

THE PROPOSED **CANADIAN MODEL** FOR

SPECIAL OPERATIONS FORCES AVIATION

PART 2

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Why not the best?

— President Jimmy Carter¹

Introduction

This final chapter will take the information contained in Part 1² and synthesize the material presented into a final recommendation for a special operations forces (SOF) aviation selection model in Canada.

There are some recorded instances where SOF aviators from the 160th Special Operations Aviation Regiment (Airborne) (SOAR[A]) have demonstrated their ability to attempt or complete extremely difficult missions. It is extremely hard to judge whether conventional aviators would have had similar successes or failures. However, the selection process to become a SOF aviator lends itself to identifying those individuals who have the qualities and attributes to do extraordinary things. As suggested by Collin S. Gray, in order for SOF to reach its full potential, there needs to be political and institutional buy-in. There has long been an acceptance for a selection process within the Canadian Forces (CF) for Joint Task Force Two (JTF 2), but the Air Force has been remiss in embracing the same acceptance for SOF aviation.

There are several key concepts that are brought forward into this section. One concept is that SOF are used to carry out strategically or operationally vital missions and sensitive tasks directed by the highest levels of the military and government. SOF are likely to operate in conditions that are physically demanding and emotionally stressful with little supervision or support. A selection process is designed to identify the individuals that have the motivation, traits, attributes, and qualities to pass training and survive operations in an unforgiving environment. Ultimately, the function of SOF is to conduct economy of force operations by delivering a much bigger bang for their buck. The advanced selection process further mitigates the risk of wasting scarce training, financial, and human resources.

This part will start by looking at the current selection process for Canadian Special Operations Forces Command (CANSOFCOM) units including the current process at 427 Special Operations Aviation Squadron (SOAS). The next section will identify the

challenges the Air Force and CANSOFCOM have in implementing a selection process. Finally, a proposed selection process will be identified for SOF aviation in Canada. The description of the selection process will provide a recommendation for the steps or gates that an individual has to go through to get to 427 SOAS. The recommendation will not, however, identify the standards to get through the process. Any attempt to define the standards or precise nature of the selection process would rapidly enter into a classified environment. The recommended process will conform to the SOF truths, especially that “quality is more important than quantity.”

Current Canadian SOF Selection Models

The JTF 2 operations in Afghanistan and the formation of CANSOFCOM have allowed SOF in Canada to enter into the mainstream of the CF. As with United States Special Operations Command (USSOCOM), CANSOFCOM has a public domain website that details the recruiting process to gain entry into JTF 2, Canadian Special Operations Regiment (CSOR), and Canadian Joint Incident Response Unit (CJIRU).³ At this point in time there is no formal recruiting or selection for the fourth unit of CANSOFCOM, 427 SOAS. This section of the paper will look at the recruiting and selection process for recruiting for all of the CANSOFCOM subunits to include the early days of dedicated aviation support to the Special Emergency Response Team (SERT) and JTF 2.

Stemming from the selection traditions of the Royal Canadian Mounted Police (RCMP) SERT, JTF 2 has a highly evolved and scientifically based selection process. Best practices have been adopted from other international SOF organizations and have been scientifically validated over the development of the unit.⁴ The unclassified portions of the JTF 2 selection process are found openly on the internet, including a recruiting brochure, toll free number, and recruiting base-visits schedule.⁵ The website identifies four phases for selection

to be a special operations assaulter.⁶ Phase One is completed at home unit level and requires unit permission and a medical review. Phase Two is a fitness and swim test administered by home base Personnel Support Program (PSP) Fitness Staff. Upon successful completion of the fitness test, a cognitive ability and interview process with the Base Personnel Selection Officer (PSO) takes place to assess a candidate's suitability for JTF 2.

Phase Three selection is what has been traditionally referred to as the selection or assessment phase. For enlisted members it is a "[v]ery demanding seven-day job specific assessment process..." with an additional three days of selection for officers.⁷ Candidates are assessed on the following:

...physical fitness (aerobic and anaerobic); performing effectively at heights, in water and in confined spaces; working as a member of a team; problem solving; and interpersonal skills. Assessments are conducted in high stress tactical settings to assess an applicant's ability to recall directions, identify and react to threats, handle weapons safely, and make decisions under physical and mental duress.... Officers [are also assessed on] organizational, analytical, communication, and presentation skills.⁸

There are no detailed open source descriptions of what happens during the enlisted and officer assessment phases, but it is acknowledged that there are attribute stands. How and what these stands measure is considered classified, with only the chief instructor knowing the full scope of assessment procedures.⁹ What can be learned from the open source literature of the JTF 2 recruiting brochure is that the unit is looking for individuals who possess intelligence, sense of duty, self-reliance, leadership, initiative, integrity, maturity, mental agility, dependability, ingenuity, physical robustness, mental robust-

ness, emotional robustness, self-control, and high determination. In addition, officers are required to be decisive, confident, analytical, creative thinkers, and strong commanders.¹⁰

If candidates are selected, they then attend a seven-month Special Operations Assaulter Course. The core skills of an assaulter are "[s]urgical shooting, close-quarter battle, and physical fitness..." while Assaulter Officer's core skills are "... command, planning, communications, and adaptive thinking..."¹¹ Not described in detail here, there are similar yet less stringent selection processes for specialists, supporters, and coxswains. Everyone at JTF 2 undergoes some form of selection process, including civilian support staff.

