

Military Unit Cohesion: The Mechanics and Why some Programs Evolve and Others Dissolve  
CSC 1999

Subject Area - General

**EXECUTIVE SUMMARY**

**Title:** Military Unit Cohesion: The Mechanics and Why some Programs Evolve and Others Dissolve

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**Thesis:** By exploring how various military unit cohesion programs have evolved, and in some cases dissolved, this paper seeks to answer basic questions regarding the future and relevance of the recently implemented Marine Corps unit cohesion program during a potentially revolutionary and dynamic period for the American military.

**Discussion:** By orienting Marine Corps manpower planners, trainers, and operators on a common mission, "the intense bonding of Marines, strengthened over time, resulting in absolute trust, subordination of self, and an intuitive relationship in the collective actions of the unit and the importance of teamwork," the 31st Commandant of the Marine Corps is determined to capitalize on the historically documented benefits of military unit cohesion. This paper examines the essence of military unit cohesion, the requirement for units imbued with a high degree of cohesion during this relatively peaceful, yet revolutionary, era in the military, the historical relevance and changing nature of military cohesion, and finally two major programs aimed at developing unit cohesion--the Army's COHORT program and the recently implemented Marine Corps unit cohesion program. To accomplish this, the paper attempts to explore the following areas:

➤ The inimical impact the Vietnam conflict had on human dynamics in the American military--focus is primarily on how the Vietnam experience reoriented leaders on the importance of cohesion.

➤ The mechanics of the COHORT system--how it was administered and the rigor applied to its formulation.

➤ The genesis of the Army's COHORT and regimental systems. How the COHORT program rapidly expanded beyond the original vision and how this rapid push to expand the program coupled with poor leadership environments to spell the end of an initially viable program.

➤ How and why Marine Corps personnel stability programs have evolved since the 1970s and how the early programs evolved in the current cohesion program.

➤ The mechanics of the Marine Corps stability and cohesion programs.

| Report Documentation Page                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                    |                                     |                                                           | Form Approved<br>OMB No. 0704-0188                  |                                 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|-------------------------------------|-----------------------------------------------------------|-----------------------------------------------------|---------------------------------|
| Public reporting burden for the collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Washington Headquarters Services, Directorate for Information Operations and Reports, 1215 Jefferson Davis Highway, Suite 1204, Arlington VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to a penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. |                                    |                                     |                                                           |                                                     |                                 |
| 1. REPORT DATE<br><b>1999</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                    | 2. REPORT TYPE                      |                                                           | 3. DATES COVERED<br><b>00-00-1999 to 00-00-1999</b> |                                 |
| 4. TITLE AND SUBTITLE<br><b>Military Unit Cohesion: The Mechanics and Why some Programs Evolve and Others Dissolve</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                    |                                     |                                                           | 5a. CONTRACT NUMBER                                 |                                 |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                    |                                     |                                                           | 5b. GRANT NUMBER                                    |                                 |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                    |                                     |                                                           | 5c. PROGRAM ELEMENT NUMBER                          |                                 |
| 6. AUTHOR(S)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                    |                                     |                                                           | 5d. PROJECT NUMBER                                  |                                 |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                    |                                     |                                                           | 5e. TASK NUMBER                                     |                                 |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                    |                                     |                                                           | 5f. WORK UNIT NUMBER                                |                                 |
| 7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES)<br><b>United States Marine Corps,Command Staff College, Marine Corps University,2076 South Street, Marine Corps Combat Development Command,Quantico,VA,22134-5068</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                    |                                     |                                                           | 8. PERFORMING ORGANIZATION REPORT NUMBER            |                                 |
| 9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                    |                                     |                                                           | 10. SPONSOR/MONITOR'S ACRONYM(S)                    |                                 |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                    |                                     |                                                           | 11. SPONSOR/MONITOR'S REPORT NUMBER(S)              |                                 |
| 12. DISTRIBUTION/AVAILABILITY STATEMENT<br><b>Approved for public release; distribution unlimited</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                    |                                     |                                                           |                                                     |                                 |
| 13. SUPPLEMENTARY NOTES                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                    |                                     |                                                           |                                                     |                                 |
| 14. ABSTRACT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                    |                                     |                                                           |                                                     |                                 |
| 15. SUBJECT TERMS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                    |                                     |                                                           |                                                     |                                 |
| 16. SECURITY CLASSIFICATION OF:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                    |                                     | 17. LIMITATION OF ABSTRACT<br><b>Same as Report (SAR)</b> | 18. NUMBER OF PAGES<br><b>98</b>                    | 19a. NAME OF RESPONSIBLE PERSON |
| a. REPORT<br><b>unclassified</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | b. ABSTRACT<br><b>unclassified</b> | c. THIS PAGE<br><b>unclassified</b> |                                                           |                                                     |                                 |

➤ A comparison of COHORT and the Marine Corps program to determine common negative trends and analyze the potential of the Marine program.

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# **MILITARY UNIT COHESION THE MECHANICS AND WHY SOME PROGRAMS EVOLVE WHILE OTHERS DISSOLVE**

## **CHAPTER 1**

### **WHAT IS MILITARY UNIT COHESION AND WHERE DOES IT COME FROM?**

*It was an act of love. Those men on the line were my family, my home. They were closer to me than I can say, closer than any friends had been or ever would be. They had never let me down, and I couldn't do it to them. I had to be with them, rather than let them die and me live with the knowledge that I might have saved them. Men, I now knew, do not fight for flag or country, for the Marine Corps or glory or any other abstraction. They fight for one another. Any man in combat who lacks comrades who will die for him, or for whom he is willing to die, is not a man at all. He is truly damned.*

*William Manchester  
Goodbye, Darkness*

*The man who will go where his colors go, without asking, who will fight a phantom foe in the jungle and mountain range, without counting, and who will suffer and die in the midst of incredible hardship, without complaint, is still what he has always been, from Imperial Rome to sceptered Britain to democratic America. He is the stuff of which legions are made.*

*T. R. Fehrenbach  
This Kind of War*

### **Military Unit Cohesion--Introduction and Basis for Further Study**

Born from a vision established by the 31st Commandant in his planning guidance, the Marine Corps has embarked on an ambitious unit cohesion program that goes well beyond the personnel stability focus of previous manpower programs. By orienting Marine Corps manpower planners, trainers, and operators on a common mission, "the intense bonding of Marines, strengthened over time, resulting in absolute trust, subordination of self, and an

intuitive relationship in the collective actions of the unit and the importance of teamwork," the Marine Corps is determined to capitalize on the human dimension of warfighting.<sup>1</sup> The end state is military unit cohesion developed during a peacetime transformation process that leads to cohesive fighting units in war. Yet, what are the benefits of developing military units imbued with the passion of military unit cohesion, and are the benefits worth the cost? By exploring how various military unit cohesion programs have evolved, and in some cases dissolved, this paper seeks to answer basic questions regarding the future and relevance of the recently implemented Marine Corps unit cohesion program during a potentially revolutionary and dynamic period for the American military.

In the 1980s, a National Defense University study group envisioned cohesion as "the bonding together of members of an organization or unit in such a way as to sustain their will and commitment to each other, their unit, and the mission."<sup>2</sup> The tacit message contained in their definition is "a willingness of individuals to subordinate their personal welfare--including life if necessary--to that of their comrades, unit, and mission."<sup>3</sup> However, the Army's failed experimentation with COHORT and the regimental system during the 1980s seems to indicate that the costs associated with developing this high degree of military unit cohesion during peacetime might outweigh the benefits.<sup>4</sup> Like the Army, the Marine Corps implemented--with varying degrees of success--personnel programs over the past couple of decades that focused on enhancing personnel stability or improving personnel management procedures. Now, in an

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<sup>1</sup> United States Marine Corps, "21st Century Fighting Power," decision brief of unit cohesion presented to the Commandant of the Marine Corps, 15 July 1996, slide 43; Gen Charles C. Krulak, USMC, "Transformation and Cohesion," *Marine Corps Gazette* 80, no. 11 (November 1996): 23.

<sup>2</sup> Industrial College of the Armed Forces, *Cohesion in the US Military*, Study, National Defense University Press, 1984, 4. This study was led by Dr. John H. Jones, Research Director, and consisted of Michael D. Bickel, Captain, USN; Arthur C. Blades, Lieutenant Colonel, USMC; John B. Creel, Lieutenant Colonel, USMC; Wade S. Gatling, Colonel, USAF; James M. Hinkle, Lieutenant Colonel, USAF; Jon D. Kindred, Lieutenant Colonel, USA; and Samuel E. Stocks, Colonel, USAF.

<sup>3</sup> ICAF, 4.

<sup>4</sup> Wm. Darryl Henderson, *The Hollow Army: How the U.S Army is Oversold and Undermanned*, (New York: Greenwood Press, 1990), 120; Mark A. Vaitkus, Ph.D., Sociology Program Director at the United States Military Academy, telephone interview by author, 16 December 1997; Paul D. Bliese, Ph.D., Research Psychologist at the Walter Reed Army Institute of Research, interview by author, 22 December 1997.

effort that aims to surpass the goals of COHORT, the Marine Corps is placing heavy emphasis on the human dimension of war and on a military unit cohesion program that goes beyond stability and efficient personnel practices.

Possibly breaking away from the current technology niche, the Marine Corps is investing heavily in the human dynamics of warfare even though the guiding document for future U.S. military capabilities, *Joint Vision 2010*, tends to neglect it. *Joint Vision 2010* weighs in heavily on the technical side of warfighting and it rarely mentions the human aspects of war. Using words as an indicator, zero occurrences of cohesion, morale, or esprit; one use of motivation and courage; 14 mentions of leadership; and only 22 cases of the word people--compared with 31 uses of the word technology--*Joint Vision 2010* clearly advocates technology rather than humans.<sup>5</sup> Can a military cohesion program developed by the Marine Corps overcome this technology focus and the documented problems of previous cohesion programs?

### **Some Elements of Military Unit Cohesion--Assumptions and Facts**

*In Combat Effectiveness: Cohesion, Stress and the Volunteer Military* Stephen D. Westbrook suggests that developing unit cohesion is a complex process and an environment of personnel stability is the largest factor influencing that process.

For example, greater personnel stability is essential to build unit cohesion than the primary group cohesion because of the inherent difficulties of developing interpersonal liking, a perception of interdependence, and similarity of values, attitudes, and goals among a larger group with fewer opportunities for interaction....Personnel Stability is probably the most critical of these conditions. The development of interpersonal affection and trust requires time and cannot occur if the membership of a primary group or unit is changing constantly. Under conditions of personnel instability, the members of a unit cannot undergo a set of common experiences that help build similar attitudes and goals as well as feelings of mutual dependence. Moreover, a group's developmental

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<sup>5</sup> Department of Defense, Chairman of the Joint Chiefs of Staff, *Joint Vision 2010*, in *Joint Electronic Library*, (May 1997), CD-ROM, accessed 23 January 1998.

process goes through a series of phases, the first characterized by individual testing and assessing their environment while attempting to find their place in the group. This phase is followed by a period of intragroup conflict, cleavage, competition, and jealousy in which the group's informal authority structure is established. A feeling of cohesion cannot develop until this stage has been completed.<sup>6</sup>

The stability assumption--perhaps the essence of most modern military unit cohesion programs--also formed the basis of the Army's COHORT and regimental programs. Although personnel stability plays a major role in the new Marine Corps Unit Cohesion Program, the Marine Corps program places personnel stability in a supporting role instead of the centerpiece role it played in the Precise Personnel Assignment System (PREPAS), the Unit Deployment Program (UDP), and the Tour Optimization for Uniform Readiness (TOUR II) program--previous Marine Corps programs that focused on stability and manpower management as an end state.<sup>7</sup>

Military history and research into war's human dynamics prove that military unit cohesion goes well beyond an environment of personnel stability, a warm and fuzzy feeling within the unit, or a developed sense of unit esprit.<sup>8</sup> According to one contemporary definition, "military unit cohesion represents bonding of soldiers of equal rank as well as between ranks, commitment of all ranks to the military mission, and the affirmation of special properties of their group, team, crew, company, or battery that keeps them alive in combat."<sup>9</sup> However, for

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<sup>6</sup> Stephen D. Wesbrook, "The Potential for Military Disintegration," in *Combat Effectiveness: Cohesion, Stress, and the Volunteer Military*, vol. 9 of *Sage Research Project on War, Revolution, and Peacekeeping*, ed. Sam C. Sarkesian, (Beverly Hills, CA: SAGE Publications, 1980), 266-267.

<sup>7</sup> The notion that personnel stability is critical to an environment conducive to developing unit cohesion is contained in LTC James A. Martin, USA, "The Unit Manning System," Walter Reed Army Institute of Research (WRAIR) unpublished research paper, 15 June 1987, 23-24 (pages are not numbered); Robert L. Goldich, "The Army's New Manning System," report to the House Armed Service Committee, Congressional Research Service, The Library of Congress, 13 June 1983, CRS-13 through CRS-34; Oliver L. North, Capt, USMC, "Unit Rotation: Making Unaccompanied Tours Easier on People," *Marine Corps Gazette* (November 1977): 70-76; Capt Michael Forrester, "PREPAS as a Manpower Management Tool," *Marine Corps Gazette* (October 1984): 52; Cowdrey, 21, 26; and United States Marine Corps, "21st Century Fighting Power," slide 37. Also see Christopher C. Straub, *The Unit First: Keeping the Promise of Cohesion*, (Washington, DC: National Defense University Press, 1988), 58-84.

<sup>8</sup> Bassford, "Cohesion, Personnel Stability and the German Model," 77; Walter Reed Army Institute of Research (WRAIR), *Evaluating the Unit Manning System: Lessons Learned to Date*, Scientific Manuscript, Report WRAIR-NP-87-10, October 1987, 1-2.

<sup>9</sup> WRAIR, *Evaluating the Unit Manning System: Lessons Learned to Date*, 2.

the purposes of this paper a more measurable definition is required. To that end, Dr. Nora Kinzer Stewart provides perhaps one of the best, and most succinct, definitions of military unit cohesion in her book *Mates & Muchachos: Unit Cohesion in the Falklands/Malvinas War*.<sup>10</sup>

Dr. Stewart, whose qualifications include a tour as the Assistant Secretary of the Army for Manpower and Reserve Affairs, special assistant to the administrator of Veterans Affairs, professor of Human Resource Management at the National Defense University, and principal scientist with the Army Research Institute for the Behavioral and Social Sciences, frames military unit cohesion in the quantifiable terms that will be utilized in this paper.

As defined by Dr. Stewart, Military Cohesion consists of three major elements:

1. Relationships between peers (horizontal).
2. Relationships between subordinates and superiors (vertical).
3. Relationship to the military as an organization or unit (organizational).

But we cannot examine the soldier solely on the micro or small-unit level and ignore the social, cultural, economic, and political heritage of his nation. Therefore, I include a fourth type of bonding:

4. Relationship of the military and the individual to the society or culture at large (societal).

Horizontal or peer bonding involves building a sense of trust among officers, among NCOs [Non-commissioned Officers], and among soldiers. Some elements contributing to peer bonding are the following:

- (a) Sense of mission.
- (b) Technical and tactical proficiency.
- (c) Lack of personnel turbulence.
- (d) Teamwork.
- (e) Trust, respect, and friendship.

Vertical bonding involves the relationship between subordinates and superior (and superior to subordinate) soldier, NCO, and officer. Some characteristics of vertical bonding contributing to military cohesion are the following:

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<sup>10</sup> David R. Segal, Ph.D., Center for Research on Military Organizations at the University of Maryland, telephone interview by author, 20 January 1998. In this telephone interview Dr. Segal indicated that Dr. Stewart's definition of military unit cohesion was very descriptive and concise.

- (a) An open (versus authoritarian) organizational climate.
- (b) Leader's concern for the men.
- (c) Leader example.
- (d) Trust and respect for leaders.
- (e) Sharing of discomfort and danger.
- (f) Shared training.

Organizational bonding, or the relationship of the soldier or officer to the military as an organization or unit, has the following characteristics:

- (a) Loyalty to the nation and its values.
- (b) Patriotism.
- (c) Military tradition and history, high status.
- (d) Strong religious belief.
- (e) Well-defined concept of valor, heroism, masculinity.

Morale, or esprit, or will-to-fight are often used interchangeably with the word "cohesion." However, we view the concepts of morale, fighting spirit, will-to-win as interdependent with cohesion....Unfortunately, military historians and most social scientist use varying, imprecise, and fuzzy definitions of cohesion, military cohesion, morale, and command or unit climate....Military cohesion is a special bonding that implies that men are willing to die for the preservation of the group or the code of honor of the group or the valor and honor of the country....Impinging on military cohesion are society's attitudes toward the military in general or toward a particular war.....Military cohesion is part of and embedded in the society's norms, values, mores, and cultural ethos.<sup>11</sup>

Dr Stewart's discussion of cohesion is key to analyzing recent cohesion programs because it clearly establishes the terms horizontal cohesion, vertical cohesion, organizational cohesion, and societal cohesion. The last two types of cohesion become key to military unit cohesion--looser definitions that neglect organizational and societal cohesion could suggest that a tightly bonded gang or rogue military unit possess military unit cohesion. Dr. Stewart's precise definition is required to differentiate simple cohesion from military unit cohesion; moreover, it clearly indicates that many factors influence military unit cohesion and that the human dimension is at least equally important to technology in the warfighting arena.

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<sup>11</sup> Nora Kinzer Stewart, *Mates & Muchachos: Unit Cohesion in the Falklands/Malvinas War*, (New York: Brassey's US, Inc, 1991), 27-30.

## **Do we need Unit Cohesion Programs in Peace?**

In an era replete with civil liberties, individual values, and personal ambitions can a program that places group values above those of the individual really succeed when we are not at war? The American military has been successful in generating unit cohesion during war in spite of the absence of peacetime cohesion programs. Moreover, we live in a peacetime society that routinely recognizes individual, not unit, performance and where a growing majority of our public and private leaders have never experienced the military--much less the intangibles associated with cohesion in military units. Our society has become more technology oriented and the traditional values of honor, fidelity, and commitment to a group have become somewhat elusive--the military has succeeded in mirroring the larger society in this arena. With promises of personal satisfaction, technology opportunities, or money for college "be all **you** can be" has become a hallmark of the modern American military.

The benefits and drawbacks of military unit cohesion programs during periods of relative peace have regularly been debated. In *Fighting Power: German and U. S. Army Performance, 1939-1945* Martin Van Creveld espouses the virtues of a cohesive German Army--*Wehrmacht*--that, as Van Creveld contends, outperformed the American Military on a unit by unit basis because of the German unit cohesion developed before the war. On the other side of the argument, Stephen Ambrose's *Citizen Soldiers* points out implications of the lack of a peacetime cohesion program; however, he suggests that the American military capitalized on diversity and developed a uniquely American form of cohesion during World War II. While not addressing the values dimension of cohesion, in the early 1980s Colonel John E. Greenwood, USMC (Ret.), now editor of the *Marine Corps Gazette*, expressed his views on peacetime

personnel stability, individual vice unit replacement, and cohesion in a letter to the editor of *Army*.

Any analysis of combat effectiveness must start with combat. The day the first casualties are taken, personnel stability becomes a thing of the past. Periodic combat reorganizations will be unavoidable, a well-functioning individual replacement system indispensable.

There is certainly nothing new in this. It has been the situation in every war in this century. The Army and the Marine Corps alike have relied on individual replacements and have demonstrated repeatedly their ability to achieve reasonable cohesion and maintain acceptable unit effectiveness despite high personnel turnover.

In short, cohesion in combat units is a product of more than just personnel stability. When cohesion becomes most critical, personnel stability will be nonexistent. It was training, and unique leadership in combat and throughout the personnel pipeline that produced cohesion in the past wars and will produce it in the next.

What is needed and what should command our attention is not a peacetime regimental system but personnel pipeline and training systems that can deliver combat-ready replacements in all critical occupational fields in war and peace. They must be functioning systems that recognize and develop the other factors contributing to unit cohesion....

Regimental systems, unit rotation, and similar plans for personnel stability are peacetime schemes. They should be permitted only on a noninterference basis, only when it is perfectly clear that the necessary wartime personnel systems are in place and can be activated without turmoil or frantic improvisation.<sup>12</sup>

The current notion that a Marine Corps unit cohesion designed in peacetime seems to run counter to Colonel Greenwood's 1980s argument.

While arguments for and against peacetime cohesion programs continue, a trend toward more small scale contingencies (SSC) and operations other than war (OOTW) involvement outside the traditional definition of war might weight the argument in favor of cohesive units during peacetime. Since the traditional definition of war is now blurred, the idea that unit cohesion in peace and unit cohesion in war are not mutually supporting might now also be blurred. Nevertheless, at this juncture, we will anchor war's human dimension in historical examples to establish a firm baseline for the modern application of, and renewed interest in, military unit cohesion during both war and peace.

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<sup>12</sup> John E. Greenwood, Col, USMC (Ret.), Letter to the Editor, *Army*, September 1982: 4, quoted in Goldrich, CRS-38.

## Cohesion--Theory and History

The notion that human factors play a significant role in war is certainly not new. The renowned military theorist Carl von Clausewitz touches on the human dynamics in war and emphasizes the importance of the moral element in war throughout his classic work, *On War*.<sup>13</sup> Clausewitz' infamous "trinity"--composed of primordial violence, hatred, and enmity which are to be regarded as a blind natural force; of the play of chance and probability within which the creative spirit is free to roam; and of its element of subordination, as an instrument of policy"--emphasizes the human element of war.<sup>14</sup> In comparing physical to moral factors, Clausewitz postulates "the physical seem little more than the wooden hilt, while the moral factors are the precious metal, the real weapon, the finely honed blade."<sup>15</sup>

Likewise, the French military theorist Charles Ardant du Picq paints a vision of cohesion with: "Four brave men who do know each other will not dare to attack a lion. Four less brave, but knowing each other well, sure of their reliability and consequently of mutual aid, will attack resolutely."<sup>16</sup> Like Clausewitz he recognized the importance of the human element and the benefits of cohesive military units; however, Ardant du Picq links cohesion to some causative factors.

A wise organization insures that the personnel of combat groups changes as little as possible, so that **comrades in peacetime maneuvers shall be comrades in war**. From living together, and obeying the same chiefs, from commanding the same men, from sharing fatigue and rest, from cooperation among men who quickly understand each other in the execution of warlike movements, may be bred brotherhood, professional knowledge, sentiment, above all unity. The duty of obedience, the right of imposing discipline and the impossibility of escaping from it, would naturally follow.<sup>17</sup>

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<sup>13</sup> Discussion on the military genius appears in Chapter 3 of Book 1, 100-112; however, the central theme of morale factors appears throughout Carl von Clausewitz, *On War*, Ill ed., Eds and trans., M. Howard and P. Paret, (Princeton, NJ: Princeton University Press, 1976).

