that would be acceptable and generate instructor “buy in”.

Job Aid Refinement

The sports psychology literature provided insight into how the squad huddle could resemble a sports game timeout. Such timeouts are typically led by the coach and last approximately two minutes. More general feedback best practices found in assessment and development literatures were investigated to determine if the huddle design could be improved or should encompass elements beyond “keep doing, start doing, stop doing.” The findings from these brief literature searches are summarized below, followed by a description of the refinements made to the squad huddle design.

Sports Psychology and Feedback Best Practices

Balance of Positive and Constructive Feedback.

According to the sports psychology literature, when feedback is provided in the midst of task performance, there is more focus on influencing the rhythm of the task performance than on improving individual technical or tactical skills (Mann, 2012). According to the zone of optimal performance, an individual’s performance is enhanced by higher amounts of physiological arousal up to an optimal point but can be negatively affected with too little or too much arousal (Arent & Landers, 2003; Hannin, 1978).¹ When considering this, feedback delivery should involve a balance of positive feedback (what is going well) and constructive feedback (what is not going well and needs adjustment) to target team members where they are in the zone of optimal performance; meaning that some team members might be at a very heightened arousal while others are at a moderate or low level. If this balance is not achieved, there is a risk that

¹ A competing theory is that argued by Csikszentmihalyi (1975). In optimal flow theory, one becomes fully engaged in or enveloped by an activity. In our research context, feedback should be given to help increase engagement and intrinsic reward whether or not arousal level necessarily tracks highly with engagement level.

some team members will experience (at the time feedback is provided) increased arousal beyond their optimal point, while other team members may not experience enough arousal (depending on where they are in the zone of optimal performance). What could result are team members whose performance decreases following the feedback session (Andrews, 2015). In searching the feedback best practices literature, it was highlighted that both positive and constructive feedback can promote learning as long as constructive feedback focuses on the behavior and not the person. Focusing on the person can have a detrimental effect on trainees' receptiveness to feedback (Kluger & DeNisi, 1996).

Clear Feedback-Standard Gap.

The literature further shows that reducing ambiguity around goals and standard performance is a key element to providing feedback on training performance. The feedback provided to the trainee should clearly indicate the feedback-standard gap. Clear goal setting increases the chance that feedback will motivate an individual to attain the goal as opposed to focusing one's attention on reducing the negative feedback (Gregory & Levy, 2015). With a clear feedback-standard gap, the feedback focuses on how the trainee's performance fell short of an established goal, and this permits the trainee to evaluate his or her performance against an established goal. Without a clear feedback-standard gap, trainees tend to focus on "self-goals" or meta task processes, whereby the trainee adopts performance-prove or performance-avoid goals and overlook mastery goals. They may instead focus on the desire to attain favorable feedback, avoid being perceived as incompetent, or prove the feedback provider wrong (Elliot & Church, 1997; Taylor et al., 1984). Mastery goals are generally associated with better training performance and outcomes (e.g., Brown & Ford, 2002; Heimbeck et al., 2003).

Focus on Critical Information in the Time Allotted.

In addition to focusing on mastery goals, overloading trainees with information during a feedback session may be ineffective since some of the feedback messages may not be fully processed in the trainees' working memory (Sweller, 1988). Further, if the feedback session is brief, such as with a sports timeout, the coach does not have the luxury of time to provide a large amount of information. When athletes are in the midst of the adrenaline and rhythm of performing, they can only process and retain a limited amount of critical information during a timeout (Andrews, 2015). For the first few seconds of the huddle, squad members would be in a similar situation having just completed an intense activity. This would mean that feedback provided within those first few seconds is less likely to be processed. Andrews also emphasized that an effective timeout uses a three-phased approach which starts first with providing time for the team members to catch their breath and making only positive and simple statements to manage the team's emotions (e.g., "good job"). Next, a specific observation of positive behavior is provided, followed by two (if possible) specific performance concerns to include how to adjust or improve. In the third phase, the timeout concludes with the coach checking for an understanding of the observations and asking the team to reply with a simple, one-to-two-word message about what the team will focus on (e.g., "better defense").

Refinements Based on Literature Search

Squad Huddle Design.

To strike this balance of both positive and constructive feedback, we determined that the squad huddle should still include the original simple elements of what the squad should continue doing (positive reinforcement) as well as what the squad needs to stop doing and adjust (constructive feedback). Further, when providing constructive feedback, the instructor should focus on the behaviors observed and not refer to the attitudes or personality traits of the squad members. However, instructors should incorporate specific contexts and incidents when providing both positive and constructive feedback, which was not prescribed in the original “keep doing, start doing, stop doing” format. A specific incident could then be tied to a goal for which the squad fell short to clearly indicate the feedback-standard gap.

While the focus of the squad huddle is on PI behaviors and not tactical behaviors, the instructor should make some connection to the specific task goals when providing feedback. For example, if the immediate task is to perform combat casualty care, the instructor might allude to falling short of the goal by providing context such as, “When you were attempting to retrieve the casualty from the tank, I noticed that you were not sending clear communication with one another about your intention to move the casualty, so other team members were getting in the way.” This statement more clearly indicates the feedback-standard gap than simply stating, “I noticed you were not sending clear communication with one another.” After conferring with MSTC staff, a three-to-four-minute duration would allow for some flexibility in executing the huddle while still keeping it concise.

Consequently, in the second half of the Phase I data collections, the huddle was modified to reflect the three-phased approach (Andrews, 2015) in this manner: (Phase 1) Allow trainees to put weapons down, drink water, put arms in ice bath, etc., while the instructor makes a simple positive comment about performance; (Phase 2) Start by providing a specific example of a PI behavior that was helping team performance followed by specific example(s) of PI behaviors that were impairing team performance and how the team could adjust; and (Phase 3) Check for understanding of what the team heard in Phase 2 by asking them to reply with how they will adjust.

Squad Huddle Job Aid.

To prevent overloading instructors as they prepared for the huddle, the section of the PI instrument that provided space for the instructor to write down what the squad should “keep doing, start doing, and stop doing” was removed. Additionally, a supplemental Squad Huddle Job Aid was developed, in the form of a standard 8 ½” by 11” sheet of paper. The aid reflected the three phases identified in the literature and incorporated a new design with five steps:

- Step One – Be prepared with ratings of the psychological intangibles and specific examples.
- Step Two – Gather squad members in a huddle.
- Step Three – Focus on what is helping the squad’s performance.
- Step Four – Focus on what is impairing the squad’s performance and how to adjust.

- Step Five – Check for understanding.

The team began using the job aid in later Phase I data collections, and it was proven effective for helping the instructors to conduct the squad huddle. Instructors were observed as they conducted huddles and then provided feedback to improve the huddle execution. Performance improvement was generally needed in the following areas:

- Instructors tended to begin immediately with constructive feedback rather than an initial statement of positive reinforcement;
- Their feedback was often on tactical behaviors rather than the PI in terms of what the squad was doing well and what needed improving;
- They tended to provide vague feedback on PI behaviors such as “you need to communicate better” rather than referring to specific behaviors such as “sending clear information” or “acknowledging requests of other members;”
- Their feedback lacked a specific context for the observations made (e.g., “remember what happened when extracting the wounded person from the tank turret?”); and
- In some cases, they spent too much time in the squad huddle (e.g., asking all squad members for their assessment [resembling an AAR]).

Quasi-Experimental Testing and Additional Job Aid Refinement

In the final data collection of Phase I, one instructor added a step to the Squad Huddle Job Aid while still keeping within the time limit of approximately three minutes. This additional step appeared to be effective, and support for this instructor’s approach was later confirmed through a brief literature search. The insights from that search are summarized below, followed by a description of the subsequent refinements made to the squad huddle design and job aid.

Additional Job Aid Literature Search

Advocacy Inquiry (A/I) Model.

While conducting the squad huddle, one instructor inserted a step between step two and three in the job aid, during which time the instructor asked squad members what they thought of their squad performance. This is a common practice employed in the Army during quick debriefs and more formal AARs (see also Smith-Jentsch, et al., 1998). This self-assessment allowed the instructor to confirm those observations in steps three and four or provide a different perspective if applicable. This approach closely relates to employing advocacy and inquiry (A/I) in a non-judgement, debriefing situation (Rudolph et al., 2007). Employing A/I in a debriefing typically involves a facilitator or a manager first providing his or her perspective, underlying interests, and reasoning behind the perspective in a non-judgmental way, and then asking others their perspective on the situation. The facilitator also invites the group to inquire about member perspectives and associated reasoning. The goal of this approach is to combine advocacy with inquiry; therefore, the flow can be reversed such that the facilitator or manager starts first with inquiry (asking about team member perspectives), followed by advocacy (their own non-judgmental assessment). Regardless, the invitation to express one’s viewpoint is explicit and manifests as a conversation (versus a monologue), creating a condition for mutual learning (Argyris & Schon, 1974; Salter & Klein, 2007). As teams continue to work together, the

facilitator can model A/I behavior such that team members begin to employ the strategy among themselves informally during brief training pauses, to help improve team communication and increase shared understanding and goals (see also Smith-Jentsch, et al., 2008).

Starting with the squad's self-assessment (prompted by instructor inquiry) and then the instructor's behaviorally based perspective (advocacy) is also a strategy for increasing psychological safety. Having a sense of psychological safety means that squad members would be more likely to take interpersonal risks because there are no negative consequences (Ashauer & Macan, 2013). Though, there is not unilateral support for the inclusion of an initial self-assessment phase in AARs at enhancing its effectiveness via psychological safety (Keiser & Arthur, 2022).

