

BEST PRACTICE ARTICLES

Targeted Advisement: An Effective Model of Internal Advisement

Joseph R. Odell, MDiv, MA^a

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This best practice paper recommends a method of command advisement. UMT command advisement about the organization is often vague and not particularly useful to the command. By focusing upon a topic the command is interested in, by pursuing the topic to the point where sufficient and actionable information is learned by the UMT, and by presenting it in a manner that makes it likely to be both read and acted upon, the UMT best meets its task of command advisement. The article includes recommendations for methods of collection and presentation, as well as integration into the different domains of the Army.

Consider a typical scenario: a commander, upon seeing the chaplain or religious affairs specialist, asks, "how's morale?" The response is, "Well, sir, the troops are pretty tired. They've been working long hours and that's also impacting their home life – I've seen an increase in marriage counseling and divorces. There seems to be frustration with unpredictability as well. However, leaders are committed to the mission and teams are working together well, so I think overall we're doing well." The commander is shown a chart that shows that marriage counseling sessions are up recently. The commander offers thanks and continues with his day unchanged. The chaplain believes she has given an honest picture of the organization and is fulfilling her duty and core capability to advise the command, but all she has done is give general feedback based upon limited interactions, in a way that the commander is unlikely to consider valuable or deserving of further consideration.

How should chaplains structure their internal advisement to better inform the command and influence the improvement of the organization? AR 165-1 states, "Chaplains advise the commander and staff on matters of religion, morals, and morale... in the following areas, but not limited to the following...[t]he spiritual, ethical, and moral well-being of the command" and "the personal impact of command policies, leadership practices, and management systems."¹ This regulatory guidance is vague, and neither

^a **Chaplain (Colonel, retired) Joey Odell** previously served as the Division Chaplain for the 4th Infantry Division in Fort Carson, Colorado. A former active duty air cavalry troop commander, he holds an M.Div. in Theology from the Southern Baptist Theological Seminary, an M.A. in Psychology from Morehead State University, and a B.S. in Chemistry from the United States Military Academy at West Point. He is a priest in the Anglican Church in North America.

¹ Department of the Army, *Army Chaplain Corps Activities (AR 165-1)* (Washington, DC: Department of the Army, 2024), 14.

regulation nor institutional training give enough detailed guidance to Chaplain Corps personnel on how to effectively fulfil this core capability. The common example above is how this particular aspect of advisement most often happens – descriptions of a vague problem with little to no detail that informs the command, but not in a way that is particularly useful. With the variety of backgrounds and experiences of Chaplain Corps personnel, the Army needs a more deliberate set of guidelines to fulfil this important capability for the command. I would submit that the most important element of internal advisement is that it helps a commander to make a decision. For the chaplain's feedback to do this, it must be advisement which the command both desires to act upon and can act upon in an informed manner.

Targeted advisement is the structure that meets both conditions - pursuing a single topic of known interest to the command, which is pursued in a high volume of interactions in the organization over time, with a deliberate method of getting to a level of detail that makes the information useful. The information must be delivered to the commander in a fashion which is most likely to be ingested and acted upon. The remainder of this article will cover the three elements of collecting the relevant information and the method of delivery to the command, as effective information collection, analysis, and communication are all necessary to provide effective internal advisement.

Information Collection and Analysis

The UMT should seek to advise the command on a topic the command already has expressed a desire to investigate. An obvious example is Morale, an important contributor to any unit's function. The UMT may investigate predictability, leader involvement, autonomy, belonging, competence, meaningful work, sense of value to the organization, purpose, and/or opportunity. Within each of these areas, there are specific programs, procedures, and resources that can increase or decrease morale. The chaplain should either present the commander with one or more options for the Unit Ministry Team (UMT) to collect information about or ask the commander if he or she already has a topic for the UMT to pursue.

Once the topic is identified, the UMT should talk about that topic with as many soldiers and leaders as possible in appropriate settings. For example, the Soldier and Family Readiness Group (SFRG) is a common unit program that is intended to keep soldiers and families informed about unit events and available resources. An SFRG that does this well increases predictability, conveys a sense of value and belonging, and provides opportunities for soldiers and their families to grow.

Commanders are probably interested in the perceived effectiveness of the SFRG. As the UMT performs ministry of presence, conducts office calls with leaders, and facilitates counseling, they should ask those individuals about their perceptions of the SFRG when it isn't an awkward interjection.

Collecting this information regularly over a period of a month or two will give the UMT confidence that the information they have is a unit problem, not merely a problem of the perception of discrete individuals.