<sup>14</sup> Clausewitz, 89.

<sup>15</sup> Clausewitz, 185.

<sup>16</sup> Ardant du Picq quoted in Nora Kinzer Stewart, *Mates & Muchachos: Unit Cohesion in the Falklands/Malvinas War*, (New York: Brassey's (US), Inc., 1991), 11. This passage is also quoted in numerous US Army research papers and reports on the COHORT program.

<sup>17</sup> Charles Ardant du Picq, *Battle Studies*, (New York: Macmillan, 1921), 96.

Ardant du Picq suggests that cohesion applies to the group as a whole--both leaders and the led--and that cohesion in peace contributes to cohesion in war. Thus described, cohesion becomes a full time, group-level phenomenon that exists across individuals--as opposed to morale or motivation that tends to ebb and flow within individuals. Ardant du Picq's long term of service requirement also implies there is a longevity and stability cost to be paid for military unit cohesion.

Although history is replete with visions of military unit cohesion, the basic idea can be traced to the Roman Legion where, "as described by Vegetius (390 AD), [the legion] devoted its core training and built its organizational structure to ensure the functional integrity and indissolubility of the line of battle and its constituent groups."<sup>18</sup>

Each Legion was divided into 10 cohorts, each with its unique ensign and each cohort divided into 10 centuries. Each century "had an ensign inscribed with the number of both the cohort and the century so that the men keeping it in sight might be prevented from separating from their comrades in the greatest tumults." Each century was further divided into squads or messes of ten men under the command of a *decanus* (a commander of ten) who ate, lived and fought together. These *conturbina* or *maniples* always fought together.<sup>19</sup>

Thus, the Roman Legion had a program to develop unit cohesion, ensure personnel stability, and capitalize on the human dimension in battle. The value of cohesion was echoed by combat commanders throughout history. "Without exception, all famed military leaders--Xenophon, Sun Tzu, Caesar, Genghis Khan, Charlemagne, Napoleon, Wellington, Washington, Lee, MacArthur, Montgomery, Mao--agree that men united for a cause, trusting in each other, and confident in their leaders will be an effective and victorious Army."<sup>20</sup> Yet, the type of cohesion required by the Roman Legion to maintain lines and formations changed as gunpowder and modern weapon systems forced dispersed formations on the battlefield.

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18     Martin, 11.

19     Martin, 11.

20     Stewart, 12.

As S. L. A. Marshall points out in *Men Against Fire*, as weapons became more and more lethal, dispersed formations resulted in less mutual support between soldiers. Without this support "the moral cohesion, brought about through the social association of troops in close physical proximity to one another, was attenuated."<sup>21</sup> After World War II, Marshall suggested that the traditional means of developing cohesion needed revision.

I hold it to be one of the simplest truths of war that the thing which enables an infantry soldier to keep going with his weapon is the near presence or the presumed presence of a comrade. The warmth which derives from human companionship is as essential to his employment of the arms with which he fights as is the finger with which he pulls a trigger or the eye with which he aligns his sights. The other man may be almost beyond hailing or seeing distance, but he must be there somewhere within a man's consciousness or the onset of demoralization is almost immediate and very quickly the mind begins to despair or turns to thoughts of escape. In this condition he is no longer a fighting individual, and although he holds to his weapon, it is little better than a club....Having to make a choice in the face of the enemy, he would rather be unarmed and with comrades around him than altogether alone, though possessing the most perfect of quick-firing weapons.<sup>22</sup>

As previously mentioned, Martin van Creveld touted the superior fighting spirit of the German *Wehrmacht* during World War II. Van Creveld reinforces Marshall's notion by indicating that "the military worth of an army equals the quantity and quality of its equipment multiplied by its fighting power."<sup>23</sup> In this context, he defines "Fighting Power" as "mental, intellectual, and organizational foundations; its manifestations, in one combination or another, are discipline and cohesion, morale and initiative, courage and toughness, the willingness to fight and the readiness, if necessary, to die."<sup>24</sup>

Though good equipment can, up to a point, make up for deficient fighting power (the reverse is also true), an army lacking the latter is, at best, a brittle instrument. History, including recent history, bristles with examples of armies that, though ostensibly strong

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<sup>21</sup> LtCol Christian B. Crowdrey, USMC, *Vertical and Horizontal Cohesion: Combat Effectiveness and the Problem of Manpower Turbulence*, Monograph, United States Army Command and General Staff College, (Fort Leavenworth, KS: May 1995), 6-7.

<sup>22</sup> S. L. A. Marshall, *Men Against Fire: The Problem of Battle Command in Future War*, (New York: William Morrow & Company, 1947), 42-43.

<sup>23</sup> Martin van Creveld, *Fighting Power: German and U.S. Army Performance, 1939-1945*, (Westport, CT: Greenwood Press, 1982), 174.

<sup>24</sup> Van Creveld, 3.

and well equipped, disintegrated at the first shock of combat through sheer lack of fighting power.<sup>25</sup>

Van Creveld's model also cultivates the peacetime sense of community that the German society (brutally reinforced by the Nazi movement) was hinged upon.<sup>26</sup>

### **Impact of the Vietnam Conflict**

Highlighting severe cohesion shortfalls in the post-Vietnam American military, the Industrial College of the Armed Forces (ICAF) published a study entitled *Cohesion in the US Military* and Wm. Darryl Henderson published *Cohesion: The Human Element in Combat*. Keeping in line with an official status, ICAF's Defense Management Study Group pointed out general and subtle trends that have a negative impact on cohesion in the American military-- technological development, management philosophies, occupational vice professional orientation, bureaucratic organization, cost versus benefit analysis, et al. Henderson's lengthy conclusions were much more damning.<sup>27</sup>

Only in the US Army have policies and practices been instituted that consistently fail to promote cohesion. The US Army faces fundamental cohesion and effectiveness problems...based on emphasizing the quantifiable and easily measured factors involved in cost-effectiveness analysis and also as a result of political expediency, the US Army, over the past two decades, has arrived at a set of policies that permeate almost all aspects of the organization--personnel, legal, logistical, and operational--and prevent the implementation of practices necessary to create cohesive units.<sup>28</sup>

The two studies found some alarming problems with cohesion in the American military (Henderson focused on the Army, but many of his conclusions may hold true for the rest of the services) and they provided sound recommendations that may have inspired senior leaders to act

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<sup>25</sup> Van Creveld, 3.

<sup>26</sup> Christopher Bassford, "Cohesion, Personnel Stability and the German Model," *Military Review* 70, (October 1990): 78.

<sup>27</sup> Factors influencing cohesion in the US military were compiled from summary paragraphs in the published ICAF study. For additional information see ICAF, 27, 41, 59, and 61-65.

<sup>28</sup> Wm. Darryl Henderson, *Cohesion: The Human Element in Combat*, (Washington, DC: National Defense University Press, 1985), 151-152. Henderson compares cohesion in the American Army with cohesion in the Soviet, North Vietnamese, and Israeli Armies.

on military unit cohesion programs as a solution. The idea that military unit cohesion is an intangible that enhances fighting power appears to be valid; when military units appear to lack cohesion they invariably attempt to devise ways to develop cohesion. Yet, before we depart the historical arena of unit cohesion, one caution is warranted.

Mark Vaitkus, Ph.D., Sociology Program Director at the United States Military Academy (also a Major in the Army Medical Service who worked extensively on the Army COHORT program during his early Army career) advises against directly tying unit cohesion to sustained success in war. Dr. Vaitkus warns against linking one phenomenon--cohesion--to a potentially unrelated phenomenon--mission success. He suggests that cohesion should be defined as "an intersubjective dynamic characterized by the strength of positive affective ties among unit members" and not linked to terms like "mission" or "success."<sup>29</sup> His point in refining and limiting the definition of cohesion was to ensure the concept did not turn into a "cure-all recipe" for all the problems confronting the military. According to Army researchers, cohesion may help solve some problems; however, military unit cohesion will not, by itself, increase physical fitness scores, improve rifle range scores, decrease attrition, or improve reenlistment rates.<sup>30</sup>

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<sup>29</sup> Vaitkus, "Longitudinal Analysis of Cohesion Measures in Military Units," (fourth page--pages are not numbered).

<sup>30</sup> WRAIR, *Evaluating the Unit Manning System: Lessons Learned to Date*, 7-14.

## **CHAPTER 2**

### **SO WHAT HAPPENED TO ARMY COHORT?**

*We trained hard, but it seemed that every time we were beginning to form up into teams we would be reorganized. I was to learn later in life that we tend to meet any new situation by reorganizing: and a wonderful method it can be for creating the illusion of progress while producing confusion, inefficiency, and demoralization.*

*Petronius Arbiter, 210 BC  
"21st Century Fighting Power," USMC Brief*

*The essence of loyalty is the courage to propose the unpopular, coupled with a determination to obey, no matter how distasteful the ultimate decision. And the essence of leadership is the ability to inspire such behavior.*

*LtGen Victor A. Krulak, USMC (Ret)  
Marine Corps Gazette, November 1986*

*The Army staff threw money and people at the problem and said, "Do it." In good American soldier fashion the Division replied, "Can Do!" and set about its task. A continual parade of high ranking officers visited the Division and invariably left singing praise for its prodigious accomplishments. Nobody from the Army staff is known to have asked, "What about cohesion and the other human dimensions that lie at the heart of what we are trying to accomplish out here?" There is little wonder the Division seemed to lose sight of the human dimensions: nobody else in the Army was paying any attention to them either.*

*David H. Marlowe, Ph.D. and others  
Unit Manning System Field Evaluation, Technical Report No. 5, September 1987*

### **The Army Problem**

"Army leaders recognized in 1943 that the personnel system was deficient in providing cohesion and a will to fight, but under the pressure of worldwide operations few changes were

made."<sup>31</sup> In an effort "to curb the independence of administrative bureaus which had become virtually autonomous fiefdoms and bring them into line with overall Army requirements and policies," the practice of rotating units in and out of combat had given way to an individual rotation policy with positive aspects from a business perspective.<sup>32</sup> In what appeared efficient, an individual rotation policy "maximized management flexibility, diminished organizational exclusivity and parochialism within the Army, and encouraged a diffusion of personnel with experience in many different jobs throughout the Army."<sup>33</sup>

In combat the rotation policy was based largely on individual merit--time in combat, wounds or personal decorations. However, this individual "rotation program is also evidence, if any further is needed, of the leadership's lack of consciousness about unit cohesion and the effect of their policies on it."<sup>34</sup> According to at least one researcher, "This type of personnel system [was] a natural offshoot of our industrial experiences as a nation."<sup>35</sup> A personnel management system based on individuals and not the unit or unit mission accomplishment was the mainstay of the Army during the early part of the 20th century. After Vietnam, the need for change within the Army became evident.

There were palpable hostility and real adversarial relationships across the ranks....In some units, soldiers died strangling on their own vomit following combined alcohol and drug use. They died in the sight of their fellows who uncaringly passed them by. In other units, NCOs and officers routinely referred to their soldiers as "scum bags" and "dirt balls." Others announced that they had banned all family members from their company areas to avoid the exposure of women and children to the "...kind of animals I command."<sup>36</sup>

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31      Straub, 27.

32      Goldich, CRS-3.

33      Goldich, CRS-ix.

34      Straub, 28.

35      Cowdrey, 14.

36      David H. Marlowe, Ph.D., "The New Manning System: The Human Aspects and the Evaluation," undated draft manuscript from the Water Reed Army Institute of Research, III-9.

Post-Vietnam, the Army finally became "concerned about the effects of the individual replacement policy on combat effectiveness, recruiting, and retention."<sup>37</sup> Many observers cited the lack of cohesion and bonding for the shortcomings in Army unit performance from World War II through Vietnam. Moreover, they contributed the dilemmas of lax discipline, racial friction, drug abuse, and alcohol abuse to an individual-oriented personnel system.<sup>38</sup> The Army finally realized that the individual replacement system did not provide the personnel stability required to develop cohesive bonds (25 percent monthly turnover for some company-size or smaller units; 50-100 percent annually for some larger organizations).<sup>39</sup> Furthermore, according to two Army psychologists, the individual replacement system actually hurt individuals.

It is hard to imagine the typical recruit, a young high school graduate, or perhaps a dropout, from a lower, or lower middle class socioeconomic stratum, taking his first real job in a city 500 or 5,000 miles away from his home, friends, and family. This is precisely what happens when he joins the Army, however, stripping him of all the social support systems he has already established. In basic training, he finds others in the same situation, and their common struggle to survive enables him to build a new and satisfying system, only to have it scattered when basic is finished. The process is repeated during and after Advanced Individual Training and finally the new man, now a number, is assigned to a unit not adequately stocked with his grade and MOS [Military Occupational Specialty]. In the course of his tour with his unit, nearly everyone he meets will disappear, until finally he leaves to start again somewhere else.<sup>40</sup>

This type of personnel system led to career soldiers who resembled "travelers and nomads" more than professional military men and women<sup>41</sup>

### **The Genesis of COHORT and the New Manning System**

Sensing that something had to be done to quell the personnel instability problem in the Army, General Edward C. Meyer, after becoming Army Chief of Staff in 1979, initiated actions

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<sup>37</sup> Goldich, 5.

<sup>38</sup> Goldich, 6.

<sup>39</sup> Goldich, 6.

<sup>40</sup> Frederick J. Manning and Larry H. Ingraham, "Personnel Attrition in the U.S. Army in Europe," *Armed Forces and Society*, Winter 1981: 269, quoted in Goldich, CRS-7.

<sup>41</sup> Goldich, CRS-86.

that eventually led to the Army's New Manning System (COHORT and a regimental-based personnel system). The Army established the Army Cohesion and Stability Task Force (ACOST) in 1979 as the first attempt to correct the personnel problems. The New Manning System (NMS), later renamed the Unit Manning System (UMS), based on two structural devices and embodied four subsidiary concepts emerged from this effort.

· **The unit replacement system**...based on:

√ Stabilization of personnel within units, normally for three years, to prevent a constant turnover of personnel which is destructive of unit cohesion.

√ Unit replacement of forces in duty stations -- whether in the Continental United States (CONUS) or overseas -- rather than individual replacement, to complement stabilization and insure that entire units deploy between CONUS and overseas duty stations such as Germany, Korea, Alaska, and Panama.

· **The regimental system** (a term frequently used in the press to describe the entire NMS)...based on:

√ Establishment of permanent regiments as administrative entities composed of several battalions, with which officers and noncommissioned officers (NCOs) will serve throughout a part of their career and retain a permanent affiliation.

√ Establishment of regimental home bases, with the mission of providing a repository for regimental history, tradition, mementos, and continued contact with Reserve Component, retired, and former regimental members in civilian life.<sup>42</sup>

The NMS was limited to major combat branches of the Army--infantry, armor, field artillery, and air defense artillery--the units who actually fight the enemy. Applicability of the NMS to the Army's support branches was uncertain at the outset. Intensive study would be required to determine if support branches would benefit from the COHORT program.<sup>43</sup>

In the summer of 1980, the unit replacement concept was tested. Approximately 3,000 newly enlisted infantrymen were kept together in the same platoons during recruit training and then assigned to operational units as platoons. Judged a success in improving morale and

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<sup>42</sup> Goldich, CRS-10. Text enhancements added by author for readability.

<sup>43</sup> Goldich, CRS-11.

performance, this concept was rapidly expanded into what became known as the COHORT program.<sup>44</sup> Conversely, the program that envisioned anchoring soldiers in an administrative, historical, and managerial--not tactical--fashion to a specific regiment never really took hold in the Army personnel management bureaucracy.<sup>45</sup> Although attempts to apply the regimental system were made, the pressure of career progression assignments, the requirement to satisfy Army-wide staffing requirements, and the desire of soldiers to move to different units detracted from its effectiveness.<sup>46</sup>

The initial goal for COHORT was to form 20 company sized units that were recruited, trained, and deployed in the same manner as the platoons in the field test. Sensing that a successful personnel program was within their grasp, senior Army leaders soon directed that COHORT be expanded. Consequently, the Army increased the goal from 20 to 80 company-sized units. They believed that a goal of 80 companies would be large enough to allow a realistic evaluation before Army-wide implementation but small enough to avoid disruption of personnel procedures while the Army changed doctrine, tactical organization, and equipment in a largely unrelated modernization program.<sup>47</sup> The Army's initial plan for implementation of company COHORT units is listed in Table 1.

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<sup>44</sup> Goldich, CRS-15.

<sup>45</sup> Goldich, CRS-19 through CRS-24. The regimental system also included a vision of retired colonels or above serving as "Honorary Colonels of the Regiment" entrusted with perpetuating the esprit, traditions, and customs of the regiment.

<sup>46</sup> Mark A. Vaitkus, Ph.D., Sociology Program Director, United States Military Academy, letter to author, 19 December 1997; and Michael Infanti, CPT, USA, student at USMC Command and Staff College with experience in COHORT and Army personnel management, interview by author, 6 January 1998.

<sup>47</sup> Goldich, CRS-16.

### **Implementation of Initial Company Unit Replacement Program**

| <b><u>Fiscal Year</u></b> | <b><u>Units in CONUS</u></b> | <b><u>Units Outside of CONUS</u></b> |
|---------------------------|------------------------------|--------------------------------------|
| <b>1982</b>               | <b>25</b>                    | <b>2</b>                             |
| <b>1983</b>               | <b>43</b>                    | <b>10</b>                            |
| <b>1984</b>               | <b>51</b>                    | <b>21</b>                            |
| <b>1985</b>               | <b>53</b>                    | <b>24</b>                            |
| <b>1986</b>               | <b>53</b>                    | <b>29</b>                            |

**\*Includes Companies in operational formations only; does not include companies undergoing initial entry training.**

**Table 1. Implementation of Initial Company (COHORT) Unit Replacement Program**

Source: Unpublished summary of New Manning System, Manning Task Force, Office of the Deputy Chief of Staff of Personnel, U.S. Army: 23, quoted in Goldich, CRS-16.

### **Initial Feedback on COHORT**

The initial phases of the COHORT program produced some very promising results. Companies were formed, stabilized for a three year period--the length of the first enlistment or the life cycle of the first-term soldier--and rotated to an overseas assignment for a portion of the three-year cycle. Some companies spent 18 months in Europe while others rotated to Korea for a 12 month assignment. Cohesion and stability began to develop a positive picture in what heretofore was a dismal post-Vietnam Army manpower arena. According to one COHORT company commander, within his unit training goals were achieved more quickly than normal units, disciplinary problems were minimal, bearing and courtesy were higher, and social interaction was intimate.<sup>48</sup> It appeared that horizontal cohesion worked in COHORT companies; however, as an analysis by the Walter Reed Army Institute of Research (WRAIR) pointed out, the issue of vertical cohesion was much different.

According to the WRAIR analysis, "there is substantial evidence to suggest that the COHORT model of keeping new soldiers together after an intense, commonly shared, initial

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48 Goldich, CRS-18.

training experience provides the basis for horizontal bonding up through the level of a company or battery."<sup>49</sup> Regarding vertical cohesion the report continues with,

While some outstanding examples were found, cadre [the officers and NCOs that provided the leadership for the first-term COHORT soldiers] stabilization was often quite elusive in company and battery sized COHORT units. Our data demonstrated that the UMS rules, both internal (within battalions) and external, were often violated. Cadre turbulence was as great in COHORT units as it was in the units governed by the traditional individual replacement systems. Among the most salient reasons for cadre instability were the following:

1. The movement of NCOs and officers out of the unit pursuant to promotion or selection for promotion.
2. The movement of individuals, supported by local authority, on the basis of a belief that "stabilization" would adversely affect the careers of junior officers and senior NCOs.
3. The relief for cause or transfer based on performance levels thought to be unacceptable by senior commanders who considered their COHORT units as highly visible and "politically sensitive" organizations.
4. The resentment of some NCOs at being "locked in" to a rotating unit and the ability of these individuals to effect their own transfer despite the rules.
5. The "normal" local needs for shifting officers and NCOs which led to the disregard [for] UMS rules.<sup>50</sup>

The failure to adequately stabilize the leadership led to both the lack of strong vertical cohesion in some units and a somewhat larger problem--many NCOs and officers had difficulty adapting to the horizontal cohesion and stability inherent in COHORT units.

Two of the documented problems with leaders adjusting to COHORT--thus problems with vertical cohesion--were leaders who tended to distance themselves from their unit, and many leaders could not adapt to the training cycle within a COHORT unit. "Instead of joining

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<sup>49</sup> David H. Marlowe, Ph.D., and others, *Unit Manning System Field Evaluation: Technical Report No. 4*, Study, Walter Reed Army Institute of Research, 15 December 1986, 9-10. In all of their analyses WRAIR utilized a combination of methods to acquire data for their conclusions. Mark A. Vaitkus, Ph.D., "Unit Manning System: Human Dimensions Field Evaluation of the COHORT Company Replacement Model." unpublished research paper, 18 April 1994, although limited to the company model; and Martin, "The Unit Manning System," provide a detailed description of how COHORT unit cohesion was measured.

<sup>50</sup> Marlowe, Technical Report No. 4, 10.

the unit and earning respect...leaders seemed to have reacted with social distance and an authoritarian leadership style better suited to leading trainees or green troops without an established social history....[Moreover,] they were threatened when the troops balked at repetitive training on skills they had mastered, and embarrassed that they had little else to teach them."<sup>51</sup>

Leaders were not able to capitalize on the ability to conduct progressive and structured training afforded by stabilized personnel within a unit that maintained its integrity for a long period. Unable to conceptualize their role or the unit's mission for a three-year cycle, they reverted to traditional training concentrated on discrete events, each with a build-up period and a culminating event followed by a decline prior to the build-up period for the next event. With a COHORT unit it was "clearly possible to build on the experiences of the last event to better prepare for the next. But, many COHORT leaders consistently ignored these opportunities, possibly because they were not trained, or required to think, beyond a six-month training schedule."<sup>52</sup> Although actions taken to strengthen overall unit cohesion resulted in increased horizontal cohesion, they may have actually detracted from vertical cohesion in some cases.

To sum up the COHORT (stabilization) program at the company level, WRAIR provided a vivid and positive analysis.

What was remarkable was the persistence of these differences [increased horizontal cohesion in favor of COHORT units] despite every type of organization chaos the Army could throw at COHORT units. COHORT units rotated between Europe and CONUS, and remained better bonded than nonCOHORT units. COHORT units endured pronounced leader turbulence, and remained better bonded. COHORT units took up new equipment or resumed using old equipment, yet remained better bonded. COHORT units lived with conflicting information, rumors, resentments, and local disregard of the HQDA [Headquarters, Department of the Army] personnel policies, and remained better bonded. The enhanced horizontal bonding in these COHORT units was remarkable because it endured despite events and actions most likely to undermine it.<sup>53</sup>

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<sup>51</sup> Martin, 21.

