

TRAINING FOR WAR

COLLECTIVE TRAINING IN CANADA'S ARMY RESERVE UNITS

Brigadier-General (Retired) Ernest Beno, OMM, CD

and

Colonel Eppo van Weelderen, CD

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FORWARD



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Canada’s Army Reserve is in the business of training. Its role, to provide a “responsive integrated capability, at home or abroad, in sustainment of the Army mission” requires that units conduct effective and relevant individual and collective training. While individual training is largely the purview of institutions at brigade, division, and Corps or Branch level, the responsibility for collective training lies largely with units and brigades. That is the reason this important book should be essential reading for unit command teams.

Brigadier-General (Retired) Ernest Beno brings to this discussion a wealth of Regular Force leadership experience and a deep familiarity of the challenges facing Army Reserve units in conducting collective training. Colonel Eppo van Weelderden is a career reservist who has had great success in training at the unit level, and is now the Commander of 41 Canadian Brigade Group. They have produced a thorough review of best practices and a guide for effective Army Reserve collective training that should be in every armoury.

Time is the most precious resource for a Reservist. He or she gives up time that could be spent on studies, a civilian job, or with family to volunteer to help defend our nation. It is vital that this time not be wasted. Too often, poorly planned or ill-focused collective training results in dissatisfaction in a unit with a resulting decrease in parade strength. Reservists ‘vote with their feet’ and the lack of planning of coordination in collective training can quickly result in negative effects on the armoury floor. Good collective training, on the other

hand, can have a very positive impact on retention and unit effectiveness – troops will attend training they know has been taken seriously and planned effectively. At the lower levels of collective training units are by-and-large left to plan their own events – this book can help any unit do better.

As we fully return to a peacetime model for training after eleven years at war in Afghanistan, it is important to rediscover the tried and true methods of collective training that built the Army Reserve that responded so magnificently when called to that war. This book and the examples it provides will assist Army Reserve units in making collective training more effective.

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We trust that this book will be helpful in ensuring that our Army Reserve units meet the demands and expectations of the Canadian Army and Canada. One never stops learning, or at least shouldn’t, and one should never stop passing on “lessons-learned”.



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Honorary Colonel
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Commander
41 Canadian Brigade Group

INTRODUCTION

“The Second World War was the last time Canada produced a full field army—two Corps with five Divisions, plus two Armoured Brigades, and a huge force training in Britain and at home. The prewar Permanent Force had been tiny but it produced some very able commanders, officers such as Harry Crerar, Guy Simonds, Harry Foster, and others. Less well known was that the Non-Permanent Active Militia made a mighty contribution. As General Charles Foulkes, the nation’s first postwar Chief of the General Staff, stated, 60 percent of the Army’s Division Commanders, 75 percent of its Brigade Commanders, and 90 percent of its Commissioned Officers came from the Militia. Very simply, Canada could not have produced “the best little army in the world” without its citizen-soldiers. We live in a different world today, and we may never again send a large army overseas. But we might. And once again, we will need Reservists, trained men and women who can step forward to serve the nation.”

Jack Granatstein, OC, PhD, LLD, DScMil, DLitt, DHumLitt, FRSC

The most important task of a military during times of peace is to prepare for war. By extension, the purpose of individual and collective training is to develop forces that can win in combat.

Canada's Army Reserve or 'Militia' is organized into about 150 units, located in most cities and communities across the country. The Militia dates back historically to the beginning of Canada, the defence of Canada in 1812-14 and the very foundation of community life. These citizen-soldiers, initially trained and led by British professionals, were mobilized for World War 1 and 2. More recently there has been an increased reliance on Reservists to support Canada’s many peacekeeping operations and counter-insurgency operations in Afghanistan.

Before getting into the principal topic of this booklet, we need a bit of clarity on a few terms. The 'Militia' has traditionally been the term that describes the volunteer units of part-time soldiers located in towns and cities across Canada. For many reasons this term is being used less frequently, replaced by the term 'Army Reserve.' It can be argued that these units are not purely Reserve Force units, i.e., they do not exist simply as a Reserve Force to support the Regular Force units and formations. They have roles and a purpose beyond just having

an augmentation role. Why do we mention this – because there is a degree of unease with regards to the label that is applied to these 150 units across Canada – are they ‘Militia’ units or are they ‘Army Reserve’ units – or a combination of the two? For the purposes of this manual, we are of the opinion that our Army Reserve units have responsibilities beyond simply augmenting Regular Force units and formations. They also have regional domestic roles and may be called upon to generate (or mobilize) sub-sub-units and sub-units (on short notice) and potentially units (with adequate notice). These units must therefore focus their training for the worst case – operations in war as cohesive units and sub-units. So, we will use the term Army Reserve, recognizing that this embodies not only an augmentation capacity, but also a domestic and mobilization capacity.

Aim

The aim of this booklet is to pass on our ‘lessons learned’ with respect to collective training for Canada’s Army Reserve units.

Our intent is to stimulate thought, discussion and positive action on collective training for the part-time Army reservists. Our ultimate objective is to help produce sound Army Reserve units and well-trained reservists:

1. while recognizing and respecting the realities of what part-time service really means;
2. noting the necessity for a critical mass of soldiers and full-time support; and
3. by accommodating the Army Reserve lifestyle that effectively balances the expectations of both the civilian and military commitments our soldiers.

This booklet takes into account the particular considerations inherent within the citizen-soldier and the Army Reserve unit. It also outlines some key principles of collective training in the Canadian Army in order to assist Army Reserve unit leadership and their staffs in this most important of military activities – training for operations. Included are specific proposals for the design, conduct, evaluation and support of collective training.

Leadership

Although this booklet is not about leadership, the effectiveness of Army Reserve units depends upon good leadership. The quality of collective training is improved greatly by good leadership and no matter how good the doctrine, process, plan or the activities are, without sound leadership the mission effectiveness of the Army Reserve unit will be significantly reduced.

In collective training at all levels within the Army Reserve (section to Territorial Battalion Group Headquarters), the emphasis in training should always be on developing leaders. Territorial Battalion Groups are task-organized groupings specific to domestic operations. We need to create soldiers and mission elements to meet specific tasks, and we must train in operations of war to develop and maintain our capability in current doctrine - but it is through the development of sound leaders that we will be ready to meet the tasks of today and prepare for the unknowns of the future. By emphasizing critical and practical thinking, mental agility and robustness, a common-sense approach to operational matters, and ethical conduct, we will ensure that we can effectively and professionally employ all of the resources in domestic or expeditionary operations. History has shown that Canada’s Army Reserve should capitalize on training its people and especially on developing its leaders. With good leaders trained for operations of war, we can build operationally effective units that will make a difference with whatever technology comes to hand.

Key to Army Reserve training is the concept of Auftragstaktik, or the ‘mission-oriented command system’ of the tradition of Scharnhorst and Moltke. Successful armies do not turn their troops into automatons nor try to control them from the top, instead they allow considerable latitude, focused on the far-reaching object. A prerequisite for employing auftragstaktik is that subordinates must be well trained, with a sound understanding of the appropriate doctrine. If we practice Auftragstaktik in training, we will be more likely to employ it in operations to great effect.

PART 1: THE CITIZEN-SOLDIER

The Role of the Army Reserve

The traditional role of the Militia was to provide the framework for general mobilization, augment and sustain the Canadian Armed Forces and serve as a link between the military and civilian communities.¹

The current role of the Army Reserve is a *professional part-time force that provides local engagement and a responsive integrated capability, at home or abroad, in sustainment of the Army mission.*²

The Canadian Army generates task-specific units for employment on expeditionary and domestic operations under the command of the Canadian Joint Operations Command. As a force generator, the Army Reserve is currently tasked with the following:

1. On order provide general purpose, combat capable soldiers and specialist sub-units capable of augmenting the Regular Force on expeditionary operations; and
2. On order provide formed Territorial Battalion Group(s) (TBGs) and/or Domestic Response Companies (DRCs) capable of augmenting the Regular Force on domestic operations.

Note this requires a wide spectrum in terms of levels and capabilities. On the one hand, the production of combat capability (largely in the form of individual augmentees) is the desired product for international operations yet a form of collective domestic operations (excluding Assistance to Law Enforcement Authorities) capability at unit or sub-unit level. In the former, individual proficiency is the desired output of training. In the latter, it is a range of potential capabilities that vary by arm and service in response to a range of potential situations. The best way to train TBGs and DRCs is for the teams to master battle procedure - solving problems at all levels and setting the conditions for success at subordinate levels.

Regardless of roles and tasks specified in current policy documents, history has shown that we need to expect the unexpected. Canada has to mobilize Army Reserve units and formations, and to deny this is to deny history. Will this happen again? Will we ever need to generate and mobilize cohesive fighting

units far beyond the Regular Force of our Army? We believe that Army Reserve leaders must understand how to train their sub-units for a worst-case scenario, and if they are called upon to supplement or augment the Regular Force, they are better prepared to do so.

The Citizen-Soldier

Army Reserve units are made up of members who for many reasons have decided to acquire the knowledge and skills of a soldier in balance with their commitments outside the Army.

The Army Reserve must be trained in a manner consistent with its particular characteristics. The most important of these characteristics are³:

1. Terms of Service. The retention and deployment of Army Reserve soldiers relies on voluntary service. The majority of Reservists serve in a part-time capacity, and must balance military commitments with their civilian employment or education. Therefore, unit activities will be constrained by a degree of uncertainty regarding the availability of their soldiers. Because there is no mandatory requirement other than to parade one period a month, poor leadership will manifest itself in poor retention and attendance, directly impacting collective training.
2. Internal Dynamics. Army Reserve soldiers possess various levels of skill, experience and commitment. The most experienced reservists are the functional equivalent of their Regular Force counterparts. Others view their role in a traditional sense, embodying the fine heritage of Canada’s ‘Militia’, trained in the essential elements of combat craft and prepared to answer the call of full-time duty when necessary. Others view their time in the Army Reserve as an opportunity to experience military training and lifestyle before making a full-time commitment, and still others remain in the Reserves following service in the Regular Force maintain contact with a familiar lifestyle but at a reduced pace and commitment level.
3. Demographics. In many respects, the Army Reserve is very different in composition from the Regular Force. For example:
 - a. Age. At junior levels, Reservists are generally younger than their Regular Force counterparts. At senior levels, Warrant Officers to Chief Warrant Officers and commissioned officers above the rank of Captain currently tend to be older.

- b. Education Profile. A considerable number of reservists under the rank of Sergeant or Captain are students, or have completed some type of post high school education. Army Reserve soldiers are generally well educated, and this must be considered when designing training; it must be challenging and rewarding in order to facilitate retention of personnel.
- c. Turnover. Army Reserve attrition is very high, with the greatest turnover (approximately 40 percent) during the first five years for both commissioned officers and non-commissioned members.
- d. Motivation. Canadians join the Army Reserve for obvious reasons – a part-time job and a chance for adventure or to give back to their country through armed service. After a period of service, motivation assumes greater dimensions and long-service individuals generally remain highly motivated and loyal to the institution they serve.
- e. Non-Military Knowledge and Skill-Sets. Reservists often bring knowledge and skill-sets that may not normally be found in Regular Force units. Many reservists have post-secondary degrees and diplomas, or specialist skills in construction, heavy equipment operations, farming, accounting, information technology, for example, often making them more employable and adaptable than their Regular Force counterparts.

Furthermore, the training audience in a unit is never a homogenous group. There are several audiences with different needs and perceptions, and a well-designed training plan will accommodate these. For example:

1. Soldiers with less than three years might prefer adventure, travel, excitement and the appearance of danger. They profess to enjoy live fire, rappelling, and mountain climbing. But they need to be socialized and integrated into a cohesive team and they need role models so that they will be ready to assume leadership positions by the five-year point. This means that collective training designs need to afford section/detachment/patrol commanders the ability to train their personnel and for their superiors to supervise them. They are prone to being quickly de-motivated by dull or purposeless training and they normally have potential for far greater performance than generally recognized.

2. Long-service Corporals, many of the senior non-commissioned members, and older Captains generally prefer predictability and a settled routine. They may have families and roots in the community. They have been through several training cycles under different Commanding Officers and in many cases have completed multiple tours overseas. They have ‘seen it all before!’ These members are cooperative and reliable by nature, but their enthusiasm needs to be protected and fostered. They have to perceive that a commander’s training concept is sensible and purposeful. They need to become engaged in activities they perceive as a professional endeavor and operationally essential. They are especially good at coaching and mentoring if they believe in the cause.
3. Master Corporals, junior Sergeants, and subalterns have been selected and taught to lead, and wish to do so. They prefer an atmosphere of challenge, excitement and personal growth. They want to be pushed and want to push the envelope. Their energies should be channelled and exploited, but they need to be given the ‘left and right of arc’. Older and wiser NCMs and officers should steer them and encourage them, allowing them to learn from reasonable mistakes.
4. Captains, Majors and Lieutenant-Colonels and many Chief Warrant Officers are the most serious professionals who understand the limitations of peacetime training and the gaps which must be addressed. They wish to expand their professional horizons and their warfighting prowess. They need war games, command post exercises and simulation to offset the peace-time deficiencies in equipment and practices. They need to practice their skills in private, i.e., tactical exercises without troops and simulation before deploying soldiers and equipment. They then need opportunities in the field with their troops so that they can go progressively through operations of war as a team to perfect the tactics and they need the opportunity to experiment.
5. Very few members of a typical Army Reserve unit will have had Regular Force service, hence very few are fully skilled and experienced in all aspects of their trade. Some will have served with Regular Force units or formations on operations, but again, their skills and experiences are limited by the training they have received and their experiences when employed. The point is that one cannot make assumptions about the resident skill-sets within an Army Reserve unit.

In summary, reservists are constrained by non-military factors and therefore require a flexible training delivery system that is modular, decentralized to the greatest extent possible, and provides more advance notice than would be necessary in the Regular Force. As turnover is constant, training must be regenerative and focused on the basics, with cleverly designed building blocks. This presents a significant leadership challenge to build morale and cohesion so as to reduce attrition. We would argue that the packaging and presentation to all ranks is crucial. The voluntary nature of the terms of service requires leaders to ‘sell’ the training plan to maximize participation. Lastly, the continual development and practicing of junior leaders (commissioned officers and non-commissioned officers) up to company, squadron and battery level must be pursued, even though formal training tasks may only extend to the platoon and troop level.⁴

The Army Reserve Unit

The establishment of many Army Reserve units is the equivalent of a small battalion with a strength of the order of one hundred and fifty to two-hundred all ranks. Commanded by a Lieutenant—Colonel, many units are organized into a unit headquarters and two to three sub-units. The sub-units of an infantry battalion may consist of a Rifle Company, a Rifle Company (-) which may be designated as a Training Company, and a Headquarters Company with administrative and logistical elements. The Rifle Company generally consists of one to three platoons manned with trade-qualified soldiers that are ready and equipped to deploy when required. The Rifle Company is generally focused on collective training. Training Companies often include one or more platoons focused on individual training, i.e., delivering basic military and trades training. In some Army Reserve units, the sub-units are located in different communities creating a challenge to manage a span of control of hundreds of kilometers.

Army Reserve units are typically grouped along geographic lines into Canadian Brigade Groups for administration and training. The establishment of the brigade headquarters includes a small brigade battle school that, when bolstered with temporary course staff and candidates seconded from units, delivers formal individual training courses from September to May. The Divisional Training Centres and Corps Schools also include an Army Reserve training cell that executes formal individual training courses during the summer period. Historically, prior to Afghanistan, these training establishments took up the individual training burden thereby allowing the Army Reserve units to focus on collective training.

Unlike a Regular Force unit where sections, platoons and companies have consistency in organization and establishment from month to month and year to year, an Army Reserve unit will have significant changes in personnel from exercise to exercise. That is just the nature of the availability of unit members – they (especially the more employable and energetic) will often have conflicting demands on their time in their non-military life.

Typically, there is a small cadre of full timers (less than ten per cent of unit strength) of Regular Support Staff and temporary full-time reservists. Their role is to provide unit administration and control over stores and equipment. These positions exist to support individual and collective training. Typically, this full-time staff is hard pressed to meet all the demands of the “system.” The personnel establishments for the units do not have sufficient full time personnel to fill the many administrative and support functions. As a result training frequency and quality should be reduced to a manageable battle rhythm unless the unit has a full complement of part-time reservists who can fill the full-time gaps.

Most Army Reserve units do not have a full fleet of modern weapons, vehicles, equipment and simulation. The required equipment is, in fact, usually insufficient to meet their complete training requirements. They lack specialist staff to fully support the maintenance of such equipment, and often the support is centralized at local Bases; “local” may in fact be hundreds of kilometres distant.

A Typical Training Year

During the course of a training year, an Army Reserve unit is required to execute a number of assigned tasks, including collective training, individual training, recruit attraction as well as fulfilling implied ceremonial and social obligations. Each of these assigned tasks competes for the unit’s personnel and equipment resources, especially junior leaders at both the officer and NCM levels.

A simplified breakdown of the allocation of training days during an average training year (September to August) at the **Corporal/Private** level in the Rifle Company of an Army Reserve Unit is shown below (a detailed breakdown is shown in the sample **Unit Training Calendar** at **Appendix 5**).

Collective Training (including Individual Battle Task Standards)

- Armoury-based Preliminary Training	8 days + 17 evenings = 16.5 days
- 6 x Sub-Unit FTXs	6 x 2.5-day exercises = 15 days
- 2 x Unit FTXs	2 x 2.5 day exercises = 5 days
<hr/>	
- Brigade Field Training Exercise	9 days
	Subtotal = 45.5 days

Ceremonial / Social

- Remembrance Day	1 day
- Regimental Anniversary / Significant Battle Commemoration	1 day
- Soldiers Christmas Dinner / Mandatory Briefings	1 day
<hr/>	
	Subtotal = 3 days

Administrative

- Arrival Assistance Group	1 day
- Exercise Preparation	9 evenings = 4.5 days
- Exercise Cleanup	9 evenings = 4.5 days
<hr/>	
	Subtotal = 10 days

Total = 58.5 days

In order to adequately prepare for these training days the unit’s **junior leaders (section and platoon) and staff** normally parade an additional 15 to 30 days for a total of about **75 to 90 days per year**. This requirement is above and beyond their non-military commitments.

Furthermore, the unit’s **senior leadership (company and unit)** normally parade a further 15 to 30 days for command and control, to attend Brigade or Corps / Branch conferences, community social events, and unit associations or museums for a total of the order of **100 to 120 days per year**.

Army Reserve units are funded for approximately 45 days per year, which creates a significant discrepancy between what Reservists think they need and what they are actually funded to execute.

After completing a troops-to-task assessment in support of the annual unit operating plan, the unit will invariably find itself short of either junior leaders or staff horsepower. The Commanding Officer must then prioritize all assigned and implied tasks, and draw a line between those that are achievable and those that are not. Those that fall beneath the line are therefore not achievable based on the unit’s current personnel strength (senior leadership, junior leadership, and/or rank and file), key equipment and resources, and/or

funding. The Commanding Officer must then identify the risks and recommend a risk management strategy (accept, transfer, mitigate or avoid) to the Brigade Commander for consideration, guidance and direction. Ideally, Brigade Commanders and Commanding Officers have done a preliminary estimate of resources versus tasks and rolled it up to Division Headquarters.

In summary, it is the ongoing responsibility of Army Reserve commanders at all levels to determine what is reasonable and achievable given the specific demographic, geographic, and resource realities of their commands. Following that determination comes the most difficult challenge to leadership in the Army Reserve; the management of expectations both up and down. The greatest litmus test for successful leadership in the Army Reserve is how many of the unit’s soldiers turn out for a training event. For unlike most of their Regular Force counterparts, Reservists have the discretionary ability to vote with their feet and stay home.

PART 2: TRAINING FUNDAMENTALS

Collective Training

The Canadian Army’s mission is to “generate combat effective, multi-purpose land forces to meet Canada’s defence objectives”.⁵

The primary purpose of the Canadian Army is to fight and win our nation’s wars. Our soldiers, units, and formations must continually train to fight and support the fighting. The two primary types of training to prepare the Canadian Army are individual and collective training:

- Individual Training - the training that the soldier receives to prepare them for the specific duties and tasks related to their assigned military occupation and appointment; and
- Collective Training - the training any group of soldiers receives to perform tasks required of the group as a whole.

The Commander of the Canadian Army Doctrine and Training Centre has defined the aim of collective training for the Army as follows:

“The aim of collective training in the current Army context is to produce battle groups, task forces or formations that are operationally deployable within realistic warning time frames. Collective training comprises Training Levels 2-7 and is conducted to meet the standards presented in assigned battle task standards. The collective training activity conducted by units must be scheduled to meet the requirements of the Managed Readiness Plan in order to provide Army contributions to operations.”⁶

Collective training in the Army Reserve utilizes garrison-based preliminary (or refresher) training, and computer-assisted (CAX), command post (CPX) and field training (FTX) exercises to develop proficiency and teamwork in performing a task to a specified standard. A CAX or CPX is a scenario-driven exercise in which the forces are simulated. It may be conducted from garrison locations or between participating headquarters in the unit. An FTX is a scenario-driven tactical exercise used to train and evaluate collective battle task standards in a collective environment that simulates the stress, sounds, and wartime conditions. It is conducted in a realistic field environment in all weather

conditions and includes day and night operations. A field training exercise guides soldiers through a series of events exposing them to the rigours of performance during wartime operations.