More specific to this situation, since there is no threat to the individuals in the group, the squad members would, perhaps, be more willing to openly express their perceptions of performance without fear of reprisal (the only negative consequence). Also, in this training context, the teams are ad hoc and team members were not in each other's chain of command; this could have also made it less likely for the members to be concerned about other perspectives. Further, by first asking the squad members about their own self-assessment, they provide their own self-attributed feedback rather than focus on the perspective of others. This could give them a sense of control and help them feel comfortable sharing their assessment. Conversely, if the instructor is viewed as an authority figure, and also proceeded to provide constructive feedback, this could possibly decrease psychological safety or simply increase conformity. In that situation, when asked, the squad members would tend to agree with the instructor instead of providing their own assessment. As noted by Salter and Klein (2007), conducting any form of debrief or AAR is a balance between a science and an art.

Further Huddle and Job Aid Refinements

Squad Huddle Refinement.

Revisions were made to squad huddle design to include a step based on the A/I model: Ask squad members for a self-assessment (e.g., what the squad did well, what the squad did not do well in terms of PI behaviors). This step was added before the instructor provides feedback on the PI behaviors. Step one (be prepared with PI ratings and examples) was eliminated since this mainly referred to preparation, and the PI assessment instrument includes a section for the instructor to determine what was helping and impairing performance.

At subsequent data collections, it was determined that some instructors were spending too much time on the self-assessment step (revised step 2). This step was refined so that instructors asked for feedback from a sample of two to three members rather than the entire squad. The instructor also advised participating squad members to briefly state their feedback in a few words or single sentence.

Squad Huddle Job Aid Refinement.

The revised job aid consisted of five distinct steps which loosely aligned with Andrew's (2015) three-phased approach but included the self-assessment step and broke down Andrew's Phase 2 into two steps. The resulting steps were:

- Step One – Gather squad members in a huddle (provide short positive phrases).
- Step Two – Ask squad members for a self-assessment of the squad’s performance (what the squad did well, followed by what the squad did not do well).
- Step Three – Provide feedback on what is *helping* squad performance (use specific examples).
- Step Four – Provide feedback on what is *impairing* squad performance, and how to adjust (use specific examples).
- Step Five – Check for understanding.

Squad Huddle Quasi-Experiment

Phase II data collections employed a quasi-experimental design using control and treatment groups (squads). Thus, half of the squads undergoing MSTC training experienced a huddle (treatment) between the first (outside) and second (inside) training segment. The control group did not receive a huddle. The research objective was to determine if the squad huddle had any effect on the PI and, in turn, impacted the squad’s performance during the second segment. To reduce variance in instructor execution of the squad huddle, more robust instructor training was conducted on how to execute the squad huddle beyond the job aid.

Data Collection

Across four data collections, twelve squads participated in the huddle, while twelve did not. The first data collection represented an all-control condition ($n = 9$), the second and third data collection represented all treatment condition ($n = 4$ and $n = 5$, respectively), and the last data collection was split between the control condition ($n = 3$) and the treatment condition ($n = 3$). Squads were given a unique identifier on their PI assessment instrument denoting whether they were in control or treatment groups. The number of squads sampled did not allow for definitive statistical analyses to be performed. PI mean score comparisons however showed a trend indicating the squad huddle may have had a positive impact on PI and on performance (compared to the control group). Detailed results of the quasi-experiment are found in an accompanying technical report (Aude et al., in preparation).

Job Aid Finalization

During the Phase II data collections, the team received feedback from instructors that the job aid would be easier to use on a small reversible card to place on their clipboards. Therefore, the card was formatted so the front side includes the five steps and guidance, and the reverse side provides instructors with some space to formulate what they would say during the huddle. The reverse side of the card was modified to include recommended phrasing that would be easy to repeat for each squad. The Squad Huddle Job Aid Card (See Appendix B for final version) was used in the last two data collections in Phase II. It received favorable reactions from the instructors, primarily that the card assisted them with successfully executing their squad huddles.

Training Guide Development

The MSTC instructors were asked to complete the PI assessment instrument as well as execute the squad huddle. Consequently, it was necessary to provide pre-training on how to

complete these tasks. The amount of time allotted and extent of pre-training instruction evolved across Phase I and II data collections, resulting in more detailed and extensive training that could be delivered in a short period of time. The training guide in its final form is located in Appendix B².

Initial Training Guide Pilot Testing

PI Instrument Training.

During initial Phase I data collections, instructors were provided with a brief, informal overview of the PI assessment instrument the morning of the training exercise. During this overview, the research team explained how to complete the top portion of the form (e.g., squad number, etc.), explained the behavior categories on the form, pointed out a few of the behaviors listed under a behavior category, and described the five-point effectiveness rating scale. Instructors were told to: (1) avoid completing the form early on in the exercise, since the observer should look for patterns of behavior, and (2) when applicable, vary the ratings by making careful observations. The squad huddle was part of the PI instrument during the earlier Phase I data collections, so this section was reviewed with the instructors as part of the instrument overview. Conducting this overview on the morning of the training exercises proved to be challenging, especially with new instructors not yet familiar with the form. Instructors were often distracted by training preparations, while the research team was attempting to conduct the overview.

PI Training Refinement

Instructors continued to receive a brief, informal overview of the PI instrument in the later Phase I data collections. The same instructors were present during subsequent data collections. As they became more familiar with the assessment instrument, there were fewer challenges with its completion. However, it was still necessary to check the assessment instruments for completion and variability in the ratings. This required brief interruptions during the training exercise to review forms and reiterate these instructions.

It became more apparent towards the latter half of Phase I that the brief overview provided to instructors could not ensure that they fully understood the meaning of each behavior and in which context or circumstance each rating might apply. It was assumed this lack of understanding could result in varying instructor interpretations of PI behaviors, and what a behavior “looks like” in a given context may vary from instructor to instructor (Fleiss et al., 2003). Additional rater bias might also be introduced, whereby each instructor applies his or her

² Potential users of the product located in Appendix B should note that this version was created and used for research purposes and includes information, phases, and terms that should be removed or modified for specific Army small unit training situations. Phrases that should be removed include but are not limited to a) Treatment / Control (or any reference to research), b) Indoor/Outdoor exercises, c) MSTC, and d) terms related to combat casualty care (e.g., casualty, tank, litter, etc.). Users may also want to customize the guide to change the term “instructor” to training lane assessor, Observer Coach Trainer (OCT), or the named role of the individuals assigned to roles for the purpose of small unit observation, assessment, and feedback.

own interpretation to the rating scale (Hoyt & Kerns, 1999). Thus, a more rigorous approach to instructor training was instituted using the Training Guide.³

The Squad Huddle Job Aid was introduced during the later Phase I data collections. This meant that the research team could distribute the job aid during the informal overview and spend time going through the job aid. Instructors were also provided a copy of the job aid to attach to their clipboards. It was observed that instructors were referring to the job aid when conducting the squad huddles; feedback on the squad huddle execution was subsequently provided to help resolve any misunderstanding instructors still had.

Quasi-Experimental Testing and Training Guide Finalization

To mitigate the challenges encountered when giving the overview the morning of the training, in Phase II of the data collections, a more formal instructor training session was scheduled and conducted the day prior to the MSTC training exercise. This session addressed the PI assessment instrument in more depth, including reviewing each behavior on the form and discussing examples of this behavior in the context of the training exercise. Instructors had the opportunity to discuss what each rating on the five-point scale would look like to them. While not a formal rater training, this discussion reduced the chance for rater bias and also improved the chance of interrater agreement. This session also covered the squad huddle in more detail and provided instructors an opportunity to practice delivering a squad huddle.

Training Guide Contents – PI Assessment Instrument.

The research team formalized the training session by creating a training guide which primarily served to ensure the training session could be conducted consistently each time. Table 1 lists the sections of the PI assessment instrument as depicted in the training guide.

³ It should also be noted that these instructors had not previously had to think about or conduct a formal rating of psychological constructs. And they had not done so during a live training event during which they were also responsible for guiding squads through a strenuous MOUT course.

Table 1*Training Guide Outline for PI Assessment Instrument*

Section	Description / <i>Comment</i>
Project Summary	Instructors are provided a brief description of the PI research project. <i>For the purpose of general implementation, this could be slightly altered to provide a background on PI and the importance of assessing PI behaviors.</i>
Assessment Rating Form – Instructions and Expectations	Instructors are provided a copy of the assessment instrument and are shown how to complete the top portion. The instrument is reviewed at a high level to ensure instructors know how to use the rating scale. Instructors are informed about when to complete ratings (after observing a pattern of behavior) and are told to ensure variability in their ratings. Observation role expectations are discussed.
Assessment Rating Form – Rating Behaviors	Instructors review each behavior under each behavior category and discuss as a group: Is the behavior wording clear? Where do you see this behavior during the training exercise? What does very effective look like? What about very ineffective? <i>The goal is for a group consensus to be reached concerning examples of these behaviors in the training exercise context and what effective/ineffective looks like.</i>
Appendix – Rater Guidance Table	This is a table which lists several behaviors on the instrument and provides an example behavior for each point on the rating scale. This can be referenced when discussing the behaviors with the instructors. <i>This section of the guide would need to be customized to be relevant to the training exercise at-hand. The guide currently refers to a medical simulation field exercise.</i>
Alternatives	Depending on how much time is set aside for the training session and how many repeat instructors are present, the training guide provides alternatives for executing the PI assessment training.

Training Guide Contents – Squad Huddle.

The squad huddle training was designed to ensure that instructors consistently executed the squad huddle following the five steps, as outlined in the final squad huddle design. The best manner to ensure a skills transfer was to provide instructors the opportunity to practice executing a squad huddle based on PI assessment data as seen on the PI assessment instrument. Merely walking instructors through the Squad Huddle Job Aid would not be enough to meet the learning objectives of the training. Table 2 lists the sections of the squad huddle as described in the training guide.

