



## Tribal Engagement Workshop Biographies

### ***Keynote Speakers***

Dr. David Kilcullen

Lieutenant Colonel John Malevich

### ***Panel - Lessons Learned***

Mr. Ben Fitzgerald, *Moderator*

Major Jim Gant

Mr. William McCallister

### ***Panel - Where We Are***

Colonel T.X. Hammes, *Moderator*

Dr. Seth Jones

Dr. Amin Tarzi

### ***Sponsors' Representatives***

Mr. Dave Dilegge, *Small Wars Foundation*

Mr. Ben Fitzgerald, *Noetic Group*

Mr. James O'Connell, *Joint Irregular Warfare Center*

Mr. Bill Nagle, *Small Wars Foundation*

Colonel Daniel Roper, *USA/USMC*

*Counterinsurgency Center*

Mr. Duane Schattle, *Joint Irregular Warfare Center*

Colonel Philip Smith, *Center for Irregular Warfare*

Colonel Scott Waterman, *Joint Irregular Warfare Center*

### ***Breakout Session Facilitators***

Mr. Andrew Exum

Mr. Ben Fitzgerald

Ms. Kathleen McInnis

## Biographies

*In alphabetical order, by last name*

**Mr. Dave Dilegge** is Editor-in-Chief and co-founder of *Small Wars Journal* and Director of Small Wars Foundation. He is also a consultant (SAIC) for U.S. Joint Forces Command's Joint Irregular Warfare Center. Previously, he was the primary action officer for the USMC / USJFCOM Joint Urban Warrior program. Dilegge's military experience includes two tours as a Scout Sniper Platoon Commander and S-2 in an infantry battalion as well as intelligence and counterintelligence / HUMINT positions with 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> Marine Divisions, 9th MEB, III MEF, MARFORPAC, Combined Marine Forces Command (Korea), Headquarters, U.S. Marine Corps, U.S. Central Command and the Joint Chiefs of Staff. At USCENTCOM, Dilegge was a member of the Afghan Fusion Cell, a CINCCENT-directed organization tasked to review Soviet operations in Afghanistan for lessons learned and to propose operational-related recommendations. As a member of 1st Marine Division during Operation Desert Storm he participated in the liberation of Kuwait. He was also a Senior Urban Operations Intelligence Analyst for the Marine Corps Intelligence Activity and was the primary author of MCIA's *Urban Generic Information Requirements Handbook*. Dilegge was also the lead for a Marine Corps project that conducted interviews of 20 Chechen commanders who participated in the 1994-1996 campaign against Russian military forces. In 1999, Dilegge was awarded the National Military



Intelligence Association's Colonel Donald G. Cook Award for his urban operations intelligence contributions to the U.S. Department of Defense.

**Mr. Andrew Exum** is a Fellow with the Center for a New American Security. He is a native of East Tennessee and served on active duty in the U.S. Army from 2000 until 2004. He led a platoon of light infantry in Afghanistan in 2002 and a platoon of Army Rangers in Iraq and Afghanistan in 2003 and 2004, respectively. Most recently, Exum served as an advisor on the CENTCOM Assessment Team and as a civilian advisor to Gen. Stanley McChrystal in Afghanistan. He is the author of *This Man's Army: A Soldier's Story from the Frontlines of the War on Terror* (Gotham, 2004) and has published opinion pieces in *The New York Times*, *The Washington Post*, the *Guardian* and many other newspapers. Exum studied classics and English literature at the University of Pennsylvania and earned a master's degree in Middle Eastern Studies from the American University of Beirut. He is a doctoral candidate in the Department of War Studies at King's College London, founder of the counterinsurgency blog Abu Muqawama and a member of the *Small Wars Journal* Advisory Board.

**Mr. Ben Fitzgerald** established and leads the U.S. division of Noetic, a national security consultancy that specializes in concept development, doctrine, lessons learned, war gaming and whole of government collaboration. Prior to Noetic, he spent several years working in large technology organizations helping government agencies align technology strategy with operational needs. He has provided strategic advice to a wide variety of government agencies in the U.S. and Australia, including the Office of the Secretary of Defense, the United Nations Department of Peacekeeping Operations, the Australian Department of Defence and a number of first responder organizations. Fitzgerald sits on Noetic's board and is a member of the *Small Wars Journal* Advisory Board.