Within the Army Reserve the focal point for training development and delivery has been the unit. The unit is well-structured and organized to conduct, oversee and evaluate collective training. Primary responsibility is assigned to officers for collective training and to non-commissioned officers for individual training. Non-commissioned officers also have the responsibility to train sections, crews and detachments.

The Doctrinal Base

“In discussing the Afrika Korps, the British official historian clearly understands what made the Germans such formidable opponents throughout the war: ‘By insisting upon a clear and well-understood doctrine, thoroughly instilled on uniform lines, they made it possible for units and even sub-units to settle down quickly in new groupings and under new commanders with a minimum of confusion.’”

Millet & Murray, Military Effectiveness: Volume III, The Second World War

Doctrine is defined as the fundamental principles by which military forces guide their actions in support of national objectives. It is authoritative but requires judgement in application.

The fighting capability of the Canadian Army depends on realistic and well-conceived doctrine. Doctrine which is written by the generals who command the troops and doctrine which is understood, practiced and followed by them and their subordinates. The doctrine should reflect a realistic Canadian Army mobilized (not necessarily an ideal army formation and certainly not a purely theoretical concept) but an army structured and equipped as Canada might in a future mobilization situation. Our doctrine should therefore reflect the warfighting capability that we need. Brigades and units will always function within Divisions and Corps in war (Coalitions and Allied), and the training philosophy should reflect these broader parameters. Such a sound doctrinal base would provide an atmosphere of unity of thought throughout the Army, which is fundamental to efficiency, effectiveness and focus in training. It will provide a rationale for the training we do.

Training Progression

Individual soldiers must acquire certain skills before they can be effective in team training; likewise, teams, crews and detachments must reach some degree of proficiency in their collective skills before they can participate safely and successfully in troop or platoon training. Troops and platoons must then achieve competency before progressing on to company/squadron/battery and combined arms training.⁷

Although this appears self-evident, Army Reserve units often launch into higher level training before the sub-components are fully prepared. The results are predictable – a broad, but shallow level of training wherein the troops are not prepared to participate in sustained operations when augmenting a deployment.

Previous collective training may provide a commander an opportunity to truncate training progression and start at levels that reflect that unit’s current capabilities. Risk is assumed whenever such truncation occurs, and it may be manifested by individuals lacking expertise or in groups acting without cohesion. Shortcuts in training should be deliberately stated in training plans and recognized by the chain of command, and subsequent training should be monitored to assess risk and confirm competency.⁸

Levels of Training

Typically, Army Reserve training follows the following hierarchy⁹:

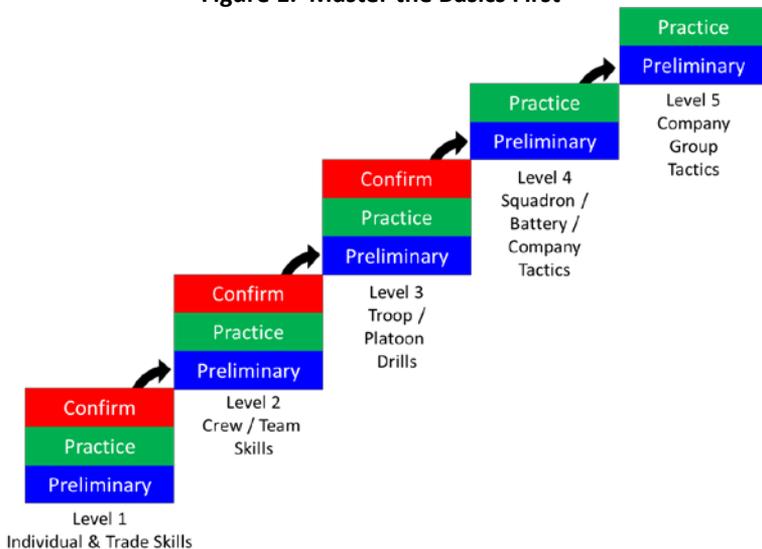
- Level 1 – Individual
- Level 2 – Section, Crew and Detachment
- Level 3 – Troop and Platoon
- Level 4 – Squadron, Battery and Company
- Level 5 – Combined Arms Sub-Unit, i.e., Company Group
- Level 6 – Unit and Combined-Arms Unit, i.e., Battalion Group

In the Army Reserve, and with the exception of confirming the Territorial Battalion Group Headquarters (Level 6), there is a standing annual requirement

to practice Level 1 (Individual) to Level 5 (Company Group) and confirm from Level 1 to Level 3 (Platoon).

Training is normally focused on a specific level within a higher context, i.e., Level 3 in a Level 4/5 context. In other words, Level 3 (Platoon) Battle Task Standards are being trained and assessed with a Level 4/5 (Company or Company Group) headquarters in place to receive orders from and to report to.

Figure 1. Master the Basics First



Stages of Training

The Canadian Army has a structured and progressive approach to training that includes five levels of training for the Army Reserve specifically; starting with the individual and proceeding to the company group (see above).¹⁰ Within each training level there are three stages; preliminary, practice and confirmation.¹¹

1. **Preliminary Stage.** Preliminary training introduces or refreshes the team to the task and affirms the common baseline knowledge while establishing or confirming Standard Operating Procedures (SOPs). The activities generally take the form of theory reviews using simple terrain models, chalk diagrams or walk-throughs on representative terrain. It is at this stage that

the leader delineates performance expectations for the training that will follow and establishes the foundation of shared and implicit understanding of the commander’s intent. Consistency is critical to a successful outcome. The leader must demonstrate mastery of the Tactics, Techniques, and Procedures (TTPs) applicable to the BTS and must be clear about SOPs. Further as training progresses, the leader’s expectations must remain constant.¹²

2. Practice Stage. The practice stage brings teams to the required competence level, required by the battle task standard, presented as task, conditions and standard of performance. This achievement is accomplished predominantly through a series of stands training events wherein frequent informal after action reviews (AARs) allow leaders to shape the collective mindset of their soldiers. Observer/Controller Teams (O/CTs) should be employed if resources allow. Where competence is identified in a set of related battle tasks, these may be practiced in a tactical context in preparation for the task confirmation. This process is completed for each battle task assigned at a given level of training. Current experience indicates that at least three iterations of any given task are required to gain an acceptable level of competence or to arrest skill fade. Training fewer tasks, but with more practice iterations, is essential: this provides an adequate base for naturalistic combat-decision making. Conversely too many iterations of the same task (using the same conditions) has diminishing value and with Reservists it can lead to demotivation.¹³
3. Confirmation Stage. Confirmation assesses performance against a given standard. It can be formal or informal depending on its nature and extent, but it is always conducted in support of the higher commander’s defined requirements. In the context of the collective training design, the confirmation plan defines the gateways, method and simulation requirements in the training plan and stipulates support assets required. Achievement of the standard must be formally confirmed by the commander two levels higher in the chain of command, who will assess performance in relation to the written battle task standard. Successful performance of the tasks results in the gateway for that training level being passed.¹⁴ Commanding Officers must not begin platoon level training until they have clearly established that their sections are ready to progress to advanced training. This requires a measure of evaluation. The most reliable method commanders have to do this is to see for themselves

the level of competence achieved by actively getting involved in the concluding stages of training. This is all couched in the Army Reserve reality that with new soldiers and leaders joining the Reserve unit every year, there is a corresponding need to restart the training year every year.

Commanders are responsible to train one-down and confirm the training two-down, i.e., the Company Commander trains their subordinate platoons and confirms their sections.

Table 1. Army Reserve Collective Training Responsibilities

Training Level	Element in Training	Training Commander	Confirmation Authority	When
1	Soldiers	Detachment, Crew or Section Commander	Troop or Platoon Commander	Sub-Unit FTX Garrison Trg
2	Detachment, Crew or Section	Troop or Platoon Commander	Squadron, Battery or Company Commander	Sub-Unit FTX Brigade FTX
3	Troop or Platoon	Squadron, Battery or Company Commander	Unit Commanding Officer	Unit FTX Brigade FTX
4	Squadron or Company	Unit Commanding Officer	Confirmation not Required under normal circumstances	Unit TEWT during Brigade FTX
	Battery			Field Artillery Regimental FTX or Brigade FTX
5	Company Group	Battalion Group Commanding Officer	Confirmation not Required under normal circumstances	Unit TEWT during Brigade FTX
6	Territorial Battalion Group	Brigade Commander	Division Commander	Brigade CAX

Confirmation above Level 2 is based upon specifically evaluating the leadership element within that element. As long as the soldiers within the element have already been confirmed at Level 2 within the assigned task, the higher level battle task standards can be deemed achieved by the confirming authority. For

example, the Commanding Officer’s confirmation of Level 3 is based upon the platoon commander and 2IC, with a company headquarters to receive orders from and report to, and the sections having already been confirmed at Level 2.

Individual Battle Task Standards

Canadian Army Order 24-04 (CAO 24-04) provides Army direction on Individual Battle Task Standards (IBTS) and specifically that the training requirement for the combat arms in the Army Reserve is the same as the Regular Force.

Although IBTS are not dealt with in detail in this booklet, we strongly recommend that Army Reserve commanders and staff thoroughly read CAO 24-04 during their annual operational planning process (brigades) and training battle procedure cycle (units) when developing their annual operating plans.



A soldier from the Queen’s York Rangers watches for enemy on an adjacent road during Exercise STALWART GARDIAN at Canadian Forces Base Petawawa, 2005. Photo: Cpl Terence Fernandes

This annual requirement creates a significant training bill for which the Army Reserve unit would need the entire Fall training period, including the three field training exercises in September, October and November,

in order to achieve the requisite standard. The successful execution of IBTS is not within the purview of this booklet, however it may constitute the loss of three field training exercise. This burden may hinder the Army Reserve unit in successfully achieving its assigned collective battle task standards.

Collective Battle Task Standards

Developing leaders, whether they are newly commissioned Second Lieutenants or developing officers and non-commissioned officers who already have some experience, means training leaders. Training means task, conditions and standards.

Battle task standards are primarily derived from doctrine. They define (by training level) the knowledge, skills and conditions required to conduct specific tactical tasks and provide an operational measure against which the effectiveness and efficiency of training can be gauged.¹⁵ ‘Standards’ are used as a guide or target – a unit should strive to meet and exceed the known Standard. Standards should be:

- Meaningful – Tactical relevance
- Clear – What is to be achieved
- Realistic – Achievable
- Measurable – Observable
- Documented – in Doctrine

Commanders should regularly utilize battle task standards to design collective training to progressively develop their sub-units up to Level 4 (Squadron, Battery or Company) or Level 5 (Company Group). For example, an Army Reserve infantry battalion has been tasked to confirm their platoons on the battle task standard **“Execute a Platoon Attack”** in preparation for an upcoming brigade field training exercise.

In order to successfully be confirmed by the Commanding Officer in the attack, the rifle platoon should also incorporate some, or all, of the following functional battle task standards while “capturing, destroying or forcing the

withdrawal of the enemy, while the dismounted infantry platoon remains combat effective”:

- **Execute a Section Attack** (Level 2 (Section) in a Level 3 (Platoon) context),
- **Establish and operate a Fire Base** (Level 2 (Section) in a Level 3 (Platoon) context),
- **Clear a Trench System** (Level 3 (Platoon) in a Level 4 (Company) context) and/or **Clear a Bunker** (Level 3 (Platoon) in a Level 4 (Company) context), and
- **Consolidate** (Level 3 (Platoon) in a Level 4 (Company) context).

The potential addition of four (or five) additional battle task standards in the aforementioned example significantly complicates the training of the platoons and sections, especially considering that Army Reserve units have only six to seven weekend field training exercises in order to practice and confirm Individual Battle Task Standards and the assigned Level 2 (Section) and Level 3 (Platoon) Collective Battle Task Standards.

An additional complication arises from the reality that the Army Reserve soldiers may not be the same ones from parade night to parade night and exercise to exercise as their individual life circumstances may prevent attendance at all scheduled training activities. This often necessitates repetition of battle task standards during successive field training exercises to ensure that a critical mass of leaders and soldiers have achieved the necessary standards. We accept that some Army Reserve units do not have many qualified leaders at the Platoon or Troop level. Can a good Sergeant or Warrant Officer lead the Platoon or Troop in the absence of a qualified officer? Can the Platoon or Troop be considered confirmed at Level 3 by the Commanding Officer?

All-Arms Training

All-arms training, involving the incorporation of affiliated arms and services into all levels of training, should be utilized by bringing units that have complementary Battle Task Standards to achieve, particularly when training commissioned and non-commissioned officers. If possible, permit soldiers from the other arms and services to fill unit or supporting positions during preliminary or practice training. No battles are won without the synergy of the

all-arms team. Units that train together, strike up affiliations and friendships, and iron out standard operating procedures together, will function better as all-arms teams under the stresses and pressures of operations. Additionally, the more we all learn from each other, the better we can employ each other’s combat and support functions, and the greater flexibility we have in preparing our people for any contingency. As the nature of warfare evolves the clear lines of demarcation between arms, regiments, specialties, etc, will blur, so there is an imperative to learn about each other now that the time is available.

This paragraph from Lieutenant-General Sir Francis Taker’s book “Approach to Battle,” commenting on the Eighth Army in North Africa, is worthy of note:

“But this was the first time in war that we British had the chance, and failed, to train our battalions and our armoured squadrons and artillery batteries, our infantry sections or platoons and our single tanks or pairs or troops of tanks and our sections of field and anti-tank artillery, to work closely together right up in front in aggressive, mobile infiltrations. Whatever form our arms may yet take, they must be trained closely together in peace, from the very smallest sub-unit up to the very largest. Never again must they drift apart and never again must any of them - or for that matter, any of the three Fighting Services - become a ‘sacred cow’.”

Combined-Arms Training

All-arms training should not be confused with combined-arms training. As mentioned in the previous section, all-arms involves incorporating affiliated arms and services into all levels of training. Combined-arms is an approach to warfare that integrates the different combat arms (armoured, combat engineers, infantry, and artillery), to achieve mutually complementary effects.

Combined-arms training in the Army Reserve normally occurs once units have practiced their sub-units at Level 4 (Squadron / Battery / Company) during the Brigade field training exercise. Then, and only then, should the Army Reserve train Level 5 (Company Group) by attaching an engineer troop and artillery forward observation officer to an infantry company.

Army Reserve commanders must avoid the current trend to force combined-arms training before the unit is ready to progress to Level 5 (company group). It is more important that the constituent arms (the infantry company, combat engineer troop and artillery observers) have had the opportunity to master

their corps skills first. Rather we suggest it is more desirable that field training exercises with the Primary Training Audience of Level 4 (squadron, battery or company) or lower focus on leveraging all-arms or co-located training opportunities in order to achieve efficiencies of skill and scale.

Force enablers such as signals, logistics and medical support can be integrated into most levels of training. The level of engagement of these branches must be in line with the level of training being conducted by the combat arm. Units are encouraged to engage the support units very early in their planning process. These support units are often looking for these opportunities to provide context for their required individual, detachment or troop/platoon level training.



An Armour1ed Reconnaissance Troop during Exercise BISON WARRIOR at Canadian Forces Base Dundurn, 2007. Photo: Sgt Dennis Power

A final note on incorporating armoured reconnaissance into combined-arms training. Armoured reconnaissance in Army Reserve regiments are equipped to operate in the light reconnaissance (scout) role. Doctrinally, armoured reconnaissance should be considered a Brigade-level close support reconnaissance capability and not employed to replace the intimate support

that should be provided by the reconnaissance platoons of the infantry battalions.

Training Responsibility

Brigade Commander

“In peacetime, training for war is the primary responsibility, perhaps the only true responsibility of an officer. Everything else needs to be tied back to that basic principle. The peacetime officer who does not feel that way about training and fails to conduct his life accordingly is being negligent.”

Major-General (Retired) H.R. Wheatley, 1999

Brigade Commanders have the right to expect unit Commanding Officers to produce well-trained units, trained to meet the specific-to-brigade standards set by the Brigade Commander. Although much of the collective training in the Army Reserve has been and is focused at platoon and sub-unit level, it should be set within a broader doctrine of brigades, divisions and corps, and the goals, objectives, standards and very philosophy set at levels higher than the unit.

Where a unit cannot field enough soldiers to field an entire sub-unit (squadron / battery / company), the Brigade Commander should direct joint unit training to create the appropriate context for the Level 3 element.

Commanders at all levels have profound responsibilities for training, whether to meet the anticipated requirements of the immediate future or to ensure the continuation of the military’s viability and effectiveness in an unknown future. The steps in Army training appear simple, but in reality the thought that must go into training calls for extensive knowledge and wisdom, and a feel for soldiering. Brigade Commanders do not need to know all the right answers, but they do need to ask the right questions, and then seek out the right answers. They must set the tone for the proper training climate.

In short, the Brigade Commander must create an environment that encourages continuous learning – a learning environment that is robust and perpetual – which will influence not only immediate subordinates, but the whole command, and will continue on its own momentum. The training environment established must not only serve their tenure, but must continue on to that of successors. If there were to be only one responsibility for Brigade

Commanders, it would be to create a healthy and vibrant learning environment. From our observations, study and experience, we have concluded that the responsibilities of the Brigade Commander in collective training is to:

1. Create and promulgate the philosophical and doctrinal base for training, i.e., establish the strategic intent and the broad lines of operation to achieve that objective.
2. Orient the brigade headquarters and units by making the desired end-state, both immediate and long-term, absolutely clear.
3. Clearly identify, in discussion with subordinates, the center of gravity in training, i.e., that training which is essential to success.
4. Articulate the principles of training, i.e., the fundamental thoughts and beliefs. Set out the sequential steps through which the training should progress. Set guidelines concerning the pace and rhythm of the training.
5. Develop branch plans for parallel training and sequel plans for the subsequent training or re-training, just in case conditions change.
6. Provide the resources, facilities and technology essential to achieving the desired capability, for without the people, time, ammunition, fuel, etc., the training will be inadequate.
7. Monitor the vital training from the most effective vantage, looking particularly for the indicators of success or failure.
8. Stimulate initiative, leader development and teamwork – the three keys to continuous improvement.
9. Allow for responsible risk taking, but demand safe practices.
10. Have the training evaluated against clear, objective and meaningful standards.
11. Insist on accountability for producing results.
12. Ensure that there is feedback, at all levels, in the form of after-action reviews and collated lessons learned.

13. Acknowledge success and encourage continuous improvement.
14. Ensure that lessons learned are embraced and incorporated, especially with a view toward long-term improvement of all teams.

Commanding Officer

In our opinion, the Commanding Officer plays the principal role in the actual conduct of collective training. Matters may have become a bit fuzzy over the past few years, but in the Canadian Army tradition and practice, 'the authority of the Commanding Officer within his unit is paramount.'¹⁶ The Commanding Officer is responsible for and should be held accountable for the training of his unit and the soldiers within it. Training is the first and most important task on any given day and Commanding Officers need to be prepared to monitor training with great frequency. They cannot allow themselves to be penned up in the office or dealing with administration or other matters at the expense of supervising training.

Field Marshal Montgomery placed 'sub-unit efficiency' immediately after the stage management of battle in his order of 'lessons learned'. If squadrons, batteries, and companies lacked the requisite skills, initiative and leadership, the best laid higher plan was unlikely to succeed. It is the Commanding Officers who must train those sub-units.

When General George Kitching was selected to command the Edmonton Regiment in World War II, he wrote down a number of things that he must do. The salient points, in his words, were:

1. *I had the responsibility for training all officers just as they had the responsibility for training their men.*
2. *All officers should be trained to take on the responsibilities of two levels above them, i.e., a platoon commander should be able to be the second-in-command of a company and also command it. Company Commanders should be able to be second-in-command of a battalion and also command it.*
3. *We must expect heavy casualties among our commissioned and non-commissioned officers once we are in action, therefore we must train replacements now; and ensure a steady flow of young officers by encouraging the men to go to officer training units.*

4. *Once satisfied that an officer knows his job - decentralize and give him his head - it's the best way of learning.*
5. *Check all faults as they occur - don't let anyone think they can get away with anything.*

General Kitching emphasized training as his principal focus upon taking command and note also, and more importantly, that he clearly understood what he wanted to achieve through training.

Company Commander

Much has been said about the Commanding Officer and his role in training, i.e., his responsibilities, the accountability, how he develops a training plan and his relationship to the Brigade Commander. Company Commanders (and battery and squadron commanders) are much closer to the actual conduct of collective training and play a major role in its delivery. They have less control over the resources but are more closely in contact with the soldiers. They know the capabilities of their troops and must motivate them, push them and set the example for them. What they may lack in experience and wisdom they more than make up for in enthusiasm and energy. If there are deficiencies, they, the Company Commanders, are the ones to put things right through hands-on leadership - personal and up front. As the key leaders who get things done, as well as being the next generation of Commanding Officer, it is critical that they be guided, educated and inspired by their Commanding Officer.

Company Commanders must always be ready to brief their superiors and get confirmation of the following:

- The Brigade Commander's intent and the Commanding Officer's concept of operations (intent, scheme of manoeuvre, main effort and end-state).
- The Commanding Officer's priority of effort.
- The training that must be conducted for the company's platoons.
- The standards that must be achieved.
- The resources the company needs.
- The Company Commander's plan to conduct the training.
- The Company Commander's plan to evaluate the training.

Commanding Officers should not be planning unit training without full knowledge of the capabilities of their sub-units and without the total engagement of the sub-unit commanders. It will be through them, the Company Commanders, that they achieve the quality and intensity of the collective training they would like and the standards which are required.

