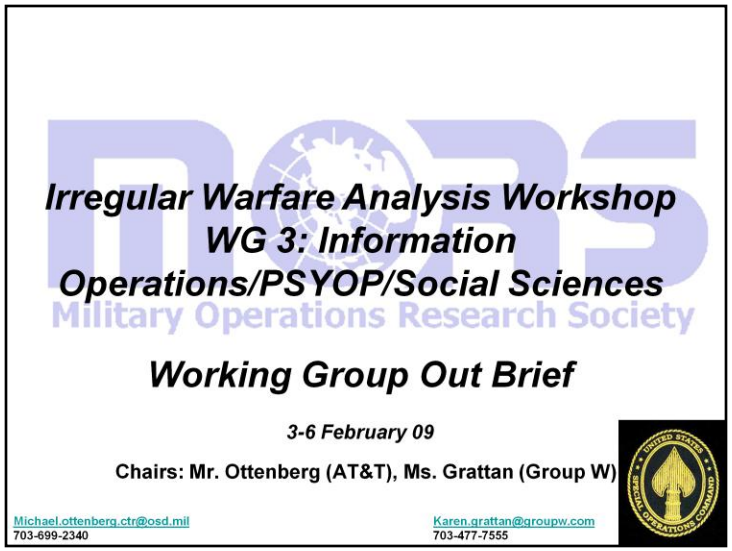
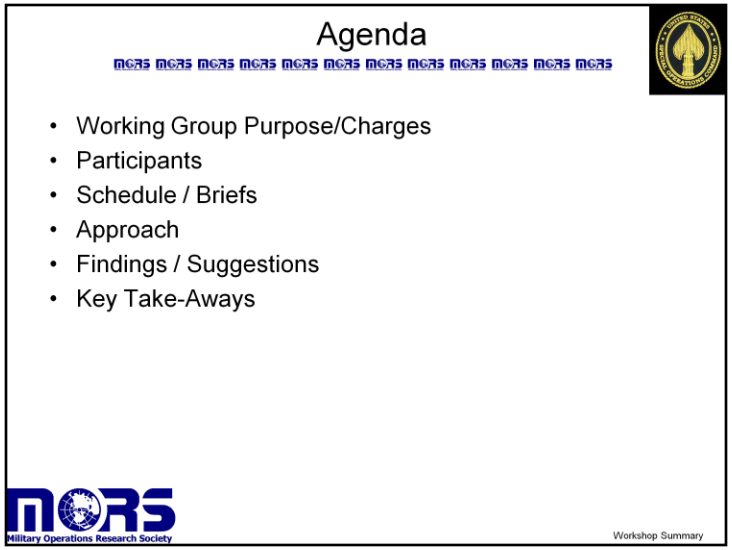


Final annotated brief.

Co-Chairs: Michael Ottenberg (AT&T) in support of OSD PA&E SAC; Karen Grattan (Group W) in support of MCCDC, USMC.

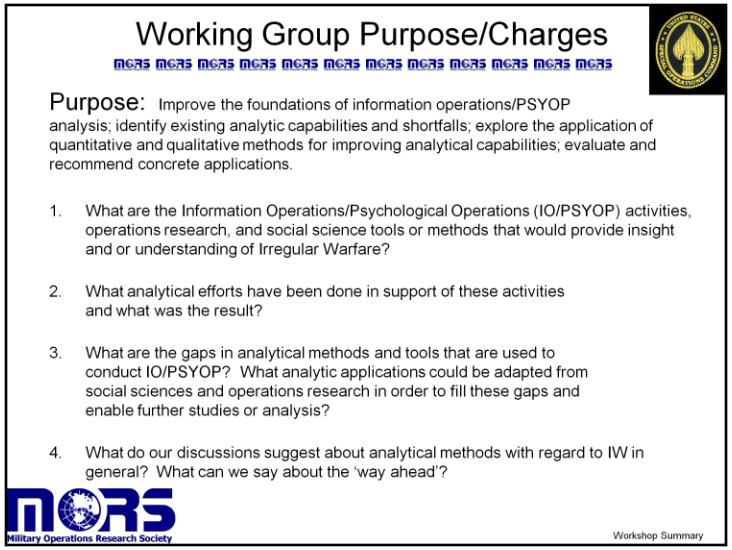
Recorder: Dr. Adam Shilling, US Army CAA

Synthesis Group Representatives: Kirk Michaelson (Lockheed Martin), Dr. Stuart Starr (IDA)



This is the agenda.