**Major Jim Gant** is currently assigned to the Afghanistan Pakistan Hands (AFPAK Hands) Program as a Tribal Engagement Advisor. AFPAK Hands is designed to develop cadres of officers (and civilians) from each of the military's services who agree to three to five year tours to the Afghanistan-Pakistan region. Under the program, the Pentagon plans to assemble a dedicated cadre of about 600 officers and civilians who will develop skills in counterinsurgency, regional languages, and culture, and then be "placed in positions of strategic influence to ensure progress towards achieving US government objectives in the Afghanistan-Pakistan region. Gant, a Special Forces Officer, has served with the 1<sup>st</sup> Special Warfare Training Group and the 3<sup>rd</sup>, 5<sup>th</sup> and 12<sup>th</sup> Special Forces Groups to include tours as a Team Leader and Unconventional Warfare Instructor. In Iraq, he served as a Transition Team Leader with the Iraqi National Police Commando Battalion. Gant has also served as an infantry Rifle/ Scout Platoon Leader. His combat awards include the Silver Star, Army Commendation with Valor Device and the Iraqi National Police Medal of Honor. Gant is author of *One Tribe at a Time*.

**Dr. Thomas X. Hammes**, Colonel, USMC (Ret.), served at all levels in the operating forces to include command of a rifle company, weapons company, intelligence company, infantry



battalion and the Chemical Biological Incident Response Force. Hammes' last tour on active duty was as Senior Military Fellow, INSS, National Defense. He served in Somalia and Iraq and trained insurgents in various locations. Hammes graduated from the Canadian National Defence College. Hammes also spent one year on a Research Fellowship with the Mershon Center for Strategic Studies. He has a Masters of Historical Research and Doctor of Philosophy in Modern History from Oxford University and has lectured widely at U.S. and International Staff and War Colleges. Hammes is the author of "*The Sling and the Stone: On War in the Twenty-First Century*" and numerous articles and opinion pieces. Hammes is a member of the *Small Wars Journal* Advisory Board.

**Dr. Seth G. Jones** was most recently a Plans Officer and Senior Advisor for Combined Forces Special Operations Component Command–Afghanistan (CFSOCC-A), based in Kabul. He was involved in the establishment and implementation of the Local Defense Initiative (formerly called the Community Defense Initiative), which involved Afghan government and U.S. Special Operations Forces helping Afghan tribes and other communities provide local security and services. He is currently a Senior Political Scientist at the RAND Corporation and an adjunct professor in the Security Studies Program at Georgetown University and the U.S. Naval Postgraduate School. Jones is the author of *In the Graveyard of Empires: America's War in Afghanistan* (W. W. Norton, 2009) and *The Rise of European Security Cooperation* (Cambridge University Press, 2007). He has published articles on Afghanistan, Pakistan, and other national security issues in a range of academic and policy journals, as well as in such newspapers and magazines as the *New York Times*, *Wall Street Journal*, and *Washington Post*. Among his many RAND publications are *Counterinsurgency in Pakistan* (forthcoming in 2010), *Counterinsurgency in Afghanistan* (2008) and *How Terrorist Groups End: Lessons for Countering Al Qa'ida* (2008). Jones received his M.A. and Ph.D. from the University of Chicago.

**Dr. David Kilcullen** is currently serving as a senior civilian counterinsurgency advisor to General Stanley A. McChrystal, COMISAF, through the ISAF Counterinsurgency Advisory and Assistance Team (CAAT) program. He is a member of the advisory board of the Center for a New American Security, was a non-resident senior fellow with CNAS in 2007-2009 and collaborated with CNAS on Iraq and Afghanistan reports, as well as violent extremism and grand strategy Solarium projects in 2007 and 2008. In 2009, Kilcullen was a partner at the Crumpton Group, a Washington, D.C.-based strategic advisory firm. In 2007-2008, Kilcullen was Special Advisor for Counterinsurgency to the Secretary of State, Condoleezza Rice, and served on the 2008 White House review of Afghanistan-Pakistan strategy. He was the principal author of the inter-agency U.S. Government Handbook on Counterinsurgency. In 2007 he served in Baghdad as Senior Counterinsurgency Advisor, Multinational Force Iraq. In 2005-6 he was Chief Strategist in the Counterterrorism bureau at the U.S. State Department, working in Iraq, Afghanistan and Pakistan. A former Australian infantry officer with 22 years' active service, including counterinsurgency, peacekeeping and stability operations in Southeast Asia, the Pacific islands and the Middle East, Kilcullen has served in Australia's Office of National Assessments