Table 2*Training Guide Outline for Squad Huddle*

Section	Description / Comment
Review Squad Huddle Job Aid Card	Instructors are provided the card to be used during the training exercise (see Appendix B-8). On the front side of the card, each step of the job aid is reviewed and discussed with instructors. Examples are provided for each step with emphasis on keeping the huddle short and concise. The back side of the card is discussed to ensure it is understood. <i>The intent of the back side of the card is for instructors to use it to write down what they plan to say during the squad huddle, specifically for steps 3 and 4, as the other steps can be accomplished by using prescribed language (as shown on the card).</i>
Squad Huddle Demonstration	Instructors are provided a mock PI assessment instrument with completed ratings (mock form is marked as Team #2). The ratings and provided notes are reviewed briefly with the instructors, which sets the context for the squad performance. The mock Squad Feedback section is also reviewed with instructors to emphasize notes for the squad huddle. A demonstration of the squad huddle is provided by a research team member. The instructors discuss the squad huddle and are provided an opportunity to ask questions about the demonstration.
Squad Huddle Practice	An instructor is provided a mock PI assessment instrument with completed ratings (mock form is marked as Team #3). On this form, the Squad Feedback section is not yet completed. The instructor is asked to go into a separate room where he or she reviews the mock assessment instrument to complete the Squad Feedback section and also the back side of the Squad Huddle Job Aid Card. The remaining instructors are provided a brief scenario description which provides a context for how the squad performed. These remaining instructors play the role of the squad members during a mock squad huddle. The instructor returns to the room and role plays the squad huddle. Following the squad huddle, a research team member provides feedback, and all instructors discuss the squad huddle. This is repeated, if time permits, with another instructor using the mock form marked as Team #5). <i>The other instructors playing the role of the squad members require the brief scenario description, so they are able to execute step 2, which is the squad self-assessment.</i>
Alternatives	Depending on how much time is set aside for the training session and how many repeat instructors are present, the training guide provides alternatives for executing the squad huddle training.

Conclusions

The PI assessment instrument and the squad huddle underwent several changes based on data analysis, instructor feedback, and observation of instructor behaviors. By including MSTC instructors in the feedback process, instructors began to understand the value of using the PI

assessment instrument as a means to provide effective feedback to Soldier trainees. Though not formally assessed, instructors had an opportunity to improve leadership skills by using the PI assessment instrument, determining which PI behaviors were helping or impairing performance, and formulating brief but impactful feedback during the squad huddles. Primarily, an assessment of team-level intangibles was created to capture behaviors indicative of team-level performance during live training. Secondly, the use of a squad huddle did show a trend in higher means scores on some PI and some performance variables and/or less reduction in means scores (with sample size limitations) compared to squads not receiving a huddle.

Future Research and Additional Use

The training guide has several uses. First, it can be leveraged in an experimental paradigm to more rigorously test PI assessment instrument and squad huddle. Second, the training guide can be used to implement a PI assessment and feedback process in training contexts other than MSTC (e.g., home station unit training, Training and Doctrine Command schools, and/or the combat training centers [CTC]). Specifically, both the PI Assessment Instrument (Appendix A) and the Squad Huddle Job Aid (Appendix B) can be integrated into various training exercises by unit leaders, instructors, or observer-controller-trainers (OCT) who are interested in going beyond tactical and technical assessment feedback. The squad performance section of the PI assessment instrument would require adjustments to match the operational context, while the job aid could be used in many contexts. Additionally, the training guide can be used as a resource by trainers, instructors, or OCTs prior to implementing the PI assessment instrument and squad huddles. Alternatively, it can be used as a train-the-trainer resource by a lead instructor/unit leader/OCT conducting the training for a larger group. Finally, the training guide could be incorporated into current leader development training to improve observational skills and to support brief, in-the-moment feedback utilizing the huddle approach.

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Appendix A. PI Assessment Instrument

SURVEY APPROVAL AUTHORITY:
U.S. ARMY RECORDS MANAGEMENT AND DECLASSIFICATION AGENCY
SURVEY CONTROL NUMBER: AAHS-RMC-22-154 (EX.)
AGENCY IDENTIFIER: DAPE-ARI
Expiration Date: 7/21/2023

Date _____ Team # _____ Instructor # _____

Training Location: Outside [] Inside []

Squad Leader: Jr Enlisted [] NCO []

Squad/Team Psychological Intangible Assessment

Before the training exercise, familiarize yourself with the seven categories and the associated squad behavior statements. Then watch for specific actions, but also a pattern of behavior. Assess the squad on statements provided in each row and make a summative decision indicating your answer with one checkmark for each statement row's checkbox. If the statement or behavior is not observed, then leave that row blank and do not check a checkbox. Use the 'Notes' section to jot down observations that help you with your squad observations and evaluation throughout the training exercise.



	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
COMMUNICATION					
How effective were the team members at:					
Communicating during pauses in the action.	☐	☐	☐	☐	☐
Repeating messages to ensure understanding.	☐	☐	☐	☐	☐
Acknowledge requests of other members.	☐	☐	☐	☐	☐
Sending clear information.	☐	☐	☐	☐	☐
Communicating non-verbally (e.g., gestures).	☐	☐	☐	☐	☐
Passing information with mutual understanding.	☐	☐	☐	☐	☐
Notes:					
SUPPORT EACH OTHER					
How effective were the team members at:					
Asking for help when needed.	☐	☐	☐	☐	☐
Providing assistance to others who need it.	☐	☐	☐	☐	☐
Recognizing when other members are struggling.	☐	☐	☐	☐	☐
Identifying each other's performance gaps.	☐	☐	☐	☐	☐
Notes:					
INITIATIVE					
How effective were the team members at:					
Demonstrating the ability to self-start.	☐	☐	☐	☐	☐
Stepping up to take on more when it matters most.	☐	☐	☐	☐	☐
Preparing for what comes next.	☐	☐	☐	☐	☐
Acting in the absence of guidance.	☐	☐	☐	☐	☐
Notes:					
ADAPTABILITY					
How effective were the team members at:					
Adjusting actions to changing situations.	☐	☐	☐	☐	☐
Attempting to solve problems from different angles.	☐	☐	☐	☐	☐
Notes:					
PERSEVERANCE					
How effective were the team members at:					
Facing setbacks without getting discouraged.	☐	☐	☐	☐	☐
Demonstrating physical toughness and stamina.	☐	☐	☐	☐	☐
Finishing whatever they begin.	☐	☐	☐	☐	☐
Notes:					

	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
SHARED LEADERSHIP					
How effective were the team members at:					
Offering direction for the team.	☐	☐	☐	☐	☐
Influencing one another to act.	☐	☐	☐	☐	☐
Notes:					
FORMAL LEADERSHIP					
How effective was the team leader at:					
Facilitating team problem solving.	☐	☐	☐	☐	☐
Planning with the team before it acts.	☐	☐	☐	☐	☐
Redistributing tasks across the team as needed.	☐	☐	☐	☐	☐
Providing direction to other members.	☐	☐	☐	☐	☐
Sharing needed information with other members.	☐	☐	☐	☐	☐
Remaining calm and composed.	☐	☐	☐	☐	☐
Displaying persistence.	☐	☐	☐	☐	☐
Demonstrates sound judgment.	☐	☐	☐	☐	☐
Notes:					

Squad Feedback

Using this section as feedback for the squad, determine which actions the squad ought to implement based on the statement evaluations above. During the MSTC exercise, what psychological intangible is having the most critical impact on team performance? That is, what is the biggest factor impairing and hindering the squad, and what is helping or enhancing squad performance the most? For each psychological intangible listed below, please check whether each factor is helping or impairing team performance:

Psychological Intangible	Helping	Impairing	Notes:
Communication	☐	☐	
Support Each Other	☐	☐	
Initiative	☐	☐	
Adaptability	☐	☐	
Perseverance	☐	☐	
Shared Leadership	☐	☐	
Leadership	☐	☐	

Squad Huddle

Please refer to the huddle job aid for providing feedback to the squad.

Squad Performance

Instructions: After the squad's performance during the outside or inside training, check your agreement with the following statements below.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
The squad's casualties had a high likelihood of survival.	☐	☐	☐	☐	☐
The squad performed effectively as a team.	☐	☐	☐	☐	☐
The squad effectively performed casualty care.	☐	☐	☐	☐	☐
The squad was tactically proficient.	☐	☐	☐	☐	☐
The squad worked well together.	☐	☐	☐	☐	☐
The squad accomplished its objectives in the allotted time.	☐	☐	☐	☐	☐
Notes:					

Appendix B. Training Guide for the PI Assessment Instrument and Squad Huddle

Purpose

The purpose of this training guide is to provide the research team with guidance for conducting the pre-data collection training with the instructors for both the control and treatment groups. This guide is for the **Treatment Group**. This means that instructors are required to complete the Psychological Intangibles (PI) Assessment Rating Form for the squads for which they are assigned (either outside or inside) and, if outside, are also required to conduct the brief squad huddle. The inside instructors will not be conducting the huddle but may conduct an After-Action Review (AAR) at the conclusion of the inside exercise. The inside instructors will still be trained on the huddle in case they are changed to the outside role during the data collection or have the outside role in a subsequent data collection.

If this is the first time you are conducting the pre-data collection training with the instructors, then detailed instructions are provided using a **DO, SAY, ASK** format (referred to as **DETAILED FORMAT**). If you are experienced with providing this training, please refer to the **QUICK GLANCE** format. If you are training instructors who are already familiar with the process (e.g., received this training prior to a previous data collection), refer to the **REPEAT INSTRUCTOR** guidance.

Logistics

Time:	Approximately 1500 on Wednesday (the day before the data collection)
Duration:	60 minutes
Materials:	Handouts – (1) Project Summary Form, (2) Assessment Rating Form labeled T for Treatment (The T is found under the ARI logo), (3) Squad Huddle Job Aid card, (4) Mock Assessment Rating Forms and Scenario Summaries for Huddle Practice Session
Format:	Researcher will conduct the training using verbal instruction in a classroom in the building next to the MOUT training site.