This is an annotated final brief. Background slides augment each portion of the brief. All background slides parallel this agenda.



Here are our charges.

We modified the charges to fit time and space available to the working group.

As a result, the WG focused on PSYOP to the exclusion of the other 4 pillars of IO: OPSEC, deception, EW, and CNO.

We also focused on IO to the exclusion of examining the impacts of social science on IW in general.

Here are our participants - ~43 people registered for the WG. We had representation from the entire IO/PSYOP community. We had a good mix of social scientists and ORSA: approx 25% social scientists.

Scott Helfstein and John Lawson were instrumental by acting as moderators in our panel discussions.

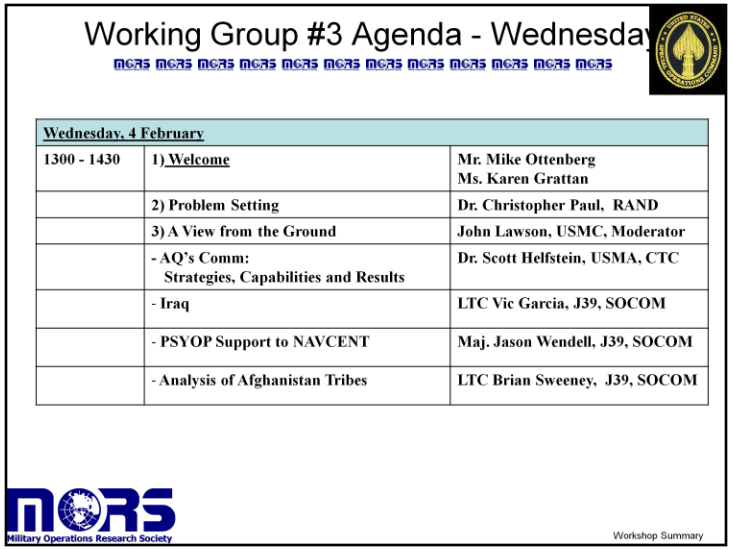
Special thanks to SOCOM, OUSD(P) SOLIC, and USSTRATCOM for assisting in providing speakers for this working group.

We would also thank Bill Young, Scott Shields, John Lawson and Yuna Wong who live in the DC area and engaged with us as we were making sense of and developing the program for this working session. Also, all of our speakers who not only prepared pieces but offered comments and otherwise engaged with the thinking behind the efforts.

Participants

- Thomas Leydorf, Wave Tech
- Thomas Mcnamara, JHU/APL
- Edward Negrelli, Leonie, LLC
- Michael Ottenberg, AT&T
- Karen Grattan, Group W
- Timothy Perkins, USA
- Jason Quirin, SOCOM
- Richard Rigazio, USN
- Todd Sherman, Lockheed Martin
- Rita Maria Szymanski, MITRE
- George Waltensperger, Lockheed Martin
- John White, NGIC
- Kirk Michealson, Lockheed Martin
- Derrick Smith, USSOCOM
- Stu Starr, IDA
- Adam Shilling, CAA
- Donna Middleton, NG
- Greg Jannarone, SOCOM

- **~43 signed up for the WG**
- **~ 20% social scientists**
- **Great SOCOM J39 participation**



Christopher Paul, RAND, "Enlisting Madison Avenue"

Scott Helfstein, CTC, "AQs Communications"

LTC Vic Garcia, JMISC, "Lines of Operations"

Major Jason Wendell, JMISC, "PSYOP Support to NAVCENT"

LTC Brian Sweeny, J39, SOCOM, "Analysis of Afghan Tribes"

Selected Insights: Chris Paul

Shaping -- activities that constrain adversary or increases friendly force options

Shaping is hard because of: Anti-American sentiment, Adversary shaping efforts, Media environment, Information environment, Culture