Platoon Commander

The Platoon Commander is normally the least experienced leader within the unit. As such they must rely heavily on the occupational competence of their second-in-command and Section Commanders. In order to reinforce the right lessons during training, it is advisable to have hard (or soft) copies of all relevant publications available in a small battle box in the platoon command post. If there is a question regarding correct standard operating procedures or tactics, techniques and procedures, the Platoon and Section leadership can congregate at the command post and check the publications to clarify current doctrine. Platoon Commanders must always be ready to brief their superiors and get confirmation of the following:

- The Commanding Officer’s intent and the Company Commander’s concept of operations (intent, scheme of manoeuvre, main effort and end-state).
- The Company Commander’s priority of effort.
- The training that must be conducted for the platoon’s sections.
- The standards that must be achieved.
- The resources the platoon needs.
- The Platoon Commander’s plan to conduct the training.
- The Platoon Commander’s plan to evaluate the training.

Section Commander

The Section Commander is the only leadership position in the chain of command that is held by a Non-Commissioned Member, normally a Sergeant or Master Corporal. Officers rely on Section Commanders to be competent in their trades, competent at battle procedure, competent trainers of troops, to utilize initiative and to anticipate future tasks.

In return, Section Commanders should reasonably expect that they are led by qualified Platoon Commanders, allocated sufficient time for section battle procedure (just-in-time delivery of orders is the kiss of death); and tasked with achievable battle task standards.

Section Commanders must always be ready to brief their superiors and get confirmation of the following:

- The Company Commander’s intent and the Platoon Commander’s concept of operations (intent, scheme of manoeuvre, main effort and end-state).
- The Platoon Commander’s priority of effort.
- The training that must be conducted for the section’s soldiers.
- The standards that must be achieved.
- The resources the section needs.
- The Section Commander’s plan to conduct the training.
- The Section Commander’s plan to evaluate the training.

The Section Commanders’ greatest asset is the knowledge they bring to the battlefield. They must keep up with current doctrine by continually reviewing the applicable military publications. The reliance on past experience rather than the review of current doctrine as summarized in the military publications must be avoided so as not to pass on the wrong lessons.

Staff Officers

The unit’s Operations Officer, Training Officer and Regular Support Staff play a crucial role in Army Reserve training because sometimes the Commanding Officer has not had the time or experience to plan and coordinate unit training. This can be mitigated by ensuring that post-sub-unit command Majors or Captains complete an appointment as the Operations Officer. In this way, future Commanding Officers will have both executed and planned unit-run collective training, and developed strong relationships with their peers in the supporting or supported arms. These habitual relationships will be significant force multipliers when these officers command their respective units.

Command Teams

In the last decade the term “command team” has become common in the Canadian Army lexicon. Command must remain the commander’s responsibility. The Sergeants-Major and Troop Warrant Officers, although not directly in the chain of command play a critical role in planning, organizing, checking, motivating, enforcing battle procedure, checking standards, supply, maintenance, and inspections. As trusted advisors they can nevertheless exert profound influence and insight upon the Commanders they partner with. Good command teams exist as a marriage-like partnership of trust, mutual respect, and common good (where one partner obviously holds the clear and ultimate say). Poor Command Teams are like forced-cohabiting couples, whose marital frictions are on public display, to the detriment of unit morale and cohesion.

The Desired End-State

The premise is that we are training for war. Commanders will have to decide on the key indicators of a well-trained unit, i.e., what they should be looking for. What is the desired end-state after a defined period of training and preparation? Indicators of a well-trained Territorial Battalion Group Headquarters, sub-unit or platoon are listed below, and these are the objectives which commanders should look for:

- Sound leadership;
- Effective command and control;
- Cohesion; and
- Good battle procedure.

The use of good battle procedure is essential whether the task at hand is operational or administrative in nature. Battle procedure is perhaps the most important collective skill; however, it is not trained well enough in terms of maximizing concurrent activity, organizing tasks for maximum efficiency, delivering clear orders, and developing and maintaining clear standard operating procedures.

Although we have listed some indicators of the desired end-state, commanders have to decide what they believe is important, within the concept of their superior’s intent. They must identify the indicators of the key qualities, i.e.,

what are the key signs or ways of determining unit cohesion? Examples might include how orders are passed, how subordinate commanders respond, how the unit or sub-unit functions in the absence of a few key individuals, and how the unit or sub-unit reacts to changing circumstances.

Training Contract

After detailed discussions of the training and its underlying philosophy, commanders and their subordinates should arrive at a mutual understanding or agreement (a contractual arrangement if you wish) specifying objectives, milestones, resources and the way that training will be evaluated. They should agree on what the desired end-state would be given the time, resources and focus provided - and both parties should adhere to the undertaking.

Brigade Commanders and Commanding Officers should agree in advance on what is required, what is achievable, and what is to be expected in terms of meaningful training accomplishments. They then establish a ‘contractual’ agreement, stating clearly their respective responsibilities and obligations in order to achieve the ‘desired end-state’. This ‘agreement’ will then be encapsulated within the annual brigade operating plan and any subsequent fragmentary orders to the operating plan.

Due to personnel or resource limitations, the best that can routinely be accomplished may be to confirm to platoon level. If this is the case then that fact should be acknowledged up front, yet the limited training should still be of high quality. Restrictions on the scope of training should not adversely affect quality.

The Brigade Commander should take every opportunity to gather information about the unit’s progress towards its training objectives. As a key stakeholder in the training contract, the commander must take an active interest in the conduct and validity of the unit’s training. Visits, indirect observation and other forms of feedback are essential in order for the commander to develop an informed appreciation and remain abreast of developments.

As a basic principle of supervision, the commander should ensure that the active collection and interpretation of this information does not interfere with the Commanding Officer’s job, nor give him the impression that he does not have the commander’s confidence. If the commander feels a mid-course correction is necessary, he need only express his concerns in terms of the

training agreement/contract, and directs it via a fragmentary order to the brigade operating plan. Governance of unit training will be well served by this arrangement.

At the same time, the Commanding Officer should seek to engage the sense of purpose and commitment of all soldiers to the training concept and plan. The vision, ultimate intent, mission and campaign plan should be familiar to all members of the unit and every soldier should be able to understand his place in the larger picture. One might ask, which soldiers would give their all to a cause without knowing the cause is worthy and makes sense, that their own interests are being looked after, and that their team has a chance of success? Commanding Officers owe it to their soldiers to let them know what they are up to and why. All ranks must understand:

- the purpose and rationale for the training;
- the method of training;
- how they fit into the grand scheme of things; and
- how the training will impact on them, their life, their career and their family.

Reservists presented with this information in a timely manner are much more likely to adjust their other commitments to accommodate their participation in training.

Unquestionably, those who provide support within and to the unit must be engaged in the training plan discussions as early as possible to anticipate requirements, identify obstacles and suggest solutions and alternatives. They may often be left in the background, but their role in support of training is vital, as it is in operations. Being a critical part of the team, they need to be fully engaged.

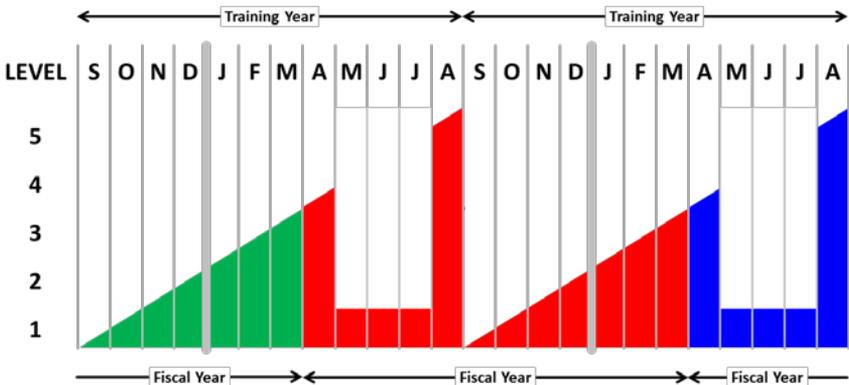
PART 3: TRAINING DESIGN

Army Reserve Unit Training Cycle

The training cycle of the Army Reserve unit does not synchronize well with the managed readiness cycle of the Regular Army as illustrated below in **Figure 1**. The Army Reserve training cycle is governed by the following non-military calendars:¹⁷

1. The Calendar Year. The distinct recruiting season, the summer training period, and the limited number of temperate weather collective training days available to Army Reserve units in large measure drive unit training calendars. Because weather conditions vary from region to region in Canada, there is not a standardized training calendar for all units.
2. The School Year. The preponderance of students in the Army Reserve imposes significant restrictions on training. Whatever the needs of the Regular Force might be, Army Reserve training must continue to cater to this reality.
3. Reserve Soldier’s Life Cycle. Short of a national emergency, most Army Reserve soldiers are available for intensive training and deployment only during certain life-cycle windows. A student who joins the Army Reserve at age 18 may be available following graduation from high school for the next four or five summers while undergoing post-secondary education.

Figure 2. Fiscal vs. Training Years



Other significant influencers in the development of the Army Reserve unit training cycle are as follows:¹⁸

- Army Reserve training must be flexible and challenging enough to accommodate the unique characteristics of the Army Reserve as stated above.
- Collective training in the Army Reserve needs to be cyclic in order to address skill fade.
- Army Reserve training must be repetitive in order to account for the fact that all soldiers may not have attended the same collective training event.
- Army Reserve units must plan for redundancy in order to accommodate the possible unavailability of particular leaders and soldiers.

Fundamentally, the unit training year begins in September with the arrival to the unit of new soldiers, who were usually recruited the previous spring and trained centrally during the summer. Since some of the soldiers will probably not possess all the skills mandated as part of the Individual Battle Task Standards (IBTS), from September to November training should focus on preparing these soldiers, with other unit personnel, for IBTS confirmation. While it is sometime possible to progress to collective training, typically, not much can be done before the onset of winter when winter indoctrination (or winter warfare) becomes the priority. Collective training takes place mainly in the spring or late summer. This training is directed towards preparing soldiers for participation in the Brigade field training exercise that will confirm their collective skills up to Level 3 (troop or platoon) for the Primary Training Audience and provide preliminary training at Level 4/5 (sub-unit or company group) for the Secondary Training Audience.¹⁹

The Primary Training Audience (PTA) is the element that is identified as the main focus of the training. The Secondary Training Audience (STA) is the element whose participation in the exercise is identified as necessary and/or suitable to assist in achieving the exercise aim and objectives. The STA may be able to exploit additional training opportunities within the scope of the exercise.

While summer training is useful for leader development, it is often a fallow period for effective collective training since it is the optimal period for

individual training. This is a constraint for which Army Reserve training must account but which it is unlikely to ever overcome. Army Reserve units are involved in individual training but, generally do not conduct it for themselves as it is provided at Division or Corps schools.²⁰

Planning Training

Brigade Commanders must issue clear, focused and comprehensive training guidance to Commanding Officers who then must produce sound training plans based on established priorities and expected standards (see **Brigade Training Direction** below).

Commanding Officers must take care to avoid trying to do a few exotic and energy-consuming activities when their units have not yet mastered basics skills or met the standards expected.



Gunners from 37 Canadian Brigade Group (37 CBG) fire during Exercise MARITIME RAIDER in Virginia, 2012. Photo: MCpl Gayle Wilson

In order to derive the greatest amount of learning and improvement from any training event, training must be designed and conducted in a manner that provides sufficient practice to acquire and retain the necessary skills and knowledge. Performing a task or a number of tasks once for the sake of having said they were conducted is not effective training. Learning theory indicates

that a task needs to be practiced a minimum of two to three times in order to be performed proficiently and for the skill or knowledge to be retained. Further iterations of tasks will be required to develop the ability to perform the tasks instinctively. Training in the Army must be designed and conducted in such a manner as to permit up to seven iterations of each battle task standard; one preliminary, two-to-four practices and one-or-two confirmations. If necessary, fewer tasks must be trained in order to achieve this degree of practice within the time and resources available.²¹

Training Battle Procedure

Doctrinally, battle procedure is: ‘the process by which a commander receives his orders, makes his reconnaissance and plan, issues his orders, prepares and deploys his troops and executes his mission’.

Figure 3. Training Battle Procedure



Battle procedure is something we practice in training but it also something we should regularly employ in designing training.

Commanders at all levels should ensure they do not anticipate to any great extent based on a ‘warning order’, since it is only upon receipt of the actual ‘order’ that significant staff effort or resources should be expended. Formal

leadership training for our company, platoon and section commanders emphasizes battle procedure and it is incumbent on our formation and unit commanders to take every opportunity to continually reinforce that training through effective battle procedure.

In the training process, the battle procedure steps might be further refined as follows:

Direction

Based on the approved Brigade or Unit OPLAN (i.e., Step 3 – “Receive Orders”) forming the ‘approval in principle’ of the upcoming training activity:

- Conduct mission analysis to confirm that the situation hasn’t changed.
- Determine the Decision Point(s). A Decision Point is the point in space and time where the commander anticipates making a decision concerning a specific course of action.
- Issue Commander’s Planning Guidance.

Consideration

- Analyze the long-term requirements and training direction (operational guidance).
- Evaluate the current status of training, lessons-learned and post-exercise reports from the previous year, and the needs of specific audiences.
- Determine preliminary (i.e., refresher) training on the minimum requirement.
- Gather preliminary information on resources available and conduct a time estimate.
- Prepare recce plan and conduct recce.
- Issue a Unit Warning Order and preliminary tasks.
- Conduct the training estimate (see **Training Estimate**).

Decision

- Conduct Decision Brief and decide on Course of Action.
- Back brief the Brigade Commander if desired Course of Action varies from approved Unit OPLAN.
- Eliminate optional training activities.
- Confirm the Transition of Command Authority, including time periods, for all external attachments and detachments.
- Establish the criteria to measure success.
- Develop a plan and issue exercise directives and orders.

Execution

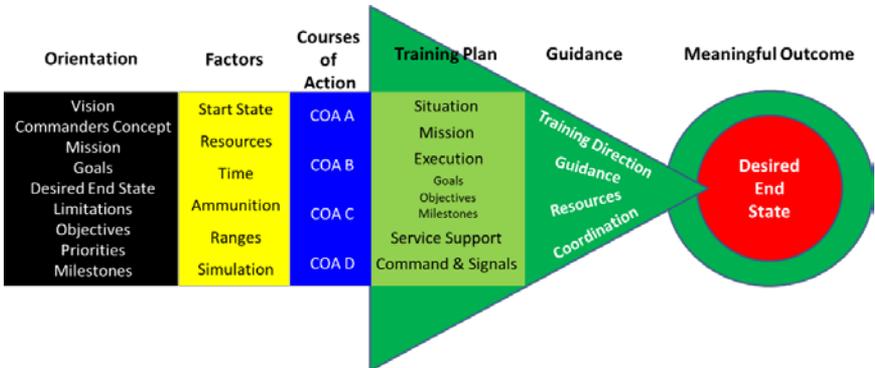
- Commence preparations and concurrent preliminary training.
- Initiate concurrent reconnaissance, planning and orders at subordinate levels.
- Conduct training co-ordination conferences and administrative co-ordination conferences.
- Carry out inspections, rehearsals, evaluations and feedback.
- Visit subordinate levels to confirm preparations.
- Make adjustments as required.
- Issue confirmatory orders.
- Deploy and conduct the training.
- Act upon continuous feedback.
- Initiate After Action Reviews from the bottom up and take corrective action.

Such training battle procedure is a vital part of training design, in that it ensures efficiency, economy of effort and thorough co-ordination, plus it exercises one of the most important qualities of operationally effective units - good battle procedure, no matter the task at hand. Sound training in battle procedure also ensures that those who need the time the most, the individual soldiers, and section and platoon commanders, are not robbed of the time they need for preparation.

The Training Estimate

An estimate provides the orderly analysis of a problem leading to a reasoned solution. Figure 4 visually depicts a training estimate.

Figure 4. The Training Estimate



The key components of the estimate are:

- The initiation step, in which a Mission Analysis is completed, based on guidance, information made available and limiting factors;
- The determination of the desired end-state, the Centre of Gravity to achieve it, and the Training Mission;
- The analysis of the training needs;
- The evaluation of Factors;
- The examination of Courses of Action;

- The commander’s decision; and
- The development of the Training Plan.

The plan is communicated through commander’s guidance, orders, instructions and directives, all focused on achieving the desired end-state. As with all planning, the estimate is cyclical in that as circumstances change the process must be repeated and the plan modified accordingly. To ensure a high degree of flexibility should circumstances (i.e., mission, resources, time, etc.) change “Branch Plans” should also be thought through, and “Sequel Plans” should be considered to ensure a seamless follow-on from the plan adopted.

Commanding Officer must go through this thought process in developing a unit training plan and must discuss this plan with the Brigade Commander. Perhaps the hardest elements to determine will be the desired end-state (what is required with the time and resources available and other commitments), the centre of gravity (i.e., the key element of the training which will ensure successful achievement of the end-state), and the mission. The Brigade Commander must ensure that the Commanding Officer’s design for training meets his specified objectives. A discussion between commanders and subordinates will help clarify the intent and guidance, ensuring they have been correctly interpreted and applied.

At least annually Army Reserve Brigade Commanders should call for a briefing from their Commanding Officers, who would review the points noted below:

- the Brigade Commander’s Concept of Operations;
- the object of the Unit's training;
- the principles and assumptions upon which the training is based;
- the types of operations or phases of war for which the Commanding Officer is preparing;
- the standards which the Commanding Officer expects to achieve and how they will be measured;
- how the Commanding Officer has or will develop Standard Operating Procedures and drills (i.e., brainstorming, war gaming, bull-pen discussions, etc.);

- how officers and NCOs will be developed and trained (i.e., simulation, war gaming, TEWTs etc.);
- the training calendar milestones; and
- the manner of feedback and ideas on mid-course corrections.

This list above is essentially borrowed from Field Marshal Montgomery's *“General Notes on What to Look For When Visiting A Unit”* (reprinted in full at Appendix 13). It forces a Commanding Officer to think through and explain the proposed training in a structured and disciplined manner. It also permits the Brigade Commander to advise and provide additional guidance to the Commanding Officer prior to the commencement of training. Montgomery wanted to know “what the unit is worth, and if the Commanding Officer knows his job.” We believe that when the above elements are discussed with Commanding Officers, Brigade Commanders can soon determine if they know their jobs.

Types of Training Exercises and Events

Figure 5. Types of Training Exercises and Events



Division or Brigade Training Events

Typically, there are three key training events conducted at the formation level; command post exercises, corps-specific and all-arms field training exercises.

Command Post Exercises

Command Post Exercises (CPXs) are scenario-driven exercises in which the forces are simulated. They may be conducted from garrison locations or between participating headquarters in the unit.

A brigade CPX should be focused on training the Level 4 (Squadron/Battery/Company) leadership on key activities or decision points related to the follow-on brigade field training exercises.

These CPXs may involve computers to simulate scenarios, processes and procedures in an operational environment. The computers may provide playback of the simulation from any perspective and allows the creation of short video clips of significant events.

Corps-specific Field Training Exercises

Corps- or Branch-specific field training exercises help either to maintain core competencies in trade-specific skills or to generate a sufficient quantity of personnel and equipment to exercise appropriately at Level 4 (Squadron/Battery/Company).



Artillery crews stand by their guns on a regimental fire mission during Exercise WESTERN GUNNER 15 at CFB Shilo, Manitoba, 2015. Photo: MCpl Louis Brunet.

For example, the Army Reserve combat engineers in western Canada have been holding an annual six-day bridge camp, focused on Level 3 (troop) in a Level 4 (squadron) context, for the past forty plus years from 26-31 December. Up to 200 sappers gather in Chilliwack, British Columbia to take advantage of the wet gaps resulting from the warm coastal temperatures. Individual augmentees from the three western Combat Engineer Regiments, with augmentation from the Divisional Engineer Equipment Troop, form a single full-strength engineer squadron with three field troops. The field troops conduct round robin administrative builds of the medium girder bridge, the medium raft and the ACROW bridge. Changes in the individual training given to Army Reserve soldiers at the Canadian Forces School of Military Engineering has

reduced the focus on bridging, so the western engineers leverage this exercise heavily to mitigate skill fade on an essential engineer capability.

Similarly, the Army Reserve gunners across Canada regularly train together at Canadian Forces Bases in order to generate a train a field battery (Level 4) in a regimental (Level 6) context including the three essential capabilities for indirect fire training (observers, technicians and command posts) – augmented and supported by Regular Force individuals or teams (example: key individuals, maintenance teams, cooks, etc).

All-Arms Field Training Exercises

Division- or brigade-controlled Army Reserve field training exercises (or Militia Concentrations – ‘MILCONS’) are held annually in the summer months as a culminating training event for the previous year’s unit-level training. Division-level concentrations are normally multi-brigade with one brigade assuming the lead for planning and execution and the others in support.



Soldiers from The Lake Superior Scottish Regiment during Exercise CHARGING BISON in Winnipeg, 2006. Photo: Cpl Bill Gomm

These extended field training exercises provide the environment to concurrently train two audiences:

- **Primary Training Audience – Level 3 (troop or platoon).** As many of the participants are simply not able to attend all of the preceding unit run exercises, sufficient time must be provided to practice and re-confirm Level 2 (section) before practicing and confirming Level 3 (platoon) battle

task standards. Training would be conducted by corps with the units from each corps generating a composite sub-unit(s). The confirming commander for Level 2 would be a sub-unit commander (someone other than the training commander in charge of the sub-unit) and for Level 3 would be the Commanding Officer.