Background Information and Preparation

For Treatment Group training, ensure you have:

- One copy of each mock assessment rating form with completed mock ratings but with Squad Feedback and Squad Performance sections blank (there are three versions of the form for each mock squad)
- Two additional copies of each mock assessment instrument with key (for researchers)
- Additional 12 copies of one of the mock assessment instruments chosen to be used for the demonstration (with key) – all instructors will have a copy to review prior to the demonstration

- Three copies of each scenario summary (there are three scenarios), one for the researcher to read aloud and then pass to the instructors playing the squad members, and the additional two to also pass to instructors (they can share and review for context)
- At least 20 copies of the Squad Huddle Job Aid card that is used during the pre-data collection training, collected, and then redistributed to the designated observer(s) who will be conducting the huddle the morning of the data collection. The observer will need a card for each squad that goes through the outside exercise and receives the huddle.

For the first data collection, the designated instructors will not be familiar with the data collection purpose. However, in later data collections, there will be repeat instructors who need less detail but must still be provided with the training. Instructors for the Treatment Group have a longer training session. Note that it is recommended to avoid using the word “treatment” to refer to the experimental condition. Instructors may confuse this with medical terminology. There is no need to explain control vs. treatment and instead to let them know whether they will be expected to execute a huddle or not and refer to the forms as C (Charlie) or T (Tango).

Gather instructors in a circle to present the project background first before handing out a copy of the PI Assessment instrument (Version – T). This will keep the instructor’s focus on what you are describing.

Introduction and Project Description

Time: 5 minutes

REPEAT INSTRUCTORS

You may be able to skip this section.

QUICK GLANCE

- Pass out project summary and allow a minute for review
- Introduce research team
- Introduce research concepts
- Ask for verbal consent to participate

DETAILED GUIDANCE

DO: *Provide instructors with a hard copy of the Project Summary and give them a minute to review.*

SAY: We appreciate your time here with us today to learn about this research and what responsibilities we are asking you to take on tomorrow as MSTC instructors to help support this research. Let’s start with a brief description of this project. We are researchers who support the U.S. Army Research Institute, and we are conducting a data collection tomorrow that requires MSTC instructors to observe and to assess specific squad behaviors during both the outdoor and indoor MSTC MOUT training exercises. These behaviors we are asking you to rate are not tactical or medically technical in nature, rather they are behaviors that occur when people interact to accomplish a task or purpose as a group or team. For this research, we have named these behaviors **Psychological Intangibles**. MSTC instructors just like you helped us develop an

assessment of Psychological Intangibles a few years ago. The behavior categories are Communication, Support Each Other, Initiative, Adaptability, Perseverance, Shared Leadership, and Formal Leadership. It is important to note that your focus for ratings should be on these behaviors as opposed to tactical behaviors or successful task completion. Additionally, you will be rating the team as a whole and not individual squad members.

ASK: What questions do you have about the project description?

DO: Address any questions that instructors have about the project.

SAY: While we want everyone to receive the training going forward, its especially important for those who will be following along with the squads and filling out the assessment.

Assessment Rating Form Instructions and Expectations

Time: 10 minutes

REPEAT INSTRUCTORS

Execute an abridged version of this section. For example, start by saying, “let’s refresh your memory on what you will be doing tomorrow” and review the form and expectations briefly or skip right to the checks on learning if the instructors are very familiar. This may also be conducted the morning of the data collection instead of the day before.

QUICK GLANCE

- Pass out assessment instrument
- Review form (at high level)
- Call attention to the top block information that instructors complete
- Explain the importance of paying attention to patterns of behavior so they can accurately provide summative ratings for each behavior of entire squad across the exercise
- Explain that they should complete the form during the exercise or take detailed notes in each section to then complete the form after the exercise
- Review expectations as to who completes the form and when to turn in the form (Observer Role completes form)
- Introduce the squad huddle at a high level, mainly who should do the huddle and when
- Complete the Check on Learning listed below to ensure understanding

DETAILED GUIDANCE

DO: Provide the instructors with a copy of the Assessment Rating Form – Version T.

SAY: Since we are conducting a study, we have some important information to review with you to ensure that all runs smoothly during our data collection without compromising the data we are collecting. Let’s start first with some basic instructions. Whether stationed outside or inside, you will be completing the same form, and each squad will have a new form for either outside or inside. On the top right corner, you see administrative information that requires completion.

Date _____	Team # _____	Instructor # _____
Training Location: Outside [] Inside []		
Squad Leader: Jr Enlisted [] NCO []		

DO: Point to this section:

SAY: Today you will all be assigned instructor #s. If you are asked to participate in this again in the coming weeks, you will use the same instructor #. A member of the research team will have a list of instructor numbers in case you forget your number. Before you begin observing and rating a squad, fill in the date and the team or squad #. Then, enter your instructor #. Select the location of the exercise (outside or inside). Identify whether the Squad Leader for the squad you will be rating is Jr Enlisted or NCO.

ASK: What questions do you have about completing this information?

DO: Address any questions that instructors have completing this information.

SAY: Let's review the Assessment Rating Form.

DO: While providing this section of the training, refer to the general format of the rating form and stick to more high-level descriptions as provided below. In the next section of the training, you will provide more specifics on how to rate the squad.

SAY: First, you will be completing a new form for each squad that goes through the exercise (whether the squad is outside or inside). Notice that the form has two sides. You need to complete both sides of the form. You must use a clipboard for your form. As you are handling the form, attempt to consistently observe the squad as it goes through the exercise to catch as much detail as possible and watch for patterns of behavior. For each behavior category, you may have several specific behaviors to observe. You are asked to rate using a 5-point scale. It is important that you rate behaviors accurately and that you do not resort to selecting the same ratings for all your squads out of ease. You should complete the ratings during the exercise so that you are not forced to remember what you observed. However, if you prefer to complete your ratings after the squad is done the exercise, use the Notes section after each behavior category to jot down any notes during the exercise to assist you with the ratings. While you are observing the squad and completing the rating form, avoid providing feedback directly to the squad members concerning behaviors listed on the form. You can provide tactical feedback or vague motivational feedback such as "Hurry up!" After completing the last category (Formal Leadership), you can wait until the squad is done with the exercise to complete the remaining section of the form. In the Squad Feedback section of the form, think about your observation and review your behavior ratings to decide which behavior categories were helping team performance and which were hindering it. You are provided a Notes section to jot down any thoughts as you prepare to conduct a brief Squad huddle before the squad enters the inside of the building for the inside exercise, and you also have the Squad huddle card that you can use to write down what you plan to say during the huddle (step by step). The best time to prepare for the huddle is when the squad has just finished and doing ice baths (only during summer months). Then, you will execute the huddle right at the entrance of the indoor exercise. You want to execute the huddle when adrenaline is still high, so do not wait too long. We will spend time later in this training reviewing the Squad Huddle Job Aid. After you have completed the huddle, you conclude with the Squad Performance section, which asks you to rate your

agreement with the statements listed. Base your ratings on the squad's performance. This is your opportunity to provide ratings about tactical performance. After you have verified that both sides were completed and all ratings were completed, locate a research team member to provide him or her the form.

ASK: What questions do you have about the format of the rating form and the general instructions?

DO: *Address any questions that instructors have about the form and general instructions.*

SAY: Let's review some expectations. If you are assigned the observer role for either the outside or inside exercise, you will be responsible for completing the form. You must complete both sides of the form, including the information at the top of the form on the first side. Avoid providing feedback during the exercise that relates to the behaviors on the form. The person who completes the form in the outside exercise will conduct the squad huddle. Return each form to a member of the research team immediately after you have completed it. Take a new form for the next squad. Specifically for the indoor exercise, begin your observation during the initial portion of the exercise (paintball) to the degree that you can observe behaviors in the dark (e.g., listen for auditory cues of squad behaviors). Let's see if everyone understands the instructions and expectations by doing a brief check on learning.

CHECK ON LEARNING

ASK: How many assessment instruments are needed for each squad?

DO: *Answer should be 2 forms (1 outside and 1 inside)*

ASK: How many sides are on the form?

DO: *Answer should be 2*

ASK: Who completes the form?

DO: *Answer should be Observer Role*

ASK: During the exercise, do you coach the squad on the behaviors on the form they are struggling with?

DO: *Answer should be No.*

Assessment Rating Form – Rating Behaviors

REPEAT INSTRUCTORS

Execute an abridged version of this section. For example, start by saying, "let's refresh your memory on how to complete the form" and select a few behaviors to analyze. This may also be conducted the morning of the data collection instead of the day before.

Time: 15 minutes

QUICK GLANCE

- Have each instructor read each behavior (under each behavior category), then discuss as a group:
 - Is the behavior wording clear?
 - Where do you see this behavior during the lanes (outside/inside)?
 - What does very effective look like? What about very ineffective?
- Use Appendix 1 – Rater Guidance Table to assist during this section

DETAILED GUIDANCE

DO: One at a time, have each instructor read each behavior (under each behavior category). After the behavior is read aloud, then have a group discussion about:

1. Is the behavior wording clear?
2. Where do you see this behavior during the lanes (outside/inside)?
3. What does very effective look like? What about very ineffective?

Refer to the **Rater Guidance Table** (Appendix 1) which provides examples of ratings. For example, when the instructor reads “Recognizing when other members are struggling under “Support Each Other.”

ASK: First, is this behavior wording clear? Meaning, do you understand what is meant by this behavior?

DO: Instructors should define this as— one squad member is having difficulty accomplishing a task in the exercise, and the other squad members take notice of this and do something to assist. If they do not define the behavior as such, correct it by providing the explanation above.

