VISION2020 Journal

PROLOGUE:

I reported to DIA in February, 1981, assigned to the Directorate for Collection as a Navy Ensign. Over the years I have served in what is now DC, DX, DT, J2, FE, CP, NMEC, and DS, generally changing jobs every 2–3 years. Most of the jobs I held were operational—collection operations, collection management, analysis, HUMINT management, etc. I have been a member of the Senior Executive Service since March, 2001, and in that capacity held executive-level jobs leading and managing large organizations of hundreds or thousands of people.

While at the National Media Exploitation Center in 2004 I began working with the Col Mike Flynn, J2/JSOC, to enhance the document and media exploitation process (DOMEX) in support of his effort and those of the JSOC Commander, then MG Stan McChrystal. Our partnership resulted in exceptional operational results and LTG Flynn never forgot the contributions the NMEC made to his command.

In Mid-2011 the Deputy Director convened a Red Team, led by Brad Knopp and composed of a small group of long-time senior DIA employees, to look at new organizational designs and culture change for DIA. This group included me and we came up with two principal organizational concepts, which we forwarded to the DD in July, 2011. One consisted of two 2-Star organizations, a directorate for operations and a directorate for support, with a limited number of direct reports. This generally was the group’s favored COA. The alternate solution consisted of four major directorates, a DO, DI, DS&T, and Support.

I spent months during the Red Team exercise and afterwards thinking about a new organizational design and culture for DIA, and wrote a culture paper as part of the Red Team exercise. I continued to think on these matters in the ensuing months because I knew LTG Flynn probably would become the next Director and also believed I might become the next DIA Chief of Staff as I knew Ms. Houy was going to retire. As the tenure of LTG Burgess drew to a close and LTG Flynn was formally nominated I began thinking more in earnest about restructuring and culture, particularly after I was passed over for the CS position. At that time the DD mentioned to me that LTG Flynn wanted to completely redesign the Agency and he the DD intended to recommend me for the lead in this effort, something I agreed wholeheartedly needed to be done and agreed to
lead the effort. So I knew well before LTG Flynn arrived that I probably would lead a restructuring effort and that LTG Flynn wanted radical change.

Chapter 1

Shortly after becoming the Director on 24 July, LTG Flynn met with me and the DD and let me know I would be tapped to lead an effort to change the organizational design and culture of the Agency, and that I needed to provide him with my thoughts on a name, way forward, draft Terms of Reference, an aggressive timeline, and structure for a task force to get the job done. He spent an hour with us sketching out his concepts for a flatter, more operationally focused Agency. He clearly knew an enormous amount about DIA and stated he had been thinking about this for a very long time. He also directed me to develop an announcement for the work force on me, and that I would be full time on this effort, working directly for him and the DD, and not be going back to my old job. I agreed with him that this needed to be a full time, dedicated effort, that would take at least a year to implement.

I immediately began work on the TOR, submitting several drafts of it and an announcement on me to him and to the DD and CS. The CS added one milestone, the DD tightened up the wording and deliverables, as did the DR. On 22 August the DR sent an e-mail to DIA ALL announcing the VISION2020 Task Force and my appointment, and promulgated the TOR. The appointment took effect the following Monday, 27 August.

As an aside, I came up with the name of the task force, which I wanted to call 2020 Vision, a take-off on sharp eyesight and reference to clarity and the future. The DR liked the VISION2020 as a logo, typed exactly as I have typed it, and it was so. He further asked us to develop a logo/symbol and put it on the door as a large poster or banner.

Knowing I was going to be leading this effort I first looked for a deputy. I had been in close contact with my old friend Dan O’Brien over the months preceding LTG Flynn’s nomination and asked him to be my deputy; he accepted. We then went through names and together selected Rey Velez as the other Senior on the team. My intent all along was to have a very small core team, with many others from across the Agency matrixed into the effort. I wanted to run the task force the same way I believe DIA needs to be run—flat, matrixed, operationally and mission focused, not having to “own” all the people, but rather reach out to those necessary to get the job done, task
them, and follow-up.

The DR wanted us to ensure the team reflected a cross-section of the Agency, and included junior and senior people, military enlisted/officers and civilians, geographic and other diversity, and people with short and long tenure at the Agency. We did this as we established our battle rhythm, which quickly settled into M/W/F 1000 meetings of the directorate and special office representatives designated to support the task force. Along with this battle rhythm we established an address list on JWICS consisting of every person involved in the task force, the Command Element, and all the DD4/Special Office chiefs and deputies. We also established a SharePoint site on JWICS and began posting all task force documents, briefings, and read-aheads there.

The major projects we began working on were a matrix of all taskings from the Director, a communications plan, culture change plan, and a briefing and paper for USD1. Our first deliverable was a paper and briefing outlining our process, reasoning, and way ahead for USD1 approval prior to 1 October. This was delivered the week of 17 September and briefed by DD and DR to USD1 on 24 September, at which time he approved the plan and way ahead.

The way ahead included developing several courses of action (COAs) for DR consideration. Each COA had to have advantages and disadvantages and detailed explanations of size, scope, effect, and rough manpower effects and costs. Along with COAs, we were tasked to identify the missions and functions of DIA and the supporting requirements (documentation). Then we were directed to conduct a prioritization exercise to determine what we believe to be the most important missions and functions and those of lesser value. We chose a coins exercise similar to the DNI’s 1000 coins programmatic process. CS and DA worked together to develop a baseline list of Agency missions and functions, and tasked out this list across the Agency for additions and corrections.

Along with these tasks we initiated many other efforts. Phil Roberts, a major contributor to the effort and former DIA Chief of Staff, led the development of focus groups at which we asked a standard set of questions to groupings of the work force. We began with our 5–Eye partners, providing them with the outline of what we were doing and solicited their thoughts and any information they could provide on similar efforts on their part. For our own work force we began the focus groups in Tampa at CENTCOM and SOCOM, with Dan O’Brien leading the effort. The work force at these Commands noted with pleasure that we initiated the focus groups at the edge rather than Washington. Another effort, led by Dan and Brad Knopp, was to look at the Command
DFEs, JIOCs, and overall DIA footprint at the Commands, and how they should be structured and how they should interact with headquarters in general and the DIOs in particular. We also mounted a multi-faceted culture project, looking at the DIA culture and what needs to be changed and how to change it. Ellen Arden and Alan MacDougall co-led one effort, with support from many individuals across the Agency. They have been tasked to look at all aspects of culture change, from the smallest things to major program changes.