- **Secondary Training Audience –Level 4 (squadron / battery / company) and Level 5 (company group).** As there is no requirement to confirm Level 4 or 5 in the Army Reserve (i.e., only the preliminary or practice stages), the Commanding Officers should be prepared to conduct preliminary training at these higher levels using a series of Command Post Exercises (CPXs) and/or Tactical Exercises Without Troops (TEWTs). Training would be conducted by corps by the respective Commanding Officers (training commanders), with those Commanding Officers only breaking away to confirm the Primary Training Audience at Level 3.

Of special note is that as these concentrations are the culminating event of the previous year’s unit-level training they normally occur in successive fiscal years (see **Figure 1**). This results in the reserve collective training year (September to August) not matching up with the fiscal year (April to March).

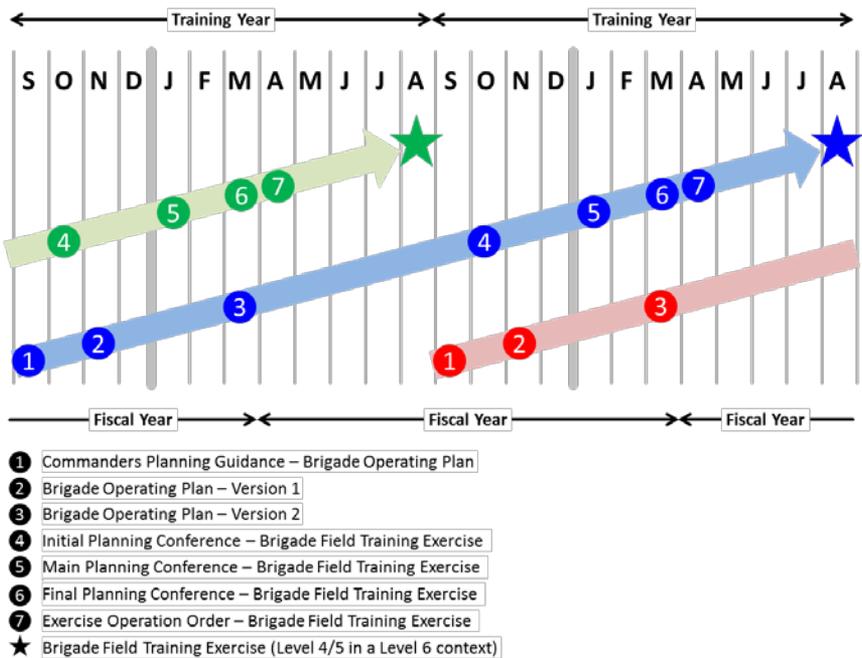


The Fusiliers du St-Laurent, the Régiment de la Chaudière and 12e Régiment blindé du Canada effecting a water crossing during Exercise NOBLE GUERRIER in North Carolina, 2012. Photo: Cpl Isabelle Provost

In order for the brigade’s units to identify the key battle task standards to train from September to April, the general brigade plan for the exercise (including key battle task standards) must be communicated to the units as part of the brigade operating plan for the preceding fiscal year. As illustrated below this will require formation commanders to generate the commander’s planning guidance for the brigade concentration plan two years out.

Models of the training progression for a one-week (nine-day) and a two-week (16-day) brigade training events can be found at **Appendixes 2 and 3** respectively.

Figure 6. Road to Brigade Field Training Exercise



Any commander trying to break this cycle by, for example, holding a Division or Brigade concentration in March-April, will likely be sadly disappointed by the poor Army Reserve participation for the reasons explained above in with respect to the demographics of the citizen-soldier and that March-April are key periods within the school / post-secondary year (see Figure 2).

Brigade Training Direction

In the annual Brigade Operating Plan, the Brigade Commander states his intent and his concept for training, gives specific direction for individual and collective training, and assigns resources to tasks. The plan also notes the restraints and constraints, and gives specific direction to Commanding Officers on unit objectives and responsibilities.

At the minimum, the brigade’s training guidance should:

1. Clearly establish the relative priorities of augmentation on operations, recruiting, individual training, collective training and professional military education.
2. Direct that all individual soldiers are:
 - a. disciplined – a steady, competent, confident discipline, and based on self-discipline,
 - b. physically fit,
 - c. proficient in basic weapons skills, tactics and field craft (Level 1),
 - d. capable of performing their primary occupational skill and function (Level 1) plus that of their immediate superior,
3. Emphasize combined arms operations at the company group (Level 5) – but master the platoon (Level 3) and company (Level 4) first;
4. Preserve the capability of the Brigade to respond to short-notice domestic operations (i.e., maintain flexibility);
5. Give Commanding Officers enough guidance to achieve the broad objectives of the Brigade Commander and specific guidance to train to mission; and
6. Emphasize leadership development and the training of individuals for higher positions.

Assuming that limitations in time, resources and training facilities will continue to exist, Brigade Commanders will be forced to set priorities. We believe that

the highest priority training task in the Army Reserve, with the greatest potential return in operational capability and flexibility, is the training of effective platoons and troops.

Commanders must avoid the long ‘shopping list’ approach in giving direction on training. The other way of training for offensive operations one year and defensive, or transitional, the next was often equally confusing because Army Reserve training years and fiscal years were out of synchronization with each other as shown in Figure 2. Commanders must reflect, focus and give rational guidance, and the staff should coordinate and synchronize. Commanders must make choices in terms of how to align what they would like to achieve with what can be achieved.

It is essential that commanders personally involve themselves in this most important of activities. It cannot be left to the training staffs. Hard decisions must be made and clear and logical direction must be given, and only those in command can do this. This may mean that the minutiae that consume commanders may have to be delegated to deputies, subordinate commanders and staff.

Training Planning Cycle

The unit’s annual operating plan should articulate general guidance on collective training to include the Commanding Officer’s desired end-state and available resourcing. It is important to allow for flexibility in executing the annual operating plan as allocated resources (budget, ammunition, weapons) can change throughout the year as can the tasking of competing higher priority activities to the units.

Ideally, units should commit to their collective training dates at the start of the fiscal year and then fix the actual activities approximately three months before the event when the Commanding Officer issues the confirmatory planning guidance for the exercise. Fixing the annual calendar provides certainty to the soldiers, which is essential for them to create and maintain family and employer support.

Starting the detailed planning for each unit field training exercise three months out provides the Commanding Officers the flexibility to adjust to changing realities, including hard assessments on the start state of the primary training audience. After all, the garrison-based refresher training for each field training

exercise normally occurs between field training exercises. In order to allow subordinate leaders sufficient time for their own battle procedure, and to observe the one-third / two-thirds battle procedure rule, battle rhythm for a unit field training exercise should respect the following, as an example:

1. > **D-120** – Division- and Brigade-level planning (operational planning process) culminating in the issuance of a Fragmentary Order to the Brigade Operating Plan at D-120.
2. **D-120 to D-90** – Commanding Officers to issue CO’s Planning Guidance to the staff and company-level command teams.
3. **D-90 to D-60** – Battalion-level planning (battle procedure) culminating in the issuance of the Battalion Operations Order at D-60.
4. **D-60 to D-45** – Company-level planning (battle procedure) culminating in the issuance of the Company Refresher Training Instruction at D-45.
5. **D-45 to D-30** – Platoon-level planning (battle procedure) culminating in the issuance of the Platoon Refresher Training Instruction at D-30.
6. **D-25 to D-9** – Platoon preliminary training in garrison on training evenings or Saturdays.
7. **D-9** – Company Operations Order issued for the field training exercise. Platoon Warning Order issued.
8. **D-2** – Platoon Operations Order issued for the field training exercise and exercise preparation (vehicle loading).
9. **D-Day (Friday)** – Deployment to the field training exercise.
10. **D+2 (Sunday)** – Redeployment to home station(s).

As shown on the sample **Unit Collective Training Plan Cycle** at **Appendix 7**, a three-month detailed planning cycle results in platoons conducting refresher training for the upcoming field training exercise and planning for next one, companies are focused on monitoring the current training and planning two exercises out, and battalion staff are planning three exercises out.

Brigade and Unit Operating Plans

Brigade and unit operating plans are keystone documents that authorize the expenditure of resources in support of training, administrative, ceremonial and

social activities. Maximum use should be made of simplicity, brevity and clarity in writing these plans as opportunity cost of the Army Reserve leadership to digest reams of paper can significantly impact time spent on the armoury floor.

Commanding Officer’s Confirmatory Planning Guidance

The annual unit operating plan provides broad direction for the unit’s progressive field training exercises that will allow the Commanding Officer to confirm their platoons at Level 3 (troop, platoon) in order to set the conditions for higher level training during the brigade field training exercise that is intended to focus on Level 4 (squadron, battery, company) and Level 5 (company group) battle task standards.

Approximately three months (D-90) before each unit field training exercise (deployment being considered D-Day), the Commanding Officer initiates the detailed estimate process with the issuance of confirmatory planning guidance. This key step allows the Commanding Officer to ‘tweak’ the execution for the field training exercise that has already been approved in principle by the Brigade Commander during the Unit Annual Operating Plan review. Therefore, the information provided in the confirmatory planning guidance builds on that already issued in the unit operating plan and serves as a unifying theme for the unit’s operations staff, providing a common start point for development of the detailed unit plans.

A sample Commanding Officer’s confirmatory planning guidance is shown at **Appendix 6**. We recommend that Commanding Officers copy the Brigade Commander and G3 on their confirmatory planning guidance to signal brigade staff in advance of any potential impact by subsequent higher-level confirmatory direction. Brigade Commanders and staff should therefore provide any confirmatory guidance to the units no later than four months (D-120) before the affected unit field training exercise.

Backbriefs

The purpose of backbriefs by the unit Operations Officer (at D-75) and sub-unit commanders (at D-50) are to allow the Commanding Officer the opportunity to provide minor course corrections on units and sub-unit plans before warning orders or operations orders are issued. In order to reinforce current training, backbriefs should utilize the following format (a sample is shown at **Appendix 7**):

1. Christen the ground;

2. Sir, I understand your intent to be ...;
3. Assigned tasks;
4. Implied tasks;
5. Limitations and constraints;
6. My mission;
7. Potential courses of action presented as concepts of operations (intent, scheme of manoeuvre, main effort, end-state) if applicable;
8. Recommended course of action – if applicable; and
9. Questions and direction.

Operation Orders

The Operation Order, as the executable addendum to the unit annual operating plan, is the formal vehicle by which the Commanding Officer assigns the sub-units additional detailed tasks. Warning Orders aside, the Operation Order should be considered the only formal authority for subordinate commanders to expend resources in support of their activities (a sample is shown at **Appendix 8**).

Much has been made recently of one-page Operation Orders. Although these orders may have their place at the sub-unit (squadron, battery or company) level or below, they are simply not appropriate at the division, brigade or unit. In the attempt to cram an entire operation order onto one page, critical coordinating instructions may be missed due to something as simple as font size.

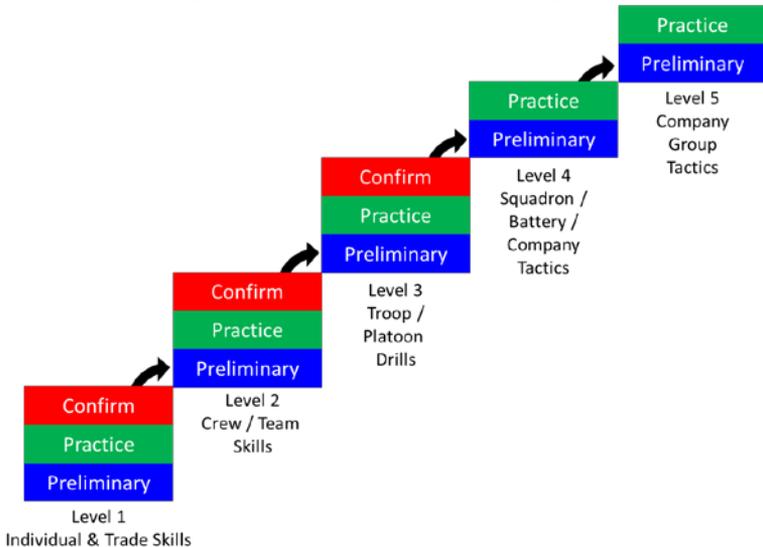
Staff should always take note that there are only two key methods of communication; oral and written. Oral communication tends to be the purview of the commanders, with staff generally limited to written communication on behalf of their commander. With the exception of issuing supplementary Fragmentary Orders, there is no easy way for staff to clarify a poorly written communication after having hit the ‘send key’.

PART 4: BOTTOM TO TOP – CREATING A LEARNING ORGANIZATION

One of the institutional characteristics of the Canadian Armed Forces is that it is a learning organization. Regardless of a member’s age, rank or experience, the CAF engages in continuous learning. All members are expected to be learning or passing on their skills and knowledge. The learning and teaching functions are seen in the schools, and in collective and individual training. Leaders at all levels should emphasize the importance of these functions constantly.

All learning requires some process by which the trainee is evaluated, coached on performance improvements, re-evaluated and confirmed.

Figure 7. Train and Confirm by Stages



Observer/Controller Team

Evaluation and feedback, from the trench to the Commanding Officer, is extremely important. In service and professional industries, ISO Quality Management Processes provide quality management. In the Army, the Observer/Controller Teams (O/CTs) provide an analogous function. The composition of O/CTs will vary according to the level of training being

conducted (e.g., company group, platoon or section), the method of training being conducted (e.g., CPX, CAX, FTX), the number of battle task standards being practiced or confirmed, the resources available, etc. Normally, support to the O/CTs should come from outside the resources of the training commander. Shortfalls in support must be identified early in the planning process and reported to the exercise director. The shortfall will normally be met from the Exercise Director’s resources or, if necessary, staffed higher through the chain of command for additional tasking.

After-Action Review

Soldiers are trained by their section commanders, who are in turn trained by their platoon commanders, who are trained by their Company Commanders and so forth. Therefore, at the section level, After Action Reviews (AARs) should be facilitated by the section commander or a designated observer/controller, at the platoon level by the platoon commander, or a designated observer/controller, and so forth.²²

Evaluation of training is productive only if the AAR is conducted in a deliberate, professional, frank and open manner. The aim of the AAR is to review the training with the Primary Training Audience (PTA) to identify key events, critical moments, weaknesses in training, and corrective actions required. The Post Exercise Reports we have all seen in the past typically entailed great reams of paper but were relatively ineffective. The AAR to which we are referring is something quite different. Brigade Commanders and Commanding Officers should ensure that appropriate AARs are conducted and that they are followed through to improve both near-term and long-term operational capability.

The AAR is an essential and integral part of all training. It will be of value only if orchestrated with great care, if it is properly focused and if it is conducted in a timely manner. The purpose is to gain objective insights into how teams performed against clearly articulated standards, not to embarrass. Ideally, because of the transparency and the way the AAR is conducted, the lessons will come from the PTA, and not necessarily from the Exercise Director or control staff – although the latter will have noted the lessons so that they can ask the right questions of the players.

All commanders should be aware of the importance of conducting the AAR professionally and an aide memoire is provided at **Appendix 13**. The outcome of an effective AAR is a PTA motivated to improve their performance, and a

training system motivated to improve processes, doctrine, equipment, drills and procedures that will improve the operational effectiveness of the Canadian Army.

Confirmation

Confirmation is a formal check whereby a group passes through a “gateway” to the next higher training level. Confirmation follows progressive preliminary training and practice periods involving iterations of a particular battle task standard. Proper confirmation requires a valid set of standards, a methodology, the appropriate personnel and tools, and analysis by the confirming commander. The purpose of confirming collective training is to compare the intended performance objectives, i.e., the battle task standards, against the results achieved.²³

When designing training for confirmation, the following must occur:²⁴

1. Identification of the exercise director and other principal control appointments.
2. Definition of the exercise aim and training objectives. Training objectives are comprised of the following three clearly defined facets:
 - a. Tasks – clearly defined and measurable battle task standards to be accomplished by the soldiers and units;
 - b. Conditions – the circumstances and environment in which a battle task standard is to be performed; and
 - c. Standard – the minimum acceptable proficiency required.
3. Identification of the exercise participants:
 - a. Primary Training Audience;
 - b. Secondary Training Audience; and
 - c. Control / Confirmation Staff.
4. Definition of the duration of the exercise.

5. Identification of the exercise venue.
6. Selection of the type of exercise, i.e., CPX, CAX, FTX, etc.
7. Decision as to what battle task standard training activities, or portion thereof, will be confirmed.

Commander's Visit

A Brigade Commander or Commanding Officer must be able to assess a unit's or sub-unit's capability. Readiness is determined by comparing the unit's or sub-unit's place in its training cycle with its achievement of the associated individual or collective battle task standards for that stage of the training cycle. If the standard has not been met, the unit is not ready for the next stage in training.

Commanders should visit their subordinate elements (both one- and two-down) in training whenever the opportunities arise - which should be often. This is part of every commander's job and responsibility and should be considered a normal component of the training evaluation process. In addition to the planned visits, casual visits should occur frequently. Visits should never be without purpose, even the most casual of visit, and there may well be times when a commander is looking for something very specific - such as the standard achieved at a particular point in time, especially when units are training for a particular mission.

Whenever possible, commanders should be included in the training, but not as a VIP. Brigade Commanders and Commanding Officers should enjoy soldiering and should not mind getting cold, wet and tired. Spending a day with a rifle section, in a reconnaissance vehicle, in a gun detachment or on a Delivery Point can reveal a lot about a unit. Spending a night with a section in an Arctic tent, or on patrol through a swamp, can be most revealing. During their visits commanders should insist on high quality briefings from junior leaders, to include:

- Where they are in the training cycle and the rationale behind the training;
- Christening of the ground and outline of the specific activity;
- The aim and scope of the training;

- The conduct of the training;
- Safety measures;
- Lessons learned to that point in the training; and
- Remedial or additional training planned or required.



BGen Rob Roy MacKenzie (Chief of Staff Reserve), BGen David Patterson and BGen Tony Stack (Reserve Advisor, Canadian Army Doctrine and Training Centre) visit members of 41 Canadian Brigade Group during Exercise GOLDEN COYOTE 16 in South Dakota, 2016. Photo: MCpl Brandon O’Connell

Commanders at all levels have the right, necessity and obligation to know what is going on throughout their organization. Field Marshal Montgomery was noted for his ‘phantom system’ of staff officers strategically placed at subordinate levels, reporting directly back to him – in his words, *“You will not have time to visit sub-units in the front line; if you want a line on how they are working, send some other officer to get that information for you.”* See his complete notes on what to look for when visiting a unit at **Appendix 9**. Wellington, Napoleon and Patton were all noted for similar ways of learning what was really going on. At the extremes, however, were, the ‘chateau

generals' of the First War, who were completely out of touch with the front, or those commanders under Westmoreland, in Viet Nam, who went overboard, constantly looking over the shoulders of, and interfering with the authority of subordinate commanders.

Each commander must find the best way to become and remain informed, in a way that fits his personality and the climate of his organization. Informal channels, like 'gathering information by walking about,' keeping attuned to the Regimental Sergeants-Major or Deputy Commanding Officer's networks, asking the right questions of Medical Officers and Padres are some of the ways of assuring oneself that the formal feedback one is receiving really does coincide with reality.

Commanders must learn about the effectiveness of the training of their subordinate organizations to determine their effectiveness as a whole, and they need to direct their telescope to assure themselves of the reality.

PART 5: TRAINING CONSIDERATIONS

Focus

There are normally competing priorities for allocated funds, which puts pressure on the Army Reserve to train effectively with fewer resources. Inattention to collective training raises the possibility that readiness standards might erode to a level where unit standards would be lower than is professionally acceptable. In practical terms, this climate obliges us to more clearly define the desired levels of collective training and then balance the resources such that the optimum training needs are being met. Commanders at all levels must identify and make clear distinctions between the desirable, the achievable, and the affordable.

We cannot emphasize enough the need for a focus. Without such, the training will most certainly stray from what the Canadian Armed Forces wants and needs. A known desired end-state sets the parameters for the required capability, and this drives the training concepts, plans and processes. Commanders must analyze the requirements and prioritize their training much more clearly than in the past, and then focus on the best way to achieve the desired condition in the most important functions, with the minimum expenditure of resources. In other words, commanders at all levels must ensure that they train smarter. This does not mean that they have to train longer, harder, or expend more ammunition or fuel, for these are not good options. What it means is that they should create the training which produces the maximum desired effect with the minimum expenditure of resources, and at the same time aggressively seek out and eliminate the least effective training activities.

The concept of “train to need” is applied differently in the Army Reserve than in the Regular Army. Need is only partly driven by the current operational tempo of the Army or the Division. Army Reserve training relates more particularly to the requirements of recruitment and retention in order to enable the Army Reserve to meet its operational tasks. “Need” is primarily the provision of basic training for recruits and essential battle-focused training necessary to provide challenge to older soldiers and leaders. While Army Reserve training supports the Regular Army’s augmentation requirements, this is **not** its primary purpose. Rather the health of the Army Reserve unit must remain the main purpose, and effective training that supports retention is the way to ensure that health.²⁵

Where possible, Army Reserve soldiers should be given access to any and every unique training opportunity possible, even if the “train-to-need” aspects are not immediately or apparently relevant (i.e., Mountain Operations, Basic Parachuting, Combat Team Commander’s Course, Psychological Operations, etc.) Doing so retains good soldiers, and brings back knowledge and insight that enhance the overall strength and capability of the Army Reserve unit. These extra capabilities can come into play in any number of unforeseen circumstance such as Domestic or Expeditionary fastballs. It also enhances a positive spirit of competitive desire to excel, as those soldiers with unique skill sets are looked upon favourably as being those who’ve gone over and above the training standard.