and on the writing team for Australia's 2004 Terrorism White Paper. From 2004 to 2005 he was seconded to the Office of the Secretary of Defense in the Pentagon, where he wrote the counterterrorism and irregular warfare strategy for the 2006 U.S. Quadrennial Defense Review. His doctoral dissertation, on insurgency in traditional societies, drew on extended residential fieldwork with guerrillas and terrorists in Indonesia during the 1990s. He is on the *Small Wars Journal* Advisory Board. His first book, *The Accidental Guerrilla* (Oxford University Press, 2009) analyses the complex interplay between local guerrillas and global terrorists in contemporary war zones from Africa to Southeast Asia. His next book, *Counterinsurgency*, will be published by Oxford in June 2010 and is dedicated to the editors of the *Small Wars Journal* in recognition of their support to the counterinsurgency community.

**Lieutenant Colonel John Malevich** is the Chief of Counterinsurgency at the U.S. Army/U.S. Marine Corps Counterinsurgency Center, Fort Leavenworth, Kansas. He joined the Canadian Armed Forces in 1989 and in 1990 he joined the 8th Canadian Hussars where he served as Troop Leader in Germany. Later, after being assigned as an instructor at the Armoured School, he was posted to the United Kingdom where he served as an exchange officer in the Queen's Royal Hussars (The Queen's Own and Royal Irish) where he served as a Squadron 2IC and Squadron Commander. After promotion to Major, he served in various staff appointments. He completed two operational tours in Bosnia in 1996 and 2001. In 2005, Malevich was seconded to Operation Enduring Freedom's Combined Forces Command Afghanistan HQ where he was the lead planner for the 2005 Afghan National Assembly and Provincial Council Elections for which he was awarded a Bronze Star for meritorious service. He returned to Afghanistan in 2007 as a member of Canada's Strategic Advisory Team where he was seconded to the Government of Afghanistan as an advisor and planner. Malevich worked on the Afghan National Development Strategy and served as the Security Advisor to the Independent Election Commission of Afghanistan where he was responsible for the security and operational plan for Voter Registration in preparation for 2009 Presidential and Provincial Council Elections. As a result of Malevich's work 4.5 million Afghans registered to vote during the last Voter Registration exercise with no major security incidents and no loss of life to registrants or voter registration workers. Malevich received a B.A. from the University of Western Ontario and his M.A. from the Royal Military College in War studies specifically focused in asymmetric warfare.

**Mr. William S. McCallister** is a retired military officer. He has worked extensively in Europe, Asia and the Middle East. While on active duty, McCallister served in numerous infantry and special operations assignments specializing in civil-military, psychological and information operations. He is a published author in military affairs and tribal warfare and has guest lectured at Johns Hopkins University and presented numerous papers at academic and government sponsored conferences such as the Watson Institute, Brown University, Department of the Navy Science and Technology, DARPA, and the Central Intelligence Agency. He has also appeared as a guest on National Public Radio (NPR). McCallister is currently employed as a senior consultant for Applied Knowledge International (AKI). He continues to study current events in Iraq and Afghanistan in tribal terms, including the tribal art of war and peace, tribal mediation



processes, development of tribal centers of power, and tribal influence in political developments. He has applied his study of tribal culture in assessing reconstruction efforts, as well as insurgency and counterinsurgency operations in Iraq, Afghanistan and the Global War on Terror.