The Canadian Special Operations Regiment has a similar process to JTF 2. Also published openly on the internet, the CSOR process consists of five phases. Phases one and two are essentially the same as JTF 2: candidate submission of an application supported by home unit, and successful physical fitness testing. The third step undoubtedly happens at JTF 2, but is not formally mentioned; there is a file review before a CSOR selection board. The fourth phase is an assessment phase that evaluates:

...physical fitness, teamwork and leadership abilities, problem solving and interpersonal skills.... Tactical scenarios will gauge your ability to make decisions under physical and mental duress.¹²

The final phase of CSOR selection is the Special Operations Basic Qualification Course. This six-month course teaches CSOR proficiency with a variety of weapons systems, communications equipment, advanced medical training, field craft, patrolling, navigation, and insertion and extraction methods by land, sea, and air.¹³

The selection process for CJIRU is also published on the internet. The CJIRU website indicates that there are four steps in the selection

screening procedure. Step one is the completion of a seven-part application, including applicable PSP and PSO testing. Step two entails the forwarding of the application to CJIRU. The third step is attendance at an assessment centre for further testing, interviews, and screening. Very few details are available for this process. The fourth step is a pre-selection board prior to commencement of specialized training.¹⁴

The process for SOF aviation selection has never been formally established, not even since the early days of non-dedicated support to RCMP SERT. In 1990, the first dedicated support to RCMP was created in the form of SERT Assault Helicopter (SAH) Flight at 450 Tactical Helicopter Squadron based in Ottawa with three CH135 Twin Hueys, 13 pilots and six flight engineers.¹⁵ 450 Squadron also flew CH147 Chinooks in support of the Army until their retirement. As recalled by one squadron member, Chinook crew members were given a personal choice to join the Utility Tactical Transport Helicopter Flight or join SAH Flight.¹⁶ 450 Squadron, equipped with CH135 Twin Hueys, was moved to St-Hubert in 1994 and was eventually disbanded in 1996. The SAH Flight personnel were then transferred to 427 Tactical Helicopter Squadron in 1996 and became B Flight of that squadron.¹⁷ B Flight provided the sole dedicated support to JTF 2 until the 1 February 2006 stand-up of CANSOFCOM.

Since the re-role of the squadron, it is now tasked to deliver special operations aircraft (SOA) effects to CANSOFCOM. While the current composition and sub-unit tasks of the squadron are not all classified, they are sufficiently sensitive in nature and will not be repeated here. What can generally be said is that there are elements of the squadron that are on extremely high readiness to support insertion, extraction and resupply for SOF in counterterrorism, direct action, special reconnaissance roles.¹⁸ Other elements of the squadron can support the same tasks, but are not on the same readiness footing or habitual training standard.¹⁹ There is a natural progression that can take place for aircrew coming into the squadron that allows them to master conventional tactical flying, basic special operations aviation (BSOA) manoeuvres, and then advanced special operations aviation (ASOA) manoeuvres.²⁰ The main difference between BSOA and ASOA tasks is the precision in which manoeuvres are performed and the platforms on which they are performed.

427 SOAS is completely different from its sister units in that there is no formal recruiting, application, assessment and selection process. Pilots, flight engineers, technicians, and other support staff are posted to the unit without having to volunteer, go through a pre-screening process, be subjected to a psychological assessment, or attend an



Photo: MCpl Robert Bottrill

assessment phase. Members are posted to 427 SOAS through negotiations with career managers and losing units. There are essentially two streams by which aircrew can find themselves posted to 427 SOAS. The first stream would be structured for new pilots who receive their wings from the Basic Helicopter Course in Portage La Prairie, Manitoba, and are then posted into one of the helicopter squadrons in the Air Force. This may be a search and rescue Cormorant, maritime helicopter Sea King, or a tactical helicopter Griffon squadron, depending on service requirements.²¹ Pilots may have a preference on aircraft type and location, but the requirements of the service need to be met first. Former SOF aviators that are now instructors, informally attempt to steer promising SOF candidates to helicopters and 427 SOAS.²²

The second method for posting to 427 SOAS is by joining the squadron as a second-tour or experienced pilot. In this instance, most pilots are volunteers, as they have been exposed to SOF aviation either directly or indirectly. In some cases the commanding officer (CO) will attempt to “head hunt” from other units based on recommendations from SOF aviators or other COs. Generally, these pilots are top performers in their current units and the losing CO may be reluctant to let them leave. Yet, no selection or assessment is done to enter the squadron except if entering directly into the high readiness flight that conducts advanced manoeuvres.

If entering into the high readiness flight either from another squadron or from another flight already internal to the squadron, there are assessment flights that are completed for pilots and flight engineers. Generally, there is a day and a night flight flown with a standard or flight training officer / flight engineer, as applicable. The flight consists of basic and advanced SOA manoeuvres being demonstrated, and then they are expected to be imitated to the best of the candidate’s ability. The assessment flight is geared to assess the candidate’s ability to learn new manoeuvres quickly, to know their own limits, to handle stress in the cockpit, and to observe general safe flying practices and airmanship. A follow-on interview with

the high-readiness flight commander probes the candidate’s motivation, determination, and expectations. The high-readiness flight commander will make a recommendation to the CO.²³ The CO has the final authority for internal postings and will determine how much effort will be spent to attempt to select a pilot from another squadron.

The above process worked to a degree when only one-third of the squadron was dedicated to SO. Now that the entire squadron is dedicated to SO there is reduced flexibility to conduct SO across the entire spectrum of missions and tasks if there are unsuitable pilots. If a “dud” pilot was posted to 427 SOAS before 1 February 2006, he was placed in a non-SOF flying position and could be gainfully employed for a normal posting tour conducting conventional aviation tasks. At the end of their tour they were posted onwards to another unit or organization.

The increased demands of SOF in Canada led to the formation of CANSOFCOM and the resultant requirement for an entire helicopter squadron to be dedicated to SO.²⁴ There is no room for aviators at 427 SOAS that do not have the capability to become fully operational and useable through the entire spectrum of SO. In order to mitigate failure of these missions, there must be a selection process that adheres to the SOF truths that “humans are more important than hardware”; “quality is more important than quantity”; and “competent SOF cannot be created quickly after emergencies occur.”²⁵

Common to CANSOFCOM units, except 427 SOAS, is a formally supported CF recruiting, application, selection, and assessment process. The process is supported through the CF chain of command even to the extent of giving the units the ability to define their own job-based physical fitness, medical and psychological standards. It has been through this selection process that JTF 2, CSOR, and CJIRU have been able to put “quality before quantity” and identify motivated individuals that are best suited for Canadian SOF. The next section of the paper will outline the joint responsibility of the Air Force and CANSOFCOM to develop a selection process.