Only an Army that is properly trained and led can effectively respond to situations requiring the employment of armed force. Such situations will arise and the Canadian Army in general, and the Army Reserve in particular, must and should respond effectively. It can only do so through sound leadership and quality collective training.

Command Relationships

All participants in a collective training event may not come from the same unit or sub-unit and a clear Transition of Command Authority (TOCA) is essential to ensure our soldiers are operating or training under clear administrative and disciplinary control. All TOCAs should be articulated formally in the brigade or unit operating plan or fragmentary orders to those plans. See the **Sample Unit Operation Order** at **Appendix 9**.

The Tactical Reserve

Napoleon said *“The moment of greatest vulnerability is the instant immediately after victory.”* As soon as the troops relaxed, there was a powerful physiological collapse. When the troops are suffering from the burden of exhaustion, and a fresh enemy unit attacks, the exhausted troops collapse like a house of cards. That is why the military always holds back a reserve and this critical tactical imperative should be continually reinforced in collective training.²⁶

Tactical and operational reserves have proven their great value for commanders in exploiting unforeseen opportunities and thereby winning victories. The existence of a tactical reserve enlarges the unit, sub-unit or sub-

sub-unit commander’s freedom of action while concurrently reducing that of his opponents. The tactical reserve provides one with increased courses of action and creates for the enemy commander a dilemma on how and when the reserve will be employed. Moreover, it ensures that the commander can master the situation in case events do not transpire as planned, as they normally do not.

In the effort to maximize the number of soldiers within the Primary Training Audience, the use of tactical reserves (even notional in Army Reserve training) has been all but forgotten. We recommend that Exercise Planners ensure notional forces, appropriately sized to act as a tactical reserve for the Primary Training Audience, be added onto the exercise order of battle for the sole purpose of reinforcing doctrine for our Army Reserve leaders.

Training the Echelons

The echelon system describes the employment and deployment of first line administrative elements integral to the unit. The unit echelon system is comprised of the:²⁷

1. F Echelon. This includes the men, weapons, and vehicles required for fighting the immediate battle.
2. A Echelon. This echelon may be further subdivided into the:
 - a. A1 Echelon. This includes the men, vehicles, equipment, and medical resources required for the moment-to-moment resupply, repair and maintenance of the F Echelon. It normally operates under the command of a Company or Squadron Sergeant-Major and is normally located one or two tactical bounds behind the F Echelon; and
 - b. A2 Echelon. This includes the balance of men, vehicles, equipment, and medical resources required forward for the day-to-day resupply, repair and maintenance of the A1 Echelon which in turn resupplies the F Echelon. This echelon is formed if the tactical situation permits or the unit requirement exists.
3. B Echelon. This includes the men, vehicles and equipment not included in the F or A Echelons but required for the routine administration of the unit.

Collective training for the Army Reserve is primarily focused on the F Echelon and secondarily, if there are sufficient personnel or equipment, on the A Echelons. The A Echelon is either notional or incorrectly composed of elements from the Service Battalion in the form of a Forward Support Group. Because Army Reserve units are typically “bare bones” regarding the support elements, it will be necessary, and advantageous, to engage their Regular Force affiliated units. Engaging Service Battalions to project forward components of an A Echelon (intimate support) will not result in reinforcing the combat service support (close support) doctrine.

We believe it is desirable that Army Reserve unit training at Level 4 (company) or Level 5 (company group) include an A1 Echelon, with either a real or notional A2 Echelon. This reinforces valid combat support doctrine and lessons by having the F Echelon deploy on a weekend or brigade field training exercise with one day of supplies, i.e., the basic load, with the A1 Echelon carrying a second day of supplies and the A2 Echelon carrying a third day of supplies. Any further resupply of the A2 Echelon would occur from either the deployed Service Battalion or at least the Service Battalion’s Forward Support Group. We fully recognize the inherent realities of the Army Reserve units in generating a sufficient mass of soldiers and leaders at these training events so as to meaningfully generate challenging training and service support.

The essential commodity types and services for the F Echelon are Class I (Water), Class I (Rations), Class III (POL), Class V (Ammo), Repair & Recovery, and Health Support Services (HSS). A sample one-page **Combat Service Support Matrix**, as shown in **Appendix 10**, is a simple means of synchronizing and communicating the details of resupply.

Use of Advance and Rear Parties

As with any deployment, it is normal battle procedure to deploy an Advance Party, the aim being that the Main Body can commence its primary activity in as brief and organized a manner as possible. The Main Body’s primary function is to train, and the Advance Party establishes the right conditions so that training may commence immediately. The reverse is also true with a Rear Party allowing the Main Body to train for as long as possible before redeployment. As shown in **Table 2**, by deploying a small Advance Party a day before a unit main body deploys on an exercise and redeploying a day after, the unit can almost double the actual exercise play for the Primary Training Audience (from 20 hours to 36 hours).

Table 2. Sample Field Training Exercise with and without an Advance or Rear Party

With Advance/Rear Party	Without Advance/Rear Party
<p>Wednesday Evening (Parade Night)</p> <ul style="list-style-type: none"> - Platoon OPORD - Sect Wng Os - F Ech and A Ech vehicle loading. 	<p>Wednesday PM</p> <ul style="list-style-type: none"> - Platoon OPORD - Sect Wng Os - F Ech and A Ech vehicle loading.
<p>Thursday Afternoon</p> <ul style="list-style-type: none"> - Adv Pty (incl F Ech & A Ech vehs) deploy from home station to training area. 	
<p>Friday Day</p> <ul style="list-style-type: none"> - Adv Pty clears into training area, prepares training venue and fuels up vehs 	
<p>Friday Evening</p> <ul style="list-style-type: none"> - Adv Pty marshals F Ech and A Ech for arrival of Main Body - Main Body draws weapons, deploys from home station to training area via highway coach when possible or 9 pax vans and falls in on F Ech and A Ech vehs STARTEX – 2200HRS - PTA deploys to hide/harbour and conducts section battle procedure for first assigned task (including forced rest) 	<p>Friday Evening</p> <ul style="list-style-type: none"> - Unit draws weapons, marshals vehicles - Unit deploys to training area via F Ech and A Ech vehs with remainder in highway coach - Refuel and marshal F Ech and A Ech vehs upon arrival at training area - Clear into training area STARTEX – 2400HRS
<p>Saturday Morning</p> <ul style="list-style-type: none"> - PTA completes first task - AAR of first task 	<p>Saturday Morning</p> <ul style="list-style-type: none"> - PTA deploys to hide/harbor and conducts Sect battle procedure for first assigned task (including forced rest) - PTA completes first task - AAR of first task
<p>Saturday Afternoon</p> <ul style="list-style-type: none"> - PTA completes second task - AAR of second task 	<p>Saturday Afternoon</p> <ul style="list-style-type: none"> - PTA completes second task - AAR of second task
<p>Saturday Evening</p> <ul style="list-style-type: none"> - F Ech replenishment from A1 Ech - PTA completes third task - AAR of third task - Redeployment Coord Conf - A1 Ech replenishment from A2 Ech 	<p>Saturday Evening</p> <ul style="list-style-type: none"> - F Ech replenishment from A1 Ech - PTA completes third task - AAR of third task ENDEX – 2000HRS - Redeployment Coord Conf - A1 Ech replenishment from A2 Ech - Forced rest (8 hrs min) for all drivers and co-drivers in advance of Sunday

With Advance/Rear Party	Without Advance/Rear Party
	redeployment
Sunday Morning - PTA completes fourth task - AAR of fourth task ENDEX – 1000HRS - PTA marshals vehicles for Rear Party and completes serialized equipment verification	Sunday Morning - Unit dismantles training venue, completes serialized equipment verification, washes vehs, clears out of training area, and marshals vehicles for redeployment
Sunday Afternoon - Main Body redeployment to home station via highway coach, clean & return weapons, dismissal before 1700hrs. - Rear Pty dismantles training venue, washes vehs, clears out of training area	Sunday Afternoon - Unit redeploys to home station via F Ech and A Ech vehs with remainder in highway coach - Unit cleans & returns weapons, with dismissal before 1700hrs
Monday Morning - Rear Pty (F Ech and A Ech vehs) redeploys to home station	

Furthermore, Advance and Rear Parties simplify the activities of the Main Body (the Primary Training Audience) on deployment and redeployment allowing them to focus on the battle task standards without the added complexity of the administrative component of clearing into the training areas and setting up the training venue.

Training to Win

Your goal as a trainer is to make all soldiers winners, and thereby generate a force of winners for augmentation to domestic or expeditionary operations.²⁸

It is simple to design a force-on-force field training exercise using weapons effects simulators, or give unfettered freedom to the Opposing Force, that will ensure the Primary Training Audience fails to meet its training objectives. However, suppose you as the trainer put the Primary Training Audience through a scenario where they fail, and then you put them through it again and they win. First you revealed a flaw in their armour and through the After Action Review process you teach them how to shore up their weakness. In doing so, they complete the field training exercise as superior soldiers with a winning mindset.

If there isn’t enough time or resources to run the Primary Training Audience through the scenario again, then quietly pull the leaders aside, give them some advice, and let the Primary Training Audience chalk up an incontestable win.

Professional Development

Command skills can only be acquired by experience with soldiers. For this reason, unit Commanding Officers must carefully manage the professional development of junior leaders (commissioned and non-commissioned officers) to ensure that opportunities exist in all four development aspects, particularly experiential.²⁹ The development aspects are education, training, experience and self-development.³⁰

Small-Unit Exchanges

It is very common for Canada to conduct expeditionary operations as part of a larger coalition effort. In order to prepare our soldiers for the nuances of working in a multi-national environment, including the realities of equipment and doctrine inter-operability, every effort should be made to conduct or host small-unit exchanges (at the platoon or section level) with the British Army Reserve or the United States Army Reserve or National Guard.



Members of 39 Canadian Brigade Group and the U.S. National Guard conduct an assault on an enemy position during Exercise COUGAR CONQUEROR 16 at CFB Wainwright, Alberta, 2016. Photo: MCpl Mélanie Ferguson

Tactical Exercises Without Troops

As a vehicle for professional development, Tactical Exercises Without Troops (TEWTs) provide an excellent opportunity during the Preliminary stage of Level 3 (Troop / Platoon) and Level 4 (Squadron / Battery / Company) to develop an understanding of the key Battle Task Standards that will be assessed during the Practice and Confirmation stages. The chief benefit of TEWTs are that they are an inexpensive way to familiarize leaders with specific operations as they can be delivered on actual terrain, possibly in the local area, with unit leaders and staffs, without troops. The leaders will be able to analyze, plan and present how they would conduct an operation on actual terrain.

In the execution of a TEWT, the commander or his operations staff orient the TEWT participants on the terrain, pointing out key features and their importance to the exercise. The commander then presents the specific task, normally an extension of the general situation that was issued in advance of the TEWT. Participants are then normally broken up into syndicates that are required to solve the specific task independently and prepare to present their solutions. At the stated location and timing, the groups would present their solutions with the commander critiquing and the follow-on discussions of individual solutions generating interest and understanding of tactics and the optimum use of terrain.

For a successful TEWT, the commander must select proper terrain and reconnoiter it. This process is vital since the TEWT teaches tactics by using actual terrain. Sites should be preselected that are appropriate for training objectives and flexible enough to portray more than one practical solution. The various locations selected for specific events during the reconnaissance become training sites for specific tasks. The Master Events List identifies these locations by six-figure grid references.

A Master Events List (MEL) is like a movie script that identifies the who, what, where, and when for all key activities. An effective MEL also enhances realism by anticipating and accounting for all the decision points, so cause-and-effect remains realistic from beginning to the end. When the training audience interacts with an MEL using a robust scenario in a real physical setting, the lessons are real as well.

Battlefield Studies

“In April 1941 he (Brooke, British CIGS) recorded he was ‘depressed at the standard of training and efficiency of Canadian Divisional and Brigade Commanders. A great pity to see such excellent material as the Canadian men controlled by such indifferent commanders’.”³¹

Dr. Jack Granatstein - The Generals

Obviously there are limited opportunities for the examination and experience of higher level doctrine for senior Army Reserve officer. Walking the ground and discussing tactics, like the battlefield studies of Normandy and the Gothic Line are examples of relating current doctrine to ground and also learning from our predecessors. Immediately after the Second World War the British Imperial Defence College did battlefield tours of major Canadian battles of the War (e.g. Operation TOTALIZE), however we chose not to do the same until several generations later. The Gulf War, Oka and even Bosnia and Somalia have yet to be studied in detail. Additionally, the voluminous after-action reports produced these days are not particularly instructive as they tend to report in excessive detail, conflicting opinions and just generally miss the point. It is tremendously important that the senior officers of the Army take time to reflect on their profession, thereby maintaining a body of knowledge at the higher level of operations. It is equally important that they pass on their thoughts to the next generation in a free exchange of ideas.

Participating in major operational studies, battlefield tours, field exercises and command post exercises of our allies would also be instructive, but only if approached from the view of maintaining our professional knowledge, which would entail documenting and bringing back lessons to include in the doctrine and/or the writing of professional papers. Everyone should document their experiences, especially senior officers.

“Lack of operational focus further hastened the eclipse of Canadian military professionalism between the wars. Instead of retrenching anywhere near realistically as had the Reichsheer of von Seeckt, which stressed theoretical training for war, the Canadian regular force ... catered to politicians who, as blind as their electorates, could not envision another conflict. ... Institutionally, there was no provision for keeping the art of war fighting alive.”³²

LCol (Retired) John English - Failure in High Command

Simulation

Balancing today's ways of doing things while taking advantage of technology, which will benefit tomorrow, is a major challenge in the training business. One must wonder, in perhaps simplistic terms, what training technology could be bought for one year's worth of training ammunition and what should be the ultimate, long-term benefit?

In George Blackburn's book, "Where The Hell Are The Guns", he describes the training technologies which they improvised in the 1940's, such as: small-bore inserts for guns, moving tank targets, indoor puff ranges and others, all of which would be familiar to today's Gunners because things haven't changed much. We still have .22 calibre inserts (which are almost never used), we don't have moving targets anymore, and the puff tables are now computerized but not much different from his day. One might wonder how much the army has progressed!

With the revolution in electronic simulation there are great opportunities for vastly improved field training at the lower levels. A higher degree of realism and objectivity in training can be introduced and battlefield tactics and movement can be vastly improved. In sending soldiers into harm's way with the frequency noted as of late it is essential that high-technology simulation be exploited to prepare them. These are no longer 'nice to have' but are essential training tools.

These problems are compounded in the Army Reserve units because they need the simulation to an even greater extent. Affordable military simulation products such as MILSIM (www.c4ic.com) train commanders and staff from company-level and above using an entity-based constructive simulation with an integrated Master Events List tool. A multi-purpose tool, MILSIM can be used for command post training and course of action analysis. MILSIM, and the emergency disaster management simulator; EDMSIM, were developed by Lieutenant-Colonel (Retired) Bruce Gilkes, former Commanding Officer of the King's Own Calgary Regiment (RCAC).

Training Safety

Commanding Officers are responsible to take care for the safety of their soldiers. Thus major importance must be attached to designing training which is realistic, challenging, exciting and effective and still safe. There are ways to

do things that look exciting, appear dangerous, make lots of noise and smoke - but are thoroughly safe.

Safety staff must be properly appointed, trained, briefed and rehearsed before going through exercises, as it is through them that commanders can influence the safety of their troops. We must emphasize though, that the responsibility for safety rests with those in command and not the appointed “safety” staffs.

Brigade Commanders and Commanding Officers must take a personal interest in the safety of their troops. They should review training instructions and orders and subsequently visit training sites to assure themselves, through observation and the occasional focused question, that there is full compliance with safety instructions. There are numerous instructions, guidelines, regulations and orders on this subject - but, as a first principle, commanders should have their subordinates use common sense - and if there is any doubt whatsoever, suspend the activity. Peacetime training must never risk the lives and limbs of soldiers just to make training seem more exciting or more realistic. This is crucial for Army Reserve leaders, for whom the administrative and reputational consequences can be dire.

How Much Is Enough?

Brigade Commanders and Commanding Officers are the judges of “how much is enough?” or the reverse, “how much is too little?” They must be a filter to protect subordinate units and sub-units and direct tasks to where they should be focused in accordance with the Division Commander’s priorities.

A scale of annual or periodic training has to be developed and it must remain sacrosanct so that the Army Reserve units are assured the minimum necessary training. We recognize that the challenge at the Reserve unit level is that ‘sacrosanct’ often holds no meaning at the Division or higher levels. Coupled with an ever-increasing task burden, and ad-hoc ‘mandatory’ lecturing throughout the year, the sacrosanct training is often sacrificed to meet the immediate crisis-du-jour.

All this to say that commanders must ensure that units get sufficient training, in the right concentration, in those areas of greatest importance – and that training resources are not frittered away.

PART 6: LEADERSHIP TRAINING

The Commander Training and Developing Himself

Service in the profession of arms must entail lifelong learning. Brigade, unit and Company Commanders need to learn continuously. This can be achieved through reading, studying operations, and keeping abreast of doctrine and international developments.

As difficult as it may be, the senior leadership in the Army Reserve must keep abreast of technology and be prepared to work with training simulation equipment. Do not just ask for an aide-memoire and try to memorize what you do not know. The soldiers will see through this very quickly and will not forget. However, if you give it an honest effort and stumble in doing so, the soldiers will forgive your clumsiness. It never hurts to do sword drill under the tutelage of the Regimental Sergeant-Major and out of sight of the soldiers, as long as you got it right when on parade, but today one can no longer prepare oneself out of sight. Senior officers must get some personal time on the technology so that they can understand the basics. They then must work at it so that they can work with it intelligently – then they will not have to “act.” With the technology being introduced with the Land Command Support System (LCSS) senior officers may have no option but to be technologically agile. Maintaining the ability to function in an analog environment is critical however as reliance on technology is a significant vulnerability.

As already stated, senior officers must also personally involve themselves in training – including the planning, execution, personal participation and assessing the training. Once so committed they automatically prevent the proverbial distracters (e.g., taskings, other opportunities, resource re-allocation) from interfering with the focus, purpose and momentum of the training. Not only must they oversee what the staff are doing, but they should personally go through the planning process as they would in operations, and they should play their operational role to the fullest. They must get right in there, allow themselves to be trained and tested, and allow themselves to be critiqued. It’s only embarrassing the first time you make a mistake – after that you do not make the mistake. Without such a degree of personal commitment senior officers cannot keep abreast of, and better yet ahead of doctrine. Furthermore, without their personal example the subordinates will surely lack interest and commitment.

Developing, Nurturing and Leveraging the Trainers

“It is the exception to find a commander who teaches his subordinates how to train troops.... very few know anything about it and a great deal of time is wasted in consequence.”

- Montgomery

Not all officers, warrant officers and non-commissioned officers were meant to be leaders and commanders. The same would apply to trainers. Some are naturally good at it. The best of these individuals should be singled out and further developed, nurtured and exploited to gain maximum advantage of their particular talents. These are the proven leaders whose natural talent is training. They should be employed as such rather than being rotated through staff and command positions. Montgomery observed, on the state of troop training in the Canadian Army in England prior to the invasion of Normandy, “little time was spent in teaching officers how to train troops.” Company Commanders who had “never been taught how to train companies” thus employed “old fashioned training methods that were in use 30 years ago, with the result that much time was wasted and many men bored.”

To avoid repeating the mistakes of the past, senior Army Reserve commanders should be selecting, encouraging and employing the really skilled and talented trainers. Create an effective training cadre, perhaps as a special skill-set in the unit/formation, develop a training philosophy within which they can manoeuvre, and use their talents and skills for the maximum benefit of all.

Commanders should employ teams of training experts to bring back lessons from the field and especially from ongoing operations. Their observations, findings and recommendations from such studies should be incorporated into the training process.

Training Trainers

Spend some thought and energy on the subject of *how to train - or, train the trainers*. Not all officers, Warrant Officers and non-commissioned officers know how to train soldiers. They may be able to do their job as commanders and leaders, but they can learn a lot about how to best train their troops. It is likely that they will only know what they have seen in their own unit, and therefore repeat the bad lessons along with the good. Commanding Officers should include professional development sessions within their training plans to

address the ‘Training the Trainer’ problem. Training must progress beyond the typically unthinking repetition of past experiences.

For example, annual Brigade-level professional development sessions are an excellent venue for focused presentations, collegial discussions and working groups by the Brigade’s senior leadership (we recommend restricting attendance down to the sub-unit command teams) on the fundamentals of training design couched within the peculiarities of collective training within the Army Reserve in general, and the geographic realities of the Brigade in particular.

Creating a Learning Environment

“Remember the more that education permeates down to the Private soldier the better.”

Lord Wolseley

Invest in education, professional development intellectual capital before, and if necessary, at the expense of equipment purchases. The professional-intellectual capacity of the Army and its people is worth so much more in international security than is the technical capacity. Technical training is a must, but Canada’s greatest contribution to world peace and security can be through people – its soldiers.