<sup>52</sup> WRAIR, *Evaluating the Unit Manning System: Lessons Learned to Date*, 7-8.

<sup>53</sup> WRAIR, *Evaluating the Unit Manning System: Lessons Learned to Date*, 8-9.

COHORT at the company level succeeded in developing a degree of horizontal personnel stability and horizontal cohesion; moreover, COHORT reinforced the belief that cohesion was a strong force within a military unit. On the other hand, COHORT at this level failed to cultivate all the essential elements of military unit cohesion required to transform the enfeebled Army into a rejuvenated and cohesive fighting force. The peacetime realities of treating career soldiers leading the COHORT companies as individuals, as opposed to pivotal members of a cohesive team, detracted from the potential benefits of vertical and organizational cohesion. An overall observation of the company-level COHORT program developed by one Army researcher appears in Appendix A.

### **Too Much, Too Soon--COHORT Expands to the Battalion and Division Level**

**CONUS-Europe Battalion Rotations.** Given the perceived success of COHORT at the company level, in 1985 the Army decided to expand COHORT to the battalion level in order to pursue the ultimate goal--a cohesive Army. Eight battalions were identified (four in Europe and four CONUS based units) for a COHORT-like stabilization program that resulted in the CONUS battalions switching places with the Europe-based battalions during the summer of 1986 in order to test the unit replacement concept on a grander scale.<sup>54</sup> The intent was to stabilize all the personnel within the eight battalions 15 to 18 months before the rotation and keep the units stabilized for 15 to 18 months after the rotation. Although only three of the eight battalions were COHORT by design, the Army wanted to test the concept of developing cohesion by keeping battalions (COHORT and non-COHORT) together for a

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<sup>54</sup> Three out of the four CONUS battalions were COHORT based (personnel joined the unit in groups who were recruited and trained together). Personnel for the remaining CONUS battalion and the four USAREUR battalions participating in the rotation were sourced normally (individually) and then stabilized for the unit move experiment.

three-year period. The rotation amounted to little more than stabilizing the units and then executing a permanent change of duty station (PCS) en masse for eight Army battalions--four to Europe and four to CONUS--together with all their associated dependents, household goods, and pets.<sup>55</sup> Because the Army had never tempted such a large-scale personnel feat, the undertaking became a highly visible event and took enormous effort from all involved.

Executed as scheduled, the rotation proved that Army battalions could be rotated into and out of a forward-deployed theater (something the Marine Corps was doing via unit deployments vice PCS). The rotation also provided a positive unifying event for an entire unit; however, it proved to be painful in other aspects. Personnel stabilization in the non-COHORT units was hard to attain and the goal of stabilizing personnel 15-18 months before the rotation was often missed. Some of the soldiers, not wanting to conduct the rotation, attempted to get out of the unit slated for stabilization before they became "locked-in" for the move. Because the rotation negated some individual desires, or required soldiers to commit to reenlistment in order to acquire obligated service for the stabilization period, positive unit factors gave way to individual desires. "Rather than being perceived as a pattern of loading, sustaining, and maintaining an Army unit, the term COHORT was equated by some soldiers with 'forcible' reenlistment and bonus losses, deprivation of schooling, and slowed promotion for career soldiers."<sup>56</sup> Army manpower managers had difficulty sourcing career-level personnel shortages; moreover, their failure to announce the impending rotation to soldiers ordered to Europe fueled negative perceptions.

Some soldiers arrived in Europe "thinking they were there for a 36 month accompanied tour only to find out that their families (awaiting in CONUS in temporary housing

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<sup>55</sup> Martin, 3-4.

<sup>56</sup> Marlowe, Technical Report No. 4, 13.

arrangements) would have to be called and told that they could not come to Europe at government expense." One soldier sold his house in CONUS before reporting to Europe only to find out he would be returning to the same location in less than 12 months.<sup>57</sup> Although these examples were extremes, negative rumors spread and led to a general feeling that individuals were being sacrificed for Army institutional objectives. On the positive side, the experiment with stabilizing non-COHORT units proved that a normal Army unit (if stabilized and given a mission that forced them to unify) could develop horizontal cohesion comparable to the company-sized COHORT units which were recruited, trained, and assigned together.<sup>58</sup>

Similar to company COHORT efforts, leaders at the battalion level had trouble capitalizing on the personnel stability and potential vertical cohesion this experiment afforded. Some of the small unit leaders showed little or no appreciation "regarding the importance of capitalizing on buddy knowledge to enhance unit cohesion."<sup>59</sup> Albeit first-term soldiers were sent to the battalions in COHORT-style small unit packages to fill the stabilization personnel requirements, the battalions often ruined any horizontal cohesion that may have been forged in the small-unit package. Many of the leaders failed to cross-level their existing personnel to create places for inbound personnel replacement packages, deciding instead to break up the COHORT packages to "fill spaces" in total disregard for "the faces." According to WRAIR evaluators, "unless this mindset is changed, the whole UMS experience will melt back into the individual replacement system it was designed to eliminate."<sup>60</sup> In spite of the continued focus on the individual vice the unit, this battalion COHORT evolution proved that the Army could rotate a battalion-sized unit without destroying horizontal cohesion.<sup>61</sup> The Army was genuinely

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<sup>57</sup> Marlowe, Technical Report No. 4, 13.

<sup>58</sup> WRAIR, *Evaluating the Unit Manning System: Lessons Learned to Date*, 8-10.

<sup>59</sup> Marlowe, Technical Report No. 4, 3.

<sup>60</sup> Marlowe, Technical Report No. 4, 3.

<sup>61</sup> Marlowe, Technical Report No. 4, 3.

pleased with the success of COHORT at the company and the limited success in developing horizontal cohesion at the battalion level; however, developing viable vertical cohesion still eluded the Army.

**COHORT Division--7th Infantry Division (Light).** The Army's next step--and what became one of their final steps in COHORT--was to develop a COHORT (cohesive) division consisting of four battalions within the 7th Infantry Division (Light) at Fort Ord, California. This experiment was part of the larger effort "to take a conventional infantry division, down-size it, refit it, train it, and certify it combat ready [as a light infantry battalion] in 18 months."<sup>62</sup> This tasking came as almost a challenge from the Chief of Staff of the Army (CSA) in a 1984 White Paper. The CSA expectations were centered on cohesion, motivation, and leadership for his new light infantry division.

The CSA's expectations with respect to cohesion were that "...COHORT...will allow horizontal and vertical bonding from the initial entry training through deployment to combat...Cohesion, the powerful, intangible combat multiplier, will help produce tight knit, self-confident, competent units capable of withstanding the most demanding stresses of war. Training...must also facilitate the bonding that occurs when leaders and soldiers share stress and hardship."

Likewise, the CSA envisioned training and teamwork as the foundation of motivation and cohesion within the division. "Training...must produce highly motivated physically fit, self-disciplined troops. Teamwork within squads, platoons and companies, teamwork between maneuver and supporting arms, and teamwork between ground and air elements will be the product. The result will be Soldier Power--the synergistic combination of concerned, competent leaders and well trained soldiers which will make light infantry forces uniquely effective."<sup>63</sup>

In short, "the CSA's 1984 White Paper on Light Infantry Divisions proposed combining three-year personnel stabilization (i.e., COHORT battalions), intensive training, and a paradigm

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<sup>62</sup> David H. Marlowe, Ph.D., and others, *Unit Manning System Field Evaluation: Technical Report No. 5*, Study, Walter Reed Army Institute of Research, September 1987, 1.

<sup>63</sup> Marlowe and others, Technical Report No. 5, 8.

of positive leadership to develop 'high performing' divisions without recourse to volunteers, highly specialized and technical skills, or special personnel screening...to create 'high performance' units with ordinary soldiers. **This attempt failed to meet its stated objectives.**"<sup>64</sup>

The Army expected "significant increased combat effectiveness and high unit performance through the 'singular focus, dedication, motivation, commitment, and proficiency' of the U.S. soldier to his leaders, his unit, and the mission."<sup>65</sup> "Contrary to expectations within the greater Army system and among the unit leaders in the division, major research findings have demonstrated that initial high levels of small-unit leadership, cohesion, and motivation indicators all shifted downward by the second year of the unit life cycle."<sup>66</sup> In the 7th Infantry Division (Light), the measures of cohesion analyzed by WRAIR actually decreased from September 1985 to June 1986--in every category, the cohesion indicators declined. As the experiment in the 7th Infantry Division (Light) progressed, troops started believing that the training emphasis shifted from "being good" toward "looking good."<sup>67</sup> While WRAIR researchers still found a significant amount of horizontal cohesion within the units, it was limited and carefully extended to trusted peers in the second analysis.<sup>68</sup>

Vertical cohesion fared even worse in the second evaluation. In the face of a unit leadership climate that tended to discount their health concerns and provided them scant rewards, soldiers who earlier felt cared for and cared about later described themselves as physically abused and emotionally deserted. Aside from environments that were not conducive to vertical bonding, organizational cohesion, or societal bonding, the research determined that

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<sup>64</sup> Marlowe and others, Technical Report No. 5, 1. Emphasis (bold text) was added to reinforce this point.

<sup>65</sup> Henderson, *The Hollow Army*, 114.

<sup>66</sup> Martin, 29.

<sup>67</sup> Martin, 29.

<sup>68</sup> Marlowe and others, Technical Report No. 5, 12-13.

some units were on the verge of complete alienation between soldiers and their leaders. In some units soldiers praised their leaders and the leaders thought highly of their people. Conversely, some units experienced the post-Vietnam ills that the new programs were designed to fix--leaders thought their soldiers were inferior or undisciplined and soldiers thought that the leaders were liars who did not look after their welfare.

At the platoon level, the WRAIR research team found several units that appeared to be vertically cohesive. "Some were islands of cohesion in disintegrating companies."<sup>69</sup> The platoons that had developed vertical cohesion generally had a strong platoon commander/ platoon sergeant team who committed themselves to three central points: "priority to the combat mission; protection of the soldiers in the platoon; and consideration of the personal, professional, and familial needs of the privates."<sup>70</sup> This type of devotion appears to be what we commonly refer to as positive leadership--perhaps a key to building vertical cohesion. Army research in the late 1980s confirmed that "strong core soldier values are a function of leadership. Those soldiers who were closely bonded to their unit leaders reflected their leaders' professional values and reported that core soldier values were...important to them."<sup>71</sup>

Some platoon leaders were often not viewed as a part of the unit by the enlisted men. Most soldiers saw their lieutenants as passing through the unit in order to get qualified for a staff job. With comments like "we can't do enough to punish those dumb shitheads" or calling soldiers "worthless, cowardly assholes," some lieutenants did little to build vertical bonds or display positive leadership. At the company level, some soldiers believed that their company commanders thought of them as "tools he'll wear out and throw away." In the officer arena one captain, disgusted at platoon's performance, made the platoon commander lay down while he berated him in front of the enlisted soldiers and then directed two privates to "drag his worthless

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69 Marlowe and others, Technical Report No. 5, 18.

70 Marlowe and others, Technical Report No. 5, 18.

71 Henderson, *The Hollow Army*, 119.

ass away." During one field exercise, a battalion commander ordered that the grass around foxholes be mowed so visitors could observe them better.<sup>72</sup> Unit cohesion and meaningful training for a real combat mission had given way to leaders who wanted to look good at the expense of the soldiers. Evidence of vertical cohesion was rare within the COHORT battalions of 7th Infantry Division (Light).

The Walter Reed Army Institute of Research second measure of cohesion within 7th Infantry Division (Light)--Appendix B is an excerpt from that survey--showed that "alienation across echelons appeared pervasive and profound." Moreover, analysis showed that four "unofficial, implicit, but traditional Army cultural practices" led to the degraded vertical cohesion.

First is the "can do" mentality of commanders who push every mission down on their subordinates rather than taking responsibility for assigning priorities. Second is the belief that subordinates do as little as they can get away with. Third is the punitive response for failure or error. Fourth is the emphasis on looking good for the duration of every command tour.<sup>73</sup>

Although most leaders initially resisted the temptation to adopt these cultural practices, the pressure to look good and enhance their careers made most of them conform to the organizational culture. Commanders became fearful when their subordinates' failures became potentially fatal to their own careers. Often the hinge-pins of cohesion--community of purpose and mutual commitment--were replaced with micro-management, subordination of soldier's interests to their own, and coercion.<sup>74</sup>

In two measures of unit cohesion conducted by the Walter Reed Army Institute of Research--one in 1985 and one in 1986--utilizing the criteria for unit cohesion contained in Appendix B, it was determined that unit cohesion in non-COHORT units grew over time while

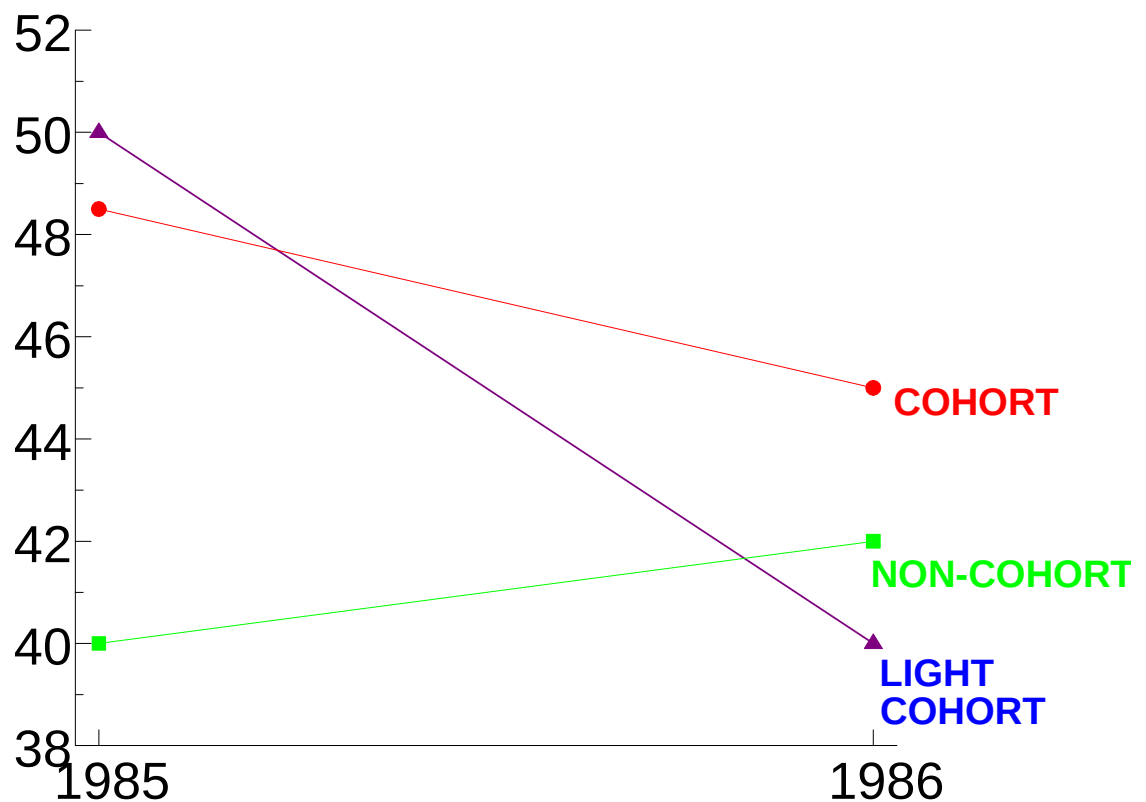
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<sup>72</sup> Marlowe and others, Technical Report No. 5, 19-20.

<sup>73</sup> Marlowe and others, Technical Report No. 5, 22.

<sup>74</sup> Marlowe and others, Technical Report No. 5, 22.

the initially high levels of cohesion in COHORT units seemed to decrease over time. Most notable is the sharp decrease in the measured cohesion levels in COHORT units in the 7th Infantry Division (Light). Initially displaying measurable cohesion levels above other COHORT and non-COHORT units, after a year the 7th Light Infantry Division ranked below both COHORT and non-COHORT units in unit cohesion. The following graph displays WRAIR's measure of vertical cohesion within the light infantry division COHORT experiment compared to other COHORT units and non-COHORT units measured at the same time.



**THE POSSIBLE RANGE OF SCORES ON THIS SCALE IS FROM 0 TO 100. THE SCALE MIDPOINT IS 50.**

**Figure 1. Vertical Cohesion Survey Data**

Source: Marlowe and others, Technical Report No. 5, replicated in Henderson, *The Hollow Army*, 118.

The 7th Infantry Division (Light) achieved the heroic goals of completely restructuring to the Light configuration and being certified combat-ready in a remarkably short time frame. Professional commitment ensured that combat readiness was maintained, challenging training was conducted, and rapid deployment force missions were assumed. The division initially displayed the heretofore unrealized potential of American soldiers who were properly organized and effectively led; however, the old social structure of the Army proved more powerful than new thinking in the human arena--much of the potential was lost. The significant achievements of the Army's first light infantry division were overshadowed by a stunning defeat in the human dimension.<sup>75</sup>

The documented and grim experience of attempting to capitalize on "soldier power" and build cohesive COHORT battalions in the 7th Infantry Division (Light) frightened Army leadership and caused them to react with vengeance. The Commanding General convened a leadership conference that focused on the human dimension challenges that were missed during the rapid stand-up of the division (Appendix C contains the conference issues and proposed policies). Faris R. Kirkland, Ph.D., a former Army officer working in the Department of Military Psychiatry at WRAIR, was tasked to put together a monograph, *Leading in COHORT Companies*, in an effort to spread the word on what COHORT soldiers expect from their leaders and what leaders can expect from their COHORT soldiers.<sup>76</sup> The Army appeared to be doing everything it could to rescue COHORT, the program that it sold to the Congress, the American people, and the Army as the cure for post-Vietnam personnel woes. Although the Army continued to market COHORT in a positive fashion well into the 1990s, the initial emphasis that the program generated waned subsequent to the 7th Infantry Division (Light) experience.

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<sup>75</sup> Martin, 31.

<sup>76</sup> For a more detailed discussion see Faris R. Kirkland, Ph.D., *Leading in COHORT Companies*, Report WRAIR NP-88-13, Walter Reed Army Institute of Research, (Washington, DC: December 1987).

In *The Hollow Army*, Henderson contends that, in spite of a marketing effort that espoused a new, cohesive Army of excellence, the Army had not really adapted to new methods and a revised way of thinking. Henderson also postulated that, the Army "is in the process or creating a myth lacking in substance. Just beneath the gloss of today's quality Army there exists a fault line with a potential fracture that could very quickly return the Army to the darkest days (1968-1980) of its recent history."<sup>77</sup> Henderson listed several continuing troubles in the human arena. Among those he included:

- MPT [Manpower, Personnel, and Training] policies ensure that combat unit training is short term, "event driven," and noncumulative.
- Personnel turbulence remains at the highest levels.
- The COHORT...program, designed originally to create strongly cohesive and highly performing units, was unable to overcome the vested policies of a deeply entrenched personnel bureaucracy and today must be considered a failure.
- Attrition remains very high and retention rates for top-quality first-term soldiers cannot meet future leadership requirements.
- ...combat units are not being adequately manned with high-quality noncommissioned officers.
- The sharp growth in officer and NCO ranks...has gone largely toward manning headquarters elements and centralized agencies at the expense of units.<sup>78</sup>

Rather than changing the Army, "the original goal of creating cohesive combat units became lost in the day-to-day struggle to adapt COHORT to the Army's existing personnel system....as time progressed, action officers changed, priorities shifted, and the ongoing system with its inertia absorbed, alleviated, and neutralized the purposes of the COHORT program."<sup>79</sup>

According to Dr. David Segal, the Army's mistake was not changing for COHORT. COHORT soldiers could not advance like other soldiers and they began to think that the organization was

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<sup>77</sup> Henderson, *The Hollow Army*, 1.

<sup>78</sup> Items were extracted from a list in Henderson, *The Hollow Army*, 2.

<sup>79</sup> Henderson, *The Hollow Army*, 120.

the enemy. Likewise, the Army failed to recognize the requirement for stabilized leaders or the requirement for strong vertical cohesion to preserve and enhance horizontal cohesion.<sup>80</sup>

COHORT could not produce military unit cohesion by itself. While reducing personnel turbulence for first-term soldiers, COHORT did not develop the essential vertical cohesion bonds between soldiers and their immediate superiors (NCOs) or inculcate values between soldiers leaders and the Army.<sup>81</sup>

Perhaps the greatest failure was the failure to create a constituency (e.g., division and unit commanders) within the Army that had a primary vested interest in the institutionalization of COHORT and related policies designed to create cohesive units. To leave the implementation in the hands of a DCSPER [Deputy Chief of Staff, Personnel] and Personnel Command community whose vested and substantial bias was and remains in favor of an individual replacement system deeply rooted in the current overall personnel system appears to have been a fundamental error.<sup>82</sup>

According to Henderson, a belief that cohesion will appear rapidly when we go to war reflects "a lack of knowledge about unit cohesion, and the time and effort required to create high-performing cohesive units." Quoting long-time researchers of cohesion he continues, "It is a great American myth that cohesion will occur the moment we go into battle."<sup>83</sup>

In *The Spit-Shine Syndrome*, Christopher Bassford indicates that COHORT was too timid to correct the Army's deep rooted problems. The program only applied to combat arms specialties and left support soldiers--even those in COHORT units--lost in the traditional confusion. He doubts that the personnel system could sustain COHORT and unit replacement in war. Even with the genesis of a logical and sensible program, the Army did not take the required steps to reform itself.<sup>84</sup> In a review of Bassford's book, Colonel Mark Hamilton--who

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<sup>80</sup> David R. Segal, Ph.D., Center for Research on Military Organizations at the University of Maryland, telephone interview by author, 20 January 1998.

<sup>81</sup> Henderson, *The Hollow Army*, 122.

<sup>82</sup> Henderson, *The Hollow Army*, 124.

<sup>83</sup> Henderson, *The Hollow Army*, 124. Henderson attributes the quote to a discussion he had with David Marlowe and Owen Jacobs at the Army Research Institute, Alexandria, Va., 1987.

<sup>84</sup> Christopher Bassford, *The Spit-Shine Syndrome: Organizational Irrationality in the American Field Army*, (Westport, CT: Greenwood Press, 1988) 43.

at one time manned the COHORT/Regimental System desk in the Army's manpower bureau--indicated that combat arms units (and MOSs) were the best candidates for COHORT because of the large numbers of a single MOS within a combat arms unit. Because the length of MOS schools vary, attrition rates vary, and the limited ability to COHORT train and assign low-density MOSs (one supply clerk per unit, etc.), COHORT could only be applied judiciously within the larger goal of "maximum, practical cohesion."<sup>85</sup> Regardless of the reasons, the cost of damaging individual careerism and changing organizational manpower procedures to develop a military unit cohesion program within Army simply outweighed the benefits--or outlasted the inertia--of a COHORT-style cohesive fighting force.