**Ms. Kathleen McInnis** is the Executive Vice President and Chief Operating Officer of Caerus Associates. Prior to founding Caerus Associates, Ms. McInnis served as an Operations Director, NATO-Afghanistan in the Office of the Secretary of Defense (Policy), working for the Deputy Assistant Secretary of Defense for European and NATO Affairs. In that capacity, she supported the creation of new NATO command and control structures for Afghanistan, led USG efforts to ensure congruity between NATO and USG strategy towards the International Security Assistance Force (ISAF), led USG efforts to develop NATO's 2008 strategy for Afghanistan, developed strategies for increasing Allied and partner support for ISAF, led a USG team to establish a multinational civilian-military coordination cell in Regional Command-South and supported formulation of the Obama Administration's Afghanistan-Pakistan strategy ("Reidel Review"). Before that assignment, Ms. McInnis served as a strategist in OSD-Policy Stability Operations Capabilities, working on improvement of DoD's ability to perform stability operations and counter insurgencies and the development of international stability operations capabilities. Prior to joining Stability Operations, Ms. McInnis spent several years at the Center for Strategic and International Studies. While there, she worked on projects analyzing U.S. nuclear weapons strategy, strategic capabilities, NATO, European security and transatlantic relations. Before joining CSIS, she was a researcher in the UK House of Commons, working on NATO, the EU and US-UK political-military relations. Ms. McInnis has written commentary and articles on national and international security issues in publications including: *The Washington Quarterly*, *Defense News* and *The Washington Times* and was a contributing author to several CSIS studies and reports, including co-authoring "European Defense Integration: Bridging the Gap Between Strategy and Capabilities" with Michèle Flournoy and Julianne Smith. She is a member of the International Institute for Strategic Studies and Women in International Security. She was awarded her MSc in International Relations from the London School of Economics in 2002.

**Mr. Bill Nagle** is the Publisher and co-founder of *Small Wars Journal* and the Executive Director of Small Wars Foundation. He is a reserve augmentee to Marine Forces Europe and a part-time contractor at Headquarters, Marine Corps for Battelle. Most of his career has been spent in or around the Marine Corps, though he did work for a few years before 9/11 in technical services and business consulting in the financial services industry. His prior experience includes command and staff positions as an infantry and light armored reconnaissance officer, both active and reserve, and work on service concept development, experimentation, homeland defense and mission assurance in staff and contractor positions. He has an MSc from the Industrial College of the Armed Forces, MBA from Utah, and BSE from Princeton.

**Mr. James W. O'Connell** serves as the director of the Joint Irregular Warfare Center (JIWC) at U.S. Joint Forces Command (USJFCOM). He and his team are responsible for leading and



coordinating USJFCOM's joint irregular warfare concept development, doctrine development, experimentation, and training to ensure that the joint force's irregular warfare capabilities meet combatant commander campaign and complex contingency requirements. Additionally, he directs the execution of USJFCOM's mission as the Department of Defense's executive agent for joint urban operations. A native of California, O'Connell is a retired Navy SEAL with 25 years of experience in leading special operations forces from the platoon to the joint task force level. During his last active duty assignment he served as the commander of Naval Special Warfare Group One, where he was responsible for all West Coast SEAL teams and was the executive agent for maritime special operations and SEAL deployments to the Pacific, Asia, the Middle East, and the Horn of Africa. Additionally, he served as Commander, Joint Special Operations Task Force - Horn of Africa. His career spans operational tours at Underwater Demolition Team 11, SEAL Teams One, Two, Four, and Five and deployments on multiple contingencies and operations including service in El Salvador in the mid-1980s, Operation Just Cause in Panama, Operation Desert Storm in the Middle East, Operation Provide Promise in the Adriatic, Operation Support Democracy off Haiti, and Operation Enduring Freedom in the Middle East. His staff tours include assignments to joint commands, the Naval Special Warfare Development Group and the Chief of Naval Operations staff. Subsequent to Sept. 11, 2001 he served as a member of both the Joint Special Operations Command's Campaign Support Group and the Chief of Naval Operations' Deep Blue. These organizations were established to assist the U.S. Special Operations Command's and the U.S. Navy's response to the war on terror. After retiring from the Navy in 2005, he worked with the Ogontz Group, Ltd. as a senior consultant. He has advised the commanders of both the U.S. Special Operations Command and the Naval Special Warfare Command as a senior mentor. He is a member of the Naval Special Warfare Surface Proponent Board of Directors. He graduated with distinction from the U.S. Naval Academy in 1979, and is a graduate of the Armed Forces Staff College and the Defense Language Institute. He earned a master of arts degree with distinction in national security and strategic studies from the College of Naval Command and Staff.