Record Lessons Learned and Note the State of Efficiency

It is important that all commanders and leaders periodically reflect on activities and make note of the tactical and the training lessons learned. Record the post-operation and post-exercise lessons. Be brief and to the point - but candid and direct. It is human nature that a one-page summary that can be placed in a notebook is far more likely to engage the mind than a bulky or excessively long post-exercise report. Brigade Commanders might wish to review these reports as a means of validating unit training plans as well as providing information to discuss with the Commanding Officer. It was the historical studies of the German General Staff which led them to conclude that the mobility of tanks and tractors to create fast moving motorized infantry units would be the key to success in any future war. They studied, practiced and perfected these concepts with the limited resources they had at hand, and in the ‘blitzkrieg’ tactics of World War Two we saw the impressive results of such a ‘learning organization.’

“... the 'Current Reports from Overseas' indicate, the army (British Army, 1942-43) in the Middle East understood what the Germans were doing, but the links within the army's chain of command were not there.... no common doctrinal centre in the army ... no consistent battle doctrine ... no means of ensuring that the many decentralized training programs reflected similar approaches.”

- Millet and Murray, British Military Effectiveness in the Second World War

Accountability

“Accountability is a fundamental part of officership at every level and increases in importance with higher rank.”

Major-General H.R. Wheatley, 1999

In our opinion the bottom line is accountability. Accountability has been sadly lacking in the training process in the Canadian Army and must be re-introduced in a deliberate and methodical manner. A comprehensive evaluation process will assist with many aspects of accountability, but still there must be a higher degree of accountability to demonstrate the wise expenditure of resources.

To ensure accountability for achieving the training standard expected, clear responsibilities must be articulated. The quality of operational capability must be evaluated and the commander at the appropriate level must be held accountable. Civilian companies do this all the time. The only difference is that the bottom line in the Army is defined in lives risked and objectives gained.

CONCLUSION

The desired end-state at all levels should be the ability, as a team, to fight and win in war. This can be achieved by sound leadership, effective command and control, cohesion, a standardized way of doing things, sound discipline and a disciplined way of doing things, as well as the use of good battle procedure whether the task at hand is operational or administrative in nature. Battle Procedure is fundamental: it takes a few moments to learn, but a lifetime to master. It is the foundation to all that we do in the army and has direct translation to our civilian lives as well.

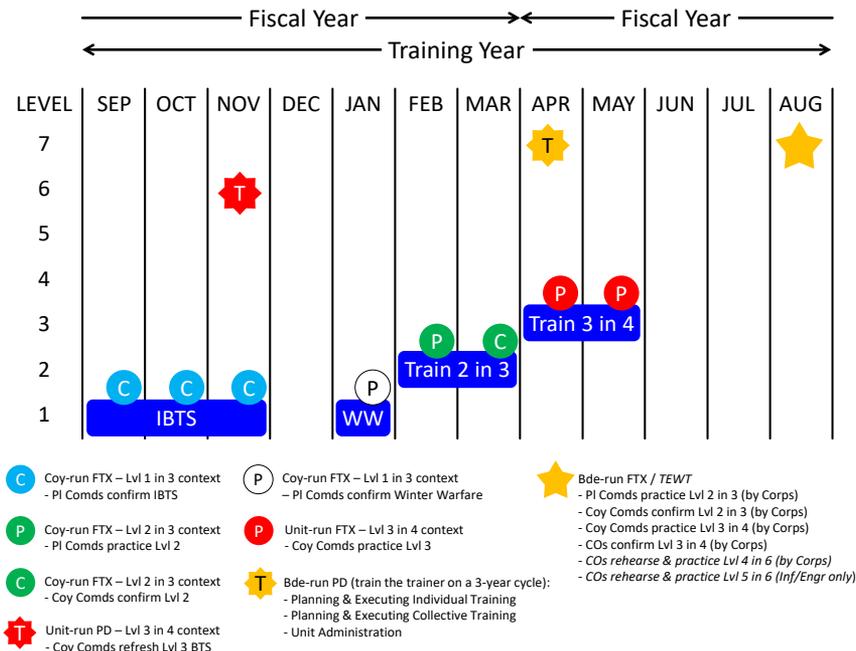
- Training is the responsibility of Commanders.
- Training must be carefully planned and professionally run – every bit as important as professionalism in operations.
- Training must have a clear purpose (concentrating on essentials) and must be objectively evaluated at stages.
- The “Mission Command” concept should be practiced in the planning and execution of Training.
- The conduct of professional AARs (After Action Reviews) is a critical component of the training environment.
- Learning Lessons and adopting Lessons Learned is critical to improving doctrine and operational capability.
- Armies need sound doctrine on Training and need courses to ensure that training is conducted professionally and effectively.
- Most nations have a stand-alone Army Doctrine and Training Command or agency.
- Train as you will fight.
- The outcome of superior Training will be highly effective, combat-ready forces.

The culmination of all collective training in the Army Reserve is to perform the learned skills in a realistic environment, an environment that is as close to war as possible.

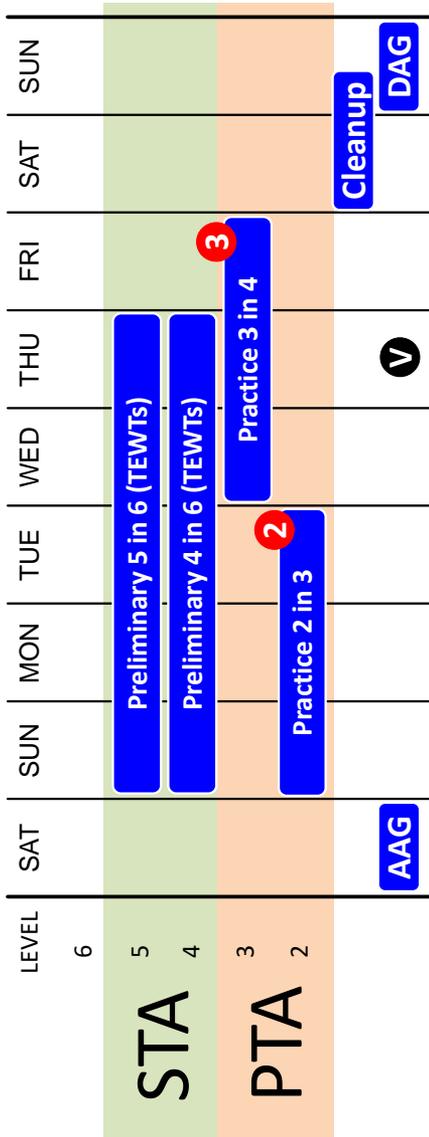
LIST OF COMMON ABBREVIATIONS AND ACRONYMS

AAR	After Action Review
Bde Comd	Brigade Commander
CAX	Computer Assisted Exercise
CPX	Command Post Exercise
CO	Commanding Officer
FTX	Field Training Exercise
OCT	Observer-Controller Team
MEL	Master Events List
PTA	Primary Training Audience
SOP	Standard Operating Procedure
STA	Secondary Training Audience
TTP	Tactics, Techniques and Procedures

APPENDIX 1: MODEL OF COLLECTIVE TRAINING PROGRESSION FOR AN ARMY RESERVE UNIT



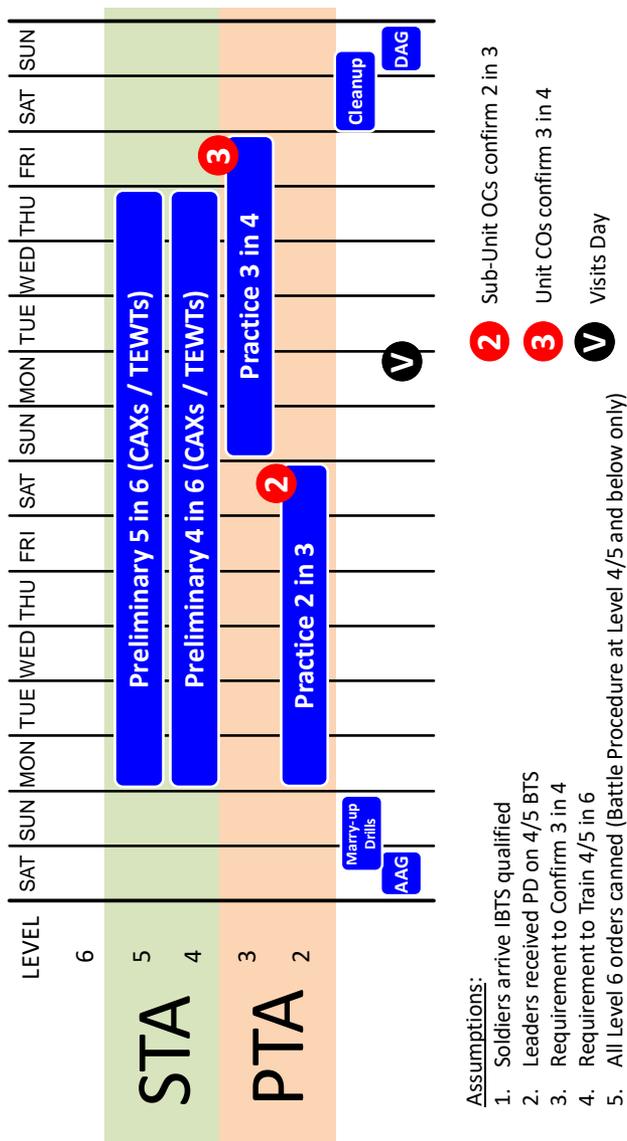
APPENDIX 2: MODEL OF TRAINING PROGRESSION FOR A 9-DAY BRIGADE MILCON



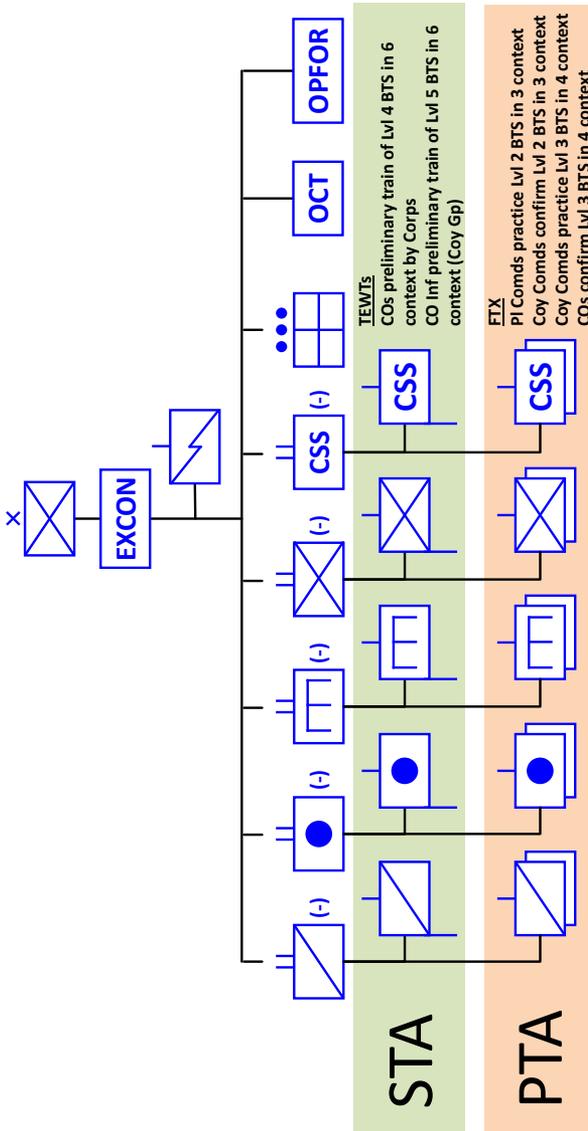
Assumptions:

1. Soldiers arrive IBTS qualified
 2. Leaders received PD on 4/5 BTS
 3. Requirement to Confirm 3 in 4
 4. Requirement to Train 4/5 in 6
 5. All Level 6 orders canned (Battle Procedure at Level 4/5 and below only)
- 2 Sub-Unit OCs confirm 2 in 3
3 Unit COs confirm 3 in 4
V Visits Day

APPENDIX 3: MODEL OF TRAINING PROGRESSION FOR A 16-DAY BRIGADE MILCON



APPENDIX 4: SAMPLE ORGANIZATION CHART FOR A BRIGADE MILCON



APPENDIX 5: SAMPLE UNIT TRAINING CALENDAR

Day	Date	Activity	Attendance				Remarks
			Bn HQ	A Coy	B Coy	HQ Coy	
Wed	10 Sep	Admin / Trg Nt	All	All	All	All	AAG
Sat	13 Sep	Trg Day	-	All	All	-	Preliminary / Practice Training
Wed	17 Sep	Admin / Trg Nt	All	All	All	All	Practice Training
Wed	24 Sep	Admin / Trg Nt	All	All	All	All	Exercise Preparation
Fri	26 Sep	Ex KILTED	All	All	All	All	Deployment STARTEX
Sat	27 Sep	WARRIOR 1					Confirm IBTS in a Level 3 context
Sun	28-Sep	A Coy FTX Confirm IBTS					ENDEX Redeployment
Wed	1 Oct	Admin / Trg Nt	All	All	All	All	Exercise Cleanup / PXR
Wed	8 Oct	Admin / Trg Nt	All	All	All	All	Preliminary Training
Sat	11 Oct	Trg Day	-	All	All	-	Preliminary Training
Wed	15 Oct	Admin / Trg Nt	All	All	All	All	Preliminary Training
Wed	22 Oct	Admin / Trg Nt	All	All	All	All	Exercise Preparation
Fri	24 Oct	Ex KILTED	All	All	All	All	Deployment STARTEX
Sat	25 Oct	WARRIOR 2					Confirm IBTS in a Level 3 context
Sun	26 Oct	B Coy FTX Confirm IBTS					ENDEX Redeployment
Wed	29 Oct	Admin / Trg Nt	All	All	All	All	Exercise Cleanup / PXR
Wed	5 Nov	Admin / Trg Nt	All	All	All	All	Preliminary Training
Tue	11 Nov	Remembrance Day	All	All	All	All	Ceremonial
Wed	12 Nov	Admin / Trg Nt	All	All	All	All	Preliminary Training
Sat	15 Nov	Trg Day	-	All	All	-	Preliminary Training
		Ex CLAYMORE SLASH 1 Bn PD (CAX) Preliminary Level 3	Comd Tms	Comd Tms	Comd Tms	Comd Tms	Preliminary training on Level 3 BTS in a Level 4 context
Wed	19-Nov	Admin / Trg Nt	All	All	All	All	Practice Training
Wed	26-Nov	Admin / Trg Nt	All	All	All	All	Exercise Preparation
Fri	28-Nov	Ex KILTED	All	All	All	All	Deployment STARTEX
Sat	29-Nov	WARRIOR 3					Confirm IBTS in a Level 3 context
Sun	30-Nov	Coy FTX Confirm IBTS					ENDEX Redeployment
Wed	3-Dec	Admin / Trg Nt	All	All	All	All	Exercise Cleanup / PXR
Wed	10-Dec	Admin / Trg Nt	All	All	All	All	Preliminary Training
Sat	13-Dec	Trg Day	All	All	All	All	Soldiers Christmas Dinner
Wed	7-Jan	Admin / Trg Nt	All	All	All	All	Preliminary Training
Sat	10-Jan	Trg Day	-	All	All	-	Preliminary Training
Wed	14-Jan	Admin / Trg Nt	All	All	All	All	Preliminary Training
Wed	21-Jan	Admin / Trg Nt	All	All	All	All	Exercise Preparation
Fri	23-Jan	Ex POLAR	All	All	All	All	Deployment STARTEX
Sat	24-Jan	SPORRAN					Practice Level 1 BTS in a Level 3

Training for War – Collective Training in Canada’s Army Reserve Units

Day	Date	Activity	Attendance				Remarks
			Bn HQ	A Coy	B Coy	HQ Coy	
		Coy FTX					context
Sun	25-Jan	Practice Winter Warfare					ENDEX Redeployment
Wed	28-Jan	Admin / Trg Nt	All	All	All	All	Exercise Cleanup / PXR
Wed	4-Feb	Admin / Trg Nt	All	All	All	All	Preliminary Training
		Trg Day	-	All	All	-	Preliminary Training
Sat	7-Feb	Bde PD	Comd Tms	Comd Tms	Comd Tms	Comd Tms	'Train the Trainer' on a three-year cycle as follows: Year 1 –Indiv Trg Year 2 –Collective Trg Year 3 - Unit Admin
Wed	11-Feb	Admin / Trg Nt	All	All	All	All	Preliminary Training
Wed	18-Feb	Admin / Trg Nt	All	All	All	All	Exercise Preparation
Fri	20-Feb	Ex BAYONET					Deployment STARTEX
Sat	21-Feb	THRUST 1 Coy FTX	All	All	All	All	Practice Level 2 BTS in a Level 3 context
Sun	22-Feb	Practice Level 2 BTS					ENDEX Redeployment
Wed	25-Feb	Admin / Trg Nt	All	All	All	All	Exercise Cleanup / PXR
Wed	4-Mar	Admin / Trg Nt	All	All	All	All	Preliminary Training
Sat	7-Mar	Trg Day	-	All	All	-	Preliminary Training
Wed	11-Mar	Admin / Trg Nt	All	All	All	All	Preliminary Training
Wed	18-Mar	Admin / Trg Nt	All	All	All	All	Exercise Preparation
Fri	20-Mar	Ex BAYONET					Deployment STARTEX
Sat	21-Mar	THRUST 2 Coy FTX	All	All	All	All	Confirm Level 2 BTS in a Level 3 context
Sun	22-Mar	Confirm Level 2 BTS					ENDEX Redeployment
Wed	25-Mar	Admin / Trg Nt	All	All	All	All	Exercise Cleanup / PXR
Wed	1-Apr	Admin / Trg Nt	All	All	All	All	Preliminary Training
Sat	4-Apr	Trg Day	-	All	All	-	Preliminary Training
Wed	8-Apr	Admin / Trg Nt	All	All	All	All	Preliminary Training
Wed	15-Apr	Admin / Trg Nt	All	All	All	All	Exercise Preparation
Fri	17-Apr	Ex CLAYMORE					Deployment STARTEX
Sat	18-Apr	SLASH 2 Bn FTX	All	All	All	All	Practice Level 3 BTS in a Level 4 context
Sun	19-Apr	Practice Level 3 BTS					ENDEX Redeployment
Wed	29-Apr	Admin / Trg Nt	All	All	All	All	Exercise Cleanup / PXR
Wed	6-May	Admin / Trg Nt	All	All	All	All	Preliminary Training
Sat	9-May	Trg Day	-	All	All	-	Preliminary Training
Wed	13-May	Admin / Trg Nt	All	All	All	All	Exercise Preparation
Fri	15-May	Ex CLAYMORE					Deployment STARTEX
Sat	16-May	SLASH 3 Bn FTX	All	All	All	All	Practice Level 3 BTS in a Level 4 context
Sun	17-May	Practice Level 3					ENDEX Redeployment

Training for War – Collective Training in Canada’s Army Reserve Units

Day	Date	Activity	Attendance				Remarks
			Bn HQ	A Coy	B Coy	HQ Coy	
		BTS					
Wed	20-May	Admin / Trg Nt	All	All	All	All	Exercise Cleanup / PXR
Wed	27-May	Admin / Trg Nt	All	All	All	All	Summer Stand-down
Wed	10-Jun	Admin Nt	Key Pers	Key Pers	Key Pers	Key Pers	
Wed	24-Jun	Admin Nt	Key Pers	Key Pers	Key Pers	Key Pers	
Wed	8-Jul	Admin Nt	Key Pers	Key Pers	Key Pers	Key Pers	
Wed	22-Jul	Admin Nt	Key Pers	Key Pers	Key Pers	Key Pers	
Wed	5-Aug	Admin Nt	Key Pers	Key Pers	Key Pers	Key Pers	
Wed	12-Aug	Admin / Trg Nt	All	All	All	All	Exercise Preparation
Sat	15-Aug	Bde FTX	All	All	All	All	Deployment / AAG / Marry-up
Sun	16-Aug						Drills / STARTEX
Mon	17-Aug						Practice 2 in 3
Tue	18-Aug						Confirm 2 in 3
Wed	19-Aug						Practice 3 in 4
Thu	20-Aug						Confirm 3 in 4
Fri	21-Aug						Preliminary 4 in 6 (TEWT)
Sat	22-Aug						Preliminary 5 in 6 (TEWT)
Sun	23 Aug						ENDEX / Exercise Cleanup / DAG / Redeployment
Wed	26 Aug	Admin / Trg Nt	All	All	All	All	Exercise Cleanup / PXR

APPENDIX 6: SAMPLE UNIT COLLECTIVE TRAINING PLAN

Name	Ex BAYONET THRUST 1	Ex BAYONET THRUST 2	Ex CLAYMORE SLASH 1	Ex CLAYMORE SLASH 2	Ex CLAYMORE SLASH 3
Date(s)	20-22 Feb	20-22 Mar	15 Nov	17-19 Apr	15-17 May
Training Level	Level 2 in 3		Level 3 in 4		
Training Stage	Practice	Confirmation	Preliminary	Practice	
Type of Exercise	FTX		CAX	FTX	
Lead	A Coy	B Coy	Bn HQ	Bn HQ	
Supporting	B Coy Elms Sig Regt Elms Fd Amb	A Coy Elms Sig Regt Elms Fd Amb	A Coy B Coy Elms Sig Regt Elms Fd Amb	A Coy B Coy Elms Sig Regt Elms Fd Amb	
Exercise Director	OC A Coy	OC B Coy	Ops O		
Training Commander	PI Comds		A Coy Comd	B Coy Comd	A Coy Comd
Confirming Commander	N/A	OC A Coy	N/A		
PTA	Sect Comds		PI Comds		
STA	PI Comds / A1 Ech		N/A	Coy / Sect Comds / A1 Ech	
Observer/Controllers	B Coy HQ	A Coy HQ	B Coy HQ	A Coy HQ	B Coy HQ
Location	Training Area		Garrison	Training Area	
Individual Battle Task Standards (Level 1)	Already confirmed during Ex KILTED WARRIOR 1, 2 and 3				
Collective Battle Task Standards (Level 2 to 5)	BTS I02353061E Execute an Advance to Contact		BTS I42323093E Execute a Section Attack		
	BTS I42323093E Execute a Section Attack		BTS I42323092E Establish and operate a Fire Base		
	BTS A02305301E Execute Reorganization		BTS I43423093E Execute a Platoon Attack		