We reviewed the eight years of Agency wide survey data that exists, in order to inform the culture change project, training, and leadership and management issues being studied by the task force. The survey data is remarkably consistent in its satisfaction with the importance of the work we do and the mission. On the other side of the coin, it also is very consistent in its criticism of Agency leadership. We also pulled EEO surveys and various EEO studies which have been conducted on the Agency. The DIA EEO office has been an integral partner in all we are doing.

A major issue we took on was the role of S&T in DIA. The Director informed us early on that he wants innovation, R&D, and those innovative and research elements of S&T consolidated from across DIA. He also stated that the new S&T element would not look like DT. He directed us to move the operational elements of DT into the operations directorate, specifying NMEC and the DT labs.

The Director tasked us to look at all the 24/7 watches in the NCR, with the aim of consolidating those in the DIA HQ which can be consolidated.

We were asked to take a hard look at the DFEs, their role with respect to the Command J-2s and JIOCs, and their relationship with the DIOs. Brad Knopp and Dan O’Brien worked this significant task. They also took on the task of involving the 5-Eyes partners, meeting with them early on to brief them and solicit their views on how they intend to restructure to meet downsizing of their own forces and any thoughts they have on how we can do things better. These briefings were very well received and we were asked to provide follow-up briefings to DOME PLATE and to meet individually with the Brits and Australians.

One of the Director’s focus areas is training. We were directed to conduct a comprehensive study of all training accomplished by the Agency, identifying all training funds and personnel, and make recommendations on the centralizing and matrixing of training across the Agency. Deb Hartman
took the lead for us on this major task.

As part of the DIA Strategic Plan process one of the ten initial initiatives was to seek cross-Agency efficiencies. Janice Glover-Jones led this effort on behalf of CS, developing a methodology and recommending the establishment of a PMO to identify efficiencies and reap savings. At the Agency-wide Performance Management Board orchestrated by Paul Batchelor, MIO, the Director agreed with the establishment of a PMO, but much to everybody’s surprise, directed that it be taken on by VISION2020. I subsequently met with Janice and Melissa separately on this matter, identified Pete Fuehrer from DI to lead the effort, and obtained DI concurrence to release him.

The Director asked us to review past restructurings, and we used Roy McCullough from the DIA Historian’s office for this task. He produced an outstanding document which described major reorganizations from the 1970’s (LTG Carroll), 1990’s (Lt Gen Clapper), and 2000’s (VADM Jacoby).

Another major task assigned to us by the Director was to look at all things Cyber and make recommendations on the Agency role in this important area. We were briefed by Yu Lin Bingle, cyber analysis chief, who outlined 19 areas in DIA which are working cyber. We then brought in Jeremy Sansbury, a DIA/DS senior assigned to CYBERCOM as the Deputy J-3 Operations Chief, and Marc Mullin, the DIA Representative to NSA. Coincident with this there was an exchange of correspondence and then a half-day meeting between Gen Alexander and LTG Flynn, at which both committed to further integration of DIA into CYBERCOM. VISION2020 continued to work this issue to ensure proper focus on cyber by DIA in accordance with the Director’s direction.

The Director tasked us to look at governance for the new organizational design, not an insignificant task. We initially deferred this task due to the amount of other work levied on us.

Chapter 2

We didn’t have to wait long for the infighting to begin. It started first with an unlikely adversary. Paul Batchelor asked for a meeting with me on Wednesday, 12 September. He went into great detail regarding the DIA Strategic Plan and its 11 initial tasks, part of a total of 37 implementation tasks in total. He correctly noted that the VISION2020 tasks comprised roughly ten of the 37, and proposed that we fold all these initiatives, which comprise the bulk of our effort, into his strategic planning Performance Management Board (PMB) process, attending monthly meetings, appointing
Champions, developing performance contracts, and turn them over to him. I informed him that this was not going to happen. We had too compressed a timeline and the Director was clear that VISION2020 was going to do this work. He came back at me, with Rey and Dan in the room, four times, attempting to get me to agree. After the meeting Rey noted how well he knew Paul and that Paul was not done with us. He added in response to my question that yes, Paul had expected me to agree and was surprised and angered when I refused.

We learned the next day the response. Paul hosted a Breakfast of Champions at 0900 Thursday, but invited Rey (I told Paul on Wednesday that I couldn’t make it) for 0930. He spent the first 30 minutes attacking VISION2020 and its refusal to support the strategy, something I went out of my way to not do. In fact, I had told Paul that I totally supported the strategy, agreed our effort nested with the strategy, and that I saw our office working itself out of a job within a year and turning over our work to strategy implementation teams. Paul informed the DD and the Breakfast of Champions none of this. It took Rey considerable time to regain the trust of the room after he arrived. We then had the same chore with the DD, who Paul had misled into believing we didn’t support the strategy. This came out at a meeting the afternoon of 14 September with the DR, where the DD came ready to pounce on Rey and Dan (I was unable to attend due to knee surgery that day). The DD visibly relaxed when he came to understand that Paul had been incorrect in our characterization of the strategy and he had nothing to fear. Subsequent to all this the DD asked me to talk with Paul and help him through this issue, which I did.

In order to enable all task force members to better understand the major elements of the Agency, we began adding information briefings to the 1000 meetings, beginning with DCS and including numerous other offices. We reached out to a variety of offices across DIA, for example the DIOs, and met with them to learn exactly what they are doing and what they plan to do to further integrate across the Agency. All briefings have been posted to the SharePoint site.

As stated above, USDI was briefed on Monday, 24 September, by DD and DR, and approved the way forward. We learned afterward that the DD had briefed USDI prior to that date and on the 25th presented one COA to him for his approval. He indicated his approval for this COA, which posited four major elements in DIA—Operations, Analysis, S&T, and Support. The DR was unaware that this was locking in this COA or that this was a COA we didn’t favor. It became clear as we conducted further fact-finding that the DD was not in sync with the DR and had been working him
over a long period of time to lead him to this DD-chosen COA. As the task force worked COA development internally we come to the conclusion that this COA was not sufficient to engender enough integration or change to DIA and would be met with disdain by the working level of the workforce, which is seeking significant change. This has put the task force in a terrible position between the DD, who is doggedly pursuing his agenda, and the right thing to do, which mirrors the instincts of the DR. We further determined that the DD has been pursuing this COA for as long as a year, when he suggested it to the Red Team effort. He is now pressing the task force to adopt his COA.