AIR FORCE AND CANSOFCOM CHALLENGES

The development of a formally accepted selection process for SOF aviators has its greatest challenges from the perspective of the Air Force. Within this section there are several issues that the Air Force faces that impede the development of a selection process. The first and most important issue is the institutional acceptance that a formal selection process is required for SOA aviators. The second issue to be examined is the unique relationship of 427 SOAS under operational command (OPCOM) of CANSOFCOM and the resulting division of responsibility for generation of SOA capabilities.

financial resources, as the training program has an approximate cost of \$1 million.²⁶ The CF can ill afford to send a pilot to a foreign test pilot school for that amount of money just for them to fail the program. AETE has an extensive selection process that is thoroughly documented by Internal Project Directives and an AF 9000 Plus quality assurance process.²⁷ The objective of the AETE selection process is to evaluate the candidate's "potential to succeed at [test pilot school],... suitability for flight test work at AETE, and demonstrate ... the workload and nature of work to be expected...."²⁸ Also related by CO AETE was that there is a decreasing experience pool to draw from in the CF. As a result AETE has been challenged to draw suf-



Photo: MCpl Robert Bottrill

Singularly and/or in combination, these issues must be addressed and overcome if there is to be a sustainable and viable selection process.

The first issue to be examined is the requirement for the Air Force to accept as an institution the requirement for a SOF selection process. There have been precedents set for the CF and Air Force to accept additional selection criteria for two of its air units. The Air Force has endorsed a selection process for 431 (Air Demonstration[AD]) Snowbirds Squadron, and the Assistant Deputy Minister Material (ADM[MAT]) Aerospace Engineering Test Establishment (AETE) has developed Test Pilot selection criteria.

The CO of AETE related that the current premise of selection for test pilots was to save

efficient qualified candidates to meet the growing needs of the ADM (MAT) and the Air Force.²⁹ Subsequently, there has been a reduction in the initial application criteria, but not the end state criteria. The cost of failure in test flying aircraft goes beyond the cost of the course. Test flying by its very nature is hazardous and can put personnel and materiel at risk. By having a selection process, AETE is able to minimize risk by selecting motivated quality candidates.

The process for selection into 431 (AD) Squadron is also accepted by the Air Force. As an AD squadron, the Snowbirds are not facing the same risks as SOF soldiers in combat, but the physical risks are still quite high. Eight Snowbird pilots have lost their lives since 1972 during training or show accidents.³⁰ Any

failure on the part of the Snowbirds could also damage Canada's national image. The Snowbirds are an iconic image of Canada and serve as ambassadors to the world, flying over 60 air shows a year in North America.³¹ The Snowbird selection process is designed to initially assess the candidate's motivation, and the potential of the candidate to work with the team. This assessment is made by current team members that review the candidate's application and home unit CO's recommendation. If accepted at this point, the candidate is invited to a flying tryout to evaluate their piloting ability. The flying assessments are designed to grade a pilot's skill level based on what position in the formation they will occupy. Depending on the position, some skills are weighted more than others and are plotted graphically and statistically. Final selection is made by consensus by the serving team members with the CO having the final decision. If accepted, candidates then continue through a formal training process until show season.³² Due to the nature of extreme physical risk and the projection of national image, the Snowbirds can accept no less than the best-suited candidates available. They too require "quality before quantity."

The selection processes for AETE and the Snowbirds demonstrate that there are institutional examples that the Air Force can draw from in realizing that in order to save resources and mitigate risk, a selection process for 427 SOAS is both logical and required. It is desired that this paper will greatly assist educating members of the Air Force who currently do not understand the underpinning reasons for a selection process. CANSOFCOM has already grasped the *raison d'être* for a selection process for their other units but the management of 427 SOAS is not completely under their control. CANSOFCOM has only been given a partial responsibility for the ultimate success or failure of the squadron.

The second major challenge to be examined is the unique relationship 427 SOAS has with the Air Force and CANSOFCOM. Prior to 1

February 2006 and the OPCOM detachment to CANSOFCOM, 427 Squadron was placed under the 1 Wing and 1 Canadian Air Division Order Of Battle. To facilitate the transfer of 427 Squadron to CANSOFCOM, a formal transfer of command authority (TOCA) document was jointly developed by Air Force and CANSOFCOM staff as a means to delineate the Air Force and CANSOFCOM responsibilities for the unique relationship: The TOCA empowers Comd CANSOFCOM with the necessary authority to shape 427 Sqn to meet his operational objectives while maintaining the Air Force oversight of key processes required for the safe and effective generation of this specialized capability.³³

The Air Force retains its traditional residual responsibilities: approval authority for air doctrine; operational airworthiness including operational procedures and aircrew training standards; technical airworthiness; flight safety issues; aircraft maintenance policy and technical matters; aircraft specific logistics; and personnel management of core Air Force personnel.³⁴ As related to operational airworthiness, CANSOFCOM has the responsibility for staffing authorization requests to 1 Canadian Air Division (1 Cdn Air Div) any SOA specific changes to standard manoeuvre manual, flying orders, SOA tactics, SOA doctrine, SOA Operational Risk Assessments, and SOA flight testing requirements.³⁵

Directly related to personnel management, the TOCA specifically acknowledges that "CANSOFCOM and SOA support requires the creation of specific and speciality skill sets, as well as certain mental and physical attributes."³⁶ The TOCA also recognizes the requirement for a delicate balance that must be struck between the long training period to generate an SOA aviator and the premature turnover of personnel. The priority manning of 427 SOAS is further complicated by the current undermanned pilot trade and the increasing demands for qualified tactical aviators to man overseas deployments of Chinooks and Griffons.³⁷

As related to the development of a SOA aviator selection process, the TOCA identifies the following division of responsibilities:

... the responsibility for producing and maintaining generic CANSOFCOM selection criteria rests with Comd CANSOFCOM, while the responsibility for producing and maintaining SOA-specific selection criteria rests with Comd 1 Cdn Air Div as an extension of standards/pers management policy.³⁸

While the TOCA has outlined the responsibilities, it is now incumbent upon both organizations to work together to develop the selection criteria, personnel management policies, and sustainable vision for the future. It is understandable that in the past three years the pace of force development has been frantic at CANSOFCOM, and the Air Force has had other priorities, but the time has come to properly address the selection issue. Luckily so far, SOF aviation has only been measured by its success and not its failures.