The UMT must pursue the topic down to a level of detail that is actionable. to get feedback that is useful for the commander and enables him or her to make a decision. A technique for this task has been called “The Five Why’s” by Chaplain (Colonel) Will Harrison. Once a topic has been introduced and the person has given the UMT member their initial opinion on it, the UMT member should keep asking “Why” until they have the necessary level of detail. This should take no more than five “why” questions. For example, using our SFRG topic:

UMT: “Do you believe the SFRG is working well?”

Soldier: “Not really.”

UMT: “Why do you think that is?”

Soldier: “Well, there isn’t much participation, for one.”

UMT: “Why do you think people don’t participate in the SFRG?”

Soldier: “They just don’t seem to give us very useful information.”

UMT: “Why isn’t the information useful?”

Soldier: “It seems as if they don’t know what we need to know.”

UMT: “That must be frustrating. But, if SFRG leaders are spouses, why don’t they know what your family needs?”

Soldier: “The SFRG leader is the XO’s wife and they just got married. She hasn’t been around the military much and there isn’t any training for SFRG leaders.”

It takes four “why” questions to get to an actionable element for advisement. It’s not particularly helpful to tell the commander that SFRG isn’t working well. Just telling the command that people aren’t participating won’t lead to an improvement, because spouses aren’t required to obey commanders’ orders. Mentioning that the information isn’t useful could possibly lead to an improvement, but it also will add a permanent task to someone’s plate to tell the SFRG leader what he or she should tell the SFRG. But, if the commander is informed that SFRG leaders aren’t trained, a training plan can be developed and implemented which will not only improve the current SFRG, but also future SFRGs.

Another example of The Five Why’s:

UMT: Do you all feel your time is being used effectively?

Soldier: No, it gets wasted a lot.

UMT: Why is that?

Soldier: We have to work late almost every day.

UMT: Why do you have to work late so often?

Soldier: We’re working on the tanks, trying to get them back up.

UMT: Why do you have to work late to do that?

Soldier: Probably because the first half of the day the platoon either is doing hip pocket training or sitting around.

UMT: Why aren't you working on the tanks earlier?

Soldier: The parts don't come in until mid-afternoon, so we can't work on them until then.

Now the UMT has actionable information for the command. When presented with the problem of consistently late arriving parts, the commander can choose a solution – investigating the ordering and delivery systems, altering the duty day, providing compensatory time, or adjusting the training schedule. However, if the conversation had not been pursued to the final “why,” either no solution would have been implemented or, perhaps, even a counter-productive solution could mistakenly have been put into place.

Once the information has been collected in a deliberate, thorough fashion, the analysis has already largely been completed. The UMT doesn't need hard numbers, just a general awareness of the types of answers they've been given and a sense of how common the different answers are. Using our SFRG scenario again, the UMT states that they talked to around 200 people about it, with perhaps about 20% of soldiers saying the SFRG was effective; and of the 80% who didn't, 1/3 thought the problem was poor communication and 2/3 said the information wasn't useful. Most of both groups identified SFRG leader training as a gap. This may not be “data” in the same way that the operations research / systems analysis (ORSA) officers or data integrators crunch numbers, but it will provide the sense of confidence that the identified specific actionable problem is worth spending time and resources on fixing.

Delivering the Advisement

After the topic that already has been selected by the command has been investigated, and the information collected and analyzed, the UMT must present the results to the command in a way that is likely to lead to action. UMTs must accomplish two things: help the commander to receive the information in its entirety and help the commander to understand the problem that can and should be addressed.²

The chaplain's prior interactions with the commander help them understand how commander best receives information. Commanders are bombarded with information and demands from multiple directions. One effective way to deliver targeted advisement is a hard copy, one-page summary, using spacing, italics, and bold text to draw the commander's attention to the most important information. Keeping in mind that the commander wants the

² Todd Rogers and Jessica Lasky-Fink, *Writing for Busy Readers: Communicate More Effectively in the *Real World* (New York: Dutton, 2023). Recommended by Chaplain (Colonel) Brian Koyn.

results of analysis, not just information or data, structure the summary with a larger font title, a Bottom Line Up Front (BLUF), an analysis section with bulleted statements, a clear problem statement, and a recommended Courses of Action (COA) section.

At first, the UMT may want to include the data briefly (conversations with around 800 soldiers and family members, across five battalions, indicated that about 80% were dissatisfied with SFRGs). Once the commander is used to receiving targeted advisement, he or she will no longer need that kind of data – it will be a shared assumption that the UMT(s) are sourcing their feedback through a significant volume of the organization so that the analysis is not based upon a few anecdotes.