Utilizing Dr. Stewart's four basic criteria for military unit cohesion, introduced in chapter 1, it is obvious where COHORT failed. Horizontal cohesion was heightened; however, vertical, organizational, and societal bonds in COHORT units remained questionable. The Army continued to embrace the virtues of military unit cohesion in spite of the demise of the regimental system and COHORT. Perhaps the cost of a peacetime unit cohesion program were too high or the Army adopted the view of Colonel Greenwood-- peacetime schemes do not produce cohesion in war.<sup>86</sup> COHORT died in the Army because the Army could not grapple with the sacrifices, leadership changes, and institutional changes that a unit cohesion program demanded. Moreover, COHORT failed because the Army attempted to capitalize on the benefits of cohesion too quickly, and on too large of a scale.<sup>87</sup> The critical leadership element of military unit cohesion broke down in the COHORT program.

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<sup>85</sup> Mark R. Hamilton, COL, USA, review of *The Spit-Shine Syndrome: Organizational Irrationality in the American Field Army* by Christopher Bassford, in *Parameters*, June 1989, 92.

<sup>86</sup> Greenwood, 4, quoted in Goldich, CRS-38.

<sup>87</sup> David R. Segal, Ph.D., Center for Research on Military Organizations at the University of Maryland, telephone interview by author, 20 January 1998. In this interview Dr. Segal indicated that cohesion needs to be focused on the small unit level and the Army lost sight of this view. As espoused by S.L.A Marshall, in the post-Napoleon era, dispersed formations require a different view of how we train and how we view cohesion.

### **CHAPTER 3**

#### **THE MARINE CORPS PROGRAMS**

*A spirit of comradeship and brotherhood in arms came into being in the training camps and on the battlefields. This spirit is too fine a thing to be allowed to die. It must be fostered and kept alive and made the moving force in all Marine Corps organizations.*

*Major General John A. Lejeune  
as quoted in Marine Corps Manual*

*His pride in his colors and his regiment, his training hard and thorough and coldly realistic, to fit him for what he must face, and his obedience is to his orders. As a legionary, he held the gates of civilization for the classical world;...he has been called United States Marine.*

*T. R. Fehrenbach  
This Kind of War*

*Marines do not climb from their fighting holes, or leave warming tents, and go forward into fire, the unknown, and possibly even death because of grandiose visions about the national interest, the international security structure, or even love of family or our American culture. They go forward because of their friends and comrades--fellow Marines, who display their special skills and abilities for each other, and often, in the ultimate loneliness of close combat, for each other alone.*

*FMFM 1-0, Leading Marines*

#### **Such as Regiments Hand Down Forever**

The Marine Corps might have an advantage in the unit cohesion arena because of its smaller size and strong sense of tradition. Although the Marine Corps experienced many of the same personnel problems that plagued the Army in the post-Vietnam era, it took a somewhat different approach in addressing the human problems. While most Marines may feel closer to

their fellow Marines by virtue of association with a smaller service, the small size of the Marine Corps also facilitates bonding between Marines who are also frequently able to serve together in several different units and locations. Moreover, a sense of history, tradition, and a unique service culture is deeply rooted in most Marines; therefore, Marines generally feel aligned with their service, embrace their service virtues, and share a common bond with other Marines.

Among Marines there is a fierce loyalty to the Corps that persists long after the uniform is in mothballs....Woven through that sense of belonging, like a steel thread, is an elitist spirit. Marines are convinced that, being few in number, they are selective, better, and above all, different....Both the training of recruits and the basic education of officers--going back to 1805--have endowed the Corps with a sense of cohesiveness enjoyed by no other American service.<sup>88</sup>

Even with this potential advantage in the human arena, the Marine Corps realized in the mid-1970s that personnel instability was undermining readiness and creating problems within the Corps. This realization led to the implementation of personnel stability programs that focused on units through a "homeporting" process. The two programs launched in the late 1970s were the Unit Deployment Program (UDP) and the Precise Personnel Assignment Program (PREPAS). UDP deployed CONUS-based infantry units to Okinawa on a six-month rotational basis and eliminated the practice of individually assigning Marines to infantry battalions in Okinawa for a 13 month tour.<sup>89</sup> PREPAS was a computer-based model that attempted to assign first-term Marines to the same unit for the duration of their first enlistment. These programs produced some limited benefits and eventually evolved into the Tour Optimization for Uniform Readiness (TOUR II) program in the early 1990s and ultimately formed the foundation for the recently implemented unit cohesion program. PREPAS, UDP,

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<sup>88</sup> Victor H. Krulak, LtGen, USMC (Ret.), *First to Fight: An Inside View of the U.S. Marine Corps*, (Annapolis, MD: Naval Institute Press, 1984), 155.

<sup>89</sup> In both the 13-month tour and the six-month unit rotation dependents were not allowed to accompany their sponsors overseas.

and TOUR II were hinged on personnel stability at the battalion level and any resulting cohesion was viewed as an additional benefit. The new Marine Corps program enhances the stability concepts from previous systems and adds a horizontal cohesion focus at the small unit level. The current and previous Marine programs anchor the achievement of personnel stability on the predictable routine of peacetime training and deployment schemes.<sup>90</sup> Like the Army with COHORT, the Marine Corps made a substantial investment; unlike the Army, the Marine Corps continues to invest heavily in personnel stability and unit cohesion programs.

### **Computer Models and Unit Deployments**

The first attempts to develop personnel stability in the post-Vietnam Marine Corps revolved around effective manpower management aided by computer models and six-month unit deployments, vice individual 12 or 13 month assignments, to Okinawa. PREPAS was envisioned as "a set of interrelated computer models designed to provide manpower planners and managers with efficient training and assignment plans for first-term Marines."<sup>91</sup> The PREPAS model dispensed with the policy of assigning new Marines to the division level and started assigning Marines directly to the battalion level. The concept was that a permanent assignment by Headquarters, Marine Corps (HQMC) to the battalion level would cause Marines to remain in the same battalion throughout their first enlistment--or until they were reassigned by (HQMC). By ensuring that the battalions were staffed with adequate personnel in the correct occupational skills and grades, the intent of PREPAS was to eliminate the hasty local reassignment of Marines between battalions that had occurred in the seventies. Although

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<sup>90</sup> Routine six-month deployments, separated by a known time at the homebase in CONUS, lend themselves to personnel assignments during a certain phase of that cycle.

<sup>91</sup> Michael Forrester, Capt, USMC, "PREPAS as a Manpower Management Tool," *Marine Corps Gazette*, October 1984, 52.

commanders above the battalion level would retain a degree of authority in reassigning Marines based on local or unforeseen requirements, those reassignments would require coordination with manpower managers at HQMC. The goals of PREPAS were personnel stability, fixed tour lengths in the operating forces, and manpower efficiencies aimed at ensuring first-term Marines do not have "wasted" time at the end of their contract.<sup>92</sup> Moreover, PREPAS was key to ensuring that infantry battalions were adequately staffed for the Unit Deployment Program.

In an effort to reduce the hardships created by 12 or 13 month dependent-restrictive tour to the western Pacific (Okinawa) and to meet Department of Defense mandated reductions in PCS moves, the Marine Corps decided to "homebase" all of its infantry battalions in CONUS and fulfill the Okinawa requirements through six-month, temporary additional duty, deployments of entire battalions. Before adopting UDP, the Marine Corps studied two previous unit deployment efforts that failed--USMC Transplacement Battalions (1958-1965) and, more recently, an Army experiment of deploying units to Europe vice assigning individuals for 36-month accompanied tours.<sup>93</sup>

The Marine Corps hoped to overcome previous problems in unit rotation with the Unit Deployment Program. Because the Marine Corps was replacing a long dependent-restricted tour with a shorter one it assumed that morale problems would be minimal. The Marine Corps hoped that unit rotation would provide:

- √ Increased stability for Marines and their families.
- √ A net reduction in half of our [USMC] overseas dependent restricted requirements, resulting in an increased "turn around time" between 12-month hardship tours to nearly twice that currently experienced.
- √ Improved personnel availability and readiness in...FMF units that will enhance mission responsiveness.
- √ Increased retention of our highest quality Marines.

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<sup>92</sup> Forrester, 52. "Wasted" time was categorized as time at the end of the first-term Marine's enlistment where remaining obligated service precluded training evolutions, deployments, or assignment to a new duty station.

<sup>93</sup> North, 72-73. Army Brigade 75/76 was not discussed with regard to COHORT because it was not part of the COHORT program nor was it aimed at developing personnel stability or cohesion.

√A more equitable distribution of arduous duty throughout the Fleet Marine Forces.  
√A system for rewarding individual Marines for the hardship duty they perform  
in the Fleet Marine Forces--whether based in CONUS or overseas.<sup>94</sup>

In essence, UDP was designed to provide the mandated force presence in the western Pacific while reducing two major forms of personnel instability in the Marine Corps. First, it aimed to reduce the inter-command turbulence caused by the requirement to continually source individual western Pacific requirements. Secondly, coupled with PREPAS, unit deployment focused on mitigating intra-command turbulence caused by local reassignments to compensate for grade and billet skill deficiencies. PREPAS was viewed as the required mechanism to ensure infantry battalions were staffed appropriately prior to the unit deployment and stabilized for the duration of a six-month deployment. The Marine Corps wanted the previous practice of pre-deployment personnel build-up and post-deployment personnel tear-down to become a thing of the past.<sup>95</sup>

The Marine Corps implemented UDP in phases. The first phase relocated permanent units from the western Pacific to CONUS or Hawaii and replaced those units with a Marine Expeditionary Unit (then a Marine Amphibious Unit) and a forward-deployed fighter squadron (VMFA) from 1st Marine Brigade in Hawaii on a six-month rotational basis. In order to appropriately align personnel within the Hawaii units scheduled for deployment, the Marine Corps found it necessary to create some initial inter-command turbulence. As the Corps realigned Marines in Hawaii to ensure that obligated service and rotation dates supported unit rotations, they firmly believed that the long-term advantage of individual stability for a 18-36 month tour outweighed the costs of short-term turbulence.<sup>96</sup> "The trade off is individual stability versus unit turbulence. Unit turbulence (the movement of units rather than individuals)

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94 North, 70.

95 North, 74.

96 North, 76.

is however, more manageable and less debilitating than individual turbulence associated with intra- and inter-command transfers."<sup>97</sup>

**Phase I of the Marine Corps Unit Deployment Program**

**Units Deploying to WestPac on six-month Deployments**

| <b><u>Unit</u></b>                 | <b><u>USMC<br/>Off/Enl</u></b> | <b><u>Navy<br/>Off/Enl</u></b> |
|------------------------------------|--------------------------------|--------------------------------|
| HQ (III MAF w/1st Mar Bde augment) | 12/66                          | 0/0                            |
| BLT                                | 47/939                         | 3/31                           |
| Composite Helicopter Squadron      | 48/193                         | 1/2                            |
| LSU [now an MSSG]                  | 8/156                          | 1/11                           |
| VMFA                               | <u>36/238</u>                  | <u>0/0</u>                     |
| Totals:                            | 151/1592                       | 5/44                           |
|                                    | 156/1636                       |                                |
|                                    | 1792                           |                                |

**Units Relocating to CONUS/Hawaii from WestPac**

| <b><u>Unit</u></b>                                  | <b><u>Off/Enl</u></b> |
|-----------------------------------------------------|-----------------------|
| Infantry Battalion to 29 Palms Ca (1st Bn, 4th Mar) | 36/779                |
| Artillery Battery to 29 Palms                       | 9/101                 |
| Motor Transport Section to 29 Palms                 | 1/33                  |
| Tank Platoon to 29 Palms                            | 1/20                  |
| LVT [AMTRAC] Platoon to 29 Palms                    | 1/32                  |
| Reconnaissance Platoon to 29 Palms                  | 1/21                  |
| LSU [CSS] Augmentation to Hawaii                    | 17/144                |
| Shore Party Platoon to Hawaii                       | 1/26                  |
| HMM-165 [Helicopter Squadron] to Hawaii             | 42/177                |
| [Aviation Support] Detachments to Hawaii            | 10/56                 |
| VMFA-232 [F-4 squadron] to Hawaii                   | <u>36/238</u>         |
| Totals:                                             | 155/1627              |
|                                                     | 1782                  |

**Table 2. Phase I of the Marine Corps Unit Deployment Program**

Source: Oliver L. North, Capt, USMC, "Unit Rotation: Making Unaccompanied Tours Easier on People," *Marine Corps Gazette* (November 1977): 75.

The remaining phases of UDP were implemented in the years that followed. Today the majority of combat arms, and some aviation, units resident in the western Pacific are sourced

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<sup>97</sup> North, 76.

from CONUS and Hawaii bases for six-month rotational deployments. As in COHORT, combat service support units were not included in the UDP. Possibly assuming that the administrative burden would be too great, that personnel stability is not as important in support units, or that the task-organized method of forming combat service support units for deployment precluded stability, support units were neither incorporated into the Unit Deployment Program nor made the subject of direct--PREPAS--assignments by HQMC personnel managers.<sup>98</sup> Although task-organized logistics units participate in amphibious unit deployments, standing combat service support units do not rotate to the western Pacific like their combat arms or aviation counterparts. While amphibious deployments from Hawaii were eventually replaced by Marine Expeditionary Unit deployments from the west coast, ground and aviation combat units on six-month rotational deployments still form the bulk of Marine Corps combat power in the far east.

**Unit Deployments to the Western Pacific--December 1997**

| <b><u>Infantry Battalions</u></b>              | <b><u>Marine Expeditionary Units</u></b> |
|------------------------------------------------|------------------------------------------|
| 3d Battalion, 4th Marines (Fm 29 Palms)        | 13th MEU (SOC) (Fm Camp Pendleton)       |
| 3d Battalion, 8th Marines (Fm Camp Lejeune)    | -1st Battalion, 1st Marines              |
| 2d Battalion, 3d Marines (Fm Hawaii)           | -HMM-164 (Rein)                          |
| 2d Battalion, 5th Marines (Fm Camp Pendleton)* | -MSSG-13                                 |
| <br><b><u>Fixed-Wing Squadrons</u></b>         | <br><b><u>Helicopter Squadrons</u></b>   |
| VMFA(AW)-225 (Fm MCAS ElToro/Miramar)          | HMH-462 (Fm MCAS Tustin)                 |
| VMFA-232 (Fm MCAS El Toro/Miramar)             | HMLA-369 (Fm Camp Pendleton)             |
| VMA-311(-) (Fm MCAS Yuma)**                    |                                          |

\*Assigned as the Ground Combat Element of the Okinawa-based 31st MEU

\*\*Six Plane detachment dedicated to the 31st MEU

**Table 3. Unit Deployments to the Western Pacific--December 1997**

Source: *Marine Corps Gazette* (December 1997): 9.

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<sup>98</sup> Task organized Combat Service Support units do participate in Marine Expeditionary Unit amphibious deployments; however, the land-based CSS units in the western Pacific are provided personnel on either one-year dependent-restricted or three year accompanied tours. Assumptions on why CSS units do not fully participate in UDP are based on personal observations made by the author while briefing senior USMC officials and while participating in the formulation of the new cohesion program.

## **Special Operations Capable Units and TOUR II**

In the 1980s, the Marine Corps added a new capability to traditional six-month amphibious deployments. The new Special Operations Capable (SOC) program required amphibious units to undergo an intense six-month training and certification period prior to their six-month amphibious deployment. This additional training period, and its attendant requirement for stabilized personnel during the training, created a new personnel stability challenge and ultimately led to a new stability program. Previously, manpower officials were generally satisfied if they staffed a deploying unit with stabilized personnel prior to the unit actually deploying. Now, units required not only personnel stability for a six-month unit deployment, but also personnel stability for a six-month training period prior to the deployment. This additional stability requirement gave birth to a program dubbed Tour Optimization for Uniform Readiness or TOUR II.<sup>99</sup>

With TOUR II, the Marine Corps attempted to align the personnel cycle for first-term Marines with the unit's deployment stabilization and deployment cycle. Again, this program was aimed exclusively at combat arms and aviation units involved in unit deployments.<sup>100</sup> The goal for TOUR II was to ensure that units were fully staffed with deployable Marines three months prior to a unit rotational deployment to the western Pacific or six months prior to a SOC amphibious deployment.<sup>101</sup> TOUR II attempted to ensure that first-term Marines remained in the same unit for the duration of their first enlistment, most making two unit deployments with

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<sup>99</sup> Information on the Marine Expeditionary Unit (SOC) program and TOUR II was gleaned through the author's personal experience in billet assignments as the Logistics Officer for the 22d MEU (SOC) and in the Enlisted Assignment Branch at HQMC.

<sup>100</sup> Personnel in task-organized Combat Service Support units were manually stabilized through "stabilization rosters" submitted to HQMC; however, they were not formally incorporated into the TOUR II program.

<sup>101</sup> UDP units did not require the six-month training period. Staffing these units three months prior to there UDP has done to ensure some equality in deployment staffing requirements.

the same unit.<sup>102</sup> TOUR II was viewed as a stability--not cohesion--program; however, leaders realized that the stability provided could also create an environment conducive to unit cohesion. The three or six month personnel staffing "lock-on" for unit deployment was subsequently vigorously monitored by HQMC manpower managers. The program helped to ensure that deploying units were staffed for their deployments; however, the program largely neglected units outside the personnel stability windows. Unfortunately, TOUR II did not produce the degree of uniform stability and uniform personnel readiness that officials had hoped for.

Because deploying units were not always on a cycle that matched the enlistment length or the career progression requirements of the Marines, many Marines could not make two deployments with the same unit. Some Marines were ordered from one deploying unit to another deploying unit after their first deployment because their obligated service precluded a second deployment in the same unit while it afforded a deployment opportunity in another unit. Conversely, Marines without the obligated service to make a second deployment in the same unit, often either remained in the unit until they separated or were forced into a short-term hasty reassignment when their original unit deployed. In these situations, deployable replacement Marines were often ordered to a unit while the "non-deployable" Marine remained onboard awaiting discharge or reassignment (units next in the deployment cycle were actually overstaffed at the expense of other units). "Non-deployable" Marines were often excluded from pre-deployment training or assigned menial jobs while they awaited the end of their obligated service. If the unit deployed before the end of their obligated service, the Marines were transferred to another local unit to serve their last few weeks or months in the Marine Corps in an alien environment, branded as a "non-deployable" and performing menial tasks. Naturally,

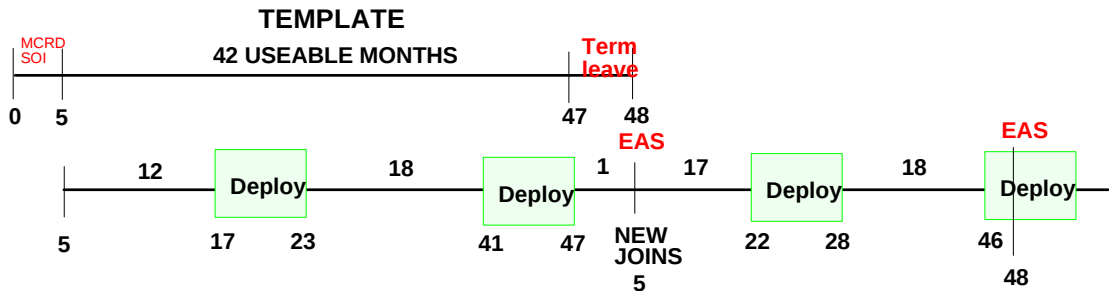
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<sup>102</sup> Spending the entire first enlistment with the same unit and making two deployments with that unit applied only to the Marines in TOUR II units.

these manpower actions did little for individual morale, detracted from overall personnel stability, and had a degrading effect on unit cohesion.

The following figure depicts an example of the disconnect between the obligated service for first-term Marines (48 month enlistment with 42 useable months after recruit and MOS training) and unit deployments (a 48 month cycle example) under the TOUR II program.<sup>103</sup> The template represents the initial enlistment period for Marines and the graph below represents a notional unit deployment schedule. Regardless of where the obligated service template is placed in the deployment graph, continuous staffing for two deployments could not be attained and personnel instability resulted.

**CURRENT FIRST-TERM MODELS  
LEGISLATE DISRUPTION/INEFFICIENCY**



**UNACCEPTABLE ALTERNATIVE IS A 5 MONTH GAP IN STAFFING  
(THE REASON TOUR II WORKS FOR ONLY ONE DEPLOYMENT)**

**Figure 2. Current First-Term Models Legislate Disruption/Inefficiency**

Source: "21st Century Fighting Power," decision brief, slide 30.

<sup>103</sup> TOUR II was focused on first-term Marines; however, senior enlisted leadership stability suffered under the program in much the same manner as first-term Marines. An undated working paper entitled "Officer Cohesion" by the Officer Assignment Branch Cohesion Team (USMC Majors Lynes, Rachal, Hoffman, and Glazer; and Captains Tiede, Gruendel, and Arantz ) indicates that only three or four of the 21 lieutenants in an infantry battalion will remain for a second deployment.

In this TOUR II example, the 42 month useable period in the enlistment of a first-term Marine equates to either two deployments (with a unit staffing gap of five or six months between the EAS of one Marine and the arrival of his replacement) or continuous staffing with the dilemma of Marines assigned at a time in the cycle where EAS precludes a second deployment. With the optimum deployment schedule of a 42 month cycle, shorter deployment cycles in Hawaii (a 36 month cycle) and varying cycles elsewhere exacerbated stability, unit cohesion, and personnel readiness problems throughout the Marine Corps.