On 26 September we requested an urgent meeting with the DR (the DD left 25 September for Afghanistan) to raise these concerns. He listened and understood, and directed us to develop three COAs to present to him the following Sunday. We traveled to Charlottesville on Thursday, 27 September, and spent the day with Phil Roberts finalizing the three COAs, one a Joint Staff model, another the DD choice, and our own preferred COA (initially developed during the previous two weeks by Rey Velz and Dan O'Brien with Phil in a trip to Charlottesville and subsequent meetings and discussions). Our COA involved full integration of collection and analysis within a large operations directorate. Jameel Moses, an outstanding ManTech contractor graphics expert with previous deployment experience did a great job assisting us in preparing the substance and style of the large table-top sized Adobe graphics we printed for the Sunday session with the Director. We also had graphics depicting the overall size and relative office size of the elements in the enterprise, arrayed as various sized planets. DX, DI, and DS were the three Jupiter-sized planets, with the other directorates and Commands being smaller planets or moons. Separate from the charts we had the classified manpower numbers associated with the planets. The charts contained all the major offices and functions of the Agency.

We had a discussion with the Director on Sunday, 30 September which lasted over two hours. He asked many detailed questions as we went through each COA in detail. He clearly favored full integration, but stated he was not going to pick a COA. We described the need for transparency and for the broader VISION2020 team to have the opportunity to comment on the COAs. We decided to strip out all the elements of each COA and place these functions and office symbols on one chart, with the other charts containing only the blank framework of the integrated, four major elements, and Joint Staff structures. We added a full blank page for advantages and disadvantages and another for comments. We then briefed the entire task force membership on Wednesday, 3
October on the COAs and how to fill out the charts. We noted in each COA there was a Command Element box which was blank, and we were looking for their recommendations as to the direct reports to the Director. We also asked for the nuances of advantages and disadvantages, noting we already knew the big advantages and disadvantages of each COA. We asked each member of the task force, junior to senior, to fill out the charts, name them DD4_last name so they would take ownership of their input. I explained I was asking each of them as task force members to complete the assignment. I was not telling them whether or not or how to coordinate within their directorates. In response to a question I stated we want as many inputs as possible and noted that the assignment would be posted to the SharePoint site and sent out electronically to the VISION2020 address group, which included all the DD4s and deputies.

The week of 17 September we initiated the Vice DD4 advisory group, in accordance with the TOR, and briefed them on what was being presented to USDI Vickers. I also outlined our battle rhythm, major tasks, and timeline. On Monday, 24 September I followed this briefing with a briefing to the Key Leader Engagement Meeting (KLEM), the Monday 0830 replacement for Hollywood Squares. I briefed again on the status of the overall project and the way ahead, without PowerPoint slides this time. I scheduled another VDD4 advisory board briefing for the week of 8 October, with a KLEM briefing for the following Monday. I was striving throughout this process to put as much information out as possible regarding task force activities and to be as transparent as possible.

Concurrent with this activity, I briefed the DIA Advisory Board on VISION2020 on Thursday, 27 September. Present were Mary Margaret Graham, LTG (Ret) Don Kerrick, USA; General (Ret) Hill, USA; Mr. Gilman Louie, first In-Q-Tel director; Admiral (Ret) McConnell, former DNI; Ms. Mo Baginski, former NSA SIGINT director and FBI Intel Division director; and Mary Connell, former CIA CFO. My scheduled one hour went an hour and forty minutes, with a fascinating discussion resulting in many ideas for us and in them having a private closing session with the Director. The result of this closing session was that the Director asked us to advance our timeline for completion of COAs so the Advisory Board could red team them for him. He also advanced the timeline because he wants to choose a COA in advance of the beginning of the FY 15–19 program build process, scheduled to start in mid-November. This was one reason why we redoubled our efforts internally to develop COAs separate from and in advance of the larger group—we feared just such a timeline advance and wanted to be prepared. We believed opening up the COAs to the larger group without our preconceived notions would result in fresh ideas and in them identifying things
we had not thought of.

The bureaucratic politics at this early phase of the project have been far more difficult than I imagined they would be so early in the process. I didn’t anticipate them coming into play until after a COA was chosen and promulgated. They began on Wednesday, 19 September when Paul Batchelor, MIO and primary staff senior for the DIA Strategic Plan, came to see me. He noted that at least ten of the 37 strategy initiatives fell within the purview of VISION2020, and proposed therefore that the VISION2020 efforts in these areas, which encompass nearly everything we were doing, be placed under his MIO Performance Management Board (PMB) process, with contracts written, champions assigned, and PMB briefings scheduled. I politely informed him this was not going to happen. I stated the Director has given us nearly impossible timelines and that there would be no possible way I could achieve them if I were a part of his process. He repeatedly came at me attempting to change my mind, at least four times, and I politely refused each time. Afterward Rey Velez, who has known Paul for a long time, stated that Paul was mad that I rebuffed him and that Paul had fully expected me to fold my effort into his. He warned me that Paul would not stop at that and would elevate the issue, which he did in a particularly devious and underhanded fashion. First, he went to the DD and completely mischaracterized my remarks as being against the strategy process and as undermining the strategy, which was completely false as I had reassured him of my full support for the strategy process. Further, I had informed Paul that we hoped to work ourselves out of a job within a year and that all most of our initiatives ultimately would be turned over to the strategy process once we had made enough progress on them.