ASK: Can you think of an example in the MOUT exercise (outdoor or indoor) when this behavior may come into play?

DO: Instructors might mention a squad member struggling to climb over the wall (outside) or struggling to apply a tourniquet or bandage (inside).

ASK: What does very effective look like? What about very ineffective?

DO: Use the below example to assist with this.

Behavior	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
Recognizing when other members are struggling.	No squad members take action when another squad member is struggling to get over the wall, and others wait or continue with their current action	It takes the struggling person mentioning he/she needs help getting over the wall before someone takes action	A squad member struggles to get over the wall but eventually does so on his/her own	It takes one squad member to mention that another squad member is struggling but everyone steps up right away	Without mention, mostly all or all squad members go into action to assist the struggling squad member to get over the wall

Squad Huddle Description and Job Aid Card

Time: 10 minutes

REPEAT INSTRUCTORS

Execute an abridged version of this session by refreshing their memory on the five huddle steps (using the Job Aid as a reference).

QUICK GLANCE

- Pass out Squad Huddle Job Aid card
- Emphasize who executes the huddle and when
- Review Job Aid step by step to ensure understanding
- Show how the instructor uses the other side of the Job Aid Card to enter information as he or she prepares for the huddle
- Complete the Check on Learning listed below to ensure understanding

DETAILED GUIDANCE

DO: *Provide the instructors with a copy of the Squad Huddle Job Aid card.*

SAY: If you are an outdoor instructor and assigned to complete the form (Observer Role), you will be conducting a brief squad huddle at the conclusion of the outdoor exercise near the entrance to the inside exercise. The person who completes the form must also execute the huddle. We know that you are already giving the squad some feedback after the completion of the exercise, so this is not an extra step. But, as part of this research study, we are interested in how this brief huddle might impact performance in the indoor exercise, so it is very important that you conduct the huddle in a specific manner. We have provided you with a job aid to assist you with conducting this huddle, and on the back of the card is space for you to actually write down what you plan to say during the huddle (for each squad). Before reviewing this job aid with you, we want to point out some important information about this huddle. The squad will still have the indoor portion of the exercise to complete, so the huddle is not meant to be an AAR. Think of it like a timeout during a sports game. The coach has a short amount of time to interact with the players and strives to make an impact on their game play upon return to the game. So, the interaction needs to be brief but meaningful. Also, ensure the huddle occurs very quickly after the outdoor exercise is completed so that squad members still have adrenaline but wait until after any required break is provided (e.g., ice bath in summer). The research team has investigated sports science-based methods to design the huddle's format. One very important aspect of the huddle is to ensure the feedback provided or discussed during the huddle relates to the behaviors on the Psychological Intangibles assessment instrument and not feedback related to tactical performance.

DO: *Review the job aid portion first with the instructors (front of the Squad Huddle Job Aid card). Ask an instructor to read each step. After the instructor has read the step, add some additional information (see the SAY sections below.)*

Instructions: Print on card stock, front/back, measuring 5.5" by 8.5"

Squad Huddle Job Aid

(Huddles are 3 to 4 minutes total)

- 1 **Gather squad members in a huddle**
 - Let squad members catch their breath and get water.
 - Provide **positive feedback** with short phrases such as: "Good work!" | "You made it!" | "Get some water!"
 - 2 **Ask squad members for a self-assessment on the squad's performance**
 - Ask 2-3 squad members what the squad did well, followed by what the squad did not do well.
 - Ask for 1 or 2 word answers only (quickly).
 - 3 **Provide feedback on what is *helping* squad performance**
 - Tell the squad what they were **doing well** and should continue (1 or 2 of the psychological intangibles).
 - Provide specific examples observed during the exercise.
 - 4 **Provide feedback on what is *impairing* squad performance, and how to adjust**
 - Tell the squad what was **not done well** and how to improve (1 or 2 of the psychological intangibles).
 - Provide specific examples observed during the exercise.
 - 5 **Check for understanding**
 - Ask squad members what they will **start doing**.
 - Prompt them for **one word or a short answer**, such as: "Help each other!" | "Communicate better!"

Squad Huddle Feedback Card

Date	Squad #	Instructor #
Step 1: Gather in a Huddle; Short Positive Statements		
<i>Good work! You made it. Get some water.</i>		
Step 2: Ask Squad Members for a Self-Assessment		
<i>How did that go? Let's hear from 2-3 people, and keep it to a few words...</i>		
<i>What are 1 or 2 things the squad did well?</i>		
<i>What are 1 or 2 things the squad did not do well?</i>		
Step 3: Provide feedback on what is <u>helping</u> squad performance	Step 4: Provide feedback on what is <u>impairing</u> squad performance, and how to adjust	
[Record notes on 1-2 categories from the assessment form, with specific behaviors]	[Record notes on 1-2 categories from the assessment form, with specific behaviors]	
Step 5: Check for Understanding		
<i>So quickly....</i>		
<i>What is the one thing you can do better as a squad, going into this next exercise?</i>		

SAY: For Step 1, it is important that you start out with a positive comment when the squad is gathering around, and squad members are trying to catch their breath. You may be tempted to start with a negative comment especially if the overall performance was poor. If you can't find a phrase off the top of your head, you can always use something generic such as "good work" or "nice job out there" or "good hustle." It is easiest, always start with the same phrase each time.

ASK: What questions do you have about the first step?

DO: Address any questions that instructors have about Step 1.

SAY: For Step 2, it is important to keep the self-assessment to one or two-word answers. If it is easiest, simply ask the same question each time— “In 1-2 words, what went well and what didn’t go well?” You will only have time for a few squad members to provide a self-assessment, so move through this quickly. If a squad member starts to mention tactical behaviors, tell them you are more interested in their self-assessment of things such as adaptability, shared leadership, etc. In other words, use the behavior categories on your form. There will not be enough time for

each squad member to provide specific examples during the self-assessment. While squad members are providing their self-assessment, try to store some of their words in your memory for when you execute steps 3 and 4. That way, you can refer to their own words when agreeing/validating what they said or, if you didn't agree, you can point out your perspective on their self-assessment. We will come back to this when we are reviewing Steps 3 and 4.

ASK: What questions do you have about the second step?

DO: Address any questions that instructors have about Step 2.

SAY: For Step 3, focus on what the squad did well but use specific examples. In this case using the behavior category on the form (e.g., communication) will be too vague, so use specific behaviors on the rating form. For example, instead of saying "communication was good," think of an example when there was a pause in action and squad members were talking about their performance. Focus on maintaining the momentum in the next step instead of just taking a breather and remaining silent. This is an example of the behavior "communicating during pauses in action." By providing this specific example, you are giving targeted feedback on what the squad is doing well. If during Step 2, squad members used more vague terms on the self-assessment such as "communicated well," you can then refer back to this by validating it and providing a specific example. So, you would say "Some of you mentioned that you communicated well. I agree with that. I noticed when there were pauses in action, you talked about performance and maintaining momentum for the next step instead of just taking a breather. Keep that up!"

ASK: What questions do you have about the third step?

DO: Address any questions that instructors have about Step 3.

SAY: For Step 4, focus on what the squad was not doing well and how to adjust this. As with Step 3, using the behavior category on the form (e.g., support each other) is too vague, so use the specific behaviors on the rating form when talking about what they did not do well. For example, instead of saying "you didn't support each other," think of an example when there was a squad member who was struggling, and the squad did not take initiative to help this member until after it was mentioned by someone else. This is an example of the behavior "recognizing when other members are struggling." By providing this specific example, you are giving targeted feedback on what the squad is not doing well, so you can follow that up easily with what they need to do to adjust. If during Step 2, squad members used vague terms on the self-assessment to describe what they needed more improvement in such as "we didn't help each other out," you can then refer back to this by validating it and providing a specific example. So, you would say "Some of you mentioned that you didn't help each other out. I agree with that. I noticed no one helping [Smith] get over that last wall until [Jackson] yelled something out. It took a while until you all came together to make that happen. When confronting an obstacle, pay attention to who needs help and empower everyone to engage so everyone gets over the obstacle." Note that in Steps 2 and 3, you may end up disagreeing with something mentioned during the self-assessment, and that is ok too. You can refer back to the comment that was made and state that you saw it a different way and then provide your specific example. If you have time for another example of what the squad was not doing well, please follow the same process.

ASK: What questions do you have about the fourth step?

DO: *Address any questions that instructors have about Step 4.*

SAY: For Step 5, your goal is to wrap up the huddle by checking for understanding on what the squad will improve upon in the next exercise. Like a sports team who yells out “Defense” at the end of a timeout, you want the squad to yell out one word (or short phrase) when you ask, “What is the one thing you can do better as a squad, going into this next exercise?” If you have time, you can ask each squad member to go one at a time or you can ask them to yell it out all at once, understanding you may hear variants of the same phrase. The squad may refer to the specific behaviors, but it is also fine if they use a broader term. So, you might hear “Notice others who are struggling” or you might just hear “Help each other.” The goal is to ensure that listened to the feedback you provided. If it is easiest, simply ask the same question each time.

ASK: What questions do you have about the last step?

DO: *Address any questions that instructors have about Step 5.*

SAY: If you flip to the other side of the card, you see space to write down what you want to say during the huddle. You will notice that Steps 1, 2, and 5 provide some scripted language you can use. It’s only Steps 3 and 4 where you need to come up with your own examples. For each squad, you will have a new card. You can attach the card to your clipboard and write down Steps 3 and 4 when you have the opportunity. You can flip back to the job aid to help you remember what to do. When you execute your huddle, you can read directly from your card. Just keep in mind that statements from their self-assessment may require you to change your approach to Steps 3 and 4. You may need to address some of the self-assessment comments before providing your feedback or, at the very least, incorporate their comments into Steps 3 and 4. For example, if you wrote down this comment in Step 3 “I noticed that you all communicated clearly when working together to get the casualty out of the tank,” and during the self-assessment someone mentions this “I think we communicated well,” then you will need to edit your Step 3 to be similar to, “So, you mentioned that you communicated well. I agree with that. I noticed you all communicated clearly when working together to get the casualty out of the tank.”