APPENDIX 7: SAMPLE UNIT COLLECTIVE TRAINING PLANNING CYCLE

EXERCISE NAME Lead Exercise Type Training Stage Training Level	D-90	D-75	D-75	D-60	D-60	D-50	D-45	D-40	D-30	D-9	D-2	D-Day	D+5
	CO's CPG issued	Ops O backbrief Bn plan to CO	Unit Wng O issued	Unit Op O to Unit OPLAN issued	Coy Wng O issued	OCs backbrief Coy Refresher Trg PI Comds backbrief	Coy Refresher Trg Instr issued	PI Comds backbrief refresher Trg plan PI Comds backbrief	PI Refresher Trg Instr issued	Coy FTX Op O issued	PI FTX Op O issued	D-Day (Deployment)	OCs conduct PXR
Ex KILTED WARRIOR 1 A Coy FTX - Confirm IBTS	28 Jun	13 Jul	13 Jul	28 Jul	28 Jul	7 Aug	12 Aug	17 Aug	27 Aug	17 Sep	24 Sep	26 Sep	1 Oct
Ex KILTED WARRIOR 2 B Coy FTX - Confirm IBTS	26 Jul	10 Aug	10 Aug	25 Aug	25 Aug	4 Sep	9 Sep	14 Sep	24 Sep	15 Oct	22 Oct	24 Oct	29 Oct
Ex CLAYMORE SLASH 1 Bn CAX - Preliminary 3	17 Aug	1 Sep	1 Sep	16 Sep	-	-	-	-	-	-	-	15 Nov	20 Nov
Ex KILTED WARRIOR 3 A Coy FTX - Confirm IBTS	30 Aug	14 Sep	14 Sep	29 Sep	29 Sep	9 Oct	14 Oct	19 Oct	29 Oct	19 Nov	26 Nov	28 Nov	3 Dec
Ex POLAR SPORRAN B Coy FTX - Practice WW	25 Oct	9 Nov	9 Nov	24 Nov	24 Nov	4 Dec	9 Dec	14 Dec	24 Dec	14 Jan	21 Jan	23 Jan	28 Jan
Ex BAYONET THRUST 1 A Coy FTX - Practice 2	22 Nov	7 Dec	7 Dec	22 Dec	22 Dec	1 Jan	6 Jan	11 Jan	21 Jan	11 Feb	18 Feb	20 Feb	25 Feb
Ex BAYONET THRUST 2 B Coy FTX - Confirm 2	20 Dec	4 Jan	4 Jan	19 Jan	19 Jan	29 Jan	3 Feb	8 Feb	18 Feb	11 Mar	18 Mar	20 Mar	25 Mar
Ex CLAYMORE SLASH 2 Bn FTX - Practice 3	17 Jan	1 Feb	1 Feb	16 Feb	16 Feb	26 Feb	3 Mar	8 Mar	18 Mar	8 Apr	15 Apr	17 Apr	22 Apr
Ex CLAYMORE SLASH 3 Bn FTX - Practice 3	14 Feb	1 Mar	1 Mar	16 Mar	16 Mar	26 Mar	31 Mar	5 Apr	15 Apr	6 May	13 May	15 May	20 May

Note: Dates highlighted in YELLOW would need to be advanced to 3 Dec so as not to negatively impact Coy or PI battle procedure.

APPENDIX 8: SAMPLE COMMANDING OFFICER’S CONFIRMATORY PLANNING GUIDANCE

03 DEC

EX BAYONET THRUST 2 (20-22 Mar)

GENERAL

1. Detailed below is my confirmatory guidance, which will allow the Ops staff to commence the detailed estimate process for the company-level field training exercise to confirm assigned Level 2 (Section) battle task standards in a Level 3 (Platoon) context. The information provided will serve as a unifying theme for the staff, providing a common start point for development of the Unit plans.

REVIEW OF THE SITUATION

2. Division Commander Intent. No change from Unit Annual Operating Plan.
3. Brigade Commander Concept of Operations. No change from Unit Annual Operating Plan.
4. Unit Concept of Operations. No change from Unit Annual Operating Plan.

FORCES AVAILABLE

5. B Company. Lead sub-unit.
6. A Company. Supporting sub-unit.
7. Signal Regiment. 2 x Signals Detachment to be att OPCON.
8. Field Ambulance. 2 x Ambulance to be att OPCON.

TRANSITION OF COMMAND AUTHORITY (TOCA)

9. A Company attached under Operational Command to B Company from arrival at the Release Point at training area on 20 Mar until crossing of Start Point for redeployment to home stations on 22 Mar.

10. Signals detachments and Medical support will be attached under Operational Control to B Company from 201830 Mar until 221200 Mar.

PLANNING LIMITATIONS

11. Main bodies to arrive at Release Point at training area NLT 202300 Mar.

12. Main bodies to cross the Start Point for redeployment to home stations NLT 221200 Mar.

13. Advance and Rear Parties authorized.

MISSION. No change from Unit Annual Operating Plan.

PLANNING GUIDANCE

14. CO’s Intent. To prepare the Unit through a series of progressive company-then unit-controlled field training exercises to successfully execute a Level 5 (Company Group) attack during the brigade field training exercise. To that end, B Company will execute the second of two company-level field training exercises to confirm the rifle sections on assigned section (Level 2) battle task standards in a platoon (Level 3) context, with the other Companies participating as directed.

15. Scheme of Manoeuvre. The company-level field training exercise will focus on confirming the following section (Level 2) battle task standards in a platoon (Level 3) context in offensive operations:

- a. I02353061E – Execute an Advance to Contact;
- b. I42323093E - Execute a Section Attack; and
- c. A02305301E – Execute Reorganization.

16. Main Effort. Confirm execution of a Section Attack.

17. Desired End-State. Each rifle section will have successfully attacked three successive enemy trenches, providing emergency medical treatment and evacuation for any casualties sustained.

18. Levels of Acceptable Risk. I will accept inefficiencies at the platoon level in order to ensure that the sections successfully achieve their battle task standards.
19. Exercise Director. OC B Company.
20. Training Commander. Platoon Commanders.
21. Confirming Commander. OC A Company.
22. PTA. Rifle Sections.
23. STA. Rifle Platoon Commanders and B Company A1 Echelon.
24. Other Critical Issues. Operations Officer to determine additional external and internal personnel and resources as soon as possible and coordinate both attendance and TOCA no later than (NLT) 4 Jan.
25. Planning Milestones.
 - a. 042000-2030 Jan–Operations Officer backbrief of unit plan to Commanding Officer;
 - b. NLT 042200 Jan–Unit Warning Order issued;
 - c. NLT 192000 Jan–Unit Operation Order to approved Unit Annual Operating Plan issued;
 - d. NLT 192200 Jan – Company Warning Orders issued;
 - e. 292000-2100 Jan–Company backbriefs of company refresher training and FTX plans to Commanding Officer;
 - f. NLT 032000Feb – Company Refresher Training Instructions issued,
 - g. NLT 112000 Mar–B Company Operation Order (Field Training Exercise) issued,
 - h. 20-22 Mar - Ex BAYONET THRUST 2, and

- i. NLT 252200 Mar - B Company-led unit post-exercise review completed.

Lieutenant-Colonel
Commanding Officer

APPENDIX 9: SAMPLE UNIT OPERATION ORDER

19 JAN

EX BAYONET THRUST 2 (20-22 MAR)

SITUATION

1. Friendly.

- a. Division Commander Intent. No change from Unit Annual Operating Plan.
- b. Brigade Commander Concept of Operations. No change from Unit Annual Operating Plan.

2. Attachments & Detachments

- a. 2 x Signal Detachments attached under Operational Control from the Signal Regiment from 201830 Mar until 221200 Mar.
- b. 2 x Ambulance attached under Operational Control from the Field Ambulance from 201830 Mar until 221200 Mar.

MISSION. No change from Unit Annual Operating Plan.

EXECUTION

3. Concept of Operations

- a. Commanding Officer’s Intent. To prepare the Unit through a series of progressive company- then unit-controlled field training exercises to successfully execute a Level 5 (Company Group) attack during the brigade field training exercise. To that end, B Company will execute the second of two company-level field training exercises to confirm the rifle sections on assigned section (Level 2) battle task standards in a platoon (Level 3) context, with the other Companies participating as directed.

- b. Scheme of Manoeuvre. The company-level field training exercise will focus on confirming the following section (Level 2) battle task standards in a platoon (Level 3) context in offensive operations:
 - (1) A02301000E – Execute Section Battle Procedure;
 - (2) I02353061E – Execute a Section Advance to Contact;
 - (3) I42323093E - Execute a Section Attack;
 - (4) A02305301E – Execute Section-level Reorganization; and
 - (5) A02305302E - Treat and Evacuate Casualties.
- c. Main Effort. Confirm execution of a Section Attack.
- d. End-State. Each section will have successfully attacked three successive enemy trenches, providing emergency medical treatment and evacuation for any casualties sustained.

4. Groupings & Tasks

a. B Company.

(1) Groupings.

- (a) A Company attached under Operational Command from arrival at the Release Point at training area on 20 Mar until crossing of Start Point for redeployment to home stations on 22 Mar.
- (b) 2 x Signal Detachments attached under Operational Control from the Signal Regiment from 201830 Mar until 221200 Mar.
- (c) 2 x Ambulance attached under Operational Control from the Field Ambulance from 201830 Mar until 221200 Mar.

(2) Tasks.

- (a) Conduct company-level preliminary training,

- (b) Conduct company deployment from home station to Release Point at training area,
- (c) Conduct Ex BAYONET THRUST 2 with a view to confirming assigned section (Level 2) battle task standards in a platoon (Level 3) context,
- (d) Conduct company redeployment from training area to home station, and
- (e) Lead Unit Post Exercise Review.

b. A Company.

- (1) Groupings. Attached under Operational Command to B Company from arrival at the Release Point at training area on 20 Mar until crossing of Start Point for redeployment to home stations on 22 Mar.
- (2) Tasks.
 - (a) Conduct company-level preliminary training on 4, 8 and 11 Mar,
 - (b) Conduct company deployment from home station to Release Point at training area,
 - (c) Conduct company redeployment from training area to home station, and
 - (d) Support Unit Post Exercise Review.

5. Coordinating Instructions

a. Key Timings.

- (1) NLT 292000 Jan-Company backbriefs of company refresher training and FTX plans to Commanding Officer by email,
- (2) NLT 032000 Feb – Company Refresher Training Instructions issued,

- (3) 041900-2200 Mar – Garrison-based Preliminary Training,
- (4) 080800-1600 Mar – Garrison-based Preliminary Training,
- (5) 111900-2200 Mar – Garrison-based Preliminary Training,
- (6) NLT 112000 Mar – B Company Operation Order (Field Training Exercise) issued,
- (7) 181900-2200 Mar – Company-led Exercise Preparation
- (8) NMB 201800 Mar – Deployment of Company Main Bodies from home stations (less Recce and Advance Party),
- (9) NLT 221200 Mar– Redeployment of Company Main Bodies (less Rear Party) to home stations,
- (10) NLT 221600 Mar – Officers Commanding A, B & Headquarters Companies email verification of Personnel (CF 98s), Serialized Kit to Operations Officer
- (11) 251900-2200 – Company-led Exercise Cleanup
- (12) NLT 252200 Mar – B Company-led Unit Post Exercise Review, and
- (13) NLT 082200 Apr – B Company Post Exercise Report emailed to Operations Officer.

b. Preliminary Training. TBI.

c. Confirmation. TBI.

SERVICE SUPPORT

6. Concept of Combat Service Support. Integral combat service support to B Company only (augmented as necessary from A Company).

a. Supply. As per Combat Service Support Matrix (see **Appendix 11**).

b. Supply Services.

- (1) Waste Management. Contracts have been established for chemical toilets, grey water, and garbage dumpsters.
- (2) Local Purchase Order. All unit LPO will be done through the SQMS.

7. Transport. Companies and attachments are to deploy with sufficient assets to transport personnel, fresh rations and ammunition. A & B Companies shall generate separate deployment and redeployment movement orders in order to move their personnel to and from the training area.

8. Accommodations. A & B Companies and attachments should be self-sufficient and supply tentage for their deploying pers.

9. Health Services Support. Medical support will be centrally controlled through C/S 2.

- a. Role 1. Attached medics.
- b. Role 2. CFB medical facilities.
- c. Role 3. Civilian hospitals as coordinated by medical staff.
- d. Casualty Reporting. As per Battalion Standing Orders. Commanding Officer and Operations Officer are to be informed immediately following any significant incident.

10. Start State. A Company nominal roll must be completed and submitted to the Operations Officer prior to deployment.

11. Post-Exercise Drills. Operations Officer to be informed of any CF 98’s, missing serialized kit, vehicle damage or other significant items prior to dismissal of personnel.

12. Financial.

- a. General. Costs to be cost captured and reported to the Adjt.
- b. IO. GRC0000BYNT2. All expenditures against this IO must be authorized by Operations Officer.

13. Dress. As per Battalion Kit List – List 2.

COMMAND & SIGNALS

14. FTX Chain of Command. OC B Company, OC A Company.

15. FTX Appointments

- a. Exercise Director. OC B Company;
- b. Training Commander. Platoon Commanders; and
- c. Confirming Commander. OC A Company.

16. Locations. Training Area, Area OWL.

17. Signals. CEOs TBI.

18. Acknowledge Instructions. Action addresses acknowledge to Operations Officer by email NLT 051600 Dec.

Lieutenant-Colonel
Commanding Officer

APPENDIX 10: SAMPLE COMPANY COMMANDER TRAINING BACKBRIEF

29 JAN

EX BAYONET THRUST 2 (20-22 MAR)

SIR, I UNDERSTAND YOUR INTENT is “to prepare the Unit through a series of progressive company- then unit-controlled field training exercises to successfully execute a Level 5 (Company Group) attack during the brigade field training exercise. To that end, B Company will execute the second of two company-level field training exercises to confirm the rifle sections on assigned section (Level 2) battle task standards in a platoon (Level 3) context, with the other Companies participating as directed.”

ASSIGNED TASKS

1. Conduct company-level preliminary training,
2. Conduct company deployment from home station to Release Point at training area,
3. Conduct Ex BAYONET THRUST 2 with a view to confirming the following section (Level 2) battle task standards in a platoon (Level 3) context:
 - a. A02301000E – Execute Section Battle Procedure,
 - b. I02353061E – Execute a Section Advance to Contact,
 - c. I42323093E - Execute a Section Attack,
 - d. A02305301E – Execute Section-level Reorganization, and
 - e. A02305302E - Treat and Evacuate Casualties.
4. Conduct company redeployment from training area to home station, and
5. Lead Unit Post Exercise Review.

IMPLIED TASKS

6. Confirm A Company rifle sections will be prepared to practice assigned battle task standards as of 18 Mar.

LIMITATIONS AND CONSTRAINTS

7. Forces Available.

- a. B Company. Lead sub-unit.
- b. A Company. Supporting sub-unit.
- c. Signals Regiment. 2 x Signals Detachment supporting.
- d. Field Ambulance. 2 x Ambulance supporting.
- e. Company Main Bodies to arrive at Release Point at training area NLT 202300 Mar.
- f. Company Main Bodies to cross the Start Point for redeployment to home stations NLT 221200 Mar.
- g. Advance and Rear Parties authorized.

8. Transition of Command Authority (TOCA)

- a. Participating A Company main bodies attached under Operational Command to B Company from arrival at the Release Point in the training area on 20 Mar until crossing of Start Point for redeployment to home stations on 22 Mar.
- b. Signals and Medical support will be attached under Operational Control to B Company from 201830 Mar until 221200 Mar.

9. Garrison Preliminary Training. Company-directed and limited to 4 Mar (evening), 8 Mar (day), and 11 Mar (evening).

10. Levels of Acceptable Risk. You will accept inefficiencies at the platoon level in order to ensure that the sections successfully achieve their battle task standards.

MISSION

B Company will conduct Ex BAYONET THRUST 2 on 20-22 Mar with a view to confirming the assigned section (Level 2) battle task standards in a platoon (Level 3) context.

CONCEPT OF OPERATIONS

11. Officer Commanding B Company Intent. To conduct the second of two company-level field training exercises to confirm the battalion's rifle sections (Level 2) in a platoon (Level 3) context on assigned battle task standards, with A Company participating as directed.

12. Scheme of Manoeuvre. Four phases:

- a. Phase 1 – Preliminary Training. Garrison-based refresher training on assigned battle task standards on 4 Mar (evening), 8 Mar (day), and 11 Mar (evening).
- b. Phase 2 - Deployment. Company-directed exercise preparation on 18 Mar (evening), deployment of B Company Advance Party on 19 Mar and deployment of Main Bodies from home stations to arrive at the Release Point at the training area NLT 202300 Mar at which point exercise participants will be attached under Operational Command to B Company (STARTEX).
- c. Phase 3 – Practice Training. B Company-led field training exercise to train the following section (Level 2) battle task standards in a platoon (Level 3) context:
 - (1) I02353061E – Execute a Section Advance to Contact
 - (2) I42323093E - Execute a Section Attack
 - (3) A02305301E – Execute Section-level Reorganization
- d. Phase 4 - Redeployment. NLT 221200 Mar(ENDEX) exercise participants revert to individual company command upon crossing the Start Point for Main Body redeployment to home stations. This phase includes the B Company Rear Party and exercise cleanup as well as the B Company-led post exercise review on 25 Mar.

13. Main Effort. Confirm execution of a Section Attack.

14. End-State. Each rifle section will have successfully attacked three successive enemy trenches, providing emergency medical treatment and evacuation for any casualties sustained.

QUESTIONS AND DIRECTION

Major
Officer Commanding B Company

APPENDIX 11: SAMPLE COMBAT SERVICE SUPPORT MATRIX

Commodity Type	Bn HQ	A Coy	B Coy	HQ Coy
Class I (Water)	Comd Team to deploy with 1 DOS. Replen daily from RQMS at 2000hrs at GR234567.	F Ech to deploy with 3 DOS.	F Ech to deploy with 3 DOS.	Ops Cell to deploy with 1 DOS. Replen daily from RQMS at 2000hrs at GR234567.
Class I (Rations)		F Ech replen daily from A Ech at 1800hrs at GR123456.	F Ech replen daily from A Ech at 1800hrs at GR123456.	RQMS replen daily from FSG or Svc Bn at 1200hrs as of D-Day at GR345678 (if deployed)
Class III (POL)		A Ech replen daily from RQMS at 2200hrs at GR234567.	A Ech replen daily from RQMS at 2200hrs at GR234567.	
Class V (Ammo)				
Repair & Recovery	Svc Bn or ASU	1 x MRT att OPCON to Coy HQ fm Svc Bn. MRT to deploy with 3 DOS.	1 x MRT att OPCON to Coy HQ fm Svc Bn. MRT to deploy with 3 DOS.	Svc Bn or ASU
HSS	Fd Amb	1 x Amb att OPCON to Coy HQ fm Fd Amb. Amb to deploy with 3 DOS.	1 x Amb att OPCON to Coy HQ fm Fd Amb. Amb to deploy with 3 DOS.	Fd Amb

Note. DOS = Days of Supplies

APPENDIX 12: SAMPLE AIDE-MEMOIRE FOR COMMANDER’S TRAINING VISIT

When commanders at all levels visit training they would normally have a purpose in mind and would draw conclusions about what they have seen, heard and sensed. This aide-memoire offers some suggestions on points to consider and conclusions that may be drawn. Offer a few words of encouragement and advice on the spot, at an appropriate time, and follow up as required.

Training Visit Aide Memoire – Points To Consider	
AIM	Achieving aim
	Focused
	Relevant
	Realistic
DESIGN AND CONDUCT	Progressive stages
	Logical Rhythm and Tempo
	Repetition
	Challenging
	Developing people
	Training second teams
LEARNING ENVIRONMENT	Confirmation at Stages
	After-action reviews
	Proper critiques and coaching
	Recording lessons-learned
	Mid-course adjustments
	Conducting AARs
TRAINING ATMOSPHERE	Realism
	Safety
	Adequacy of pre-training preparations
	Efficient use of resources
	Care and maintenance of vehicles, equipment and weapons
LEADERSHIP	NCOs making sure training runs smoothly
	Officers doing their job
	Leaders being developed
GENERAL	Soldiers know what they are doing and why
	Total team involvement
	Effective use of available talent
	Good feedback and healthy after-action review process
	Lessons being learned and incorporated

CONCLUSIONS. Determine the answers to the following questions and then do something about it:

1. Is the training effective?
2. Are there better ways to achieve the aim?
3. How can the training be improved?
4. How can the learning environment be improved?
5. Are the lessons learned valid?
6. Are the problems of doctrine, leadership, equipment, simulation, pre-training, resources or coaching?
7. Are there any specific recommendations?