The future is uncertain when and where the government of Canada will require SOF aviation, but the December 2008 kidnapping of Canadian United Nations diplomats Robert Fowler and Louis Guay in Africa speaks to having capable forces ready.³⁹ A hostage rescue mission is the type of mission CANSOFCOM may be directed by the government to plan and execute. Depending on the tactical situation, 427 SOAS may be called upon to provide insertion, extraction, and reconnaissance capabilities to the assigned special operations task force. It is also logical then that these aviation forces should be manned by the best suited aviators possible and be generated before the crisis occurs. Finally, there are those who doubt the capability of the Griffon to support such an activity, but they do not take into account the ingenious and creative thinking that will allow a selected SOF aviator to adapt and find some means to exploit every potential capability.

Another recent example is the April 2009 hijacking of a CanJet airplane in Montego Bay, Jamaica. CanJet is a Canadian company whose jet was full of vacationing Canadian citizens. It is reported that the Jamaican assault forces had been trained by elements of CANSOFCOM's CSOR.⁴⁰ Falling under a CANSOFCOM Defence, Diplomacy, and Military Assistance role, it is conceivable that 427 SOAS crews could also be similarly tasked to train Jamaican Defence Force aircrew in SOA techniques. The successful resolution to such a hijacking event brings credit to those that train, plan, and execute it. If such a rescue had failed, Canada would not have wanted the blame assigned to itself for not having provided the best suited and qualified instructors available. Having selected, trained, and equipped SOF gives the government flexibility of options in dealing with high-risk or politically sensitive situations. The Air Force should be eager to positively influence events of such strategic nature.

Proposed Canadian Model for SOF Aviation

The proposed selection model will provide a recommendation on the path an individual needs to take to become an aviator at 427 SOAS. The model is primarily developed for pilots but could be easily adapted to provide a process for other aircrew such as flight engineers and mission specialists.⁴¹ The selection model would potentially have to be extensively revised for technicians and other support trades. This selection model cannot be adopted overnight because 427 SOAS is not starting off as a new unit like the 160th SOAR (A), JTF 2, or CSOR. There are "legacy" personnel that need to be dealt with concurrently with the implementation of the new selection process. Consistent with CANSOFCOM units and previously described United States SOF units, the proposed selection model will consist of a recruiting campaign and four phases: Phase One – unit level application, Phase Two – home and base level screening for fitness and suitability, Phase Three – personality and flying assessment, and Phase Four – probationary posting and initial SOA training.

Recruiting Campaign

The first issue in creating a selection process at the unit level is establishing the level of determination and motivation that a member has to come to 427 SOAS. JTF 2, CSOR, and CJIRU all conduct recruiting tours that travel to bases around the country to educate as much as possible within operational security (OPSEC) restraints, the realities of training and operations. High readiness elements of 427 SOAS had conducted recruiting visits to other tactical helicopter squadrons and flying schools in Moose Jaw and Portage La Prairie, but they have since been discontinued due to lack of effectiveness.⁴² Properly described within OPSEC limits, potential members of the squadron can get a feel for whether the career of a SOF aviator is one they wish to excel in. Recruiting will allow motivated individuals to make an informed decision on their desired career path. This could be argued as the most important part of selection; self-selection as determined by one's own motivation and determination.

A shortcoming of not having a recruiting and selection process is that even if people are motivated to come to 427 SOAS, there is no ability to determine what that motivation may be. Some aircrew may come out of the training system looking for the extra hazard pay, some may wish to move to Petawawa because their service spouse is posted there, and others may desire the challenge because they possess a true warrior ethos. It is the latter individual that most SOF organizations seek, as a warrior ethos

is critical to achieving mission success when faced with the stress and rigours of combat. Major Jerry D. Garrett's monograph "The Problem of Motivation in the Third Dimension of Combat: What's the Solution?" examines the factors that affected American B-52 crews during intense operational periods in Vietnam. He challenges the U.S. Air Force's focus on aircraft technology and suggests more attention should be paid to the moral domain as an indicator of motivation and success in combat.⁴³ Similarly, there are several articles about the actions of 160th SOAR(A) aircrew that demonstrate the difference a highly motivated and determined warrior can make with regards to mission completion and saving lives.⁴⁴ A selection process allows a CO an opportunity to have intimate discussions with potential candidates to see if they have the desired motivation and warrior ethos.

An Air Force-blessed and CANSOFCOM-supported recruiting campaign must take place in order to generate interest in the roles, mission, and tasks of 427 SOAS. Just as there are advertisements in Department of National Defence (DND) publications for 431 (AD) Squadron Snowbirds, AETE test pilots and other CANSOFCOM units, 427 SOAS needs to be included. A multimedia presentation should be developed that can be given by recruiters during visits to flying training schools, units and symposiums. The presentation or video should be easily accessible on the Defence Wide Area Network. The recruiting

campaign should target two audiences: pilots that are coming through training, and second tour or experienced pilots. The issuance of CANAIRGENs [Canadian Air Force General Order] or CANFORGENs [Canadian Forces General message] along with distribution in DND publications like *The Maple Leaf* would ensure wide distribution. The similar process used by other CANSOFCOM units, the U.S. Green Berets, and the 160th SOAR(A) allows a candidate's motivational desires to be known as a function of a robust recruiting campaign.