In addition to going to the DD, Paul knowingly invited Rey to the Breakfast of Champions the following day at 0930, even though he convened the meeting at 0900. He used the half hour before Rey arrived to trash VISION2020, me, and the overall effort. Rey then walked into a completely hostile group of senior executives and had to set the record straight. Paul still did not give up, teeing up the DD to challenge us in front of the Director at a meeting Friday afternoon, which he invited himself and the DD to (it was our private VISION2020 update to the DR). As I had knee surgery that day I was unable to attend. According to Rey, the DD arrived 20 minutes late loaded for bear and ready to pounce on them. As he listened his body language visibly softened and he began to understand that Paul had misled him. The Director agreed that VISION2020 would remain separate from the strategy process, but that as our initiatives matured we would fold them into the strategy process, something we already had agreed upon with Paul. Throughout this
coupé of days Paul displayed remarkably unprofessional, selfish behavior, and put his boss, the DD, in a bad position. It would not be the last time he did this.

It was shortly after this that we became aware of the DD’s own preconceived notions regarding the COA he wanted to implement. At the same time, we became aware through the DR’s Command Element staff that the entire CE was aware of the rift between the DD and DR and that the DR increasingly was aware as well. There were several instances of the DD working at odds with the DR, going over him to USDI, and in general using his knowledge and influence to take control of things the Director wanted to control. One example was the 15–16 initial program build offsite. The DD had mentioned a routine unimportant budget off-site to the DR that the latter didn’t need to attend. When the DR discovered that in fact it was the two day kickoff for the FY 15–19 program build he insisted the dates be changed and he lead the off-site. Paul then relayed a note to us that he was going to ask the DD whether or not he wanted to change the dates, knowing as he did this that the DR had already directed that the dates be changed.

On Monday, 1 October at 0730 I met privately with the Director to review with him the state of play with the DD and suggest some alternatives to a head-on confrontation, including the movement of seniors particularly close to the DD (Alan MacDougall and in the future possibly Paul). I told him I would think hard on other ideas for him, and subsequently suggested a variety of bureaucratic ju-jitsu, including regular e-mails from him to USDI, having me work on LTG Palumbo, PDUSDI Tom Ferguson, and DUSDI John Salvatore, all defense people I have known a long time. I also began routing him additional information demonstrating what the DD was doing to him.

In a NIPR e-mail from the road on 2 October the DD reiterated to me that he was committed to the four-box COA. This made it clear to me that he was not going to back down, but rather going to force that COA upon the DR by any means necessary.

Beginning the end of the first week in October we noticed a change in the voice track of the Director. He seemed to be adopting a more directive, certain tone and focus on the fully integrated COA, publicly stating on more than one occasion his interest in this COA. He met with Cathy Johnston and asked her to be briefed by us, something Phil Roberts did on Friday, 5 October during her visit to Charlottesville. She was totally on board with full integration.
The real COA work with the full task force began the first week in October. Following the Sunday, 30 September session he directed that we present the three COAs to the task force members as blank slates, with all the functions arrayed on one chart, and have them recommend which functions go in which major blocks of each COA. For example, the Joint Staff COA contains classic J-Staff codes, with IT in the J-6, logistics in the J-4, etc. The only real decisionmaking on this COA is what falls within the J-3 and J-2. For each COA we left an empty block labeled Command Element, and asked the team to provide their thoughts on which functions should report to the CE. We passed out and described this task to all team members (there were over 50 in the room) at the Wednesday, 3 October task force meeting. The three COAs we described were the J-Staff J-1 through J-8, the four element COA (the CIA model, separate elements for operations, analysis, S&T, and support), and full integration, or two-block model, with two large direct reports, operations and support. The inputs were due Friday, 5 October, and we asked each member of the task force to submit an input putting each function into each COA block, and to rank their preference of COAs 1, 2, or 3, with the inputs due noon Friday, 5 October. We further asked each task force member to take ownership of their input by labeling the submitted files with their office symbol and name.

We received approximately 50 inputs from across the task force and the Agency. Spot-checking with our Agency networks revealed that a large number of people were consumed with this task, which was widely available across the Agency and understood to be very important. Many elements consolidated inputs, so the 50 or so we initially received probably represented the views of a much larger number of people.

The initial data crunching of the inputs revealed a preference for COA B, the four block (CIA) approach, but a surprising number of senior officials favored COA C, full integration, including Melissa Drisko, Paul Batchelor, George Peirce (GC), and Cathy Johnston, who will prove to be a critical ally.

As we went through all the inputs and held subsequent discussions with seniors, opinion began to gel for COA C, full integration. Leo Delaney and Dave Leatherwood concurred, as did several others. Most surprisingly, after we had obtained DR concurrence, we briefed the DD on Thursday, 11 October, showing him the big COA charts and walking him through them, with Melissa Drisko in attendance. After making several good observations (title ops intelligence operations, move DCS
up and highlight it on the chart), he told us he favored COA C, full integration. The meeting almost couldn’t have gone better and we believed we had turned the corner with the DD and the vice we had been squeezed in was released.

The DD had a meeting on Friday, 12 October with Dr. Vickers (the DR was TDY). He then called me into his office on Monday afternoon, 15 October, to give me a read-out of the conversation. He began by expressing significant concern and frustration with the DR’s leadership style, showing me a memo the DR had signed out to CJCS without informing or copying USDI. Dr. Vickers had asked the DD for the memo and the DD told him he thought it had been sent, and would look for it. He expressed concern at the loss of political capital on the part of the DR for bypassing his boss in such a manner. He then told me he wanted to give me a readout of his Friday conversation, and stated Dr. Vickers would never go for integrating operations and analysis. He wants the CIA operations model—that’s all he cares about. He also will not go for a joint staff naming convention or for strict COMO lines as an organizational construct.

On Tuesday, 15 October we briefed DUSDI Tom Ferguson; LTG Ray Palumbo, USA; Reg Hyde, Tom Matthews, Tim Clayton, and several others on VISION2020. Tom disliked the briefing, stating it was a typical DIA product that didn’t go far enough. We then went off script and described in detail to Tom how radical we were thinking for the reorganization. He stated that nothing radical had been done at DIA since the Lt Gen Clapper reorganization and that DIA needed a, “Cultural Revolution.” We urged him to discuss his views with Dr. Vickers, and enlisted Linda Petrone, a USDI senior, to ensure that Tom gets to Dr. Vickers prior to my scheduled Friday AM meeting with him, and that Tom attends that meeting.