### **Battalion Deployment Scheme by Division and Regiment before the Unit Cohesion Program**

| <b>UNIT</b>                | <b>Number of Battalions</b> | <b>Type of Deployment</b>  | <b>Deployment Duration</b> | <b>Time Between Deployments</b> | <b>Deployment Cycle (Deploy X2)</b> |
|----------------------------|-----------------------------|----------------------------|----------------------------|---------------------------------|-------------------------------------|
| <b>1st Marine Division</b> | <b>12.00</b>                | <b>1 X MEU<br/>2 X UDP</b> | <b>Six Months</b>          | <b>Based on Regiment</b>        | <b>Based on Regiment</b>            |
| 1st Marines                | 4.00                        | MEU                        | Six Months                 | 13-15 Months                    | 38-42 Months                        |
| 5th Marines                | 4.00                        | UDP                        | Six Months                 | 18 Months                       | 48 Months                           |
| 7th Marines                | 4.00                        | UDP                        | Six Months                 | 18 Months                       | 48 Months                           |
| <b>2d Marine Division</b>  | <b>9.00</b>                 | <b>1 X MEU<br/>1 X UDP</b> | <b>Six Months</b>          | <b>Varies</b>                   | <b>Varies</b>                       |
| 2d Marines                 | 3.00                        | MEU/UDP                    | Six Months                 | 9-22 Months                     | Varies                              |
| 6th Marines                | 3.00                        | MEU/UDP                    | Six Months                 | 9-22 Months                     | Varies                              |
| 8th Marines                | 3.00                        | MEU/UDP                    | Six Months                 | 9-22 Months                     | Varies                              |
| <b>3d Marine Division</b>  | <b>3 Permanent Assigned</b> | <b>UDP</b>                 | <b>Six Months</b>          | <b>12 Months</b>                | <b>36 Months</b>                    |
| 3d Marines                 | 3.00                        | UDP                        | Six Months                 | 12 Months                       | 36 Months                           |

**Figure 3. Battalion Deployment Scheme by Division and Regiment**

Source: Compiled from unclassified unit deployments working papers obtained from the Enlisted Assignment Branch at HQMC.

Because of the unintended consequences associated with TOUR II, some commanders and senior officers painted a very bleak stability and cohesion picture.

In a past life I believed that TOUR II was a skeleton plan to improve stabilization....TOUR II...may not provide a method to achieve stabilization...Do we need stability, cohesion, bonding? I believe the answer is an emphatic "yes." War is a human endeavor. We exist to win battles....Without stabilizing our ranks, cohesion's benefits are lost and training is the equivalent of pouring water into a bottomless bucket - we should not be surprised we do not gain long term benefit from training at the rate we lose men....the solution here lies in placing higher value on bonded teams of fewer men who know/trust each other than on nearly T/O [table of organization] strength units at certain times in their lifecycles (i.e. lock-on through deployment) and low C-2/C-3 [degraded personnel readiness rates] six months after deployment.<sup>104</sup>

I have had to move Marines from the next deploying bn [battalion] to the one on deck during the last month prior to that deployment. We do the best we can, but we either don't have the leaders or we don't have the Marines, at least not until the last 90 days.<sup>105</sup>

TOUR II finally kicks in. The seams are splitting- IRT [in regard to] barracks occupancy, 782 gear [individual combat equipment] availability, etc...[then we receive] orders to the Marines in our bn [battalion] who are nondeployable [with us] but who are deployable [with other battalions]. I talked to a group of these Marines yesterday prior to their departure. What do you say to a group of Marines who have served their unit very well.<sup>106</sup>

I think it's best to begin by saying up front that the current TOUR II system does not give us cohesion. What TOUR II does is stuff deploying battalions with people a short time before deployment in order to reach a staff-derived quantifiable numbers goal....TOUR II does not work now, and the downside--the detritus--of this broken system is disastrous.<sup>107</sup>

The battalion is most stable when it is deployed. Obviously, nobody can take people away from us if we are overseas...Now that we have returned to CONUS and are the duty battalion, we have become little more than a personnel and equipment allowance pool for every other tenant organization on the base....Three weeks ago we went out on a battalion run and fell out with 121.<sup>108</sup>

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104 Commanding Officer, Seventh Marines, letter to Head MMEA, 1000 A1/1/UC, subject "Unit Cohesion," 11 April 1996.

105 James D. Lenard, Col, USMC, "Enhancing the Corps Fighting Power," personal e-mail, (8 July 1996).

106 Jack K. Sparks, LtCol, USMC, "Unit Stability and Cohesion," personal e-mail, (13 March 1996).

107 Kenneth F. McKenzie, Maj, USMC, "Unit Stability and Cohesion," personal e-mail, (13 March 1996).

108 David F. Bonwit, LtCol, USMC, "Unit Stability and Cohesion," personal e-mail, (11 March 1996).

Marines who were subjected to the turbulence of TOUR II also voiced their thoughts. One young Lance Corporal, forced to move to another unit for deployment requirements, wrote to his previous battalion commander and called his original unit "My Home Sweet Home!"<sup>109</sup> The planning guidance from the 31st Commandant of the Marine Corps addressed this stabilization and cohesion issue and provided a catalyst for a change.

### **Team Integrity and Synchronization Provide the Foundation for Cohesion**

General Krulak's Commandant's Planning Guidance (CPG), published in July 1995, advocated longer tour lengths to develop personnel stability and unit cohesion. After some analysis by manpower planners, this longer tour length option was dismissed because it did not provide the stability and cohesion end state initially envisioned by the Commandant. In December 1995, a working group led by Colonel Gregory Newbold, and chartered by Lieutenant General Christmas the Deputy Chief of Staff for Manpower and Reserve Affairs, was established to explore the issues of stability and cohesion within the Marine Corps. After several months of intense study, the working group presented four recommendations to the Commandant on 15 July 1996. The four recommendations focused on shifting more priority to the operating forces, establishing a stable manpower environment for the operating forces, enhancing training opportunities for the operating forces, and forming teams in the initial training pipeline to enhance small unit cohesion. During the 15 July 1996 decision brief, two of the recommendations, small unit cohesion (later dubbed Team Integrity) and the stable manpower environment (eventually entitled Synchronization), were formally approved by the

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<sup>109</sup> Larry D. Mays, LCpl, USMC, letter to LtCol Sparks, Commanding Officer, 3d Battalion, 6th Marines, (11 July 1996).

Commandant and implementation actions were subsequently initiated.<sup>110</sup> As the Commandant of the Marine Corps later stated, "this added cohesion will result in increased fighting power, provide positive peer pressure, and reinforce our core values as the team's honor becomes dominant over self-interests."<sup>111</sup>

In developing the recommendations, the working group conducted an in depth study of the current Marine Corps personnel stability models, the German cohesion model, Army COHORT, and various combinations of the models. After considerable discussion and debate, the group agreed that the focus of a Marine Corps cohesion program should be at the smallest unit possible. The squad was adopted as the optimum unit for developing the basics of horizontal cohesion under the Team Integrity program. It was also determined that a deployment scheme which enables a squad to remain together required attention. The working group pictured squads leaving the Schools of Infantry and joining an infantry battalion as a squad, less the fire team and squad leaders. Squad leaders would interface with the squad while they were undergoing training at the school of infantry and ensure a smooth transition from the training environment to the operating forces--building vertical cohesion early and eliminating the long and impersonal process typically encountered when first-term Marines joined their first unit. Moreover, the squads would be assigned to a unit as a squad, building on the common bonds forged during the training process, and remain together for at least one operational deployment.

An example: Nine new Marines are formed into a team at the Schools of Infantry. They train together, learning each others strengths, habits, and weaknesses, and how to depend on one another. Then, as a team, these nine Marines will receive orders to their new battalion. Upon arrival, their squad leader, who has already been in contact with them, introduces them to their fire team leaders and a new, more cohesive,

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<sup>110</sup> Although the training and priorities recommendations were not formally approved at the decision brief, the basic tenets of these recommendations have been instituted under other recent Marine Corps initiatives.

<sup>111</sup> General Charles C. Krulak, USMC, "Transformation and Cohesion," *Marine Corps Gazette* 80, no. 11 November 1996: 23.

and thus more powerful squad is formed. We know that some Marines in the team may have to be replaced for one of a number of reasons during the course of their enlistment. But the nucleus will be formed, cohesion will be stronger, and replacements can be more easily assimilated. Other occupational specialties may not be as easy to handle....This is not an easy task for our manpower managers. We do not expect a 100 percent success rate....All leaders must make unit cohesion [vertical, horizontal, organizational, and societal] one of their highest priorities and principal objectives.<sup>112</sup>

Realizing that reassignments within the battalion for career progression or leadership requirements would naturally occur after the first deployment, squad members would remain in the same battalion, but perhaps not the same squad, for their entire first enlistment. While not perfect, this program was almost a quantum leap from previous systems that individually assigned new Marines to their first unit. Moreover, initiation of the Team Integrity assignment process was tied to the first Marines who graduated from the "revised 12-week boot camp program, which includes the 54-hour Crucible field training event" focused on teamwork and [organizational] core values.<sup>113</sup> The intent was to expound on the "single defining event" and "transformation" that the crucible provided; however, forming squads and transferring them to a unit intact appeared simple when compared to challenge of changing assignment practices and devising a deployment scheme that kept the squads together.

The problem of assigning squads to a battalion in a manner that synchronized the available 42-month period in the first-term enlistment with two deployments posed a dilemma to planners because the existing two-deployment cycles varied between 22 and 60 months. The only recognizable solutions were to vary enlistment lengths (an option deemed too hard to administer and unfair to some Marines) or align unit deployments with the personnel cycle. The working group agreed that a previously unheard of practice would be initiated--deployment schedules would be changed to accommodate for the availability of personnel resources. This

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<sup>112</sup> Krulak, "Transformation and Cohesion," 23.

<sup>113</sup> Gidget Fuentes, "Call it 'team integrity,'" *Navy Times, Marine Corps Edition*, 27 January 1997, 3. The Marine Corps core or organizational values are honor, courage, and commitment.

mindset lead to what became known as Synchronization--the deployment and personnel cycle alignment plan.

Synchronization works within the known constraints of the usable contract length of a first-term Marine and the dates of deployments to match the available personnel resources to deployments in a manner that:

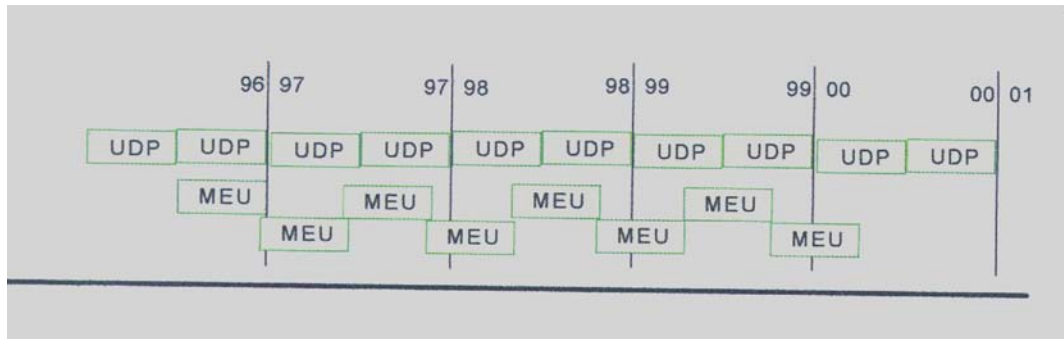
1. Fulfills forward presence requirements
2. Fits deployments into the 42-month personnel cycle of a Marine
3. Enables structured progressive training with units being fully staffed 8-16 months prior to deployments.<sup>114</sup>

The actual synchronization of assignments and deployment cycles of infantry battalions was accomplished at a workshop conducted at Headquarters, Marine Corps (HQMC) during 27-31 January 1997. At this workshop, representatives from the Marine Forces and Divisions (primarily G-1 and G-3 representatives), the Schools of Infantry, coupled with HQMC operations and manpower representatives, utilized anticipated manpower requirements, the anticipated flow of infantry Marines through training, and the Training Exercise and Employment Plan (TEEP) of units to orchestrate assignments and deployments. For the first time a thorough manpower estimate of supportability for the deployment schedules of infantry battalions was devised and then applied. The fixed portions of the equation "are the flow of manpower from the SOIs (dictated by the recruiting cycle) and the scheduled deployments. The variable portion of the model is the actual unit assigned to the deployment."<sup>115</sup> The first stage in the synchronization process was to graphically portray all of the required deployments for a MEF without a specific units assigned to a specific deployment as depicted in the II MEF (2d Marine Division) example in figure 4.

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<sup>114</sup> Commandant of the Marine Corps message to all Marine Corps units, subject: "Unit Cohesion--Commandant's Intent," ALMAR 454/96, 231300Z Dec 1996.

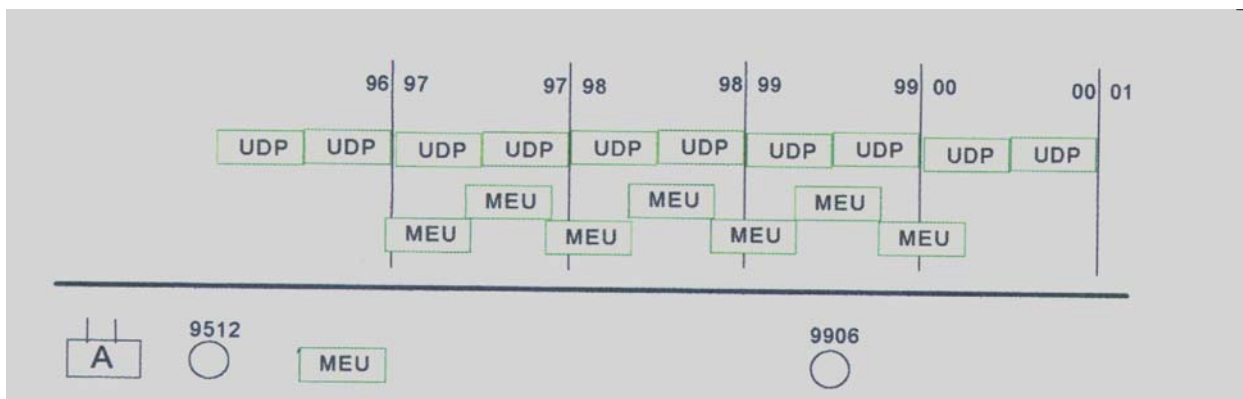
<sup>115</sup> Marine Corps Order (MCO) 3500.28 (Draft), *Marine Corps Unit Cohesion Program Standing Operating Procedures* (Washington, DC: United States Marine Corps, 15 August 1997), 1.



**Figure 4. Required Deployments**

Source: "Unit Cohesion Update," information brief, March 1997, slide 16.

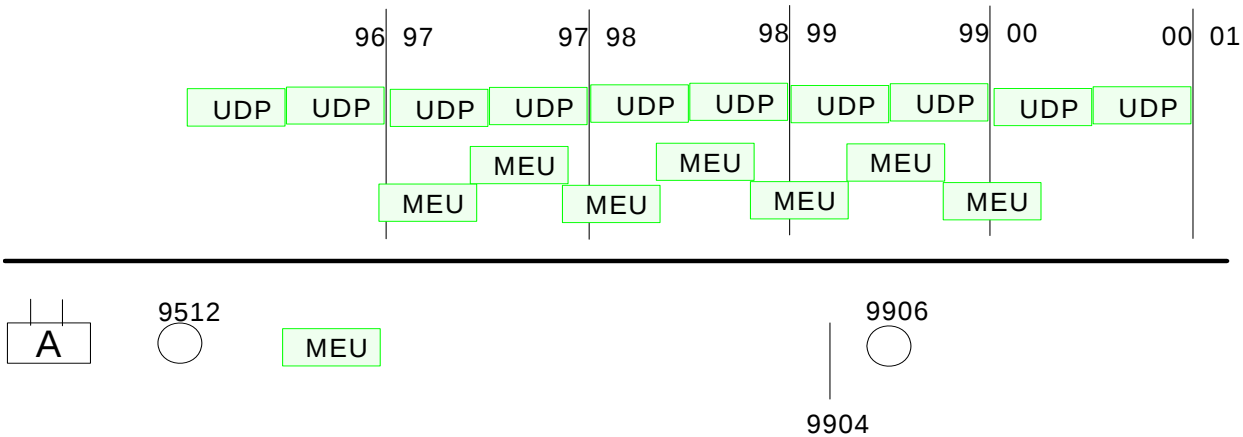
The next step was to determine and plot deployments and units which could not be influenced by assignments because they were either already deployed or Marines had already been assigned to support a specific deployment. After these units and deployments were identified, the manpower managers utilized assignment data to determine a month--the fill window--when the majority of the first-term Marines were assigned to support the deployment. This fill-window information was displayed along with a corresponding end of active service (EAS) window 42 months after the fill window when the first-term Marines would reach the end of their obligated service. This EAS window became the target date for replacing the first-term Marines with new Marines--a subsequent fill window for the unit as shown in figure 5.



**Figure 5. Current Deployments and Fill/EAS Windows**

Source: "Unit Cohesion Update," information brief, March 1997, slide 17.

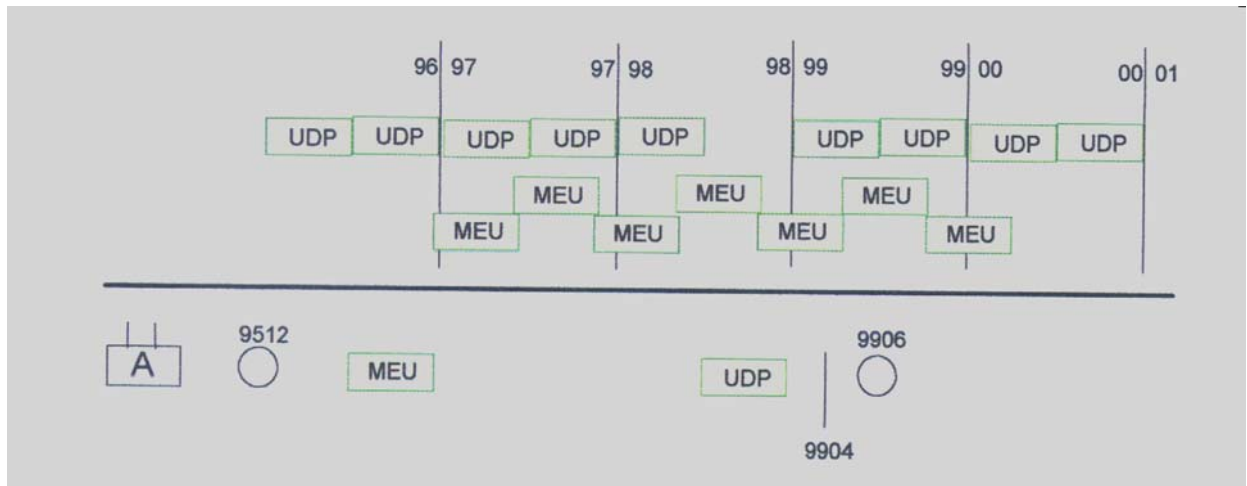
The third step was to plot another deployment for the unit that respected the known, and previously plotted, EAS and fill windows. Realizing that some time is required after the deployment--time for Marines to prepare to leave the service, consider reenlistment, or transfer--a period of not less than two months before the EAS window was utilized as a deployment end date criteria for determining a suitable follow-on deployment for the unit. Likewise, the fourth step in the process was to determine which required deployment best accommodated the known and fixed personnel EAS/fill window. These two steps are depicted in figure 6 with a deployment cut-off date of April 1999 and in figure 7 with a suitable unit deployment to Okinawa that ends in January 1999.



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**Figure 6. Subsequent Deployment Completion Date (Target)**

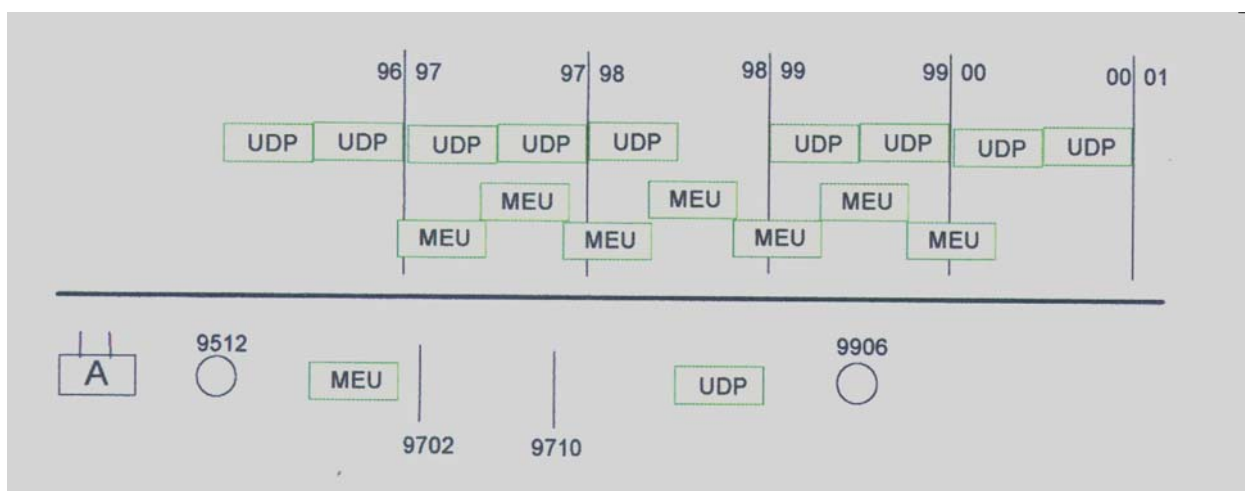
Source: "Unit Cohesion Update," information brief, March 1997, slide 18.



**Figure 7. Subsequent Deployment**

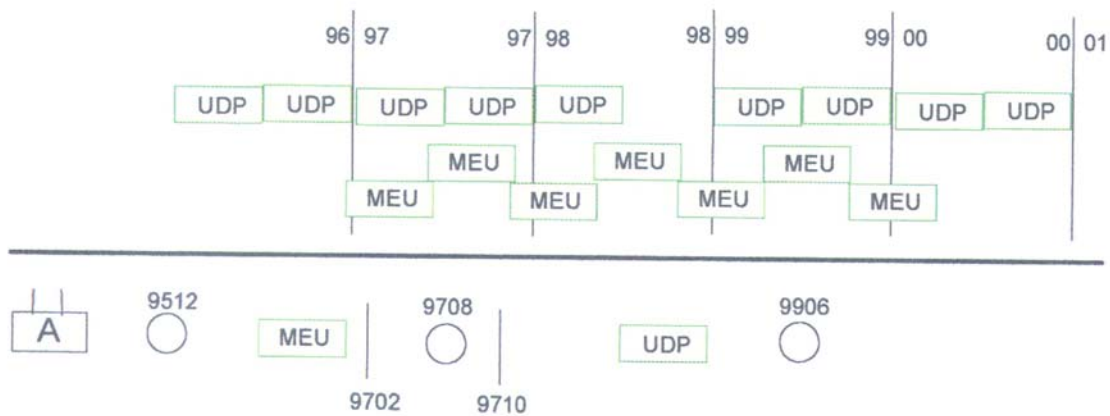
Source: "Unit Cohesion Update," information brief, March 1997, slide 19.

Realizing that there is a requirement for new first-term Marines eight to sixteen months prior to the deployment that ends in January of 1999, the following three steps consist of determining a window 8-16 months prior to the deployment where the anticipated flow of Marines through training would support a fill window, plotting another fill window, and then plotting a corresponding EAS/fill window 42 months later.