PHASE ONE AND TWO— HOME UNIT AND BASE LEVEL APPLICATION

Up until Phase Four, there would be two streams of selection—one for undergraduate pilots and a second for experienced aircrew. The application details of Phases One and Two are the same for both undergraduate pilots and experienced aircrew. Phase One would be the submission of a home unit endorsed application to a joint Air Force / CANSOFCOM recruiting office. The application would be very similar to those found on the JTF 2 and CSOR recruiting websites.⁴⁵ Provided the Phase One application was found suitable, the candidate would be invited to complete Phase Two. Phase Two would be a physical fitness test, a swim test, and an assessment completed by a PSP Staff and Base/Wing PSO for 427 SOAS suitability. The standards and measures for the physical fitness tests would have to be jointly developed by the Air Force and CANSOFCOM to represent the minimum operational fitness level required. A potential suitable standard would be the current CF EXPRES test to an exempt level in conjunction with the current Army Battle Fitness Test. Likewise, the PSO cognitive ability test may have to be specifically structured for aircrew in lieu of the standard *ab initio* recruit aircrew selection test.

Through the recruiting process, undergraduate pilots should be able to indicate their preference as early as possible in their training. This may even be as early as basic flying training before it is determined what

type of airframe they will be flying. A program similar to the U.S. Green Beret 18X program could be instituted except the candidates would be selected during flying training rather than straight from civilian life. If the 18X model was taken to an extreme measure, pilots could be recruited from other CF military occupational specialties through occupation transfers (OT). There has been more than one Combat Arms Officer that has successfully transferred to pilot. These OT candidates have the potential of being more suitable in regards to maturity and previous experience. The undergraduate or OT candidate would be funnelled through basic helicopter training and be given a guaranteed Phase Three assessment near or at the end of their helicopter course. If the pilots are not selected then they could be still be posted to any rotary wing aircraft type and subsequent operational training unit (OTU).

PHASE THREE— PERSONALITY AND FLYING ASSESSMENT

Phase Three is at the heart of the selection process. Up to this point, the candidate has met the initial medical, physical, and career file review. The main difference in the selection process between undergraduate and experienced pilots would be the timing and application of Phase Three. Although potentially hard to manage due to the dual-stream nature of Phase Three, it is now time to determine if under physical and emotional stress the candidate has the right attributes and skills that will predict success in training and operations.

In accordance with division of responsibilities of the TOCA, the development of these attributes would fall under the domain of CANSOFCOM. Support from CANSOFCOM staff would be required to generate the required testing mechanism and standards. The U.S. Army Research Institute for the Behavioral and Social Sciences has been quite active in this area, attempting to capture the personality profiles of U.S. Army helicopter pilots.⁴⁶ The deputy commanding general of the U.S. Army John F. Kennedy Special Warfare Center

and School, Brigadier General Bennet Sacolick, considers "...maturity, commitment, judgment, courage, initiative, decisiveness, empathy, self-confidence, and adaptability" as essential SOF qualities.⁴⁷ These qualities would be a good start to assess in 427 SOAS aircrew.

Due to its technical nature, the flying assessment of Phase Three is also very critical. Some pilots may have all the motivation, warrior ethos, and prerequisite SOF personality traits, but they may not be good hands and feet pilots. Supported units have a very long memory when it comes to one of their members being bounced off a building or inserted into a swamp. The common saying is that "you are only as good as your last insert." The flying assessment phases could be divided into two streams: one for undergraduate pilots and the other for experienced pilots. The first stream to be described will be for undergraduate pilots.

If an undergraduate volunteer passes through Phase One and Phase Two of selection, a modified pre-Phase Three personality and flying assessment could be carried out. A limited Phase Three flying assessment is possible at the Portage La Prairie Basic Helicopter Course, as the new syllabus now includes flying Bell 412CF Outlaw aircraft including Night Vision Goggle flying. The Bell 412 Outlaw has been converted from CH146 Griffons (militarized Bell 412) and have been updated with glass cockpits and advanced engine controls.⁴⁸ It is conceivable that although not trained in tactical flying by this time, a modified test assessment could be developed to measure potential SOA criterion. Alternatively, the candidate's flying ability could be assessed by examining the student's Air Lesson Plans and Flying Test results. The Chief Helicopter Instructor or a former SOA pilot could make a recommendation for SOA employment based solely on course results to date.

The flying assessment portion of Phase Three for an experienced pilot would consist of day and night flights at 427 SOAS. If the candidate is a tactically qualified Griffon pilot, it is a very simple process. All that would be necessary would be a review of the candidate's log book for currency requirements and then

carry out the flight with a detailed mission and crew brief. If the candidate is helicopter wings qualified, but neither current nor qualified on the Griffon, there may have to be allowances for a familiarization flight. Current currency and manning regulations may have to be requested to be modified to allow the flight to take place. If the candidate is a fixed wing pilot with no previous helicopter experience it would be extremely difficult to conduct an accurate assessment of SOA helicopter aptitude. Circumstances may direct that a detailed review of the candidate's past flying file be carried out with emphasis on annual flying and simulator assessments. Essentially, fixed wing pilots would have to join the undergraduate 18X program and complete the Basic Helicopter Course prior to a full assessment being made.

If the candidate is a fighter pilot, there is an added dimension, as they are now working with a crew rather than flying by themselves. Further assessment may be required for those pilots as the SOA environment is extremely team oriented between the pilots, the flight engineer, and the "customer" in the back. The 1997 United States Air Force Armstrong Laboratory Report *An Assessment Methodology for Team Coordination in Combat Mission Training* developed a method to assess mission readiness from the viewpoint of crew resource management. The tool was developed to identify individual and team behavioural processes for Air Force special operations component (AFSOC) MC-130 SOF aircrew. The results were used to generate an effective simulator combat mission training program.⁴⁹ Some similar process may be developed in conjunction with flying assessments to ensure potential crew cooperation and coordination are measured.