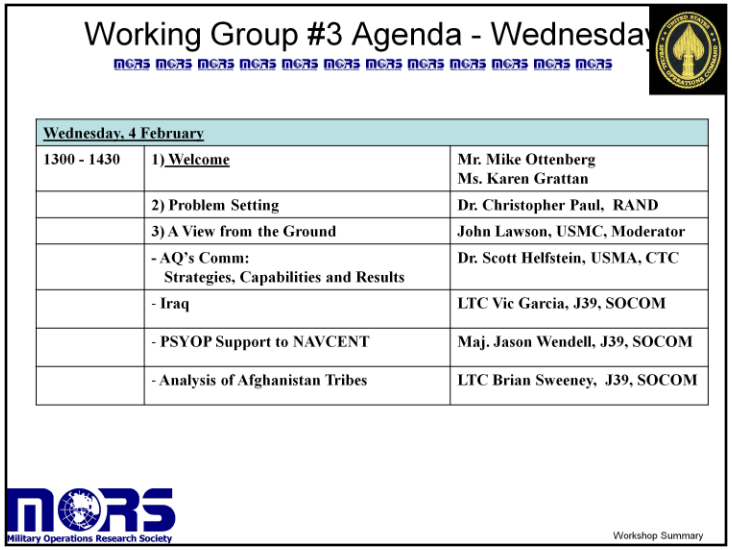
Selected challenges: Market segmentation, Information fratricide,PSYOP taint, Legal barriers, Measuring persuasion, influence, Command failure to use shaping assets, Intelligence needs for shaping, Balancing goals (near-, mid-, long-term)

Selected Insights: John Lawson, Moderator

Mass communications theory and the application of it as a set of criteria to evaluate IO.

Causality is not necessarily provided by IO; may be an exogenous stimulus to the system provided by other message or kinetic action

Mass media tools provide 70% of the solution: survey, focus groups, content analysis, theories change over time; move away from the idea of media as content purveyors with the ability to set agendas in a constrained, limited media environment. Media shapes agenda, but not opinions? (Not sure if this is a correct transcription). Older media filters out items, acts as a cultural filter, context providers. Internet obviate agenda setting. New, non-traditional, and multiple types of media change this idea. Ultimate source of truthful reporting, even if non attributed on the blogs, is usually traditional media. Audience as media users, not targets. Active choosers. Friends/grape vine vs media as source. Spiral of silence. Audiences hold opinions in private even when in public to avoid dissonance, exclusion, etc. According to Steven Chaffee, mass media is dead. Explosion of sources and opinions



Selected Insights: Scott Helfstein

Use of mass mobilization is crucial to AQ endgame. They use different media vice a single, unified media strategy. Their use of media supports their recruitment objectives. They employ segmentation and targeting. Are achieving an increasing share of a decreasing market. Are not contesting the battlefield of the mind. IO should be used to shape the environment as well as IO is used in coordination with kinetic operations to achieve US goals. Nature of news and media. Global communications. Media competition … US message competes with entertainment. Translation snafus can be ameliorated by pre-testing the product with reverse translation. Extensive US approval process to ensure control since the US appears to be risk adverse as a culture. Foreign perception of a US bias towards miss-information: all information disseminated by the US is all black or grey. Foreign audiences misattribute false information to the US even though most US information is "white". US message is distrusted … Middle east audiences use the term "Jewish" as a label to discredit the PA officer as well as the message

Selected Insights: LTC Vic Garcia

Achieved feedback by an extensive indigenous polling operation

Addressed four lines of operations

High levels of

Recall

Bonding

Selected Insights: Major Jason Wendell

Challenge:

Performed target audience (TA) analysis for maritime issues; e.g.,

Maritime activities (e.g., fishing, oil)

Media to use (e.g., HF, handbills)

Selected Insights: Scott Helfstein - Moderator

Think about strength and weaknesses of the methods presented here.

The presentations will outline representative examples of general methods.

Keep in mind as you listen to the presentations on how you would apply these and related methods to IO problems.

Working Group #3 Agenda - Thursday

MORS MORS MORS MORS MORS MORS MORS MORS MORS MORS MORS MORS

Thursday Morning, 5 February		
0800-1430	4) Key Problems in IO/PSYOP	
	- Open Space Technology	Ms. Karen Grattan Entire Group
	5) Methods, Models, and Tools I	Dr. Scott Helfstein, USMA, CTC, Moderator
	- Case Study	Scott Shield, JS
	- Case Case Study Application to Algeria 1956-1962	Dr. Bill Young, N81
	- Operation Iraqi Freedom Strategic Communication Analysis and Assessment	COL Tom Cioppa, PhD, TRADOC
	6) Methods, Models, and Tools II	Dr. Scott Helfstein, USMA, CTC, Moderator
	- Agent Based Modeling	Dr. Debbie Duong, SAIC
	- Media Influence Model, COMPOEX	Dr. Bill Bennett, BAE
	7) Key Problems in IO/PSYOP	
	Capabilities, Gaps, and Priorities	Ms. Karen Grattan Entire Group