**Colonel Daniel S. Roper** is Director of the U.S. Army and Marine Corps Counterinsurgency Center at Fort Leavenworth, Kansas. The Center improves counterinsurgency capabilities through research of best practices, improvement of doctrine, training and education, and collaboration with interagency and international partners. In his capacity as Director, Roper has conducted a number of counterinsurgency assessments in Iraq and Afghanistan. Roper is a 1982 graduate of the United States Military Academy at West Point and holds a Masters of Science in Nuclear Physics from the Naval Postgraduate School. He also holds two Masters of Military Art and Science from the Command and General Staff College at Fort Leavenworth, Kansas, and is a graduate of the Advanced Operational Arts Studies War College Fellowship program. He has commanded at the battery, battalion, and brigade levels, served as an instructor in the School of Advanced Military Studies, and served on both the Army and Joint Staffs. Roper was Chief of Operations and Intelligence for the Coalition Forces Land Component Deep Operations Cell in Operation Iraqi Freedom and also served in Iraq as a Counterinsurgency Advisor. He has been



published in *Parameters*, *Army Magazine*, *Military Review*, *Field Artillery*, *Armor*, and the *Strategic Studies Institute*. Both Roper's sons also are serving in the U.S. Army.

**Mr. Duane Schattle** is a retired Marine Infantry Officer currently serving as the Deputy Director (General Purpose Forces) of the U.S. Joint Forces Command (USJFCOM) Joint Irregular Warfare Center. Internationally recognized for his work regarding operational level Joint Urban Operations (JUO) issues, he is currently responsible to the Commander, USJFCOM, the Department of Defense (DoD) Executive Agent for Joint Urban Operations, for executing the Department's strategy to improve operational level JUO capabilities. Co-author of the DoD strategy document for improving JUO capabilities, *The DoD Master Plan for Joint Urban Operations*, he also co-authored two seminal documents used to formulate the basis for the DoD strategy: *The DoD Joint Urban Operations Roadmap* and the *NATO Urban Operations 2020 Study*. Schattle's Marine Corps background includes command at the infantry battalion level as well as four company command tours, three years as a military history instructor at Virginia Tech, four years as an instructor at the Infantry Officer Course at The Basic School, a tour as the assistant officer in charge for Marine Special Operations Training Group in the Pacific and five years on senior level staff. His joint experience includes three years as the lead for Joint Urban Operations in the Joint Staff Force Structure, Resources, and Assessment Directorate. Upon retiring from active duty in 1999, Schattle served for three years as a Joint Urban Operations consultant to the Office of the Secretary of Defense.

**Colonel Philip E. Smith** is currently the Director, the Center for Irregular Warfare (CIW), Marine Corps Combat Development Command, Quantico, VA. In 1974, he enlisted in the Marine Corps from Houston, Texas and was commissioned in 1982. He commanded a variety of units that included a Weapons Platoon, 81 mm Mortar Platoon, Infantry Company, Rifle Battalion and Infantry Regiment. He also served as a staff officer at III MEF Headquarters, as A/CS G3, 3rd Marine Division and as Director, G3/5 of MCCDC Quantico, responsible for developing concepts. Smith graduated an honor graduate and received a Masters of Military Studies from Command and Staff College, Marine Corps University, Quantico. He also attended the Marine Corps War College and received a Masters in Military Strategic Studies. Smith served as Director of the Marine Corps Infantry Officer's Course and as Director, Warfighting Group at The Basic School. He has participated in operations in Grenada, Beirut and Somalia. He served as Commanding Officer of the Afghanistan Regional Security Integration Command and Regional Security Advisory Command—Central Afghanistan for all coalition advisers in the 201<sup>st</sup> Corps, Afghan National Army and the Central Region from Marcy 2007-March 2008. CIW serves as the central USMC agency for identifying, coordinating, and implementing IW across Doctrine, Organization, Training, Materiel, Leadership and Education, Personnel and Facilities (DOTMLPF) in order to increase, improve, and enhance operations across the spectrum of war against irregular threats.