PHASE FOUR— PROBATIONARY POSTING AND INITIAL SOA TRAINING

Only after successful completion of Phase Three would aircrew receive a probationary posting to 427 SOAS. Phase Four would take the candidate through ground training such as advanced survival, escape/evasion, resistance

and extraction (SERE), resistance to interrogation (R2I) Level C, and “move, shoot, and communicate” skills.⁵⁰ The aircrew could conduct this training while awaiting their Griffon OTU. The end of Phase Four would be dependent on the successful completion of the BSOA course resulting in the removal of their probationary status at 427 SOAS. The SOA aircrew may now be fully employed operationally. At any time a member fails to meet the prescribed standards in the process, or fails to perform adequately, a 427 SOAS Career Review Board would determine suitability for further training and employment. If found unsuited, the individual would be posted out of the unit regardless if it is the designated posting season or not. By having a selection process up front, it potentially reduces the frequency and cost of unexpected postings and moves due to failures in selection or training. The career management system can hardly afford to fund a full-cost move for aircrew if they have only been at the squadron for six months and failed their SERE or BSOA course.

Even if the above selection process was fully supported and adapted by the Air Force and CANSOFCOM, there are significant chal-

lenges for implementation. There is the issue of what to do with current “legacy” unprocessed aircrew. For those aircrew that have already met the flying standard for BSOA or ASOA, only a psychological assessment would need to be administered. This would go on their file for further reference, and in extreme cases may be the lever that the CO uses to post qualified but no longer gainfully employable aircrew. For aircrew that have not yet reached BSOA or ASOA status, there should be a psychological and flying assessment completed. If it is deemed that they do not meet any of the standards, the Air Force must give the CO the ability to post those individuals out to conventional units.

Once the selection process has been approved and blessed by the Air Force and CANSOFCOM, it is assessed that the greatest implementation challenge will come from CANSOFCOM. CANSOFCOM must be prepared to lose capability in terms of lines of operation, standby commitments, and force generation activities while the squadron changes from legacy status to a true SOF organization. The squadron has never been afforded that



Photo: Sgt Donald Clark

opportunity to transform itself. If SOF continues to be differentiated from conventional forces by having soldiers and airmen and airwomen being specifically selected rather than by the missions they conduct, the squadron must be allowed to select its personnel. If during the implementation process it is deemed that one-third or a half of the legacy personnel do not meet the SOF aviator standard, will CANSOFCOM reduce 427 SOAS's operational tempo by that same amount? If they do not, there is an extreme risk of burnout and fatigue which can lead to errors. Errors cost financial, materiel, and personnel resources, and the selection process becomes self-defeating at this point. It is only through the eventual implementation of a joint Air Force and CANSOFCOM selection process that 427 SOAS will become an SOF unit. Consistent with the theory that it is the people rather than the mission that defines SOF, 427 SOAS aircrew have yet to make that transition.

**More is not better,
better is better.**

- Former U.S. Army Chief of Staff,
General Gordon R. Sullivan⁵¹

**We sleep safe in our beds
because rough men stand
ready in the night to visit
violence on those who
would do us harm.**

- **George Orwell**⁵²

Conclusion

The requirement for SOF has grown significantly since the attacks on the World Trade Center in September of 2001. SOF has been considered the force of choice when dealing with transnational non-state terrorism. The literature review of the first chapter sought to identify the scope and breadth of SO/SOF theory and doctrine. Though varied by a function

of vocabulary and definition, the literature is consistent that it takes extraordinary people to conduct extraordinary missions. The SOF truths provide a simple common thread through the majority of literature and offer a guide for the development and employment of SOF. Directed by the highest levels of the government and military, SOF provides an economy of force choice for sensitive tasks and missions that conventional forces cannot provide.

The development of a selection process is what has commonly allowed militaries to choose the individuals that will have the greatest chance of succeeding and surviving training and combat. The criteria and mechanisms have evolved significantly since WW I, but the end state has not changed—selection provides a means to save financial, materiel, and personnel resources that would otherwise be wasted. The operational environment that the SOF soldier find themselves in has led to a focus on an individual's personality profiles, qualities, and attributes. An ideal SOF aviator would possess the CANSOFCOM core values of loyalty, sense of duty, integrity, courage, relentless pursuit of excellence, indomitable spirit, shared responsibility, creativity, and humility.⁵³

The selection process must include a measure of a candidate's motivation and desire to excel in the SOF community. With focused determination, the candidate will persevere through the mental and physical rigours that are presented during training and operations. The selection process must appeal to a wide base of applicants so that there can be a sustainable mix of inexperience and experience in the Squadron. The BSOA and ASOA training modules may have to change, but with selected individuals entering the unit, the courses will no longer cater to the lowest common denominator as they do now.

If CANSOFCOM truly believes the SOF truths that “humans are more important than hardware”; “quality is more important than quantity”; “SOF cannot be mass produced”; and “SOF cannot be created quickly after an emergency occurs”, then they cannot allow the squadron to continue on its current path.

Beyond the wording in the 427 SOAS TOCA document, CANSOFCOM needs to champion the cause for SOF aviator selection with the Air Force. The Air Force, being cognizant of the nature of CANSOFCOM activities, must realize that it takes “...**specially selected personnel** that are **organized, equipped** and **trained** to conduct high-risk, high-value special operations...”⁵⁴ CANSOFCOM must also be prepared to accept a decrease in capability while the process is implemented. 427 SOAS was begrudgingly assigned to CANSOFCOM by the Air Force under a unique command

relationship. It has been suggested that some Air Force officers anecdotally would wish for nothing more than CANSOFCOM to fail in managing 427 SOAS so that it could be pulled back into the conventional blue Air Force. Canada has so far been lucky enough not to have had its Desert One or Blue Ribbon panel like the 160th SOAR(A), but if the Air Force and CANSOFCOM fail to properly manage mutual expectations of 427 SOAS's generation and employment, special operations aviation in Canada will be measured by its failures and not its victories. ■