DO: *Quickly review the other side of the card to ensure their understanding of how to complete it.*

ASK: What questions do you have about completing the card?

DO: *Address any questions that instructors have about completing the card.*

SAY: Let’s see if everyone understood the huddle instructions and expectations by doing a check on learning.

CHECK ON LEARNING

ASK: How many huddles does a squad receive?

DO: *Answer should be one – between the outside and indoor exercise.*

ASK: Who executes the huddle?

DO: *Answer should be person who completed form.*

ASK: Where do you execute the huddle?

DO: Answer should be at the door entrance to indoor exercise.

ASK: Is the huddle as long as a typical AAR?

DO: Answer should be No.

ASK: Which steps do you write down on the back the job aid card?

DO: Answer should be Steps 3 and 4.

Squad Huddle Practice

Time: 15 minutes

REPEAT INSTRUCTORS

Execute an abridged version of this section. Ask for one instructor to volunteer to perform in a huddle role play, or, if the instructors are very familiar, read one of the role play scenarios out loud and discuss as a group what key elements they should pick up on for huddle steps 3 and 4.

QUICK GLANCE

- Demonstrate a huddle using an example assessment rating form (See B-19 through B-24) and debrief the demonstration
- Pass out example assessment rating forms for at least two practice sessions— this requires one instructor volunteer, one person to volunteer to play the role of the “pusher”, and five squad member volunteers (for squad members, read aloud and then pass out the scenario summary)
- Provide feedback on the practice sessions
- Collect all Squad Huddle Job Aid cards since they may not remember to bring them the next day
- Collect all mock assessment rating forms and scenario summaries
- Thank instructors for their time and attention

SHORT ON TIME

If you run out of time to conduct this section of the training, it is recommended to skip the huddle demonstration and go right to asking for one instructor to volunteer. After providing feedback to this instructor, if there is time, ask for another volunteer. If there is little time remaining, read the two remaining scenario summaries out loud and then engage in a group discussion about how the huddle should be performed based on the scenario.

DETAILED GUIDANCE

DO: Hand out one copy of the demonstration mock assessment instrument (without key) to each instructor. For the purpose of making copies, it is best to select this mock assessment instrument in advance to be sure you have enough copies for everyone.

SAY: I have provided each of you with a mock assessment instrument. You can see the ratings and notes provided by the instructor on each side. Take a moment to read through this assessment instrument, including some notes in the Feedback section.

DO: *Provide 2 minutes for the instructors to look over the mock assessment instrument.*

SAY: Imagine this is the assessment instrument you completed for a squad, and now it's time for you to execute the huddle. We are going to demonstrate executing this huddle while you follow along with the Squad Huddle Job Aid card.

DO: *Using the Squad Huddle Job Aid card, provide a demonstration of the huddle, lasting about 3-4 minutes. One researcher plays the role of the "Squad" for Steps 2 and 5, and the other researcher executes the huddle. Refer to the applicable scenario description if needed.*

ASK: How do you think we followed the job aid? What did you notice?

DO: *Gather answers and comment on responses. Debrief the demonstration and point out how the job aid was used properly. Refer back to the mock assessment instrument if necessary.*

SAY: How you execute this huddle is very important to the research, and so we want to ensure you feel comfortable doing it, following the steps provided in the job aid. So, for the remainder of the session, we want to give you an opportunity to practice. We are going to give you an example of an assessment rating form with some notes so that you can formulate a squad huddle in an impromptu manner. In this practice session, you will be required to review the assessment instrument and then determine which behaviors were helping and which were hindering and complete those ratings as such. You will also prepare your huddle notes using a Squad Huddle Job Aid card. One person will play the role of the "pusher". In this case, you will simply ask the squad members to remove gear, go to the ice bucket, etc. Other instructors will play the role of the five squad members. Those who are playing the role of squad members will be provided a summary description of the squad performance, so they can execute step 2 of the huddle (self-assessment). The goal is to make this as impromptu as possible since this is how it will play out tomorrow. For the purpose of time, we may only get to complete two practice sessions, so there are two different example assessment rating forms. After you do the huddle, we will provide you some feedback on the huddle execution. You will be allowed to use the job aid while practicing.

DO: *Ask for a volunteer to play the role of the instructor and then ask the remainder of the instructors to play the roles of squad members. Hand out a mock assessment rating form (See B19 through B24) to the volunteer instructor and also provide a Squad Huddle Job Aid card. Tell the instructor to use the card to complete Steps 3 & 4 based on the mock assessment instrument. Send this volunteer off to a separate room for one-to-two minutes. Then, turn your attention to the instructors who will play the squad members in the role play and provide them a description of the squad's performance, which is explained in the scenario description. Read the description out loud and then pass out a few copies of the description so they can share and review. **Note:** One of these scenarios will have been used during the demonstration, but for the purpose of this guide, all three scenarios are described here. **Scenario 1 used for TEAM 2** – Overall, your team performance was good. When going over the walls, you listened to each other, provided clear messages, used gestures appropriately, and there were requests for help. On the last wall, teammates noticed one*

person still struggling to get over and you worked together to help. On the other hand, the team struggled with getting the casualty out of the tank. There were some setbacks and a lack of problem solving to find the right solution. Everyone became frustrated and needed pauses before trying a different approach. Some approaches were started that were then not finished once a challenge arose.

DO: *Ask the volunteer instructor to return to the room and then ask him or her to begin. Follow along with the job aid to see where you can give feedback to the instructor volunteer. Ensure the huddle does not go over 3 minutes. After the huddle practice is done, start first with positive feedback. Then discuss points that need to be adjusted and check for understanding.*

DO: *Rotate the instructor and squad members. Hand out another mock assessment rating form (See Appendix 2). **Scenario 2 used for TEAM 3** – During the outdoor lane, the overall performance was poor. This squad took the longest to get through the exercise. There were instances when squad members who pulled security never got up to help get the casualty over the wall even when they almost dropped the litter. Several squad members did not have the physical stamina to do the low crawl and took a long time but made it through. The squad seemed to figure out how to get over the last wall once everyone realized what needed to be done. Even though they took the longest and appeared tired, they did not show frustration.*

DO: *Rotate the instructor and squad members. Hand out the last mock assessment rating form (See Appendix 2). **Scenario 3 used for TEAM 5** - You are an intact team coming through this exercise, so you already know how to work well together. There were no setbacks, and the team leader provided direction and guidance. Your communication was clear, and use of gestures assisted your team in getting the casualty out of the tank, on the litter, and over the walls.*

On the other hand, it was observed a few times that when someone struggled to get over the wall at first, this person did not ask for help, specifically did not ask for someone to take his/her weapon.

This is the end of the training session.

DO: *Thank instructors for their time and attention to the training session. Tell them you are looking forward to working with them tomorrow!*

Rater Guidance Table

The table includes at least one example from each **Behavior Category**, and, at times, there are several examples from one category.

BEHAVIOR CATEGORY: COMMUNICATION	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
Communicating during pauses in the action. Context: Either Outside or Inside	Squad members focus on catching their breath or taking a knee during pauses, and neglect opportunities to communicate about squad performance	Squad members communicate but the information is not relevant to individual or squad performance	Squad members share 1 or 2 observations or points of feedback, but are marginally related to squad performance	Squad members share information with one another that includes squad performance and lessons learned	Squad members focus communication on their successes and challenges, what to sustain and what to do differently
Repeating messages to ensure understanding. Context: Either Outside or Inside	Squad members share a message once before gaining the attention of the intended audience	Squad members share a message once and then quickly move on to the next topic	Squad members share a message once and are satisfied with a verbal acknowledgement (“roger”)	Squad members repeat the same message twice or more to ensure understanding	Squad members ensure understanding by phrasing the message several different ways
BEHAVIOR CATEGORY: SUPPORT EACH OTHER	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
Asking for help when needed. Context: More likely to occur Inside	Squad member attempts to address casualty wounds on their own w/o adequate supplies or persons to help. Casualty dies	Squad member attends to wounds keeping casualty alive but assistance and/or additional first aid supplies were needed	Squad member looks around for help but does not verbalize it, continues to apply first aid techniques keeping casualty alive	Squad member asks for help generally, getting someone to come over and help diagnose and treat the casualty	Squad member asks for and receives specific skills and/or first aid equipment (e.g., tourniquet) that speed casualty care and minimize wound damage
Recognizing when other members are struggling. Context: Outside—climbing over wall	No squad members take action when another squad member is struggling to get over the wall and others wait or continue with their current action	It takes the struggling person mentioning he/she needs help getting over the wall before someone takes action	A squad member struggles to get over the wall but eventually does so on his/her own	It takes one squad member to mention that another squad member is struggling but everyone steps up right away	Without mention mostly all or all squad members go into action to assist the struggling squad member to get over the wall