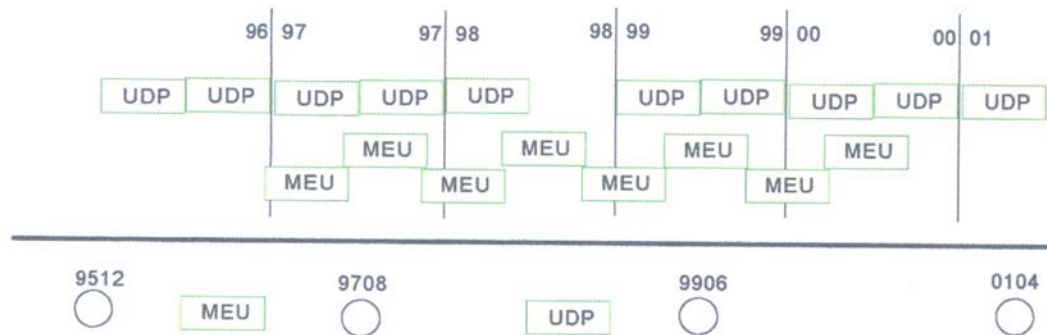
**Figure 8. Subsequent Deployment Fill Window Possibilities**

Source: "Unit Cohesion Update," information brief, March 1997, slide 20.



**Figure 9. Plotting Fill Window for Second Deployment**

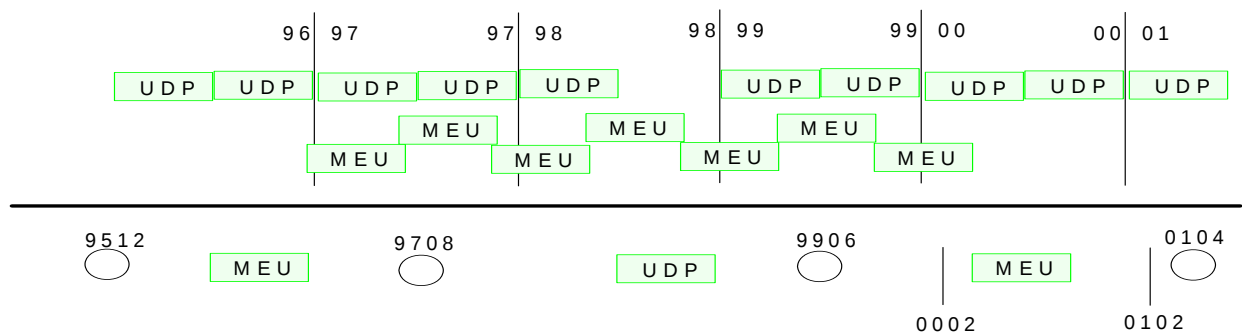
Source: "Unit Cohesion Update," information brief, March 1997, slide 21.



**Figure 10. Corresponding EAS/Fill Window 42 Months Later**

Source: "Unit Cohesion Update," information brief, March 1997, slide 22.

Next, a deployment window not earlier than February 2000 (eight months after the June 1999 fill window) and not later than February 2001 (at least two months before the April 2001 EAS window) is established. A MEU deployment during the summer of 2000 that fits into the deployment window is subsequently assigned to the unit.

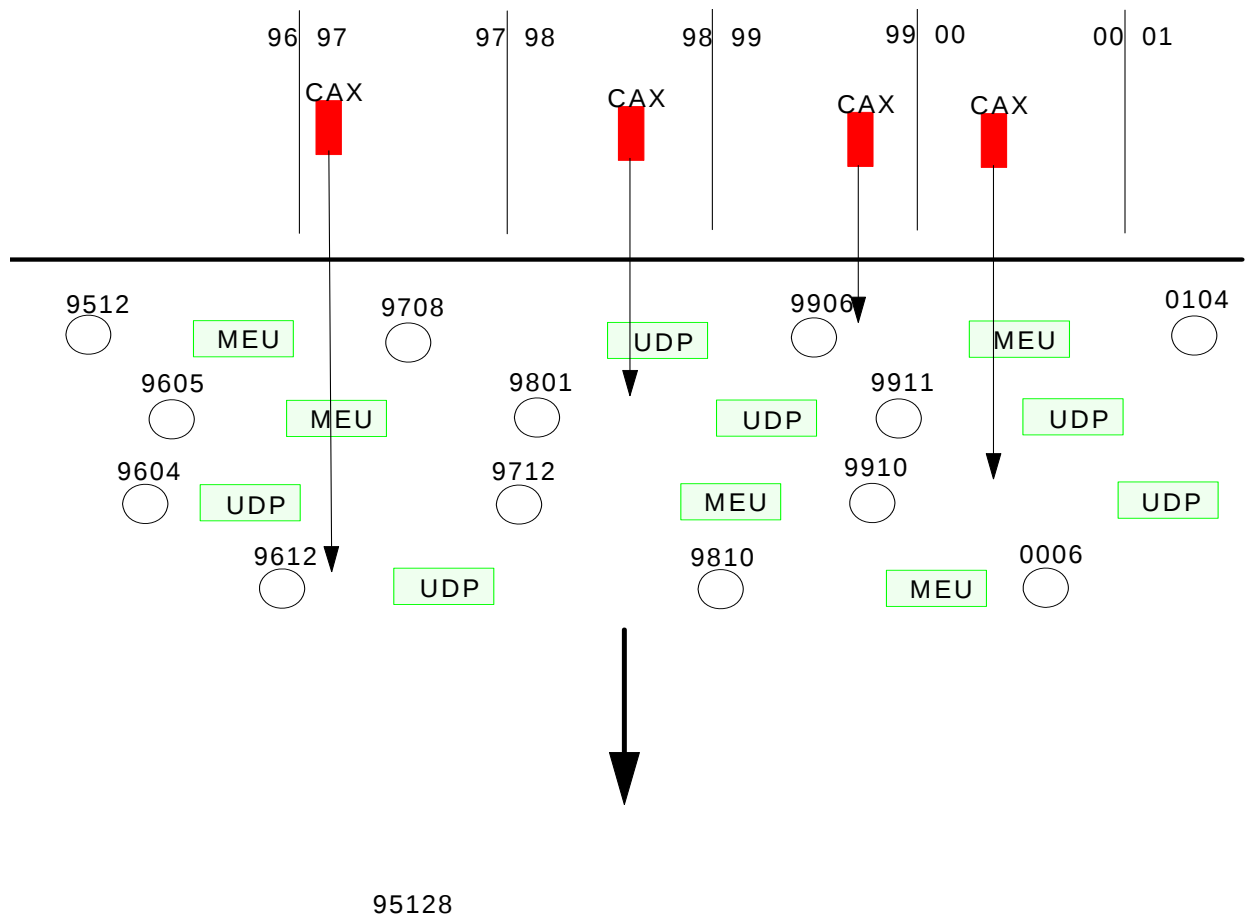


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**Figure 11. Next Deployment Window and Deployment**

Source: "Unit Cohesion Update," information brief, March 1997, slide 23.

At this point in the process, deployments and personnel fill windows for the first unit have been assigned for a five-year period. At this juncture the process for deployment planning is repeated for all of the infantry battalions in the Marine Expeditionary Force, ensuring that all of the MEU and UDP deployments to satisfy the required geographical forward-presence requirements. The next figure is an example of a partial fill window and deployment assignment of other units in the division and how major training events (Combined Arms Exercise or CAX shown) can subsequently be applied to maximize training benefit after a personnel fill window and before a deployment. Utilizing this deployment and training plan, with the projected personnel assignment and EAS dates included, Commanders could now focus on structured and progressive training. Likewise, Marines assigned during the fill windows could remain in the same unit, possibly in the same squad, and possibly with the same Marines until their EAS. The environment for a sound horizontal and vertical cohesion program could now be possible.



**Figure 12. All Units, all Deployments, and all Major Training Opportunities Assigned**

Source: "Unit Cohesion Update," information brief, March 1997, slide 25.

Although only a II MEF infantry example is displayed, the program was applied to deploying infantry battalions in I MEF and the three III MEF infantry battalions in Hawaii that rotate to Okinawa on the UDP. In Hawaii the solution was to maintain the three battalion rotation but extend the six-month deployment to seven months with 14 vice 12 months back in Hawaii in order to obtain the 42 month two-deployment cycle. Moreover, it was clearly the intent of the Commandant to apply both Team Integrity and Synchronization to as many units and as many MOSs as practicable.<sup>116</sup>

<sup>116</sup> CMC, ALMAR 454/96, 231300Z Dec 1996.

Following infantry implementation, a deliberate decision was made to push forward fast, capitalize on the initial enthusiasm, and extend the program outside of the normal combat arms specialties.<sup>117</sup> The armor community--tanks, Light Armored Reconnaissance (LAR), and Assault Amphibian vehicle (AAV) units--was picked for this expansion for several reasons. First, the companies and platoons in these units are primarily made up of two MOSs--operators and mechanics. Next, the initial training length for the associated operators and maintainers are nearly the same and, with the exception of LAR, performed at the same location and school. Finally, these units deploy as either companies or platoons making application of synchronization a possibility and potentially applied within units vice through top-down orchestration.<sup>118</sup> Armor units were implemented into Team Integrity with classes that convened in May and June of 1997. Even with this push to accelerate implementation, the two components of the Unit Cohesion Program--Team Integrity and Synchronization--only set the stage for military unit cohesion and will not produce cohesive units by themselves. The key to developing cohesion again rests on how leaders exploit the opportunities they are given and how they learn and adjust from initial mistakes.

### **Initial Feedback on Team Integrity and Synchronization**

In his message announcing the new unit cohesion program, General Krulak indicated that transitioning from TOUR II to a new way of doing business would not be easy. Specifically he said, "we will be faced with many challenges as we make this much needed transition--I

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<sup>117</sup> Although expanding outside of combat arms was unique to the Marine Corps program, the notion of rapidly expanding what was viewed as a solid cohesion program resembled one of the major pitfalls of COHORT.

<sup>118</sup> East coast (II MEF) AAV, Tank, and LAR units deploy as platoons to support the MEU (SOC) program. Because Marines are not assigned directly to the platoons by HQMC, synchronizing the assignment with deployments must be done locally. West coast (I MEF) AAV, Tank, and LAR units deploy on the UDP as companies as well as source platoons for the MEU (SOC) program. Marines are assigned by HQMC directly to AAV, Tank, and LAR companies on the west coast; therefore, the responsibility for synchronization is shared by I MEF and HQMC.

firmly believe that the investment will reap enormous dividends. Expect some initial turbulence during implementation, be flexible, proactive, and make it work--we can afford no less."<sup>119</sup>

Deconflicting major training events, such as combined arms exercises for three battalions on the east coast, with the assignment of new Marines is just one example of an oversight made during the initial synchronization conference that created turbulence and demanded flexibility.<sup>120</sup>

The initial arrival of Team Integrity Marines in east and west coast battalions produced much fanfare. Although, assigning sufficient quantities of sergeants as the squad and section leaders remained a problem (potentially a horizontal cohesion issue), Commanders were inspired and determined to make the system work with the junior leaders they had available. In a personal e-mail to the first battalion commander on the east coast the Commandant reinforced this notion.

I have been watching your battalion manning--particularly the issue of sergeants--and I am aware that you are "short" in this critical area. Believe me when I tell you that our manpower folks are doing the best that they can with the numbers available. We have to be very careful that we don't "gold-plate" one unit just to make an initiative work....The cohesion effort will have tough times in the beginning but believe me...the effort will be well worth the pain. If we can make this work, it can literally change our Corps.<sup>121</sup>

The battalion commander responded in a positive manner per the Commandant's intent. "From our view unit cohesion is a winner. I don't understand why we haven't always done it this way--common comment from SNCOs in the battalion."<sup>122</sup> Regarding the shortage of sergeants, the battalion commander wrote, "I have to admit I was unsure how our young (some Lance Corporals, few Sergeants) squad leaders would perform -- a lot of pressure to be the expert. In true Marine fashion they all rose to the occasion and walked tall."<sup>123</sup>

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119 CMC, ALMAR 454/96, 231300Z Dec 1996.

120 Thomas E. Sheets, Col, USMC, "Cohesion Synchronization," personal e-mail, (5 March 1997).

121 Charles C. Krulak, Gen, USMC, "Unit Cohesion," personal e-mail, (3 March 1997).

122 Lance Ledoux, LtCol, USMC, "Cohesion," personal e-mail, (17 March 1997). Full text of this e-mail is included in Appendix D.

123 Ledoux, e-mail, (17 March 1997).

The battalion had integrated its leaders into the training at the School of Infantry, transported the new Marines and their belongings back to the battalion area after graduation, introduced them to the chain of command and the unit philosophy, and ensured they were appropriately equipped and billeted. Moreover, the battalion arranged tours of the battalion area and a special meal in the dining facility for the families of the new Marines after the School of Infantry graduation. Echoing the enthusiasm of his battalion commander, the regimental commander indicated that he and his Sergeant Major had attended the graduation and "I knew this would be good, I just never realized how good....this first attempt at cohesion/transition was a total success!"<sup>124</sup>

On the west coast, the division commander chimed in with his praises of the cohesion program even before his first battalion received new Marines. Addressing the program he indicated, "its impact on our division is absolutely incredible in improving our personnel readiness....because of the new manpower fill window process we have been able to revise and enhance our [training plans]."<sup>125</sup> Following the graduation and arrival of the first Team Integrity Marines, the division commander reported that he, his Sergeant Major, the regimental commander, and the battalion commander and his staff had attended the School of Infantry graduation. Following graduation the new Marines were escorted back to the battalion area and a formal battalion parade was conducted to incorporate the new Marines into their respective platoons and companies.<sup>126</sup> Even though the initial prospects of the new program looked promising, there were several concerns.

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<sup>124</sup> John F. Sattler, Col, USMC, "Cohesion," personal e-mail, (17 March 1997). See Appendix D.

<sup>125</sup> John H. Admire, MajGen, USMC, "Crucible Influence," personal e-mail, (13 March 1997). Full text of this e-mail is in Appendix E.

<sup>126</sup> John H. Admire, MajGen, USMC, "Crucible SOI Graduation," personal e-mail, (2 April 1997). Full text of this e-mail is in Appendix F.

## **Speed Bumps and Evaluation**

Aside from the noted problems with deconflicting personnel fill windows and training events and the shortage of sergeants, there were also concerns with officer stability, moving too quickly with implementation of the program, and the constant doubt whether the delicate program could withstand a contingency that disrupted the routine schedule.<sup>127</sup> As noted by the officer assignment branch during research for the cohesion program, the career track of infantry officers often precludes a 42-month tour in an infantry battalion. According to their research, only three or four lieutenants stay in an infantry battalion for two deployments. Likewise, when captains are reassigned to an infantry battalion after serving a tour outside their primary infantry specialty, they only serve for a short time as a company commander before they face selection to major.<sup>128</sup> While not documented, this environment appears prime for spawning one of the pitfalls experienced in COHORT--officers attempting to look good for their one shot at command at the expense of the troops.

In the rapid application of the cohesion program arena, the Commandant's desire to apply the program across the spectrum of MOSs and units created a fervor within the leadership of the Marine Corps. Again reflecting one of the pitfalls of COHORT, what seemed to be a viable program was rapidly applied outside of the infantry community. This caused everyone involved in the program to focus on implementing additional MOSs and units instead of refining the infantry program and correcting mistakes. A member of the 1st Marine Division staff who was deeply involved in the program commented, "I still believe very strongly that we

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<sup>127</sup> First Battalion, Sixth Marines, "Integrating New Joins into the 1/6 Team," confirmation brief of unit cohesion, 5 February 1998, slide 9 indicates that the problem with sergeant staffing had not been corrected in almost a year after implementation of the cohesion program. The brief reflects sergeant staffing in the battalion at 35% of the cohesion program requirement.

<sup>128</sup> This information was obtained from an undated working paper entitled "Officer Cohesion" by the Officer Assignment Branch Cohesion Team (USMC Majors Lynes, Rachal, Hoffman, and Glazer; and Captains Tiede, Gruendel, and Arantz).

are doing this TOO FAST! We're not stopping to look at lessons learned from our first effort and here we are throwing a whole bunch more horses into the race."<sup>129</sup> His comments, along with others caused HQMC officials to do another review of the MOSs and units that would lend themselves to the unit cohesion initiative.

In response to his request, on 27 February 1998 the Commandant of the Marine Corps was briefed on the status of full implementation of the unit cohesion initiative. By this time, nine more military occupational specialties were included in the team integrity portion of cohesion; however, not all of the units they were assigned to had become integrated into the synchronization slice of the program. The brief indicated that research showed 76.7% of the initial-entry Marines possess MOSs that lend themselves to teaming during entry-level training and team assignment thereafter, but a smaller percentage of those teams would join units suitable for the synchronization portion of the program. Due to small annual training requirement or the small size of some MOSs, some Marines would not be included in either portion of the cohesion program. The brief concluded that all applicable MOSs and units would be included in the unit cohesion program by the third quarter of fiscal year 1999.<sup>130</sup> Again, this brief appeared to present a rosy outlook for the program and did not dwell on the problems which could undermine the positive effects of the program.

The impact of a contingency upsetting the carefully scripted fill window and deployment schedule can only be contemplated at this time. Clearly, a contingency on a grand scale that required prolonged commitment of forces might cause the synchronization portion of the program to go awry. While such a contingency might also force re-implementation of the draft or other drastic measures, the trend toward smaller-scale contingencies and asymmetrical

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<sup>129</sup> Raymond P. Ganas, Lt Col, USMC, "Armor Unit Cohesion," personal e-mail, (21 April 1997).

<sup>130</sup> United States Marine Corps, "Unit Cohesion--Where we are and Where we are Going," information brief to the Commandant of the Marine Corps on unit cohesion, 27 February 1998.

attacks tend to discount the notion of warfare on the grade scale. However, the threat of a war interrupting the peacetime assignment, stability, and rotation plan does introduce the requirement for a combat replacement system that compliments the cohesion program. Moreover, operating a peacetime unit cohesion program based on scripted peacetime rotations also reintroduces Colonel Greenwood's argument regarding the value of such programs.

Finally, two recent events serve to refocus us on the key role of leadership in the cohesion building process and two tenets of a complete military unit cohesion program as embraced by Dr Stewart in the opening chapter of this paper--organizational cohesion and societal cohesion. Although both incidents come from media reports and not the official investigations of the events, the fact that they occurred brings into question the type of cohesive environment that existed in the respective units. In the first case, a young Marine training as tank crewman at Fort Knox Kentucky suffered a ruptured spleen, internal bleeding, and injuries to his kidneys in what was called a "love session." According a media report on the incident, "new arrivals and anyone slacking off were routinely beaten during so-called 'love sessions.'" The article also indicated that according to a Marine Officer familiar with the case, "noncommissioned officers directed students in several classes to beat those classmates 'who weren't measuring up.'"<sup>131</sup>

In the second case, "a lance corporal was [accidentally] dropped out of a window and killed while participating in a game called 'Trust' with other Marines, who were holding him outside a window by the ankles."<sup>132</sup> While there is no doubt that the "Transformation" process and unit cohesion are having a tremendous positive influence on the Marine Corps and

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<sup>131</sup> Gidget Fuentes, "Fort Knox Beating under Scrutiny--Four Marines Accused," *Navy Times, Marine Corps Edition*, 26 January 1998, 3.

<sup>132</sup> Gidget Fuentes, "Krulak to Corps: Clean up Your Act," *Navy Times, Marine Corps Edition*, 13 April 1998, 11. The abuse of alcohol was also involved in this fatal incident.

preventing serious incidents, these two examples of a strong rogue form of horizontal cohesion resemble the COHORT pitfall when tightly bonded teams fall into a poor leadership environment.

Unlike COHORT, the Marine Corps program has not been fully evaluated and clinically scrutinized by an independent, professional analysis team--most with doctorate degrees. However, in one unsolicited response after observing a battalion recently implemented into the program a Colonel wrote, "most impressive was the squad leader control taking full advantage of the cohesion....At the point, I can see unbelievable results from cohesion and we need to stay on it like a pit bull on a pork chop....No kidding, the best I have seen in a long time."<sup>133</sup> Moreover, a battalion commander who observed the performance of his unit battalion, after implementation into the unit cohesion program, also had high praise from the performance of his Marines. "Their professionalism and desire to do well as Marines is so intense that, according to the company commanders, it actually motivates their leadership to rise to the occasion." In an interesting observation he notes "either the entire team did rather well, or it performed rather poorly. What was pulling a particular team in a particular direction we could not determine; but, whatever it was, they were consistent as a team."<sup>134</sup>

Utilizing the framework for military unit cohesion established in the first chapter of this paper, it appears that the Marine Corps unit cohesion program has established a firm foundation to build upon. There is a clear intent from the Commandant of the Marine Corps and most leaders seem to embrace the fundamental values of the program--the core values of honor, courage, and commitment. Based on the performance of the teams to date, the team integrity

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<sup>133</sup> Richard M. Barry, Col, USMC, "Cohesion Units," personal e-mail, (21 October 1997). Full text of this e-mail appears in Appendix G.

<sup>134</sup> David G. Linnebur, LtCol, USMC, "Crucible-trained/Unit Cohesion Marines," personal e-mail, (21 October 1997). Full text of this e-mail appears in Appendix H.

portion of the program is establishing a high degree of horizontal cohesion at the small unit level--proficiency, teamwork, trust, and respect without the previous personnel turbulence. In spite of the lack of non-commissioned officers to lead the teams and a turbulent officer picture, vertical cohesion within the units appears to be forming. As indicated at the beginning of this chapter, most Marines share their institutional values; therefore, organizational cohesion might be off to a solid start. However, as noted with the Army's COHORT program in the second chapter of this paper, initial perceptions of the program could be misleading and could cause leaders to act too quickly. A great amount of work obviously went into developing the Marine Corps program--institutionalizing the process will demand enormous dedication and rigor from everyone involved. As previously stated, sound leadership might be the hinge pin of military unit cohesion.