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List of Abbreviations

1 Cdn Air Div	1 Canadian Air Division
AD	air demonstration
ADM(MAT)	Assistant Deputy Minister Materiel
AETE	Aerospace Engineering Test Establishment
AFSOC	Air Force Special Operation Command
ASOA	advanced special operations aviation
BSOA	basic special operations aviation
CANAIRGEN	Canadian Air Force General Order
CANFORGEN	Canadian Air Force General Message
CANSOFCOM	Canadian Special Operations Forces Command
CF	Canadian Forces
CJIRU	Canadian Joint Incident Response Unit
CO	commanding officer
CSOR	Canadian Special Operations Regiment
DND	Department of National Defence
JTF 2	Joint Task Force Two
OPCOM	operational command
OPSEC	operational security
OT	occupation transfer
OTU	occupational training unit
PSO	personnel selection officer
PSP	Personnel Support Program

R2I	resistance to interrogation
RCMP	Royal Canadian Mounted Police
SAH	SERT assault helicopter
SERE	survival, escape/evasion, resistance and extraction
SERT	Special Emergency Response Team
SO	special operations
SOA	special operations aircraft
SOAR(A)	Special Operations Aviation Regiment (Airborne)
SOAS	Special Operations Aviation Squadron
SOF	special operations forces
TOCA	transfer of command authority
US	United States
USSOCOM	United States Special Operations Command

Notes

1. Jimmy Carter, *Why Not the Best?: The First Fifty Years* (Toronto; New York: Bantam Books, 1976). Chapter Five of the book is titled “Why not the best?” This chapter deals in part with the selection of personnel by Admiral Rickover to join the U.S. Navy Nuclear program. Rickover’s selection interviews were legendary but it goes to show the exacting standards that Rickover placed on his men. Under his watch as the head of the nuclear program, it is reputed that the Navy had a perfect safety record with nuclear reactors.

2. Travis A. Morehen, “A Selection Process for Special Operations Forces Aviation in Canada,” *The Canadian Air Force Journal* 2, no. 4 (Fall 2009): 6–23. Available online http://trenton.mil.ca/lodger/CFAWC/eLibrary/Journal/Current_Issue_e.asp (accessed December 7, 2009).

3. Department of National Defence (DND), “CANSOFCOM Careers / Recruiting.” Available online at <http://www.cansofcom.forces.gc.ca/ct/index-eng.asp> (accessed March 15, 2009).

4. Author interview with Former Chief Instructor and Selection Officer of JTF 2, 23 February 2009.

5. DND, “JTF 2 Recruitment and Selection Process.” Available online at <http://www.jtf2.forces.gc.ca/rec/sp-ps/soa-fis/index-eng.asp> (accessed March 15, 2009).

6. JTF 2 refers to its “operators” as assaulters, whereas CSOR still defines its fighting troops as operators.

7. DND, “JTF 2 Recruiting Brochure,” 16. Available online at <http://www.jtf2.forces.gc.ca/rec/docs/brochure-eng.pdf> (accessed March 15, 2009).

8. DND, “JTF 2 Recruitment and Selection Process.”

9. Author interview with former Chief Instructor and Selection Officer of JTF 2, 23 February 2009.

10. DND, “JTF 2 Recruiting Brochure,” 3, 6, 9.

11. *Ibid.*, 6, 9.

12. DND, “CSOR, Recruiting and Selection, Special Operator.” Available online at <http://www.csor.forces.gc.ca/rs/so-os-eng.asp> (accessed March 15, 2009).

13. *Ibid.*

14. DND, “CJIRU, Careers / Recruiting.” Formerly available at <http://www.cansofcom-comfoscan.forces.gc.ca/cji-uu/cjiru-cr-uiicr-eng.asp> (accessed March 15, 2009). Link no longer active.

15. 427 Squadron Association, “ROAR April 2009, Special Operations Aviation in Canada Historical Timeline.” Available online at http://www.427squadron.com/roar/roar_apr09_page_5.html; (accessed April 20, 2009).

16. LCol Townsend e-mail to author 20 April 2009. LCol Townsend was a Captain at 450 Squadron when he was given the choice to go to SAH Flt. He does not recall any formal selection criteria to support JTF 2 at that time.
17. 427 Squadron Association, "ROAR April 2009, Special Operations Aviation in Canada Historical Timeline."
18. DND, *Canadian Special Operations Forces Command: An Overview* (Ottawa: DND Canada, 2008), 11.
19. When the author left 427 SOAS as the Squadron Operations Officer in summer 2008, there were ongoing efforts to identify the correct internal structure of the squadron to meet the required balance between force generation and force employment demands.
20. DND, *B-GA-002-146/FP-001 - 1 Canadian Air Division Standard Manoeuvres Manual, CH146 Griffon Helicopter*, Chapter 2, 400 series tasks (June 2008). The 400 series tasks are classified portions of the SMM that pertain to BSOA and ASOA tasks.
21. DND, "Canadian Forces Recruiting, Pilot Officer." Available online at http://www.forces.ca/html/pilotofficer_reg_en.aspx (accessed April 20, 2009).
22. As related by a former SOA pilot who then became an instructor in Moose Jaw. An informal network is established with former SOA pilots who are instructors to find out who the promising candidates are.
23. As described by the current high readiness Flt Commander, 21 April 2009.
24. Darcy Knoll and Scott Taylor, "Canada's Commando Commander; Colonel David Barr discusses the creation of the Canadian Special Forces Operations Forces Command," *Esprit de Corps* 14, no. 6 (July 2007): 8-11.
25. Full knowledge of 427 SOAS tasks are limited by OPSEC and are compartmentalized. If there is a failing in this paper it is that there is an inability to describe how important these tasks are and why in very specific terms a SOF selection process is so important.
26. Author's telephone conversation with Colonel Meiklejohn, CO AETE, 24 February 2009.
27. DND, AETE, *Screening and Selection of Candidates for Qualified Test Pilot, Flight Test Engineer, and Flight Test Navigator* (Canadian Forces Base Cold Lake: AETE AF9000 Plus MAP, Part 2, QPM 4.9.11.103,) 27 February 2008.
28. DND, AETE, *Internal Project Directive 127/137 Test Pilot, Flight Test Engineer, and Flight Test Navigator Candidate Evaluation* (Canadian Forces Base Cold Lake: IPD 127 (RW2)) 23 September 08, 2.
29. AETE is a unique CF air unit as it works for ADM(MAT) and with the Air Force as its "customer."
30. DND, "In the Memory of Fallen Snowbirds." Available online at <http://www.snowbirds.forces.gc.ca/v2/tt-le/ts-hs-eng.asp> (accessed April 23, 2009).
31. Department of National Defence, "Snowbirds 2009 Air Show Schedule." Available online at <http://www.snowbirds.forces.gc.ca/v2/as-sa/sch-cal-eng.asp> (accessed April 23, 2009).
32. E-mail to author from Capt Mike "MIGS" French, Snowbird #3, 431 (AD) Squadron Selection and Tryout OPI, 16 March 2009.
33. Steve Lucas, Chief of the Air Staff, *Transfer of Command Authority - 427 Squadron*, (NDHQ Ottawa: file 3010-1(D Air SP), 27 January 2006), 1.
34. *Ibid.*, Annex A, 5-6, 14-17.
35. *Ibid.*, 6-8.
36. *Ibid.*, 16.
37. Carol Potvin, *Pilot Career Manager Brief*. Updated 16 February 2009. As of February, the CF was under strength by approximately 177 (16%) trained pilots at the Captain/Lieutenant rank.
38. Lucas, *Transfer of Command Authority*, Annex A, 17.
39. Bruce Campion-Smith, Richard J. Brennan and Michelle Sheppard, "Al Qaeda 'abused' Canadians," *The Toronto Star*, April 23, 2009. Available online at <http://www.thestar.com/news/canada/article/622994> (accessed April 24, 2009).