MORS Military Operations Research Society

Workshop Summary

Tom Cioppa, TRAC -- Applying OR to Strategic Communication in Iraq;

- Critical to align
  - Facts on ground
  - Public perception
  - Media portrayal
- Petraeus: “60% of the fight is information”
- Issues
  - Inadequate time for reach-back
  - Need to **simply** convey information to senior decision makers
  - The IO Team tends to be “pick up”, variable
  - It is a challenge to convey lessons learned
- Assessment of strategic communications in Iraq using traditional ORSA techniques of statistical methods
- Facts on the Ground must = public perception must = media portrayal to achieve success.
- IBP of media
- Alignment of the message – capture, categorize, share quotes
- Iraqi perceptions – polls, focus groups
- Manage erroneous stories
- Cognitive dissonance on the part of US leadership

Scott Shields, J8 -- Case study Methodology

- Explanatory (how or why)
- Descriptive (time sequence)
- Exploratory (what or who)
- Explanatory – How, why
- Descriptive – discover key phenomena
- Explanatory – Why who leads to in-depth exploration
- Mohammed’s Face example
- Test new theories
- Research and teaching tool
- Advantages
  - context dependent
  - emphasis on learning versus proof
- Disadvantages
  - unique to case
  - validithy or reliability
  - Case selection bias
  - Subjective conclusions
  - Not predictive
- Study Design
  - type
  - cases
  - analysis
  - Reporting

Bill Young, N81 -- Algerian case study (‘56-’62):

Semiotic -- signs that form a message (e.g., action, reaction)

Battle of Algiers

Sequence how one output affects the next output – French did not look at long term, much less 2nd and 3rd order effects.

Kinetic actions as IO messages: bombings and counter bombings; assassinations

Hierarchy large to small

French could not disaggregate need to see the entire campaign. Needed success of all parts to achieve campaign success; was not able to accomplish

Semiotic – symbols, signs, words that form a message.. Sender-communications system (code) – receiver

No overall French message except Algeria = France. The message did not resonate with Algerians although it did with the Pied Noirs

Not plausible. Did not mobilize the population to do something.

FLN oriented its IO towards internal, metropolitan France, and 3rd party audiences.

Revenge achieved small group behavior modification – frightened Algerians from collaborating. Algerian moderates were placed in a dilemma on what to do – usually defected to the FLN

Afghan IO: THE US MUST:

- develop an over all message
- Determine what is expected from the population
- Determine what is the vision for the future of Afghanistan
- Describe what the US intends to do
- Be oriented towards the correct target audiences with plausible messages

Notes from Thurs (continued)

Q&A

- What is the relation of case study method to statistics?
- What is the difference between case study and history? Essentially identical
- How should semiotics (symbols) be modeled?
- How can statistics be better used?
- Garcia sees the effort briefed by Cioppa as systematic ORSA support to IO, Public Affairs, and PSYOP. Has this approach been codified? Yes, but …
- Timeliness issues – lessons learned
- immediacy of data output – use case study
- timeliness = 75% of the message, not just the message itself
- If the story being told/followed is a persistent miss-communication, then expend the effort to counter. Time and resources problem such that small items are left unchallenged. What is the impact on the overall goals of this triage effort?
- Must explain to the population the strategic reasons of Why the US invaded; What the US is trying to accomplish; what are the eventual long term relationship of the country to the US.
- Spokesmen perceived as being "Jewish", not to be trusted.
- Is ORSA applied to strategic communications only for determining media effectiveness? No. ORSA applied to all aspects of strategic communications, IO, and PSYOP. Also applied to IPB, intelligence in general, etc.
- JFCOM will take the lessons learned and apply them to improve joint concepts and doctrine.
- Stringent time requirements: typically 2 hour timeframe. However, analysts should apply case study methodology to do long term trends.
- Personnel changeover is a big problem. Overlap and mentor systems ameliorate this issue to some degree
- Analytic reach-back is not sufficiently timely to deal with short term problems.
- All of the data in the View from the Ground briefs is dated and probably incorrect at this time due to rapidly changing events
- Contractors and government personnel form up a base of PSYOP experts… noted that post WWII almost all US PSYOP capability was dismantled
- Case study may be used for the short term and the long term
- Definitely should use the case study method for professional military education
- What is the mechanism for the capture of knowledge and transference for personnel change? Lessons learned, mentors, overlapping periods of service, etc.