We had a lunch meeting with Ellen Ardrey, CP, and Christy Monaco, PA, at their request. They are concerned with LTG Flynn’s leadership style and expressed concern that he’s “losing” the senior corps. They’re aware of the split in the Front Office between the DR and DD. They asked for our thoughts on how to manage LTG Flynn and how to get through to him. Later in the afternoon we had lengthy discussions on what to do with respect to these issues and to the McKinsey survey commissioned by the DD. This survey, a follow-on to the contract, is a “kick-the-tires” look at LTG Flynn’s first 90-120 days. The DD told me last week that the real purpose is to interview selected seniors and provide LTG Flynn with a candid view of his leadership style and what it’s doing to the Agency. We agreed it will not be well received at all by the DR and debated how,
whether, and/or when to inform him of this study. I'm concerned that nobody but me, the DD, and DR know about it so if it gets out now the DD will know I informed the DR. Dan and Rey are concerned at the DR's reaction if he doesn't find out until the out-brief. For now we will wait until McKinsey starts interviews. After that it is plausible the DR could have heard about it from others.

As all this is going on we continue to make progress on more mundane fronts. We prepared graphics for the DR to work for the USDI meeting, completed the initial phase of the missions and functions task, and have a series of briefings lined up for our meetings at 1000. The training, culture, and comms pieces continue to get worked, as do the final COA charts for our Thursday meeting with the Director. Also during this timeframe the DR increasingly tasked VISION2020 with additional functions. Via the Chief of Staff he directed that we lay down a space footprint for Reston II and by extension the entire NCR. He directed that we determine who would occupy Reston as part of our organizational design. This involved obtaining a geographic plot by zip code of the entire NCR work force as well as building locations and sizes. We quickly determined that the entire 1600 spaces at Reston II were essentially available for redistribution, except for one floor of 20 SAP rooms specially built for DT. We also learned that Alan MacDougall had within the past two months directed DA to build out additional SAP rooms and space for DT which cost the Agency $1m, apparently without consultation with anybody. It is unclear to me or the rest of the team that these rooms or space for 500 DT people is necessary given that over 80% of their funding will disappear after FY-14. The DR also tasked us with pulling together all information on Agency training, including how many people, dollars, courses, and relative value. Deb Hartman took the lead for us on this task.

The briefings to the DR and USDI on Thursday and Friday, 18–19 October were critical to COA selection, and we were concerned about the influence of the DD and his work behind the scenes. Fate intervened. On Wednesday afternoon David got a call that his terminally ill father had been rushed to the hospital in Florida and he immediately departed for Florida. We were on our own with the DR Thursday morning when we reviewed new 4x8 foot COA charts hand-carried from Charlottesville by Phil Roberts. The DR seemed unfocused and indecisive as we reviewed the COAs, suggesting that NMEC belonged under S&T and not appearing to be convinced COA C was right yet. It may have been the extra people in the room, which included several from his staff and CS.
The next morning was the key briefing to Dr. Vickers, USDl. We had previously provided the DR with simplified COA PowerPoint charts, which he revised several times overnight. He used these Friday morning to brief Dr. Vickers. The day before I had received a NIPR e-mail from David from Florida reiterating his support for COA B and his view that COA C was too hard and would not sell in Washington. He stated in this e-mail that he has spoken to this effect with Dr. Vickers. With this in mind I was not at all confident that we would be able to obtain a decision in favor of COA C. DR and I were driven to the Pentagon at 0630 Friday morning for our 0730 meeting with Dr. Vickers. We spent 30 minutes in DR’s Pentagon office reviewing the charts and voice track for the meeting. At the 0730 meeting were me, DR, Tom Ferguson, Deputy USDl, and Dr. Vickers. His O-6 military assistant sat in the back of the room. DR briefed and did an outstanding job. He got approval for COA C. I took detailed notes throughout the hour long discussion on VISION2020 and rendered the notes into an e-mail later in the day which codified the decision. After clearing the note with the DR I sent it to David, who replied that he was surprised. He then asked what he could do to help. The USDl meeting was a complete victory and for the time being put to rest the COA decision.

After the meeting the DR called me into his office and wrote out on his white board the plan for the next few weeks. He wants to have a meeting next Thursday with the entire VISION2020 team in the Conference Center if possible to be briefed on each COA and to take questions and comments, after which he will direct a decision briefing for the following Thursday. Then the Thursday after that (8 Nov) he will hold a town hall with all the seniors at which he will outline the COA. Then he will have an Agency-wide town hall the last week in November for 1.5–2 hours to lay the COA out for the work force. He also asked that we get to DNI Clapper next week and back to Dr. Vickers the following week, to lay out the COA he intends to implement.

Over the past couple of months both Dan and Rey have been critical to the overall success of the effort. Dan conceptualized and formalized the Center concept, with Rey’s help and Cathy Johnston. Rey worked with Brad Knopp and others to define the role of the DFEs and their relationship with the DIOS. Rey also reached out to the DIOS and arranged for mutual information sessions. Rey and Dan traveled to Charlottesville in early October and built the initial COAs with Phil Roberts, who then used Jameel Moses, his contract graphics person, to create the Adobe graphics and print out the 4x8 foot charts used to brief LTG Flynn initially and again on 17
October. This effort represented the foundation of the COAs.

Dan led our outreach effort via focus groups, traveling to Tampa and Miami for our first focus groups. Tatum Fraites from Accenture accompanied him and played a large role in developing the focus group structure and recording the results. It was noted at CENTCOM, SOCOM, and SOUTHCOM that our first focus groups were held at the edge and not in Washington. Dan and Rey continued a number of focus groups, aimed primarily at the junior individuals in the work force, throughout the 15-19 October week.

Dan and Rey also met with key seniors to enlist their support, including Leo Delaney and Dave Leatherwood from DX, Cathy Johnston and Jenny Lasley from DI, John Kirchoffer from DX/CI, Chris Bordine from DC, and Alan MacDougall and Jim McIlmail from DT. With the exception of the latter two, they were successful in obtaining concurrence for COA C. DT is boresighted on preserving its own S&T empire and opposes any changes that would diminish its role. It remains a lone wolf.

Nora Green did a masterful job getting the SharePoint site established and updated daily. Her ability to work substantive actions, taking the initiative without waiting for guidance, is outstanding. She ensured each Mon/Wed/Fri 1000 meeting had a good agenda, that all parties were Tandberg’ed in, and that the results were posted to the site. She updates the task matrix, alerts me to actions needing to be completed or suspenses coming due, and in general has kept the entire team on task and on time.