Rater Guidance Table

BEHAVIOR CATEGORY: INITIATIVE	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
Stepping up to take on more when it matters most. Context: More likely to occur Outside	Squad member unable to get over obstacle, no one “steps out/up” of their security role to help get the squad member (SM) over the obstacle	Squad member unable to get over obstacle, other squad member notices/says something but fails to act	Squad member unable to get over obstacle, other SM delays but eventually helps after instructor prompting	Squad member unable to get over obstacle, other SM moves to help them over the wall without prompting	Squad member unable to get over the obstacle, other SM verbalized need to do more gets more than one SM to join in stepping up
BEHAVIOR CATEGORY: ADAPTABILITY	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
Adjusting actions to changing situations. Context: More likely to occur Outside	Squad members use the same course of action through an obstacle, even when it did not work previously	Squad members use the same course of action through an obstacle despite being instructed to change	Squad members adapt their course of action but only after receiving outside guidance	Squad members adapt their roles when someone becomes injured or is struggling, but it takes several minutes	Squad members quickly adapt their roles when someone becomes injured or is struggling
BEHAVIOR CATEGORY: PERSEVERANCE	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
Facing setbacks without getting discouraged. Context: Either Outside or Inside	Squad members get frustrated and become resigned when faced with setbacks, they stop trying as hard to overcome the challenges	Squad members temporarily frustrated, take a pause, but regroup and overcome the challenges	Squad members temporarily stop or pause after a setback before reengaging and overcoming the challenges	Squad members continued to exert effort despite setbacks to overcome challenges	Squad members moved through challenges with no change in their efforts or behaviors as if they had not faced a setback at all
Demonstrating physical toughness and stamina. Context: More likely to occur Outside	1 or more squad members complain or ask instructor for relief from completing the task to standard	Task completion requires notable encouragement and/or support from other squad members or instructors	Squad members complete the task to the minimum standard despite notable shortcomings in physical abilities	Squad members complete the task to standard despite physical challenges	Squad members maintain high motivation throughout the task, despite notable physical challenges

Rater Guidance Table

BEHAVIOR CATEGORY: SHARED LEADERSHIP	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
Offering direction for the team. Context: Inside but could apply to Outside	Casualty dragged from street but is left unattended and dies	Casualty dragged from street, SM notices but doesn't attend to casualty	Casualty dragged from street and squad member points out need for someone to attend to them, but no one does	Casualty dragged from street and SM directs one person to redirect their attention to the casualty	Casualty dragged from the street and SM directs everyone to attend to whomever they dragged from the street – leave no one unattended
Influencing one another to act. Context: Outside—climbing over wall	No one speaks up at wall obstacle leaving SM to struggle getting over the wall	SM notices SM struggling at wall, says a few words but no one acts to help	SM notices SM struggling at wall, asks another SM to help but they are unsuccessful	SM notices SM struggling at wall, directs another SM who successfully helps SM over the wall	SM proactively verbalizes need to help each other over the wall, all SM help one another over the wall
BEHAVIOR CATEGORY: FORMAL LEADERSHIP	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
Planning with the team before it acts. Context: Inside	No discussion at all by the team on how they will organize for security, casualty evacuation	General discussion of need to organize but roles are not specific to individual SM	General discussion of roles but they break down immediately under paintball fire	Security and casualty evac roles identified, SM stay in their roles with mixed success	Primary and back up roles by SM identified. Squad adapts roles under fire, providing return fire and evac casualties successfully
Redistributing tasks across the team as needed. Context: Inside— Mass Casualty	Individual SM stay with casualty they evac regardless of wound urgency. Multiple casualties die	Individual SM stay with each casualty, one or more casualties do not receive sufficient care	Need to shift SM to more critical patients/tasks is verbalized but no one acts to help	SM verbalize and act on some patients need for more SM and medical supplies than others	SM initially triage casualties and distribute SM and first aid supplies accordingly to meet all needs
Sharing needed information with other members. Context: Inside—Mass Casualty	Each SM attends to own casualty, no exchange of info on severity of casualty wounds	Each SM attends to own casualty, no verbalization of medivac request info	Each SM attends to own casualty with incomplete medevac request info shared	SMs share info on critical wounds for complete 9-line medevac request	SMs share info, shift resources and priorities to most urgent care cases. 9 -line complete & submitted

Rater Guidance Table

Remaining calm and composed. Context: Either Outside or Inside	Squad members appear agitated or frustrated through the whole exercise	Squad members temporarily calm, but usually quite agitated or frustrated throughout the exercise	Squad members appear equal parts calm and composed, as well as, frustrated and agitated throughout the exercise	Squad members usually appear calm and composed, but occasionally express frustration	Squad members appear calm and composed through the exercise
Displaying persistence. Context: Inside but could apply to Outside	Designated leader never takes on leadership role failing to communicate or influence others	Designated leader makes initial attempt at communicating/ directing but stops after the first few obstacles	Designated leader verbalizes once but if no one acts does not keep insisting or influencing – falls silent and lets SM do whatever they want	Designated leader continues to communicate and direct throughout Outside/Inside with limited success	Designated leader role models persisting while successfully influencing others as well

TEAM 2

Overall, your team performance was good. When going over the walls, you listened to each other, provided clear messages, used gestures appropriately, and there were requests for help. On the last wall, teammates notice one person still struggling to get over, and you worked together to help.

On the other hand, the team struggled with getting the casualty out of the tank. There were some setbacks and a lack of problem solving to find the right solution. Everyone became frustrated and needed pauses before trying a different approach. Some approaches were started that were then not finished once a challenge arose.

TEAM 3

Overall, your team performance was poor. Your team took the longest to get through the exercise. You did not talk a lot with each other except for during the last wall. You showed improvement, but only at the end by encouraging each other and better communication. Through most of the exercise, you were not focused on teammates. For example, those who pulled security did not realize their help was needed when other people struggled to get over the wall or get the litter over the wall. In fact, no one stepped up when the litter almost fell to the ground when going over the wall. Your team leader did not provide much direction, so that is why you were often required to act in the absence of guidance.

On the other hand, the team did not show frustration at any point in the exercise and persevered, even when facing setbacks, and completed the exercise.

TEAM 5

You are an intact team coming through this exercise, so you already know how to work well together. There were no setbacks, and the team leader provided direction and guidance. Your communication was clear, and use of gestures assisted your team in getting the casualty out of the tank, on the litter, and over the walls.

On the other hand, it was observed a few times that when someone struggled to get over the wall at first, this person did not ask for help, specifically did not ask for someone to take his/her weapon.

Date 8/10/22 Team # 2 Instructor # 99

Training Location: Outside [☒ Inside []

Squad Leader: Jr Enlisted [☒ NCO []

** Training **

Squad/Team Psychological Intangible Assessment

Before the training exercise, familiarize yourself with the seven categories and the associated squad behavior statements. Then watch for specific actions, but also a pattern of behavior. Assess the squad on statements provided in each row and make a summative decision indicating your answer with one checkmark for each statement row's checkbox. If the statement or behavior is not observed, then leave that row blank and do not check a checkbox. Use the 'Notes' section to jot down observations that help you with your squad observations and evaluation throughout the training exercise.



	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
COMMUNICATION					
How effective were the team members at:					
Communicating during pauses in the action.	☐	☐	☐	☒	☐
Repeating messages to ensure understanding.	☐	☐	☐	☐	☒
Acknowledge requests of other members.	☐	☐	☐	☒	☐
Sending clear information.	☐	☐	☐	☐	☒
Communicating non-verbally (e.g., gestures).	☐	☐	☐	☒	☐
Passing information with mutual understanding.	☐	☐	☐	☒	☐
Notes: <i>Walls - listened to each other, used gestures, clear about what was needed, repeated info</i>					
SUPPORT EACH OTHER					
How effective were the team members at:					
Asking for help when needed.	☐	☐	☐	☒	☐
Providing assistance to others who need it.	☐	☐	☐	☒	☐
Recognizing when other members are struggling.	☐	☐	☐	☐	☒
Identifying each other's performance gaps.	☐	☒	☐	☐	☐
Notes: <i>Wall-Last one - realized one couldn't get over, worked together to help</i>					
INITIATIVE					
How effective were the team members at:					
Demonstrating the ability to self-start.	☐	☐	☒	☐	☐
Stepping up to take on more when it matters most.	☐	☐	☐	☐	☒
Preparing for what comes next.	☐	☐	☐	☒	☐
Acting in the absence of guidance.	☐	☐	☒	☐	☐
Notes: <i>Troubleshooted when there were issues getting litter over wall, people stepped up</i>					
ADAPTABILITY					
How effective were the team members at:					
Adjusting actions to changing situations.	☐	☒	☐	☐	☐
Attempting to solve problems from different angles.	☐	☒	☐	☐	☐
Notes: <i>Issues getting casualty out of tank, trouble with problem solving, took too long</i>					
PERSEVERANCE					
How effective were the team members at:					
Facing setbacks without getting discouraged.	☐	☒	☐	☐	☐
Demonstrating physical toughness and stamina.	☐	☐	☒	☐	☐
Finishing whatever they begin.	☐	☒	☐	☐	☐
Notes: <i>Became frustrated with getting casualty out of tank, needed pauses</i>					

	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
SHARED LEADERSHIP					
How effective were the team members at:					
Offering direction for the team.	☐	☐	☐	☐	☒
Influencing one another to act.	☐	☐	☐	☒	☐
Notes:					
FORMAL LEADERSHIP					
How effective was the team leader at:					
Facilitating team problem solving.	☐	☒	☐	☐	☐
Planning with the team before it acts.	☐	☐	☒	☐	☐
Redistributing tasks across the team as needed.	☐	☐	☐	☒	☐
Providing direction to other members.	☐	☐	☐	☒	☐
Sharing needed information with other members.	☐	☐	☒	☐	☐
Remaining calm and composed.	☐	☒	☐	☐	☐
Displaying persistence.	☐	☒	☐	☐	☐
Demonstrates sound judgment.	☐	☐	☒	☐	☐
Notes:					

Squad Feedback

Using this section as feedback for the squad, determine which actions the squad ought to implement based on the statement evaluations above. During the MSTC exercise, what psychological intangible is having the most critical impact on team performance? That is, what is the biggest factor impairing and hindering the squad, and what is helping or enhancing squad performance the most? For each psychological intangible listed below, please check whether each factor is helping or impairing team performance:

Psychological Intangible	Helping	Impairing	Notes:
Communication	☐	☐	
Support Each Other	☐	☐	
Initiative	☐	☐	
Adaptability	☐	☐	
Perseverance	☐	☐	
Shared Leadership	☐	☐	
Leadership	☐	☐	

Squad Huddle

Please refer to the huddle job aid for providing feedback to the squad.