40. David Pugliese, "Jamaican assault team trained by Canadians," *The National Post*, April 20, 2009. Available online at <http://www.nationalpost.com/news/story.html?id=1516241> (accessed April 23, 2009).

41. Air Force flight engineers and Army combat arms mission specialists are non-commissioned members that fly as aircrew in the back of aircraft. They provide situational awareness to the crew when flying in a tactical environment, operate the majority of the aircraft mission kits including door guns, supervise troop loading and unloading, other mission essential duties. The Flt Engineers have additional technical and mechanical duties that are a result of their aircraft technician background. SOA flt engineers and mission specialists have additional duties related to SOA insertion and extraction techniques.

42. As related to the author by a former SOA Flight Commander, Fall 2006. Some briefings were attended by non-SOA aircrew wearing ski masks as a joke, thereby demonstrating their lack of seriousness. Some commanding officers would not allow the briefings to take place, or if they did so, would not allow aircrew to volunteer to leave their units.

43. Jerry D. Garrett, "The Problem of Motivation in the Third Dimension of Combat: What's the Solution?" (student monograph, United States Army Command and General Staff College, 1991): 40. Available online at <http://cgsc.cdmhost.com/cgi-bin/showfile.exe:CISOROOT=/p4013coll3&CISOPTR=1655&fileame=1656.pdf> (accessed February 21, 2009).

44. James A. Schroder, "Ambush at 80 knots: Company B, 3/160th SOAR," *Special Warfare* 15, no. 3 (September 2002): 39-41. Online link: <http://proquest.umi.com>; (accessed January 28, 2009).

45. DND, "Application for Service with JTF 2," Available online at <http://www.jtf2.forces.gc.ca/rec/docs/asjtf2-defoi2-eng.pdf> (accessed March 15, 2009).

46. John A. Caldwell, Jr., et al, "Personality Profiles of U.S Army Helicopter Pilots Screened for Special Operations Duty," *Military Psychology* 5, no. 3 (September 1993): 187-199. Available online at <http://ejsccontent.ebsco.com/ContentServer.aspx?target=http%3A%2F%2Fwww%2Einformaworld%2Ecom%2Fsmpp%2Fftinterface%3Fcontent%3Da785379270%26format%3Dpdf%26magic%3DDebscohoste%3C%7CAA3D3EFB68C36A> (accessed February 23, 2009).

47. Bennet Sacolick, "Character and the Special Forces Soldier," *Special Warfare* 22, no. 1 (January/February 2009): 8-9. Available online at <http://search.ebscohost.com/login.aspx?direct=true&db=mth&AN=37297200&site=ehost-live> (accessed February 6, 2006).

48. DND, "Canada Wings, Aviation Training Center, Quick Reference: Bell 412 CF." Formerly available at http://www.airtraining.forces.gc.ca/training/fmt/canadawings_bell412cf_e.asp. (accessed April 20, 2009. Link no longer active).

49. Stephen J. Tourville, et al, *An Assessment Methodology For Team Coordination In Combat Mission Training*, Report prepared for the United States Air Force Armstrong Laboratory (Mesa, Arizona: July 1997): 1, 16. Available online at <http://www.dtic.mil/cgi-bin/GetTRDoc?AD=ADA327932&Location=U2&doc=GetTRDoc.pdf> (accessed February 26, 2009).

50. "Move, shoot, communicate" skills relate to the ability for a soldier to find cover, accurately fire their weapon, and communicate internal and external to their crew. This concept is covered in the 160th SOAR(A) Green Platoon Phase Two training. If the aircrew are shot down, they are not expected to become assaulters. They are expected, however, not to be a liability to their own forces on the ground. In terms of ground combat skills, aircrew must be compatible with friendly forces, not comparable. In some cases the crew may have to fight their way to friendly forces or to positions to await extraction.

51. Dennis J. Reimer, "Training: Our army's top priority and don't you forget it," *Military Review* 76, no. 4 (July/August 1996): 55-62.

52. The Complete Works of George Orwell, "George Orwell Quotes." Available online at http://www.george-orwell.org/l_quotes.html (accessed January 30, 2009).

53. DND, "CANSOFCOM Key Tenets." Available online at <http://www.cansofcom.forces.gc.ca/gi-ig/ckt-dcc-eng.asp> (accessed April 26, 2009).

54. DND, *Canadian Special Operations Forces Command: An Overview*, 3. Bolded emphasis added.