Lori Kreger, our staff director, works substantive actions and attends meetings in place of us seniors when we’re double scheduled. She has the substantive expertise to represent the team at DD4 meetings and other high level forums. She also ensures our actions get completed, read-aheads submitted, and prepares papers for our signature.

We ran into several problems with our FA-50 team. Tim Zack initially failed his polygraph, necessitating my intervention to get him retested. He then failed the psych eval, requiring another intervention. In the meantime, his friend who he wanted to bring onto the team, Col Dave Anderson, USAF, Ret, turned out to be a former DIA RMO chief who was forced to retire in lieu of an Article 15 due to misconduct. I made the decision not to bring him on board. We did get LTC Ken Lewis, USA, brought on board without incident. Jay Strojnowski helped to obtain space for the team in Reston and worked hard to get the entire team aboard. He will have to ensure the team
works well together. I’m concerned enough about this team that I’m bringing in Kevin Poling, a GG-15 from HC, to oversee the team to ensure it doesn’t go off track. We’re bringing in Pete Fuehrer from DI to lead the efficiencies PMO, per DR direction. We also brought in Joe Kupsky, who is returning from deployment.

October 29 brought us Hurricane Sandy, and on Sunday, 28 October OPM announced the government would be closed on Monday. On Friday, in anticipation of this event, I had arranged with LTG Flynn to meet with him Monday morning with Rey and Dan. We did so, and it turned into a three hour detailed review of COA C. The result was a large list of actions and the need to revise the COA prior to the meet later in the week with USDI. The government remained closed on Tuesday and none of us reported to work. I prepared a long NIPR e-mail detailing all the tasks coming out of our Monday meeting, so won’t repeat them here.

Upon returning Wednesday we engaged Phil and Jameel to revise the graphics in time for the DR’s Friday meeting with Dr. Vickers. I originally had been scheduled to attend this meeting with David and the Director, but Friday morning the USDI’s exec sent the DR an e-mail stating Dr. Vickers wanted a candid discussion with a small group and the meeting would be only with the DR and DD. It appeared to each of us that the DD had intervened to get this done. David returned to work Wednesday after two weeks away to tend to the last days of his father. Upon his return he hosted me for a one-on-one on Wednesday at his request to be updated on COA progress. He insisted that analysis not be subordinated to collection; I assured him we would not do this. He asked me what he could do for me to help with implementation after my discussion with him on implementation difficulties. I asked for a senior to lead an implementation PMO. He agreed this was needed and late that same day called in Bill Mills, SEMO, and directed him to find me a senior. I learned of this Friday morning when Bill called me. He floated two names, Jim Nelson in DAC and Geoff Strayer in DI. I checked with Phil and Dan and discovered that Geoff is highly thought of and would be perfect for the role. He probably is available because he works for Brian Fila in Knowledge Management.

The USDI meeting lasted only five minutes before he was called over to the White House. The DR directed us to forge ahead with COA C; I had already drafted an announcement all hands e-mail for him to send out on or after Election Day letting the work force know he had selected COA C. He was in on the 3–4 November weekend to work on the e-mail. The DR had a desk-sized
updated detailed COA C chart from Phil which was hand-carried to us by Jameel. They did great work to prepare it on short notice. Both last week and this week I prepared draft e-mails for the DR to send to USD; he sent them. He did not send the all hands e-mail he pledged to send the week before the storm after the Thursday meeting with the larger group in Conference Center A. We’re consistently having trouble getting DR to dispatch all hands messages. I informed him on Friday, 2 November that the previous all hands message was overcome by events and he needed to focus on sending out the COA decision all hands instead.

We began work in earnest with Accenture on implementation. They provided us with a description of the scrum methodology and over the weekend I drafted a long list of scrum team projects to be started. The idea is for the PMO senior (Geoff Strayer we hope) to lead the scrum efforts. Rey, Dan, and I will selectively work alongside the teams and at the same time handle the many other tasks coming to the larger task force. Russ Miller is familiar with this methodology and will help a lot. Pete Fuehrer is leading the efficiencies PMO, which is separate from, but related to the scrum effort. Joe Kupsky continues to work with Dan to flesh out the Center concept, something which we need to move on quickly to ensure proper COA C implementation.

I met the week before Hurricane Sandy with my executive coach, and shared with her this document as it was written up to that point. She was amazed by the bureaucratic infighting in the Command Element and offered a lot of constructive thought as to how to navigate. She also provided valuable advice on the way ahead, culture change, and messaging. She tasked me to focus on internal communications, with a discrete set of actions that I completed within a few days.

The DD returned 31 October from Florida and immediately went to work to codify his desires, COA B. Dr. Vickers’s executive officer informed the Director the day before his 2 November meeting with him that I was not needed at the meeting. The day before the meeting Mr. Shedd informed me via NIPR e-mail that Dr. Vickers had spoken privately with him that night and wanted COA B, stating COA C created an unnecessary layer above collection and analysis. Interesting arguments which keep changing, and which we’re all sure Dr. Vickers doesn’t know or care about. DR and DD attended the Dr. Vickers meeting, which was stopped after five minutes due to a call to the White House. The meeting was postponed to the following Thursday, 8 November. At that meeting COA C was discussed in detail and according to the DD, the result was a combination of
COA B and COA C. According to the DR, we got 99% of what we wanted. This became clear when the DR came down to my office a little after noon, Thursday, 8 November. He drew out on my white board the solution’s rating chain, which had the centers and other hot dogs reporting to the DDI or DDO, something which would have caused the persistence of the DD4s. Our solution to this recommendation is to ignore it and to forge ahead with the Center concept of having them report to the Director of Intelligence Operations.

On Friday, Dan, Phil (via Tandberg) and I spent a total of three and a half hours reviewing each of the SES/DISL names and slotted them against each of the jobs on the COA C graphic. Phil stated he would further review them and write them up over the weekend for me to review, comment on, and forward to LTG Flynn. It was a masterful list, accommodating a lot of people and solving a lot of problems. It’s not perfect, but is a great head start for the Director.