## CHAPTER 4

### CONCLUSION--COMPARING THE ARMY AND MARINE PROGRAMS

*We few, we happy few, we band of brothers; For he to-day that sheds his blood with me Shall be my brother.*

*Shakespeare  
Henry V, Act IV, Scene 3*

*We have good corporals and good sergeants and some good lieutenants and captains, and those are far more important than good generals.*

*William Tecumseh Sherman  
quoted in We Were Soldiers Once...and Young*

#### **Setting the Stage and Refreshing our Recollection**

This paper poses the question if the recently implemented Marine Corps unit cohesion program could overcome the failures of previous cohesion programs, particularly the ill-fated Army COHORT program. In order to develop a scale to measure cohesion, Dr Nora Kinzer Stewart's definition of cohesion from her book, *Mates & Muchachos: Unit Cohesion in the Falkland/Malvinas War*, was utilized. Dr Stewart espouses four elements of military unit cohesion--horizontal cohesion or peer bonding; vertical cohesion characterized by an open vice authoritarian organizational climate with mutual respect between the leader and the led; organizational bonding or the loyalty to organizational values and institutional ethics; and societal bonding or the relationship between the military and society.<sup>135</sup> The paper then focused on the benefit of units imbued with a cohesive spirit, some historical examples of cohesion, and how the mechanics of developing cohesion within fighting units has changed throughout

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135      Stewart, 27-30.

history. With the basis for military cohesion formed, the next two chapters explored, in depth, a 1980's Army cohesion program, COHORT, and the evolution of a recently implemented Marine Corps unit cohesion program. Although now largely defunct, the well documented and analyzed COHORT program serves as a good way to analyze potential shortfalls in the new Marine program.

### **Potential Pitfalls Common to All**

While the COHORT program initially concentrated on developing highly cohesive small units (company is relatively small in a large organization like the Army), it quickly shifted its attention to developing larger and more robust COHORT units. Attempting to couple the formation of a light infantry division with a COHORT cohesion program--instituting both in 18 months--the Army lost sight of its cohesion goals in the human arena. By the Army forcing COHORT on a division distracted by re-equipping, reorganizing, developing new light infantry tactics, and struggling to meet stringent timelines, the previous positive factors of COHORT became overshadowed by the cohesion disaster at Fort Ord. Leaders at all echelons placed the institutional benefits of touting the Army's light infantry program above the soldiers they were charged with. The Army was after publicity and was guilty of simply attempting to do too much, too fast. As noted by at least one observer of the Marine Corps program, possibly the Corps is also pushing forward too fast with unit cohesion.

The team integrity portion of the Marine Corps program is the small unit building block for horizontal cohesion. Although these small unit teams join larger units, the focus of the program remains on the small unit--the largest team size is the basic infantryman team of nine to twelve Marines. An argument can be made both ways regarding the decision to expand the

program to other MOSs and units before the gains and lessons learned within the infantry community could be consolidated and evaluated. In his book, *The Spit-Shine Syndrome: Organizational Irrationality in the American Field Army*, Dr Christopher Bassford accused the Army of being too timid with the breadth and scope of COHORT application.<sup>136</sup> On the other side of the argument is the notion that everyone involved in the program will be so busy implementing new MOSs and new units that problems will be overlooked and the true intent of the Marine Corps program will be lost in the morass of administration.

Perhaps the potential pitfall of losing sight of the end state of the unit cohesion program could be avoided by ensuring appropriate resources are applied to developing, administering, and evaluating the program. Something will be neglected in a rapidly developing and aggressive program and the Marine Corps could suffer from the same too much, too soon syndrome the Army faced, if human resources are not thoroughly engaged in program growth and administration. Maybe, an evaluation by a disinterested internal or external agency (tiger team or Center for Naval Analyses) might prove beneficial and identify potential problems before they undermine the program. COHORT and previous Marine Corps programs appeared solid at the onset, but unintended and undetected consequences soon diminished their value.

The Army experienced a issue with COHORT that could pose a very real problem for the Marine Corps program. When COHORT teams arrived in a larger unit, some commanders hesitated reorganizing their units to make room to leave the COHORT team intact. By splitting up the team and assigning individuals vice a team, they squandered the time and effort devoted to training the team together and eliminated the prized horizontal cohesion within the team. In essence, this countermanded the objectives of COHORT and reverted to the assignment system that COHORT was designed to replace. In the Marine Corps, it will require a large amount of

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<sup>136</sup> Bassford, *The Spit-Shine Syndrome: Organizational Irrationality in the American Field Army*, 43.

discipline and some ingenuity to overcome the temptation to break the teams apart for efficiency sake--especially in the units that do not receive direct assignments from Headquarters, Marine Corps.

If, for example, a team of seven mechanics checks into a Force Service Support Group and each of the seven battalions is short one mechanic, the natural tendency would be to assign one mechanic to each battalion. In order to preserve team integrity, the efficient assignment by the numbers requires some preplanning and quite possibly a reassignment to keep the team together. Clearly these assignments and reassignments will create some additional turbulence--and potentially some hard feelings from Marines forced to change units to make room for the team. However, this initial turbulence is essential to preserving the concept in perpetuity. Everyone involved must be thoroughly indoctrinated into the program, understand the changes and sacrifices that are involved in implementing the program, and believe in the future benefits the Marine Corps will reap from unit cohesion. The institution as a whole must be willing to adapt to new methods and a new way of thinking--with COHORT, the Army could not accomplish this feat.

A huge failing in COHORT was not ensuring that the program was anchored on sound leadership. As noted in the Walter Reed Army Institute of Research report on cohesion in the 7th Infantry Division (Light), vertical cohesion was largely a function of sound leadership. Moreover, horizontal cohesion either broke down or disassociated itself from the institutional mission and values (rogue peer bonding) when leadership failed to create the right environment. The Army report on cohesion within the 7th Infantry Division (Light) listed numerous incidents of poor leadership and the resulting impact on all facets of cohesion. Albeit only two isolated cases, the beating at Fort Knox and the death during a game of "Trust" represent the type of

atrocities that could arise when leadership fails and rogue peer cohesion takes over. The leadership thread is weaved throughout military unit cohesion and could possibly be the most important ingredient in any cohesion program.

Leaders and the led must share common values and mutually experience hardship and danger. Leaders must always be concerned for their Marines--the Army experience of leaders attempting to look good for their command tour at the expense of their soldiers must be squashed at first appearance. The leadership turbulence (particularly in the sergeant , staff non-commissioned officer, and junior officer arena) must be mitigated in order to shore up the vertical cohesion dimension. Leaders must believe in the tenets of the unit cohesion program, exhibit an open organizational climate, and set the example for their subordinates if the Marine Corps unit cohesion program is to reach its full potential. Moreover, leaders at every level must be willing to adjust the program to correct for errors, avoid pitfalls, and adjust for contingencies that could disrail unit cohesion in the Marine Corps.

In sum, the recently implemented Marine Corps unit cohesion program possesses the rigorous mechanical underpinnings of a viable endeavor. The Marine Corps initiative can overcome the problems of previous cohesion programs, including the failed Army COHORT program, if it is applied with reason and appropriately, if it is not undermined for efficiency sake, and if it is anchored and a strong leadership foundation.

## **APPENDIX A: COHORT COMPANY REPLACEMENT MODEL--OVERALL CONCLUSIONS**

1. Across seven different samples of COHORT replacement companies and batteries, horizontal bonding and cohesion were significantly higher among the COHORT soldiers than among IRS soldiers in companies and batteries from the same or similar combat arms battalions. By horizontal bonding and cohesion we mean a shared knowledge about who fellow unit members are based on common group experience, the formation of supportive friendships in the unit that extend beyond the duty day, a concern for the welfare of fellow unit members, and a general sense of group tightness, closeness, teamwork, and solidarity.
2. The positive effect of COHORT unit status on horizontal bonding was found whether looking at individual survey items or scale scores, and regardless of what stage in the life cycle the COHORT companies and batteries were surveyed. Never did an IRS control sample score higher than a COHORT unit sample on a horizontal cohesion scale or survey item. COHORT NCOs also displayed higher horizontal cohesion than IRS NCOs.
3. There are no consistently significant differences between COHORT and IRS unit samples on other measures of unit climate and cohesion related to confidence in officer, NCOs, training, weapons, and self. Sometimes the COHORT sample is significantly higher than the IRS sample on such measures, sometimes lower, but usually there were no significant differences between the samples. Where there are differences, therefore, we conclude that they are caused by phenomena other than COHORT itself. The significantly positive effect of COHORT on horizontal bonding appears to be greater when the differences between the COHORT and IRS samples on the other unit climate and cohesion measures are roughly equal (net neutral) or net positive (favoring COHORT).
4. Because these other measures of unit climate and cohesion are correlated with the horizontal bonding measures, in the minority of cases where the differences on the other measures are net negative between an individual COHORT and IRS unit in the same battalion (i.e. favoring the IRS unit), there may be few or no significant differences on horizontal bonding favoring the COHORT unit. Almost without exception, however, the IRS unit under such circumstances will still fail to score significantly higher than the COHORT unit on any of the measures of horizontal bonding.
5. The higher horizontal bonding in the COHORT samples vis-a-vis IRS control samples leads to significantly more positive social psychological unit outcomes like company pride and willingness to go to war with fellow unit members. However, because horizontal bonding measures and the other measures of unit climate and cohesion are both correlated with positive social psychological unit outcomes, this occurs only when the COHORT sample is net neutral or net positive with respect to the IRS sample on the other measures of unit climate and cohesion. The same phenomenon is seen when comparing a single COHORT company with an IRS company in the same battalion.
6. COHORT scores appear to be elevated and significantly higher than IRS scores on all measures of unit climate and cohesion early in the unit life cycle. Scores decline with later stages of the life cycle, but the declines are more steep for the measures of vertical cohesion

than horizontal cohesion. Across all stages of the life cycle surveyed, significant positive differences with the IRS control samples are sustained only for the measures of horizontal cohesion.

7. Ranger battalion scores on all unit climate and cohesion scales are significantly above those in both COHORT and IRS unit samples. However, at least on horizontal cohesion measures, COHORT units are generally at or above the neutral point whereas IRS units are generally below.<sup>137</sup>

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<sup>137</sup> Vaitkus, "Unit Manning System," 60.

## APPENDIX B: EXCERPT FROM SOLDIER SURVEY EVALUATION FORM FOR COHORT

### UNIT COHESION AND MORALE.

In this next section, we ask you several questions about your feelings toward your equipment and your unit. Read each statement carefully, and then circle the number corresponding to the answer that best describes your feeling.

- |                                                                                                 | VERY<br>HIGH | HIGH | MODERATE | VERY<br>LOW | LOW |       |
|-------------------------------------------------------------------------------------------------|--------------|------|----------|-------------|-----|-------|
| 1. What is the level of morale in your company?                                                 | 1            | 2    | 3        | 4           | 5   | (109) |
| 2. How would you describe your company's readiness for combat?                                  | 1            | 2    | 3        | 4           | 5   | (110) |
| 3. How would you describe your fellow soldiers' readiness to fight if and when it is necessary? | 1            | 2    | 3        | 4           | 5   | (111) |

In the event of combat, how would you describe your confidence with the following:

- |                            | VERY<br>HIGH | HIGH | MODERATE | VERY<br>LOW | LOW |       |
|----------------------------|--------------|------|----------|-------------|-----|-------|
| 4. your platoon leader     | 1            | 2    | 3        | 4           | 5   | (112) |
| 5. your Company Commander  | 1            | 2    | 3        | 4           | 5   | (113) |
| 6. your crew/squad members | 1            | 2    | 3        | 4           | 5   | (114) |
| 7. yourself                | 1            | 2    | 3        | 4           | 5   | (115) |

How would you describe your confidence in the tactical decisions made by the following:

- |                                                                                               | VERY<br>HIGH | HIGH | MODERATE | VERY<br>LOW | LOW |       |
|-----------------------------------------------------------------------------------------------|--------------|------|----------|-------------|-----|-------|
| 8. your Battalion Commander                                                                   | 1            | 2    | 3        | 4           | 5   | (116) |
| 9. your Brigade Commander                                                                     | 1            | 2    | 3        | 4           | 5   | (117) |
| 10. your Division Commander                                                                   | 1            | 2    | 3        | 4           | 5   | (118) |
| 11. your Corps Commander                                                                      | 1            | 2    | 3        | 4           | 5   | (119) |
| 12. the Army General Staff                                                                    | 1            | 2    | 3        | 4           | 5   | (120) |
| 13. How much confidence do you have in your unit's major weapons systems (tanks, APCs, etc.)? | 1            | 2    | 3        | 4           | 5   | (121) |

## APPENDIX C: ISSUES AND PROPOSED POLICIES DEVELOPED IN THE JANUARY 1987 LEADERSHIP CONFERENCE

## **7th Infantry Division (Light)/Fort Ord**

### ISSUE: TIME

#### **POLICY: WORK DAY IN GARRISON**

- 10 HOUR DAY
- 50 HOUR WEEK
- PROTECT DISCRETIONARY TIME
- FLEXIBLE WORK HOURS
- COMPENSATE FOR EXTRA DUTY TIME
- MINIMIZE WEEKEND WORK

#### **POLICY: COMPENSATORY TIME**

- OFFICIALLY SCHEDULE ON TNG SCHEDULE
- AS SOON AS POSSIBLE AFTER EVENT
- TWO DAYS FOR 1ST WEEKEND LOST
- ONE DAY EACH ADDITIONAL WEEKEND LOST
- COINCIDE COMP TIME WITH FREE WEEKENDS
- SCHEDULE TRIPS, ACTIVITIES, PERMISSIVE TDY IN CONJUNCTION WITH COMP TIME

#### **POLICY: NORMAL HOURS OF OPERATION FOR MILITARY SERVICES**

- NORMAL HOURS 0800 TO 1630 MON, TUE, WED, FRI 0800 TO 1900 ON THURSDAYS
- HIGHER STAFFS & CDRS DO NOT CALL SUBORDINATES OUTSIDE OF THESE HOURS
- LIMIT WEEKEND OPERATIONS TO MISSION ESSENTIAL
- GARRISON CDR AUTHORIZED TO CURTAIL SERVICES FOR MILITARY TNG

ISSUE: RECREATION AND QUALITY OF LIFE

POLICY: WEAR OF PT UNIFORM

- LIBERALIZE ON POST WEAR OF PT UNIFORM

ISSUE: RECOGNITION PROGRAM

POLICY: AWARDS PROGRAM

- MILITARY AWARDS
- CIVILIAN AWARDS
- VOLUNTEER AWARDS
- RECOGNITION OF SERVICE IN PUBLICATIONS
- PUBLIC DISPLAYS, PARKING, MONETARY AWARDS
- TIMELY AWARDS PUBLICITY AND RECOGNITION

ISSUE: LEADERS' COMMITMENT TO EDUCATION

POLICY: COMMITMENT TO EDUCATION MAKE INDIVIDUAL EDUCATION TOP

- DO NOT PLAN UNIT TNG AND ACTIVITIES THAT WILL DIVERT SOLDIERS FROM PLANNED EDUCATIONAL PROGRAMS DURING INDIVIDUAL TNG CYCLE
- STRIVE TO MEET MINIMUM ARMY EDUCATION GOALS
- WORK WITH OPT AND DPCA TO COORDINATE TNG AND EDUCATIONAL OPPORTUNITIES THAT ARE COMPLEMENTARY
- PUT MAX NUMBER OF CLASSES ON WEEKENDS AND EVENINGS

ISSUE: PROFILE AND DEVELOPMENTAL PHYSICAL TRAINING

POLICY: DEVELOPMENTAL PHYSICAL FITNESS TRAINING

- DESIGN INDIVIDUAL RECOGNITION PROGRAMS
- PROTECT PROFILED SOLDIERS

- DEVELOP POSITIVE SUPPORTIVE STAMINA BUILDING PHYSICAL FITNESS PROGRAMS
- READ AND ADHERE TO REGULATIONS AND FIELD MANUALS

ISSUE: STRESS REDUCTION

POLICY: STRESS REDUCTION

- USE BACKWARD PLANNING SEQUENCE
- COMMANDERS & LEADERS TO ATTEND ANNUAL STRESS MANAGEMENT WORKSHOPS
- SEND SUBORDINATES TO MEETINGS
- QUESTION PRIORITIES THAT CREATE STRESS AND ARE COUNTERPRODUCTIVE

ISSUE: LEADERS TAKING CARE OF THEMSELVES

POLICY: LEADERS TAKE LEAVE AT FORT ORD

- NO ONE TO LOSE LEAVE
- PERIODIC REVIEW OF LES
- PROGRAM LEAVES BY QUARTERS
- TREAT LEAVE AS NORMAL MILITARY DUTY
- WHOLE CHAIN OF COMMAND INVOLVED

ISSUE: WORKING SPOUSES / MILITARY CARE PLAN

POLICY: WORKING SPOUSES TREATED AS 1ST CLASS CITIZENS

- WORKING SPOUSE IS A CONTRIBUTOR TO MILITARY LIFE
- CONTRIBUTES TO RETENTION, FAMILY, AND INSTALLATION INCOME
- FILL ON-POST CIVILIAN NEEDS AND HELP OTHER FAMILIES COPE WITH STRESS

ISSUE: HUMAN RESOURCES COUNCIL

POLICY: ESTABLISH A QUALITY OF LIFE COUNCIL

- INCLUDE ALL AGENCIES RESPONSIBLE FOR QUALITY OF LIFE ACTIVITIES AT FORT ORD
- RUN BY GARRISON COMMANDER
- MEET ON A MONTHLY BASIS
- ELIMINATE DUPLICATION
- PREPARE COMMUNITY STATUS REPORT (CSR)
- CONDUCT QUARTERLY CSR FROM CG, CDRS, PRIMARY STAFF OF INSTALLATION AND DIVISION, COMMAND SERGEANTS MAJOR OF ALL SUPPORTED ORGANIZATIONS
- REDUCE REDUNDANT COUNCILS AND MEETINGS
- TAKE ON RESIDUAL ISSUES FROM LEADERSHIP CONFERENCE THAT WERE NOT APPROPRIATE FOR POLICY IMPLEMENTATION

**APPENDIX D: 17 MARCH 1997 E-MAIL FROM LTCOL LEDOUX WITH  
COMMENTS FROM COL SATTLER**

From COL JOHN F SATTLER@2D MAR@2D MAR DIV, on 3/17/97 12:51 PM:  
To: MAJGEN LAWRENCE H LIVINGSTON@C G@2D MAR DIV  
Cc: COL THOMAS E SHEETS@C G@2D MAR DIV

Forwarded to: MAJGEN LAWRENCE H LIVINGSTON@C G@2D MAR DIV  
cc: COL THOMAS E SHEETS@C G@2D MAR DIV COL JAMES C  
HARDEE@6TH MAR1@2D MAR DIV COL TONY L CORWIN@8TH MAR@2D MAR  
DIV COL JAMES L SACHTLEBEN@10TH MAR@2D MAR DIV COL DARRELL L  
COMBS@HQ BN@2D MAR DIV LTCOL JOSEPH V MEDINA@2D MAR@2D MAR  
DIV LTCOL JEFFREY J PATTERSON@2D MAR4@2D MAR DIV  
Forwarded date: 3/17/97 12:51 PM  
Comments by: COL JOHN F SATTLER@2D MAR@2D MAR DIV

SIR

I HAVE ATTACHED LTCOL LANCE LEDOUX'S ANALYSIS OF THE UNIT COHESION PROGRAM. WE HAVE BEEN WORKING HARD WITH BOTH YOUR STAFF AND COL JIM O'DONNELL FROM SOI. WE HAD A SOLID GAME PLAN AND LOI GOING IN, BUT WHAT REALLY MADE IT WORK WAS THE FLEXIBILITY AND PROFESSIONALISM ON THE PART OF 3/2. WE UNDERSTOOD YOUR COMMANDER'S GUIDANCE AND INTENT...EXECUTION WAS EASY.

SGTMAJ ISHERWOOD AND I WENT TO THE GRADUATION ALONG WITH THE CO, XO, S-3, SGTMAJ, COMPANY CDRS, PLT CDRS, PLT SGTS, AND SQD LEADERS OF 3/2. THE FAMILIES WERE IN AWE OF 3/2'S LEADERSHIP. WE INVITED THE FAMILIES BACK TO OUR MESS HALL TO JOIN IN THE WELCOME ABOARD MEAL WITH THEIR SON/BROTHER/NEPHEW/HUSBAND. THIS WAS LTCOL LEDOUX'S IDEA AND A GREAT ONE IT WAS. WE MET AND TALKED TO EVERY FAMILY MEMBER IN OUR CHOW HALL AND MADE THEM PART OF THE COHESION TEAM. AS LANCE INDICATES IN THE ATTACHED, WE WILL FORMALIZE THIS BEFORE THE NEXT CLASS GRADUATES. OUR INTENT IS TO HAND EACH FAMILY A FLIER THAT INVITES THEM TO OUR REGT AREA TO SEE THE BEQ, REC ROOMS, BN CP, AND THEN SUBSIST WITH THEIR MARINE IN 2D MARINES' CHOW HALL. THE TOUR OF THE AREA FILLS THE DEAD TIME WHEN THEIR MARINE IS LOADING HIS BAGGAGE AND MOVING OVER FROM GEIGER. THE MOOD IN THE CHOW HALL WAS VERY FESTIVE...IT TRULY WAS A FAMILY AFFAIR.

ALL OF THE CREDIT FOR THIS STARTS WITH JOE MEDINA WHO GOT THE BALL ROLLING AS CO 3/2 AND MOVES TO LANCE LEDOUX WHO TOOK THE PLAN AS THE NEW CO 3/2 AND EXECUTED WITH ALACRITY. YOU HAD TO BE THERE TO SEE THE FACES OF THE YOUNG SQD LDRS WHO WERE PROUD OF THEIR NEW MARINES, AND THE SMILING FACES OF THE NEW MARINES WHO WERE CONFIDENT THEY WERE PART OF THE 3/2 FAMILY. WHEN WE RECEIVED MARINES THE OLD WAY THROUGH PC&AO THEY USED TO HAVE THAT FEARFUL LOOK OF A YOUNG DEER CAUGHT IN A SET OF HEADLIGHTS...NO FEAR OF THE UNKNOWN IN THESE MARINES' EYES. I KNEW THIS WOULD BE GOOD, I JUST NEVER REALIZED HOW GOOD.

AS YOU WILL SEE FROM LANCE'S ATTACHMENT, HIS NEXT BATCH OF GRADUATES ARRIVES IMMEDIATELY AFTER THE BN DEPARTS FOR CAX. I

WILL GET WITH THE CHIEF TO SEE ABOUT THE FUNDING TO TRANSPORT THE 4 APR GRADUATES OUT TO CAX WITH THEIR SQD LEADERS. HATE TO HAVE THEM SITTING BACK HERE WHILE THE "FAMILY" IS GOING THROUGH CAX. THEY IMMEDIATELY BECOME THE WANNABE'S AS FAR AS THE REST OF THE BN IS CONCERNED. ALSO, WANT TO TALK ABOUT TAD FUNDS FOR SQD LDERS TO TRAVEL TO SOI WEST TO PICK UP THEIR SQUADS.

IN SUMMARY, THIS FIRST ATTEMPT AT COHESION/TRANSITION WAS A TOTAL SUCCESS! BUT THIS BEING SAID, WE CAN DO BETTER IN THE FUTURE.