Choosing to deliver the information in person, on hard copy, not only separates targeted advisement from the morass of email communication the commander receives, and, thereby, makes it more likely to be read. The in-person delivery makes the exchange of information more likely to be clearly understood and allows for immediate answers to the commander's questions about the topic and details. The format draws the commander's eyes to certain details that are most useful for making an informed decision. This is not the only format a UMT can use for targeted advisement. Some commanders might prefer a narrative format for their UMT analysis. Still, in the absence of an already expressed format, the example in Figure 1 will allow the commander to rapidly understand the main point and seek more detail as he or she desires.

[INFORM]: FFIR from Division UMTs. SEP-OCT Data Collection and Analysis.

Topic: SFRGs

BLUF: Most SFRGs below BDE struggle to gain meaningful participation because they are not understood or valued by Soldiers and Families

Analysis:

- There are a few SFRG's that stand out for excellence, including **4-7 CAV** (CAB, BN Level) and **B/222BSB** (1BDE, Company Level). However, the vast majority, *if measured by Soldier & Family Member awareness and value*, are fair to poor.
- We do not follow any training model for SFRG leaders, resulting in **untrained leaders who want to do well, but don't know how.**

- Senior Leaders, who served over a decade under GWOT, have a much greater understanding/value of SFRGs than most of their formations.
- SFRG's **are** conducting meaningful events, especially when they collaborate with other agencies or utilize UMT funding.
- However, a significant number of Soldiers
 - Are not aware that those events are driven by the SFRG
 - Many do not know who the SFRG leader(s) are
 - Most could not express the purpose of the SFRG
 - *This group of low information Soldiers includes some SFRG leaders*

The foundational issues seem to be **lack of clear purpose and lack of leader emphasis below the BN HQ level.**

How do we improve the effectiveness of SFRGs across the organization?

Provide incentives and training for SFRG leaders and participants and clearly communicate the purpose and relevance of the SFRG as a leader responsibility and to Soldiers & Families during their events.

Recommended COAs:

1. **Brief SFRG training as part of the SATB down to CO level.** Important tasks are planned and scheduled.
2. **Give compensatory time or UMT-led event priority for SFRG participation.** While us “old-timers” may view this as unnecessary, since the SFRG already should be a benefit, changing culture requires us to change how we are doing business.
3. **Units clearly message SFRG activity and benefits.** Additionally, a two-question survey, “what do you need most from the SFRG” and “what is one SFRG event you would enjoy most” can increase effectiveness by meeting the expressed need, thereby increasing participation.

Figure 1. An Example One-Page Targeted Advisement Brief

In my organization, when subordinate UMTs have used targeted advisement, they have always received greater investment by the commander in providing topics and asking for feedback. Furthermore, those commanders went on to

disseminate the targeted advisement product to their subordinate commands, emphasizing findings and giving command guidance for improvement. This allowed those subordinate commanders to engage their UMTs to develop targeted advisement for their own organizational goals.

The two-year span of a command gives ample opportunity for reengaging a previous topic to see if the command decisions made an impact. For example, my organization surveyed the topic of belonging by specifically focusing upon periodic written counseling as a means of increasing leader engagement and strengthening unit relationships. After the first targeted advisement on the topic the command initiated the development and dissemination of a counseling SOP and made counseling packets an inspectable item. Ten months later, the topic was targeted again, and the results showed marked gains in not only the frequency of periodic written counseling and accompanying verbal sessions, but also in soldier sense of belonging and belief that their leaders cared about them.

Conclusion

The U.S. Army Chaplain Corps has two core capabilities: provide religious support and advise the command on matters of morals, morale, ethical issues, and the impact of religion on all aspects of military operations. UMTs are typically very adept at the first and receive little training or direction on the second. Targeted advisement is an answer to the question, “how do we advise the command in a way that is useful to the commander and can lead him or her to make an informed, effective decision that will improve the organization?”

Of course, targeted advisement isn’t the only way the UMT advises the command. Soldier discipline, pastoral care to leaders, operational religious support, casualty care, and concerns generated through typical UMT operations are all topics and areas about which the UMT is likely to engage with the command and provide professional advice. Historically, the amount of interaction the command has with the UMT is based largely upon UMT and command team personalities. Targeted advisement, because of its command decision focus, can also open the door to a command team or team member who is not generally open to UMT feedback. When leaders see how the UMT enables them to make informed decisions for the organization, the leaders are almost always moved toward greater interaction with the UMT.

Targeted advisement is already beginning to spread throughout the Army as UMTs I’ve trained take it with them as they move to other locations and other units. While this organic growth is good, it would be far better to also make targeted advisement part of both installation and unit UMT training as well as the institutional domain, particularly for the Chaplain Basic Officer

Leader Course and 56M Advanced Individual Training. Every chaplain and religious affairs specialist should be equipped with a known and effective method of advising the command.

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