Also on Friday, Alan MacDougall completed the review of S&TI which the DR permitted him to do via e-mail in late October. When we challenged the DR during the 29 October hurricane session he stated he wanted to see if Alan would do the right thing and he was giving him enough rope.... We all knew what Alan was going to do, and he didn’t disappoint. For at least the third time he came up with the same solution—a huge DT with even more responsibilities and with exploitation and NMEC attached. On Saturday, 10 November I forwarded an e-mail to the DR pointing this out, and noting how corporate Leo and Cathy and others were being, and how self-centered Alan was. I also noted the extraordinarily condemning IG report against DTC and forwarded the DR a spreadsheet showing DT FY-13 base funding of $3m and OCO funding of $125, and explained the unsupportable nature of this chasm and the need to reduce DT.

Election week also saw several meetings with the Accenture team and the rest of the core group to determine the way ahead regarding implementation. We described to the large group meeting what we intended to do with the implementation groups and asked them to start looking at who wants to be a part of which group.

On Friday afternoon at 1500 in the NGA spaces at the Pentagon we briefed Tish Long, NGA Director, and Ellen McCarthy, COO, NGA, at their request. We described in detail COA C and why, resulting in a lot of questions from her. She stated at the end that any organizational design would work; the key is the people, communication, and establishing new business rules.
Dan, Rey, Phil, and I went back and forth over the weekend and during the short week of 13–16 November on the SES placement list, making changes each time we looked at it. I finalized it on Thursday and sent it to the Director. It is a great list, probably a 90% solution, and takes into account geography as well as skill matches and sending messages. The Director responded that he would take the list as his own and discuss it with us. In addition to working on the list, the majority of the week was spent on developing a wiring diagram and rating chain for COA C, per DR instructions. The team spent hours on it, and reviewed it with me. Phil did a great job defining each of the jobs down to the Office level and outlining the rating scheme, which we intentionally established to reflect COA C rather than COA B. In other words, the hot dog leaders report to the Director of Intelligence Operations, not to the directors of analysis, collection, etc..

The big news this week was the resurgence of the DD and his public insistence that the solution we are going to implement is COA B. He began this at Tuesday’s KLEM, which he led because the DR was on leave all week. He informed the assembled seniors in carefully parsed words that he and the DR had discussed the COAs the previous Friday with USDI Vickers and we are going to implement COA B, with a bit of COA C sprinkled in. He stated this by referring several times to COA B and only once to COA C, leaving all who heard him with the clear understanding that COA B is going to be implemented. He then met with me privately at 0930 and reviewed his notes of the USDI meeting, never mentioning that he had discussed COA B at the KLEM. He stated that MV said he favored COA B, but realized it didn’t go far enough, among other things. He did not state this at the KLEM. Needless to say, the KLEM announcement caused a lot of confusion among the seniors. This was reflected in several ways. At our Wednesday 1000 Task Force meeting, which I was unable to attend due to a DNI Awards Board, Jim McIlmail informed the entire group that according to the DD it was COA B and not COA C. As a result, he argued that we could not proceed with implementation. This resulted in a heated exchange with Dan and Rey, which Phil had to interrupt and direct it be taken off line.

On Thursday morning I walked in with Leo Delaney, who raised the COA B/C issue and noted the DD and DR appear 180 degrees out. Later in the morning John Powers, Deputy FE, stated exactly the same thing. When Rey met with Mike Pick on Thursday, Mike informed him that Dave Leatherwood had stated to Mike that, “COA C is dead.” It is apparent to the entire Agency leadership that the DD and DR are not on the same sheet of music. It is so egregious that Cathy
Johnston, DI, informed Dan and Rey that she was going to stay on the fence to see how this sorts itself out. A GG-13 approached Dan and noted the difference between the DD and DR, and asked Dan what was going on.

The DD proceeded with the two-day FY15-19 program build off-site on Thursday-Friday, at which I briefed VISION2020, focusing on the impact on the program and what efficiencies we hoped to obtain for the Agency. I carefully briefed the COA C slide, explaining it was marked as such because it was a week old and that the DD and DR had made changes to the chart. I explained the real impetus for change would be the formation of Centers, and as I went to the next slide depicting the Center concept, the DD interrupted. He stated he understood there was some confusion caused by his remarks at the KLEM earlier in the week and he wanted to clarify them. He stated we are going to implement COA B, with a bit of COA C sprinkled in. He further stated the USDI directed us not to be Center-happy and that we were going to have four Directorates in addition to the Centers. This clearly articulated to everyone present that it is COA B, not COA C.

As an aside, on the timeline slide before the COA slide I had made the comment that some of the many ongoing efforts were being undertaken on the fly. When the DD made his above COA remarks after my briefing the COA C slide, he started by stating he had not done anything on the fly since he was ten years old, and this was a serious effort which required considerable thought and planning. That remark explains a lot.

LTC(P) Tony Demartino was present at the off-site and sent an e-mail to the Director outlining what the DD had said. I had previously done the same and so had Col Nycki Brooks. Dan, Rey, Phil, and I asked the DR to meet with him this coming weekend to discuss the way forward, and to explain to the DR the seriousness of the DD’s comments and their impact on the work force. We see this as mutinous behavior on the part of the DD, which clearly involves him going over the DR’s head to USDI and putting words in USDI’s mouth. Keep in mind that only a few weeks ago, when the DD was absent, USDI stated he was good with COA C, and the DR had made it clear to the work force he almost certainly was going to pick COA C. Based on this and DR’s guidance, we as a team had made clear it was going to be COA C. It is difficult to overstate the problem this has caused for us or the amount of extra angst and work involved.

Dan, Rey, and I met with the DR for over two hours Sunday afternoon to review the new organization chart we had drafted, the personnel list, and to urge him to respond to the DD’s COA
Intelligence Integration (DII), with the DDI, DDO, and DDS&T under this individual, who reported to the DD. We didn’t learn of this until the end of day, when the DR explained it to Rey. He explained it in such a way that Rey thought the COA was COA C, as did the Director, because it was two boxes, a DII and Mission Services. It was only after Rey explained it to me in a phone call that I informed him that with the DII block above the DDI, DDO, and DDS&T, in reality it was four blocks (these three plus Mission Services), and therefore COA B. The light bulb came on for Rey. At the previous Thursday during the program build offsite the DD had stated it was COA B, there would be four directorates, and there would be a Director of Intelligence Integration working for him. I didn’t understand this last point, but filed it away in my memory, as did LTC DeMartino (Demo), who wrote about it in an e-mail to the DR. I was stunned to hear that USDI Vickers had directed this to DR as the only place I had previously heard that title or that concept was from the DD at the offsite.