**Dr. Amin Tarzi** is the Director of Middle East Studies at the Marine Corps University in Quantico, Virginia. In his position, Tarzi supports the MCU by providing a resident scholar with



expertise in Middle East and South/Central Asia, representing the Marine Corps at various academic and professional forums, and providing expert advice for all Professional Military Education programs. Prior to joining the MCU, he was with Radio Free Europe/Radio Liberty's Regional Analysis team focusing on Afghanistan and Pakistan. While working at RFE/RL, Tarzi also taught courses in political Islam, cultural intelligence, terrorist organizations and similar topics at the Washington-based Center for Advanced Defense Studies. Prior to joining RFE/RL, Tarzi worked as Senior Research Associate for the Middle East at the Center for Nonproliferation Studies, Monterey Institute of International Studies where he primarily researched Iran and its missile and nuclear developments and policies. At the Monterey Institute, he also taught a graduate seminar on Middle East security policies and threat perceptions with focus on Egypt, Iran, Iraq and Israel. His work experience includes the post of Political Advisor to the Saudi Arabian Mission at the United Nations and the position of Researcher/Analyst on Iranian affairs at the Emirates Center for Strategic Studies and Research in Abu Dhabi.

**Colonel Scott T. Waterman**, a native of Jacksonville, Florida, graduated from Washington and Lee University in June 1985 with a Bachelors of Science in Business and was commissioned a Second Lieutenant of Air Defense Artillery. Waterman's initial assignment was as a Vulcan and Stinger Platoon Leader in the 3rd Battalion (Airborne), 4th Air Defense Artillery, 82nd Airborne Division from 1985 to 1989. He transferred to Special Forces upon completion of the Special Forces Qualification Course in April 1990. From 1990 to 1992 Waterman served as the Commander, SFODA 734 (Military Free Fall), in Company C, 1st Bn, 7th Special Forces Group (Airborne) (SFG(A)); from 1992 to 1993 as the Battalion Adjutant; from 1993 to 1995 he served as the Commander SFODA 793 (Assault), and SFODA 796 (Sniper) in Company C, 3rd Bn, 7th SFG (A); from 1999 to 2000 as the Commander, Company C, 3rd Bn, 7th SFG (A)-the SOUTHCOM Combatant Commander's In-extremis Force, and from April to August 2008 as the Commander, Afghan Regional Security Integration Command-East. Colonel Waterman's staff assignments include twelve months as Commander of the Special Operations Detachment (Airborne); eighteen months as Commander Company B (Special Operations), U.S. Army School of the Americas; thirty-six months as Chief, Special Operations Branch, Operations Directorate, USJFCOM; twenty-two months as an Operations Observer/ Trainer, 26 months as the Deputy Commander, SOCJFCOM, nine months as the Chief of Staff and four months as the Commander, Afghan Regional Security Integration Command-East. Waterman's awards and decorations include the Bronze Star Medal, Purple Heart, Defense Meritorious Service Medal with 1 Oak Leaf Cluster, Meritorious Service Medal with 3 Oak Leaf Clusters, Army Commendation Medal, Army Achievement Medal with 2 Oak Leaf Clusters, Armed Forces Expeditionary Medal, National Defense Service Medal (2<sup>nd</sup> award), Global War on Terror Expeditionary Medal, Global War on Terror Service Medal, Humanitarian Service Medal, Joint Meritorious Unit Award with 4 Oak Leaf Clusters, and Overseas Ribbon (2<sup>nd</sup> award), and the NATO Medal. He also wears the Combat Infantryman's Badge, the Expert Infantryman's Badge, the Master Parachutist's Badge, the Military Free Fall Jumpmaster Badge, and the Special Forces Tab. Waterman is married to the former Tavia Ayn Wells, and they have two sons, Tom and Trevor.