Squad Performance

Instructions: After the squad's performance during the outside or inside training, check your agreement with the following statements below.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
The squad's casualties had a high likelihood of survival.	☐	☐	☐	☐	☐
The squad performed effectively as a team.	☐	☐	☐	☐	☐
The squad effectively performed casualty care.	☐	☐	☐	☐	☐
The squad was tactically proficient.	☐	☐	☐	☐	☐
The squad worked well together.	☐	☐	☐	☐	☐
The squad accomplished its objectives in the allotted time.	☐	☐	☐	☐	☐
Notes:					

* Training *

Squad/Team Psychological Intangible Assessment

Before the training exercise, familiarize yourself with the seven categories and the associated squad behavior statements. Then watch for specific actions, but also a pattern of behavior. Assess the squad on statements provided in each row and make a summative decision indicating your answer with one checkmark for each statement row's checkbox. If the statement or behavior is not observed, then leave that row blank and do not check a checkbox. Use the 'Notes' section to jot down observations that help you with your squad observations and evaluation throughout the training exercise.



	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
COMMUNICATION					
How effective were the team members at:					
Communicating during pauses in the action.	☐	☐	☒	☐	☐
Repeating messages to ensure understanding.	☐	☐	☒	☐	☐
Acknowledge requests of other members.	☐	☒	☐	☐	☐
Sending clear information.	☐	☒	☐	☐	☐
Communicating non-verbally (e.g., gestures).	☒	☐	☐	☐	☐
Passing information with mutual understanding.	☐	☒	☐	☐	☐
Notes: Did not hear a lot of talking, even when solutions didn't work. Did not use gestures when that could have helped.					
SUPPORT EACH OTHER					
How effective were the team members at:					
Asking for help when needed.	☐	☒	☐	☐	☐
Providing assistance to others who need it.	☒	☐	☐	☐	☐
Recognizing when other members are struggling.	☒	☐	☐	☐	☐
Identifying each other's performance gaps.	☐	☒	☐	☐	☐
Notes: Not focused on other teammates, those who pulled security did not realize their help was needed unless they were told.					
INITIATIVE					
How effective were the team members at:					
Demonstrating the ability to self-start.	☐	☐	☐	☒	☐
Stepping up to take on more when it matters most.	☒	☐	☐	☐	☐
Preparing for what comes next.	☐	☐	☒	☐	☐
Acting in the absence of guidance.	☐	☐	☐	☒	☐
Notes: Team leader didn't provide guidance and so team members were self-starters but no one stepped up when getting litter over wall - almost fell to ground.					
ADAPTABILITY					
How effective were the team members at:					
Adjusting actions to changing situations.	☐	☐	☒	☐	☐
Attempting to solve problems from different angles.	☐	☒	☐	☐	☐
Notes:					
PERSEVERANCE					
How effective were the team members at:					
Facing setbacks without getting discouraged.	☐	☐	☐	☐	☒
Demonstrating physical toughness and stamina.	☐	☐	☐	☒	☐
Finishing whatever they begin.	☐	☐	☐	☐	☒
Notes: Kept trying to complete tasks even if it took several tries. Did well getting over last wall. Did not show frustration at any point.					

	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
SHARED LEADERSHIP					
How effective were the team members at:					
Offering direction for the team.	☐	☒	☐	☐	☐
Influencing one another to act.	☐	☐	☐	☒	☐
Notes: On last wall, communication improved and team members encouraged each other					
FORMAL LEADERSHIP					
How effective was the team leader at:					
Facilitating team problem solving.	☐	☐	☒	☐	☐
Planning with the team before it acts.	☐	☒	☐	☐	☐
Redistributing tasks across the team as needed.	☐	☒	☐	☐	☐
Providing direction to other members.	☐	☒	☐	☐	☐
Sharing needed information with other members.	☐	☐	☒	☐	☐
Remaining calm and composed.	☐	☐	☐	☒	☐
Displaying persistence.	☐	☐	☐	☒	☐
Demonstrates sound judgment.	☐	☐	☐	☒	☐
Notes:					

Squad Feedback

Using this section as feedback for the squad, determine which actions the squad ought to implement based on the statement evaluations above. During the MSTC exercise, what psychological intangible is having the most critical impact on team performance? That is, what is the biggest factor impairing and hindering the squad, and what is helping or enhancing squad performance the most? For each psychological intangible listed below, please check whether each factor is helping or impairing team performance:

Psychological Intangible	Helping	Impairing	Notes:
Communication	☐	☐	
Support Each Other	☐	☐	
Initiative	☐	☐	
Adaptability	☐	☐	
Perseverance	☐	☐	
Shared Leadership	☐	☐	
Leadership	☐	☐	

Squad Huddle

Please refer to the huddle job aid for providing feedback to the squad.

Squad Performance

Instructions: After the squad's performance during the outside or inside training, check your agreement with the following statements below.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
The squad's casualties had a high likelihood of survival.	☐	☐	☐	☐	☐
The squad performed effectively as a team.	☐	☐	☐	☐	☐
The squad effectively performed casualty care.	☐	☐	☐	☐	☐
The squad was tactically proficient.	☐	☐	☐	☐	☐
The squad worked well together.	☐	☐	☐	☐	☐
The squad accomplished its objectives in the allotted time.	☐	☐	☐	☐	☐
Notes:					

* Training *

Squad/Team Psychological Intangible Assessment

Before the training exercise, familiarize yourself with the seven categories and the associated squad behavior statements. Then watch for specific actions, but also a pattern of behavior. Assess the squad on statements provided in each row and make a summative decision indicating your answer with one checkmark for each statement row's checkbox. If the statement or behavior is not observed, then leave that row blank and do not check a checkbox. Use the 'Notes' section to jot down observations that help you with your squad observations and evaluation throughout the training exercise.



	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
COMMUNICATION					
How effective were the team members at:					
Communicating during pauses in the action.	☐	☐	☐	☒	☐
Repeating messages to ensure understanding.	☐	☐	☐	☒	☐
Acknowledge requests of other members.	☐	☐	☐	☒	☐
Sending clear information.	☐	☐	☐	☐	☒
Communicating non-verbally (e.g., gestures).	☐	☐	☐	☒	☐
Passing information with mutual understanding.	☐	☐	☐	☐	☒
Notes: Getting casualty out of tank - used clear statements and gestures					
SUPPORT EACH OTHER					
How effective were the team members at:					
Asking for help when needed.	☐	☒	☐	☐	☐
Providing assistance to others who need it.	☐	☐	☐	☐	☒
Recognizing when other members are struggling.	☐	☐	☐	☒	☐
Identifying each other's performance gaps.	☐	☐	☐	☒	☐
Notes: Struggling to get weapon/self over wall, didn't ask for help to take weapon but team member noticed and offered help. Happened twice.					
INITIATIVE					
How effective were the team members at:					
Demonstrating the ability to self-start.	☐	☐	☐	☒	☐
Stepping up to take on more when it matters most.	☐	☐	☐	☐	☒
Preparing for what comes next.	☐	☐	☐	☐	☒
Acting in the absence of guidance.	☐	☐	☐	☒	☐
Notes: Team leader provided direction mostly, but team worked together to problem solve getting over all walls.					
ADAPTABILITY					
How effective were the team members at:					
Adjusting actions to changing situations.	☐	☐	☐	☒	☐
Attempting to solve problems from different angles.	☐	☐	☐	☐	☒
Notes:					
PERSEVERANCE					
How effective were the team members at:					
Facing setbacks without getting discouraged.	☐	☐	☒	☐	☐
Demonstrating physical toughness and stamina.	☐	☐	☐	☐	☒
Finishing whatever they begin.	☐	☐	☐	☐	☒
Notes: Smooth run Through exercise - no real setbacks were faced.					

	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
SHARED LEADERSHIP					
How effective were the team members at:					
Offering direction for the team.	☐	☐	☐	☒	☐
Influencing one another to act.	☐	☐	☐	☐	☒
Notes:					
FORMAL LEADERSHIP					
How effective was the team leader at:					
Facilitating team problem solving.	☐	☐	☐	☐	☒
Planning with the team before it acts.	☐	☐	☐	☒	☐
Redistributing tasks across the team as needed.	☐	☐	☐	☐	☒
Providing direction to other members.	☐	☐	☐	☐	☒
Sharing needed information with other members.	☐	☐	☐	☒	☐
Remaining calm and composed.	☐	☐	☐	☒	☐
Displaying persistence.	☐	☐	☐	☐	☒
Demonstrates sound judgment.	☐	☐	☐	☒	☐
Notes: <i>Led by example</i>					

Squad Feedback

Using this section as feedback for the squad, determine which actions the squad ought to implement based on the statement evaluations above. During the MSTC exercise, what psychological intangible is having the most critical impact on team performance? That is, what is the biggest factor impairing and hindering the squad, and what is helping or enhancing squad performance the most? For each psychological intangible listed below, please check whether each factor is helping or impairing team performance:

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Communication	☐	☐	
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Initiative	☐	☐	
Adaptability	☐	☐	
Perseverance	☐	☐	
Shared Leadership	☐	☐	
Leadership	☐	☐	

Squad Huddle

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Squad Performance

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The squad's casualties had a high likelihood of survival.	☐	☐	☐	☐	☐
The squad performed effectively as a team.	☐	☐	☐	☐	☐
The squad effectively performed casualty care.	☐	☐	☐	☐	☐
The squad was tactically proficient.	☐	☐	☐	☐	☐
The squad worked well together.	☐	☐	☐	☐	☐
The squad accomplished its objectives in the allotted time.	☐	☐	☐	☐	☐
Notes:					