The DR called me Tuesday evening and walked me through the Vickers meeting. When he described the two box solution (DDI and Mission Services), I asked him whether there was a box around the DDI, DDO, and DDS&T blocks, and he said no. I then stated that to the work force it equates to COA B, and replayed the words of the DD at the offsite. There was a long pause, which I ended by offering a solution: draw a box around those three elements and label it DIO, or even DII, dual-hatting the DII as the box above and the box around these three. I also offered that he needed to have the DII report directly to him rather than the DD. He agreed on both counts. He added that he was going to meet Friday afternoon with the DD to review names. I cautioned him that the DD’s names were going to be different from the names he had. I can’t overstate the problematic nature of the description he gave. He of the meeting or how he was inadvertently sucked into COA B. I talked with Rey, Dan, and Phil, and drafted a lengthy NIPR e-mail outlining the seriousness of the situation and the need for him to make it at least look like two boxes, and sent him a drawing done by Demo. The e-mail was very direct and frank and outlined what he had to do.

We had little communication with the DD or DR over Thanksgiving; the DR never answered my NIPR e-mail, not even to acknowledge receipt, which is unusual. We returned after the break to disastrous news. Nycki sent us the slide the DR used to brief USDI the previous Tuesday. It was a completely different slide master and slide, indicating someone else had prepared it, and it was clearly COA B. We asked for and received time with the DR at 1400-1430 to discuss it; the meeting
went an hour. We had prepared, with Demo’s help, a new slide which obfuscated the entire COA B/C issue, enabling the DR to brief verbally that it was COA C, while it appeared close enough to COA B on the slide to pass muster with USDI. The DR was lukewarm to our idea, changing the subject frequently and appearing nervous. We presented all the arguments for how critical it is to his tenure as the DR to make it appear as at least a hybrid COA rather than COA B. I give the odds that he will do so at less than 50%. Rey afterward reminded me that the DR stated he had gotten approval from USDI for his slide, which means he won’t change it. The bottom line is the battle is over and it is COA B.

Some side notes on this one, due to its importance. At my VISION2020 meeting, when I discussed desk officers and the DR desire to consolidate them, Paul Batchelor leaned back in his chair and knowingly nodded to Jim McIlmail. Apparently Alan, Jim, Paul, and Cathy are to some extent in collusion with the DD on the entire COA development matter. Nora believes the slide master used by the DR in the USDI brief was from MIO and MIO prepared the slide—she saw MIO staffers in the front office late Monday evening when we were delivering our COA slide version. Cathy Johnston is close to both the DD and USDI and stated to Rey and Dan that she is on the fence to see how this plays out. She also is close to the DD and USDI; she has told me more than once about conversations she had with Mike Vickers, the latest time being today, 26 November, when she stated Mike is ok with Centers. The DD informed Cathy that he opposes putting desk officers into the Centers, which would mean the center concept is dead on arrival. I haven’t given up—I met with Demo this afternoon and walked him through the entire DR presentation, slides, and war-gamed what to do. He meets with the DR tomorrow and will discuss strategy with COL Brooks. Very late in the day I got an e-mail from the DD’s secretary stating the DD wanted to meet with me tomorrow and it was on my calendar from 1000-1100.

I met with the DD Tuesday, 27 November, from 1000-1100. I started by stating I had no idea what the DR was going to say on Thursday and didn’t understand the latest COA. The DD echoed my concerns, whereupon I showed him the slide we prepared and sent to him late the previous Monday and then the slide the DR sent to me yesterday. I stated I had no idea who prepared the new slide and that it appeared totally different from any other slides anybody had prepared. The DD stated he had not seen it previous to the USDI meeting and also didn’t know who prepared it. The DD asked me what I thought of the COA and I stated I thought it was too layered and I didn’t understand the ADD/Integration. We discussed Tom Ferguson going into that block and the
perception this would create for the Agency. The DD stated the DR should have listened to USD1 at
the start, which was to implement COA B. We segued into people, at which time he stated he was
thinking of putting Alan into the Asia/Pacific Center and asked me what his China background
was. I replied he was a career analyst, although I couldn’t remember what area, and his DT work
involved China.

We then discussed the regional Centers, and the DD stated he was adamant that the desk officers
would not be in the Centers. He and the DR want to consolidate the desk officers from DCS, DAS,
IE, DC, and CI into area divisions with one set of leaders; these would be the desk officer elements
outside the Centers. He agreed there should be a limited number of desk officers in the Centers,
but appeared to believe that would be a small number. I agreed to work with Leo Delaney and
convene a group with him to review this matter. He then asked me about the 22 implementation
teams, which led to a discussion of their fledgling status and the need to flesh them out. I
explained that some were in reality efficiency efforts rather than pure VISION2020 implementation
efforts. He asked me whether we would be able, once they were in the implementation phase, to
transfer some of these implementation efforts to Paul Batchelor’s PMB process. I took the
off-ramp and stated that I would like to do this sooner rather than later and wrap up this entire
effort. I stated I intended to retire in ten months—he somehow thought I had two years left. He
stated it was a good time to be moving on and there were lots of opportunities out there. As an
aside, the latest chart has in the CE a block labeled SPP (Strategy, Plans, and Policy) instead of MIO;
the DD stated this was Paul Batchelor. This was a hot dog subordinated to operations in COA C,
which he has elevated to ensure Paul’s transition to SES.

This brings to a close the first phase of the VISION2020 effort. The DD has won, imposing his
individual will on the Agency over that of the collective SES corps, the DIA Advisory Board, and the
Director. The fault lies as much with the Director as anybody else since he ultimately makes the
decisions, or abrogates them. He never understood his power as the Director, despite our best
attempts to show him, and still doesn’t understand the impact of what he has done. When he
announces this COA, which is really COA 0 or COA B–, the effect on the seniors and work force will
be immediate and negative. He will have lost all credibility and in essence ceded his authority to
the DD. It is a decision he cannot walk back or recover from.