APPENDIX 13: SOME GENERAL NOTES ON WHAT TO LOOK FOR WHEN VISITING A UNIT

By B. L. Montgomery
Lieutenant-General
General Officer Commanding-in-Chief
South Eastern Command

6 March 1942

1. The underlying object is obviously to find out what the Commanding Officer is worth, and generally if it is a good or bad unit. The method adopted, and the length of time it will take, will depend entirely on the inspecting officer’s own military knowledge, on his own experience in actual command, and generally on whether he can be ‘bluffed’ by the Commanding Officer.
2. Most Commanding Officers will want to lay on a tour of the unit area, looking at the training, and so on. This would be quite suitable for a *later* visit. But for the *first* visit, if you really want to find out all about the unit there is only one way to do it. And that is to sit with the Commanding Officer in his orderly room and cross-examine him on certain points which are ‘key’ points, and which will show at once whether or not he knows his job. The Brigadier should be present, but no one else. The Commanding Officer is then put through it. And if he begins to wriggle and to give evasive answers, he is pinned down at once. The Commanding Officer will welcome such an interview and will learn a great deal from it. On no account must he be bullied or rattled. The great point is to show him that you really want to know all about his unit, and that you are all out to find out his difficulties and worries and to help him. I have found all Commanding Officers in the Canadian Corps most friendly, and willing to tell me how they run their show. It is very important that the Commanding Officer should realize early in the proceedings that you really do know what you are talking about, it is quite easy to show him this by cross-examining him on some point of detail about which he probably thinks you know nothing. Once he sees this, he will be perfectly frank and will welcome any ideas you may give him. Both parties will learn a great deal from the discussion – the summing up of the Commanding Officer and finding out what he knows. It must all be very friendly and natural from the beginning; you then get the Commanding Officer’s confidence; this is most important.

3. An investigation into the following points will show you at once what the unit is worth, and if the Commanding Officer knows his job.
- a. *The system of selection, promotion, and inspection of N.C.O.s.* This is a very important point, and its importance is not always realized by the Commanding Officers. The N.C.O.s are the backbone of the battalion, a good solid foundation must be built up on the Lance Corporal level, and the standard of this foundation must be the Commanding Officer's standard and NOT five different company standards. The Commanding Officer must interest himself directly in everything connected with his N.C.O.s and W.O.s.
 - b. *Organization of individual training, i.e., training of the rank and file.* The usual fault here is that men are not graded *before* the training begins, and put into categories in accordance with their knowledge and efficiency. This must always be done, so as to ensure that men get instruction in accordance with their needs. The principle of piece work is also very important.
 - c. *Training of the N.C.O.s.* The training of the N.C.O.s in all duties in the field, tactical and administrative, must be carried out by the Company Commanders. The Adjutant and the Regimental Sergeant-Major must take a very definite hand in keeping the N.C.O.s up to the mark, in instruction in discipline matters, and generally in ensuring that the non-commissioned ranks are a credit to the battalion, are able to maintain a high standard in all matters, are not afraid of the men, and are trained on for promotion.
 - d. *Training of the Officers.* The Commanding Officer must handle this himself, personally. No one else can do it for him. *He must do it himself.* The best results are obtained when the Commanding Officer has an officers' day once a week. Officers have got to be taught the stage-management of the various operations of war, the technique of movement, the cooperation of all arms in battle, the technique of reconnaissance and deployment, administration in the field, and so on.
 - e. *Organization and conduct of collective training.* Before beginning Company or Battalion Training, the Commanding Officer must issue

instructions as to how it is to be done. He should assemble his officers and lay down:

- (1) The object of the training.
- (2) The principles on which it is to be based.
- (3) The standard aimed at.
- (4) The phases of war to be studied.
- (5) His views on operations by night.
- (6) How he wishes the time available to be used.
- (7) etc.

The great point in collective training is to mix the training. During Platoon Training the whole Company should go out once a week. During Company Training the whole Battalion should go out once every 10 days or so. During Battalion training the whole Brigade should go out once in a fortnight. This far better than having long periods devoted separately to each subject.

The next point is that when you embark on unit training every exercise must include the dusk and the dawn. These are the times when things happen in war.

A small number of exercises lasting 24 hours or more are much better than a large number of short exercises. The exercise lasting from after breakfast till tea-time is of little use. A good exercise is one that tests out administrative arrangements, and involves the dusk and the dawn.

During collective training the following operations must be taught and practiced:

- a. The set-piece attack, i.e., the Brigade battle.
- b. Breaking down the Brigade battle and carrying on the advance by means of resolute fighting in small self-contained groups of all arms.

- c. The dusk attack.
- d. The night attack.
- e. Forcing the crossing of obstacles.
- f. Reorganization and holding of ground gained.
- g. Disengagement and withdrawal.
- h. Defensive tactics.
- i. Counter-attacks.

4. *Teaching 'Training' as distinct from teaching 'War'*. It is the exception to find a commander who teaches his subordinates how to train troops. In the Field Service Regulations we have laid down the principles of war, categorically. In no book do we find laid down the principles of training; officers are supposed to know all about this subject; actually, very few know anything about it and a great deal of time is wasted in consequence.

Training is a great art; there are principles of training just as there are principles of war. Training in wartime must be carried out somewhat differently to training in peacetime, as we have to be ready to meet the enemy at any time.

5. In the training of his unit the Commanding Officer has got to consider the following points:

- a. Training of the rank and file.
- b. Training of the N.C.O.s in their duties as leaders.
- c. Training of the officers.
- d. Organization and conduct of collective training generally.
- e. The best way to run sub-unit training, i.e., platoon and company training.
- f. Battalion training.

If he will think it out on these lines he has got a firm basis from which to start.

6. But he will do no good in training unless he realizes very clearly the importance of the following basic points, and has a good system for carrying them out:

- a. Interior economy and administration, and life generally within the unit.
- b. The training of the leaders, i.e., the officers and the N.C.O.s

Some Commanding Officers realize the necessity for training the officers; not a great many, but only some. Very few bother with the N.C.O.s; in fact practically none. But the N.C.O.s are the backbone of the unit; the whole question of selection, promotion, inspection, and welfare must be on good and sound lines. Sergeant’s Messes are very important.

7. *The Regimental Sergeant-Major.* The Regimental Sergeant-Major is one of the most important people in the unit. I always ask to see the Regimental Sergeant-Major, treat him like an officer, and shake hands with him. When inspecting the South Saskatchewan Regiment, I called the Regimental Sergeant-Major out in front and shook hands with him in front of the whole battalion. It may seem a small point but in my view it means a great deal.

The Regimental Sergeant-Major is the senior non-commissioned rank in the unit; his authority over the N.C.O.s is supreme, and he must be backed up and given opportunities to pull his weight. He should frequently assemble the W.O.s and N.C.O.s by Companies and address them, getting across to them various points in the daily life of the unit that want attention.

He and the Adjutant should work together as a team; and they should go out together round the battalion area whenever they can, keeping an eye on the general show.

It is very difficult, in fact practically impossible, to have a good cadre of N.C.O.s without a good Regimental Sergeant-Major.

8. *Visiting Collective Training.* When visiting a unit or inter-Brigade exercise, or a Divisional exercise, you want to be clear as to what you want to find out. Generally, I suggest that this will be as follows:

- a. What the commander is worth, and whether he is able to handle his ship when in full sail in a rough sea?

- b. Whether his machinery for exercising command is good, and runs smoothly?
- c. Broadly, how the formation or unit reacts. Does it answer to the helm, or is it awkward and unsteady in a rough sea?

As far as the Corps Commander is concerned, or in fact any senior general officer, the above points are the ones that really matter. The points of detail such as the minor tactics, the fieldcraft, and so on, are the province of the subordinate commanders. If you want to get a line on this it can be done by getting a staff officer to watch the operation in the front line and to keep an eye on such things as technique of movement, deployment, battle drill, quick manoeuvre, outflanking tactics, sub-unit tactics generally, and cooperation with other arms on the sub-unit level.

9. As regards para 8(a) and 8(b). The points here are:
 - a. What orders did the commander receive?
 - b. What did he know about the enemy when he received those orders?
 - c. What orders did he then give?

Once you have got this from the commander himself, then you are well on the way to what you want to find out. You then go on as follows:

- d. What are his present dispositions?
- e. What is his view as to the general situation, i.e., how does he view the problem?
- f. What are his plans for future action?

A few questions as to the layout of his H.Q., and a quick tour round his H.Q., follows. I should then leave him.

10. *As regards para 8(c)*. You now visit the next commander below, e.g., if para 9 has been done with a Brigadier you visit one of the forward battalion H.Q.s. There you go for the same points as outlined in para 9.

11. You have now got the answer to what you want to know. But you want to check up on it, so you must find out from the Exercise Director when some important change or event in the battle is to take place. There may be a moment when a very fast ball is going to be bowled at the commander of one side. You want to be in on this, and study the reactions. In particular, it is a good thing if you can be present when the commander is giving out his orders; by listening to this you will find out a good deal.

12. In general, the art lies in being at the right place at the right time, and knowing when that time is. The next point is to get all your information from the commander himself. You want to sum *him* up; therefore, you must deal with *him personally*. If he is out, you must chase him until you find him.

13. The last point is to remember what is the object of your visit; see para 8. You will not have time to also visit sub-units in the front line; if you want a line on how they are working, send some other officer to get that information for you.

APPENDIX 14. CANADIAN ARMY OFFICER TRAINING IN WAR

By: Brigadier General (Retired) Kip Kirby

ca. 1980

After an upbringing in The Permanent Force, service in World War II and during the Korean War (minus combat experience, which is an acknowledged factor), and a normal career in the Regular Army, I am left with the paraphrased impression that the average Canadian officer carries a Sergeant-Major’s pace stick in his knapsack; as I consider it an officer’s duty to look up and ahead, rather than down and backwards, this strikes me as a bad thing.

I have no doubt that the colonial mind lingers, hopefully not inextinguishably, in Canada and particularly in the defence establishment and this plays its part, but in war and peace Canadian officer training somehow fails all along the line to teach that the thin end of the telescope goes to the eye and that officers of every rank are paid to Think Big (or at least comprehensively), not small.

Let just one continuing gap in operational thinking and training suffice as an example: never or hardly ever has a clear, precise, governing context provided the kind of authoritative envelope within which that essential but rare characteristic – disciplined initiative – can develop and operate.

To base a training system two ranks up, as is a necessity in any army with a clear, dispassionate view of war requirements, a primary factor is confidence: the confidence of superiors in their own competence; the confidence of superiors in the capacity of their students. Maybe the first is too much to expect in war, but it shouldn’t be in peace; and the second can be imposed by the system, which can also, to a very large degree, ensure its foundations. On reflection, it was probably the lack of this kind of confidence which made the Canadian officer training system so defective in wartime, at least in my experience of it.

After a few weeks in the Horse Palace on the grounds of the Canadian National Exhibition in Toronto and two months of quite conscientious basic training in Orillia, I was sent on a brilliantly conducted and administered Assistant Instructor’s Course in Brockville, a tour de force as far as I could see, on the Warrant Officer, promoted to Major, who ran it. He was a mercenary soldier in

his element, passing on the knowledge and skill of a lifetime with dedication, precision and complete success.

But what was I, on graduation two or three months later, in the middle of a long war, doing training officers? Where were the experienced regimental NCOs who should have been there, whether or not they had combat experience at that point? What I was doing was exemplifying the deliberate degradation of candidates which formed the official attitude of the place. "I'll break your 'earts before you break mine" was the reiterated ultimatum of the commander's communication with the assembled cadets. "Treat cadets like dirt", I was ordered regularly: I didn't, nor did many of the other assistant instructors, but we were in defiance of the party line.

The contract between the Assistant Instructor's Course and the Officer Training Course probably sprang from the fact that the promoted warrant officers who commanded both were confident in teaching NCOs and not teaching officers. Officers and NCOs function at different levels: to deliberately place the training and initial orientation of wartime officers in the hands of mercenary NCOs, whatever rank was thrust upon them, was a fundamental mistake, a psychological blunder which still echoes in the Army and in the most sympathetic public perception of it.

Quite suddenly and most fortunately I found myself in the British officer training system. Whatever I must then have been, however callow, however unpromising, however foreign, I was, to every element of that system, automatically a gentleman, a potential officer to be given every skill time allowed but above all to be made confident and, subtly, an immediate colleague in the officer corps. Misdemeanours, while bringing swift punishment, were made to seem a source of disappointment than of vindictive contempt; incomprehension and minor errors were made to seem a failure to use one's capacity rather than inherent stupidity. NCOs did NCOs' work and were obviously amongst the best available: they knew their place, did their work thoroughly and well while remaining in it and, by doing so, taught cadets the rudiments of their relative positions. Officers were experienced, comradely and sympathetic, fellows in an honourable estate, encouraging cadets to enter it rather than eyeing them as suspicious and unworthy interlopers. After nine months in such an environment, I was ready and eager to command soldiers in action: a thoroughly well considered and carefully conducted system made me so.

What would have been my attitude as a graduate of the Canadian system? I can’t say and I would offer many good officers insult if I said ‘awful’, but I can only think it was despite the system that they were good. On my first morning back as a ‘Sandhurst Officer’, (a Canadian term at the time), I was sat down in the Commandant’s office, given coffee, congratulated, welcomed and assured of the earliest posting to a unit in action. When I and three companions were shown out by the Adjutant, a large platoon of “Canadian officers”, (another term in use), was brought to attention, acknowledged by the Commandant and marched back to the mess. Our relationship can be imagined. They loathed the army, were bored stiff by it, couldn’t wait for the war to end so they could escape it and showed no sign of any desire to command. The system had insulted them: having seen it in action at Brockville, I wasn’t surprised.

What has periodically bothered me since is that I still hear echoes of that military failure. While having no connection with RMC and many reservations concerning it, it does seem to provide to the cadets an officer’s environment. But what they seem to find in the schools in the summer – when they get to soldiering, not academics, is something like my memories of Brockville.

Now when I hear someone actually considering the training of officers in a new, long war, my experience suddenly bothers me again. If this hasty and partial paper does nothing else but alert responsible people to the fact that not everything in the Canadian war performance was good and to be perpetuated, it will be useful. If it can indicate that in the rapid expansion of an officer corps, it is the proper ethos which must be inculcated before all else, I will be delighted, and, of course, if it implies clearly that officer ethos is an essential element of success in war, to be understood, cultivated and sustained, what more could I expect?

APPENDIX 15: AIDE-MEMOIRE FOR AFTER ACTION REVIEW PROCESS³³

Step 1 – Planning

1. Clearly identify the tasks and standards that are to be performed during the training, particularly any tasks that need special focus.
2. Identify how information is to be collected. Will Observer-Controller Teams be employed to assist with the training?
3. At what points in the training will the conduct of AARs be appropriate? AARs should be conducted during or immediately after each critical training activity and called at the behest of the applicable commander and not the OCTs. Critical activities are those events that are key to accomplishing each task to the specified performance standards.
4. Where will be the best location to conduct the AAR?
5. When possible, all individuals involved should attend the AAR. If it is determined that this attendance is not feasible, time should be allocated to permit subordinate commanders to conduct their own AARs.
6. What training aids will help us during the AAR to establish what actually happened and to determine what needs to be improved or maintained?

Step 2 – Preparation

1. All personnel involved in the AAR Process, particularly Observer-Controller Teams, must have a good grasp of doctrine, Tactics, Techniques and Procedures (TTPs) and Battle Task Standards (BTS) related to the tasks being trained.
2. Key events that must be observed (action on contact, action on the objective, action at an obstacle, battle re-supply, etc.) must be identified.
3. The training must be observed and detailed notes must be taken.
4. Observations from all Observer-Controller Teams must be collected and collated.

5. The AAR site must be carefully selected and prepared. A shady spot, out of the wind and rain, with a good view of the ground over which the training took place is generally a good location. A representation of the terrain is needed to keep terrain considerations to the forefront of discussion. AAR aids (i.e., models, video, audio playback, UAV feedback, etc.) should clarify problem situations and illustrate points rapidly and effectively.

Step 3 – Conduct

1. Time Allocation. It is recommended that the AAR time be broken down as follows: 25% spent on what happened, 25% spent on why it happened, and 50% spent on how to do it better.
2. Introduction and Rules. How familiar our troops are with the AAR Process will determine how much of an introduction and covering of the rules will be required. Points to emphasize are as follows:
 - a. An AAR is a professional discussion of training that focuses on how the troops being trained performed the tasks against the required standard.
 - b. An AAR is not a critique. No one, regardless of rank, position or strength of personality, has all of the information or answers. Active trainee participation in the AAR is the most important element of conducting an effective AAR. Participation in the AAR is best when each member of the training unit and the Opposing Force (OPFOR) are included.
 - c. Everyone can, and should, participate if they have an insight, observation, or question that will help the unit identify and correct deficiencies and maintain strengths.
 - d. An AAR does not grade success or failure. There are always weaknesses to improve upon and strengths to sustain. Therefore, it is essential to not only focus on what could be improved but to also highlight where things went well in order to reinforce future performance.
3. Review of Training Objectives. The major and supporting battle tasks that were being trained should be stated.

4. Commander’s Mission and Intent. The commander should describe what his mission was and how he intended to accomplish it.
5. Opposing Force Commander’s Mission and Intent. The OPFOR commander should describe what his mission was and how he intended to accomplish it. This reinforces to friendly forces that they were facing a living, breathing, thinking opponent.
6. Doctrinal Review. As necessary, the key points of what was supposed to have happened, based on approved doctrine, TTPs and BTS, should be reviewed.
7. Summary of Events. The critical events that had a direct impact on the results achieved should be summarized.
8. Discussion of Key Issues. This discussion is the heart of the AAR and should receive the major share of the time allotted. It is in the discussion that the participants identify what went right, what went wrong and, most importantly, why. Identifying why something went right or wrong requires an in depth analysis of cause and effect:
 - a. **What went wrong?** “We got hit from the right flank and lost three tanks in less than a minute.”
 - b. **Why?** “Nobody spotted him until after he got off his first and second shot.”
 - c. **Why?** “Because everyone was focusing on the axis of advance, and that copse of woods wasn’t identified as a possible enemy location during the troop leader’s estimate.”
 - d. **What are we going to do about it?** “Review the troop SOP for that formation, and ensure that everyone knows their arcs.” “Ensure that we take the time to identify likely enemy positions along the axis of advance and detail a tank or tanks to cover them or make sure the supporting troop(s) can.”
9. Closing Comments. The closing comments must include a balance of the strengths and weaknesses identified and the solutions that are to be implemented.

Step 4 – Follow-Up

1. Training must be organized so that there will be an opportunity to follow up the points raised in the AAR(s), preferably as soon as possible after the weaknesses were identified. Doing ten different tasks once and then going home doesn’t give the troops involved the opportunity to demonstrate to themselves or anyone else that they have learned. We must train for success!
2. Points to be followed must be recorded to ensure that the next scenario includes opportunities to practice and observe them.
3. If something has not been corrected during the exercise, it must be noted and included as an objective for the next training activity.

NOTES

- ¹ <http://www.forces.gc.ca/en/about-reports-pubs-report-plan-priorities/2013-other-reserve-force.page>
- ² Comd Cdn Army Initiating Directive – Strengthening the Army Reserve, 1948-1 (DAS), 4 Feb 2016, p.2
- ³ B-GL-300-008/FP-001, Training Canada’s Army, p.78.
- ⁴ *Idem*, p.86.
- ⁵ <http://www.army-armee.forces.gc.ca/en/about-army/organization.page>
- ⁶ B-GL-300-008/FP-001 Training for Land Operations Chapter 6, Section 1.
- ⁷ B-GL-300-008/FP-001, Training Canada’s Army, p.7.
- ⁸ *Ibid*
- ⁹ B-GL-300-008/FP-001, Training for Land Operations, p. 2-13.
- ¹⁰ B-GL-300-008/FP-001, Training Canada’s Army, p.7.
- ¹¹ *Ibid*.
- ¹² *Idem*, p.69.
- ¹³ *Idem*, p.70.
- ¹⁴ *Idem*, p.73.
- ¹⁵ B-GL-300-008/FP-001, Training for Land Operations, p. 6-11
- ¹⁶ Canadian Army Manual of Unit Administration and Discipline, 1957
- ¹⁷ B-GL-300-008/FP-001, Training Canada’s Army, p.83.
- ¹⁸ *Ibid*.
- ¹⁹ *Idem*, pp.83-84.
- ²⁰ *Idem*, p.84.
- ²¹ *Idem*, p.90.
- ²² *Idem*, p.93.
- ²³ *Idem*, p.103.
- ²⁴ *Idem*, p.106.
- ²⁵ *Idem*, p.78.
- ²⁶ D. Grossman and L. Christensen, On Combat, PPCT Research Publications, 2004, pp. 15-16.
- ²⁷ B-GL-304-002/FP-001, Operational Training Volume 2 – Unit Administration
- ²⁸ D. Grossman and L. Christensen, On Combat, PPCT Research Publications, 2004, p. 129.
- ²⁹ B-GL-300-008/FP-001, Training Canada’s Army, p.84.
- ³⁰ *Idem*, p.30.
- ³¹ Granatstein, J.L. The Generals, Toronto: Stoddart Publishing Company Limited, 1993. P.67.
- ³² English, Lieutenant-Colonel John, Failure In High Command: The Canadian Army and The Normandy Campaign, Ottawa: The Golden Dog Press, 1995, p. 308.
- ³³ B-GL-300-008/FP-001, Training Canada’s Army, pp.90-93.