VERY RESPECTFULLY  
JOHN  
"KEEP MOVING"

----- [Original Message] -----  
Original Message date: 3/17/97 10:48 AM  
Original from: LTCOL LANCE LEDOUX@2D MAR6@2D MAR DIV  
Original to: COL JOHN F SATTLE@2D MAR@2D MAR DIV  
Sir,

From our view unit cohesion is a winner.

I don't understand why we haven't always done it this way -- common comment from SNCOs in the battalion.

The key aspect for us was integration of squad leaders and section leaders into ITB training events -- NCOs/SNCOs are what made this work. We visited with the Bravo Company Commander and several of his enlisted instructors in the field the last week of training and heard nothing but enthusiastic praise for how the integration worked -- they want more. It gave more supervision and instructor support to the Company B staff as well as elevated the perception of leadership and professionalism of our squad leaders in the eyes of their new men. I have to admit I was unsure how our young (some LCpls, few sergeants) squad and section leaders would perform -- a lot of pressure to be the expert. In true Marine fashion they all rose to the occasion and walked tall.

Special handling should be given to all Marines regardless of rank when they join a new outfit. Bypassing PC&AO is a good move. Getting the Marines under our wing and into the 3/2 family immediately will pay long term dividends. By the end of the day Friday, all Marines were integrated into the chain of command, knew the key members of the command, knew the ground rules and pit falls, understood they were accountable for their gear and had a place to live. Proof in the pudding is no liberty incidents this past weekend. Things were fast and efficient. No hanging around PC&AO for 5 to 10 days with little to do. Support from division made this work.

We had an unexpected event when we joined 39 Marines (I am not complaining -- it was a blessing from heaven) from the west coast. They were not grads of the cohesion program, but we put

our cohesion plan in action on them as soon as we heard they were at PC&AO. We folded them into all the activities on Friday.

Bringing in the entire family from graduation is something that worked well and is a good long term investment. Lots of family attend graduation -- one family came all the way from New York. They had a chance to hear me talk to the Marines as well as visit informally with our leadership during lunch. I think we have buy in for the Marine Corps, 2d Regiment and 3/2 from every family there. We have a spouses coffee tonight -- one more chance to bring our 5 new married Marines deeper into 3/2 fold.

Take aways.

- integration of leaders at ITB worked well, prior coordination with SOI/ITB staff is key, squad leaders need prep time to ensure they know the schedule and are up on training events -- they need to be set up for success not failure
- this was an entirely NCO/SNCO run show, officers insured the tasks were known and understood and stood back and let the enlisted leaders execute -- worked well at ITB and during integration into the battalion
- plan to include the families that attend graduation, get word out in advance along with flier style invite with a map on it -- have escorts assigned to show families battalion area, parents that understand and back our program will shore up a wavering Marine and come down on our side. We could have done this better. It was a last minute idea that surfaced during the confirmation brief held the night prior to graduation
- professional and organized handling of baggage -- don't start a Marine out by losing his kit -- picking up a big group means a lot of baggage, that has to be distributed to several areas, we did not lose any, but we could have done it better -- need more coordination with ITB, lots of logistics oriented tasks in getting the Marines moved
- infantry battalions should no longer use PC&AO -- send them straight to the unit, this does call for a heads up if Marines are coming from the west coast -- maybe PC&AO staff can be reduced????
- bring injured Marines that have completed training along with their buddies -- they can heal up with us and get back in the game
- hold a confirmation brief prior to execution -- makes everyone clear on tasks and iron out last minute coordination
- after action review -- we will conduct a review with SOI/ITB and division to see where we can improve

Problem Areas.

- Attrition from ITB -- 34 dropped out or were training recycles from Company B, number could be higher or lower as the

"start numbers" varied widely

- NCOs -- it would be great to have the team set with deployment NCOs prior to the integration phase -- part of cohesion is stability in the leadership positions

- west coast joins -- we know we will get six 0352 cohesion

Marines from the west coast, we want to send a NCO TAD to integrate with these Marines

- April joins -- we are looking at 56 -- we want to get them to

CAX and may need transport support -- alternate plan is to leave behind a training cadre to work with these Marines

Our training schedule has field firing lined up for this week and will culminate with a short battalion hike. We will issue the Marine Corps commitment cards at the end of the hike and hope to have the formation addressed by the regimental commander. This leaves 3/2 in great shape. We will have joined a rifle company plus worth of Marines prior to two significant training events -- CAX and MWTC. These events will only add to the sprit of team cohesion. 3/2 couldn't be better positioned for success. If 3/2 blows it -- shame on me!

Very Respectfully,

JL Ledoux  
"Keep Moving"

**APPENDIX E: 13 MARCH 1997 E-MAIL FROM MAJGEN ADMIRE WITH  
COMMENTS FROM GENERAL KRULAK**

Comments by: GEN CHARLES C KRULAK@CMC@HQMC  
Comments:

LADIES AND GENTLEMEN,

I THOUGHT YOU ALL MIGHT ENJOY JOHN ADMIRE'S THOUGHTS ON "MAKING MARINES." WITH DISCIPLINE TO THE SYSTEM, WE CAN REALLY MAKE A SIGNIFICANT IMPACT ON THE WAY WE DO BUSINESS. WILL IT BE EASY? NO. WILL IT BE WORTH THE EFFORT? ABSOLUTELY!!

SEMPER FIDELIS, CCK

----- [Original Message]-----  
Sir,

The Crucible's influence on the 1st Marine Division has a depth and breadth which are both ever expanding and indefinite. We are only beginning to realize its potential impact on our Division. While many of the Crucible's influences are intangibles such as values, motivation, and esprit; many more are very tangible. Two such tangibles relate to our manpower staffing goals and our training and exercise program.

One basic by product of the Crucible and entry level training enhancements are the Unit Cohesion and Team Integrity

concepts. In the past, our Division has traditionally had 6 to 7 infantry battalions at a C-1 personnel readiness level and 5 to 6 either descending into or ascending from a C-3/4 level. Furthermore, this descent and ascent breakdown and buildup covered 6 to 8 months. We were confident a better manpower fill window flow system should be developed. We instinctively knew it could be improved. But we needed assistance. We believed M&RA, in concert with PP&O, had the experts to resolve this challenge.

The Team Integrity Conference at HQMC the last week in January attacked the challenge. One of its principle products was an improved manpower fill window concept. Its impact on our Division is absolutely incredible in improving our personnel readiness. By this November, for example, we expect to have 9 to 10 infantry battalions at C-1 and only 2 to 3 at the C-2 or C-3 level. Plus, once fully implemented, we expect to have a minimum of 10 battalions at C-1 and at times have all 12 battalions at C-1. Furthermore, the breakdown and buildup phase will no longer require 6 to 8 months, but will be accomplished in about 30 days or no longer than 60 days.

We appreciate and thank M&RA and PP&O for their cooperation and support. They have contributed to a dramatic increase in the personnel readiness potential of our Division.

A second fundamental by product of the Crucible and entry level training enhancements are their influence on our training and exercise program. Because of the new manpower fill window process we have been able to revise and enhance our TEEP. In the past, we had battalions deploy (MEU SOC, 31st MEU SOC, and UDP) without conducting a Major Conventional Exercise (MCE) such as a CAX, DESFIREX, or Steel Knight. In fact, certain units had no such training in over four years and a significant imbalance in training occurred over time. In one case, for example, one regiment conducted 13 MCE's in four years and another conducted only 3 MCE's.

But the Crucible and Unit Cohesion and Team Integrity have combined to make it possible to correct these training imbalances. Beginning now, every deploying battalion will conduct a MCE prior to deployment. Plus, every battalion will conduct at least one MCE every two years. Furthermore, every regiment will be the OCE of two MCEs every year. Training and exercise balance and equality are now significantly improved. This revised TEEP has required much time and thought. But with General Fulford's approval and Generals McCorkle's and McKissock's support we are planning and executing the new TEEP now. Continuity of planning and execution within the regiments and battalions will be more effective and we believe at a lower cost. We will monitor both to validate our expectations.

In summary, the many influences of how the Corps is developing our new Marines are evolving and impacting our Division in numerous positive ways. We're confident that many

more improvements will result from the Crucible as we fully implement the concept. The prospects are truly exciting and rewarding.

V/R ADMIRE

**APPENDIX F: 2 APRIL 1997 E-MAIL FROM MAJGEN ADMIRE WITH COMMENTS  
FROM GENERAL KRULAK AND LTGEN FULFORD**

Comments by: GEN CHARLES C KRULAK@CMC@HQMC  
Comments:

LADIES AND GENTLEMEN,

I AM FORWARDING THIS NOTE FROM LTGEN FULFORD AND MAJGEN ADMIRE...TO SHARE WITH YOU THE GREAT IDEAS THAT ARE COMING OUT OF THE VARIOUS METHODS OF "WELCOMING" OUR NEW MARINES TO THEIR UNITS. OBVIOUSLY, THIS IS AT THE INFANTRY BATTALION LEVEL BUT THE DAY IS NOT FAR OFF WHEN WE EMBARK ON CS AND CSS UNITS AND THEN THE ACE. I THINK WE CAN ALL SEE THE "POWER" IN THIS TYPE OF "BONDING" WITH A NEW UNIT. IT WILL PAY GREAT DIVIDENDS IN THE FUTURE.

AGAIN, REAL KUDOS TO THE DEPOTS, SOI'S, MCT'S, BASES, AND COMMANDS THAT ARE MAKING SUCH A DIFFERENCE IN THE ENTRY LEVEL TRAINING OF OUR YOUNG MARINES.

WARMLY, CCK

----- [Original Message] -----  
SIR, YOU CHALLENGED US TO SUSTAIN THE CRUCIBLE EXPERIENCE. THAT IS A FORMIDABLE CHALLENGE AND WILL TAKE CONCERTED EFFORT BY US ALL. JOHN ADMIRE AND BARRY GRIFFIN ARE GIVING IT THERE BEST EFFORTS.//VERY RESPECTFULLY//CWF

-----  
Original Text

From: MAJGEN JOHN H ADMIRE@MAIN@DPLD.1MARDIV, on 4/2/97 12:42 PM:

To: LTGEN CARLTON W FULFORD\_JR@SSEC@I MEF

Sir,

We attended the first Crucible SOI Graduation for Division Marines on 31 March. Actually, we began this initiative last November, shared our program with the 2nd Marine Division, and have refined our plans in subsequent graduations. Therefore, we initiated our program prior to the Crucible, but the Crucible

has contributed to an increase in the relevance and meaningfulness of our initial initiative.

The CO 5th Marines, Col Barry Griffin, and his 2/5 commanders and staff, SNCOs and NCOs, attended the graduation. But our initial contact with the Crucible Marines at SOI began weeks ago. We have been interacting with the SOI and Crucible Marines for over a month. These past activities have included:

- SgtMaj/SNCO introduction briefs, regimental history classes, and training & deployment briefs.

- NCO (Squad & Fire Team Leaders) actual participation in and observation of the final week of SOI training.

- SgtMaj led SNCO/NCO participation in the final week SOI 20 mile graduation hike.

The Division Sergeant Major and I attended the graduation with Col Griffin and the 2/5 officers, SNCOs, and NCOs. The graduation was professionally executed by SOI and attended by over a hundred parents, relatives, and friends of the Crucible graduates. In numerous conversations with parents and relatives we were impressed with their positive comments regarding the transformation of their sons into young men and Marines. We also received a number of remarks thanking us for our "Welcome Letters" to them explaining their son's training, future home at Camp Pendleton and new family of Marines.

After the graduation the 2/5 small unit leaders escorted the Crucible Marines to their transportation and to the battalion at Camp San Mateo. Then we had our Marines take care of their baggage, check them into the BEQ, and ensure they were properly settled into their new home.

Then the battalion conducted a formal parade and ceremony in which the Crucible Marines were incorporated into their respective platoons and companies. Parents and guests were escorted to the reviewing area to observe the ceremony and rededication of the Battalion Color. As part of the ceremony, the new Marines were presented their "Fourragere's" while the battalion's history was reviewed. The Battalion Commander, LtCol Dave Linnebur, conducted an outstanding ceremony. In some respects it was as emotional as the Crucible Graduation on the hill where the Recruits are first called Marines by their Drill Instructors.

After the ceremony the new Marines were in-processed while their parents were provided a tour of Camp San Mateo. Later, all parents and guests were briefed on the upcoming year's training and deployment schedule. We provided a copy of major events to the families and they were appreciative of our inclusion of them into the new Marine Family.

At the conclusion of the briefings the Crucible Marines and their parents were hosted at the Mess Hall for a typical Marine meal. The regiment ensured it was a truly family affair and the reactions from all were impressive. One could truly sense the bonding and cohesion of everyone in attendance. The young brothers and sisters of many of the Crucible Marines contributed to the family atmosphere throughout the day.

We have all acknowledged that the sustainment of the Crucible influence is now our major challenge. Accordingly, the remainder of this week the new Marines will be fully integrated into their new battalion, new home, new family. Then next week they will either report to Coronado for Small Boat Training as preparation for the 31st MEU(SOC) deployment in November or to MWTC for mountain warfare training. We adjusted the 2/5 TEEP to ensure our new Crucible Marines were introduced to a good, solid, adventure oriented training event. Our objective is to continue with challenging, safe, and meaningful training.

We believe we have a good program. But we are conducting an After Action Review to continually improve the welcome aboard of our Crucible Marines. Nonetheless, we believe Col Griffin and LtCol Linnevr have created a solid foundation for future success.

V/R ADMIRE

**APPENDIX G: 21 OCTOBER1997 E-MAIL FROM COL BARRY WITH COMMENTS  
FROM GENERAL KRULAK**

To: LTGEN MARTIN R STEELE@P@HQMC  
Cc:  
Bcc:  
From: COL RICHARD M BARRY@AWS@MCCDC  
Subject: COHESION UNITS  
Date: Tuesday, October 21, 1997 16:48:09 EDT  
Attach:  
Certify: N

Forwarded date: Wednesday, October 22, 1997 6:14:02 EDT  
Comments by: GEN CHARLES C KRULAK@CMC@HQMC  
Comments:

GENERALS AND SES'ERS,

MARTY STEELE FORWARDED THIS E-MAIL TO ME...WRITTEN BY COL BARRY, DIRECTOR, AWS. THINK WHAT IT WILL MEAN TO OUR CORPS IF WE CAN GET ALL MOS'S INTO THIS COHESION ENVIRONMENT. AS THE GOOD COLONEL SAYS, WE JUST NEED TO KEEP PUSHING!! THE SUSTAINMENT PART AT THE UNIT LEVEL IS KEY TO THE ENTIRE TRANSFORMATION PROCESS. IF EVERYONE KNOWS WHAT THE GOAL IS, WE CAN'T HELP BUT SUCCEED!!

SEMPER FIDELIS, CCK

=====  
Forwarded to: GEN CHARLES C KRULAK@CMC@HQMC  
cc:  
Forwarded date: Wednesday, October 22, 1997 5:40:06 EDT  
Comments by: LTGEN MARTIN R STEELE@P@HQMC

----- [Original Message] -----  
SIR- JUST WANTED TO SHARE WITH YOU AN EXPERIENCE I JUST HAD WITH A FEW UNSOLICITED GROUPS AND SCORES RE COHESION AS I JUST SAW IT. EMO GARDNER ASKED ME TO GO OUT TO LZ 20 HERE BY COMBAT TOWN FOR AN "EYES ON" CUT ON A LONG RANGE HELO RAID HE WAS RUNNING FOR WORKUPS. THE CAPTS WERE BUSY WITH A MARKED REQUIREMENT SO I WENT ON OUT TO VIEW AS THIS IS THE FIRST COHESION BN WE HAVE FIELDIED YET. MISSION WAS TO RAID AN ARMS CACHE IN COMBAT TOWN ON A BOSNIA TYPE SCENARIO. AS THE COBRAS PREPPED THE ZONE AND THE 46'S CAME IN I GOT UP OFF MY FIELD GRADE BUTT TO FIND MYSELF FULLY ENGAGED BY THEIR BASE OF FIRE AS WERE THE AGGRESSORS WHO WERE IN THE "HERE COMES THE HELOS I GUESS WE BETTER GET OUR GEAR ON " MODE. THE MARINES WERE SO FAST AND GOOD I COULD NOT BELIEVE IT. THEY DEPLANED WITH TOTAL ORIENTATION ON AN UNFAMILIAR ZONE WITH AN OBVIOUS REHEARSAL AND MAP RECON HAVING BEEN COMPLIMENTED BY SANDY TABLES AND MOCKUP WORK. THEY MOVED QUITE INDEPENDENTLY BUT FOUGHT TOGETHER MOVING THROUGH THE MOUT FACILITY BETTER THAN I HAVE EVER SEEN ANYONE DO; INCLUDING THE BRITS. ALL SEARCHES/CLEARING AND MOVEMENT WERE SWIFT AND TACTICALLY SOUND. MOST IMPRESSIVE WAS THE SQUAD LEADER CONTROL TAKING FULL ADVANTAGE OF THE COHESION. EXTREMELY EFFECTIVE.

SECURITY ELEMENT SEALED OFF THE OBJECTIVE, AND ALL MARINES TO THE LOWEST KNEW THE MISSION, THE ABORT CRITERIA, AND THE ROE'S. LAST 50 METERS WAS SUPERB IN ALL CASES. CONTINUING ACTIONS ACROSS THE BOARD WERE OUTSTANDING. IF TEAMWORK DIFFERENTIATES AN INFANTRYMAN FROM A RIFLEMAN- THIS IS IT. AT THIS POINT, I CAN SEE UNBELIEVABLE RESULTS FROM COHESION AND WE NEED TO STAY ON IT LIKE A PIT BULL ON A PORK CHOP. THIS WASN'T A CAPEX, NOR WERE ANY FLAGS THERE, AND THEY DIDN'T KNOW I WOULD BE THERE. NO KIDDING, THE BEST I HAVE SEEN IN A LONG TIME. THOUGHT YOU MIGHT LIKE TO KNOW AFTER WORKING SO HARD ON THE CONCEPT- THESE ARE VERY VERY DANGEROUS MARINES---V/RESP RICK

**APPENDIX H: 2 MAY1997 E-MAIL FROM LTCOL LINNEBUR**

To: COL BARRY P GRIFFIN@5thMar@1MARDIV  
Cc:  
Bcc:  
From: LTCOL DAVID G LINNEBUR@2NDBN 5THMAR@1MARDIV  
Subject: Crucible-trained/Unit Cohesion Marines  
Date: Friday, May 2, 1997 12:28:24 EDT  
Attach:  
Certify: N

=====

Forwarded to: MAJ RAY J VANDENBERGHE\_JR@2NDBN  
5THMAR@1MARDIV

SGTMAJ MATT F CULVER@2NDBN 5THMAR@1MARDIV  
CAPT JAMES W WESTERN@2NDBN 5THMAR@1MARDIV  
CAPT DAVID D BADGER@2NDBN 5THMAR@1MARDIV  
1STSGT RICHARD H RUSH@2NDBN 5THMAR@1MARDIV  
CAPT ROD D ROBISON@2NDBN 5THMAR@1MARDIV  
CAPT PHILLIP W CHANDLER@2NDBN 5THMAR@1MARDIV

cc:

Forwarded date: Friday, May 2, 1997 13:40:41 EDT  
Comments by: LTCOL DAVID G LINNEBUR@2NDBN 5THMAR@1MARDIV  
Comments:

Gentlemen,

Thanks for your input. The following are my (your) comments to the Regimental Commander regarding our new Marines.

LtCol Linnebur

----- [Original Message] -----  
Sir,

Now that we're back from MWTC I thought you might be interested in our initial assessment of the performance of the first group of Crucible-trained/Unit Cohesion Marines--both at MWTC during the Winter Mountain Operations Course and at EWTC Pac with the ongoing Small Boat Company Raid Course.

First, in general, every company commander has noted their outstanding motivation, teamwork, and desire to do well at anything thrown their way. Their professionalism and desire to do well as Marines is so intense that, according to the company commanders, it actually motivates their leadership to rise to the occasion. They are definitely giving the "old timers" a shot of Green with their enthusiasm and performance. To some degree, their performance can be illustrated with numbers and by listing their accomplishments in their first 30 days with 2/5:

- Constituted 11 of 16 Scout Swimmers with all successfully completing the course

- Constituted 21 of 27 Coxswains with all but one successfully completing the course.

- Constituted 14 of 21 Scout Skiers from the rifle companies (H&S had another 10 quotas but received no Crucible-trained Marines to consider) with all successfully completing the course. The Rifle Company Commanders said the Crucible-trained Marines made up their majority because they were the best skiers (some had previous skiing experience) but also because they displayed the most desire and determination to

succeed and were, in their opinion, most likely to successfully complete the course.

- No Crucible-trained Marines fell out of the hikes up to Silver Creek (1600 foot elevation increase over 5 miles) carrying their personal gear, Vector packs and skis (80+ lbs)

- No Crucible-trained Marines "quit" on the mountain for evacuation to the Lower Base Camp (LBC). There were a few injuries, but all that were evacuated to the LBC had legitimate skiing injuries requiring X-rays, casts or evacuation to hospitals in Reno for observation.

The teamwork they display is also worthy of note--both in a negative and positive sense. For example, when testing the Marines for scout swimmers we tested the entire team in an effort to maintain team integrity when assigning to the scout swimmers as well as to the companies. What myself and Fox Company Cmdr, Capt Robison, observed is that either the entire team did rather well, or it performed rather poorly. What was pulling a particular team in a particular direction we could not determine; but, whatever it was, they were consistent as a team.

The company commanders will tell you, that despite maintaining team integrity, the identity of "Crucible-trained/Unit Cohesion Marine" has essentially disappeared through absorption into the companies. We agree; however, that they tend to stand out when performing as teams. This is most obvious in Weapons Company where there is intense competition going on between squads and sections within 81's, HMGs, and TOWS to be the team that competes in the Regimental and Division Crew-Served Weapons competition. Sir, your TOWs may have won the Division competition 4 years running, but Capt Badger has got some Crucible-trained Marines led by some good NCOs that are smelling raw meat--and they're hungry!

It's not a perfect world though, and we continue experiencing the same kinds of problems with these Marines as any other. Currently I have one with a DUI, a UA and one that just doesn't want to be a Marine anymore (My SgtMaj feels it would be much worse if these were not unit cohesion Marines). Also it should be pointed out that team integrity doesn't always work. Some of the teams are saddled with poor performers who have been carried by their team mates since SOI; and, they're tired of it. They just want to rid themselves of these poor performers.

In summary, the Crucible-trained/Unit Cohesion Marines have held an impressive accounting of themselves and impressed their leadership during their first 30 days. Many of my Marines, however, remain skeptical about the changes to recruit/SOI training. But, if the long term results are as impressive as the our initial observations then their own performance will win over the most ardent disbeliever.

V/R

LtCol Linnebur

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