Debbie Duong -- Agent Based Simulation (ABS)

- Two dimensions
  - Cognitive vs reactive agents
  - Data- vs theory centric
- Key challenge -- micro- and macro-level integration
- Problems with ABS
  - Artifacts
  - Explain in general, not specifics
  - Technology of AI
- Emerging tool -- Nexus (cognitive agent simulation of popular support)
- Agents behave according to rules (may have rules imposed by culture)
- New patterns of behavior emerge within the total system as a result of individual behaviors examined collectively.
- Cognitive – rules of behavior do not change
- Data Centric – what actually happened versus what theory states
- Problems
- Generalities from instances
- Artifacts – not from assumptions, how do we instantiate the affects of assumptions
- Replication is another technique
- If computation is based on assumptions, this explains the general, not the specifics since the instance of the world is arbitrary.

Bill Bennett, BAE Systems -- Media Influence Modeling in Support of COMPOEX

- Purpose -- forecast influence of media information on public attitudes/opinions toward subject entities
- Approach -- hybrid modeling paradigm
  - ABM (entity behaviors)
  - SDM (time evolution of effects)
- Theoretical underpinnings (e.g., agenda-setting theory; opinion leadership; social influence theory; co-orientation theory; priming and framing theory)
- Key factor -- characterization of media channel
- Issue -- has not performed VV&A
- Media Influence Model
- Hybrid of systems dynamics and agent based modeling
- Audience cognition is modified by themed message content
- Signal to noise ratio problem of messaging
- Does not model the modification of audience behavior due to messaging
- Explicit theme sources
- Media theme coverage – which channels at what times
- Estimate changes on public attitudes towards HNS government, COCOM, and the USG
- Audience segmentation problem
- Rhetorical/Intensity/Reinforcement/Acceptance issues
- Represent short term projections

Notes from Thurs (continued)

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Media Influence Model

Hybrid of systems dynamics and agent based modeling

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Media theme coverage – which channels at what times

Estimate changes on public attitudes towards HNS government, COCOM, and the USG

Audience segmentation problem

Rhetorical/Intensity/Reinforcement/Acceptance issues

Represent short term projections

Agent based component uses named entities, influence relations, and entity influence behavior

Uses the following communications theories:

Primary Framing theory

Information theory

Social influence theory

Opinion leadership theory

Agenda setting theory

Co-Orientation theory

Changes in attitude depend upon the legitimacy, affinity, and competency of the message originator as well as the trust and credibility of the originator

Data sources include opinion polling – problems with stale data, limited snapshots have been ameliorated to some degree; also use SME

Complexity theory

Computational social science is at its infancy so why use M &S; it is hard to determine whether the means leads to a specific endstate

Q&A

MIM is good as a conceptual model, good representation of media. When should M&S be used?

Should there be an audience reception model? Yes. Also require a small approach to include the correct cultural filters. Other models treat social domains. Only attitude changes are modeled. Message bias has intensity and a direction. Message bias may produce an effect in favor or against the content of the message

Conceptual model includes a degree of trust. Selection of the channel type plays a role in the level of trust towards a message

Fratricide may be limited by using the correct, focused channel directly to the target audience.

Easier to tear down trust than it is to build trust with IO. Negative political campaigns work!

Data is an issue.

MIM is in the proof of concept stage and requires VV&A

CAMEO, EPIC, and IO JMEM may also provide conceptual models that should be compared to MIM

Create standards to process data; this will shorten the timeline for modeling

Define MOE, then obtain the data

Do we have studies on the emotional attitude to straight news vs editorial reporting?

Could use SNA to conduct research on perceptions and the impact of messages on perception

Conceptual model can be done without mathematics; it is extremely valuable in helping analysts better understand the problem being modeled. Just framing the problem provides understanding.

Primary Themes

Open Space technology used to have the WG divide into semi-structured discussion groups. The groups developed the following themes to represent a synthesis of perceived capabilities, gaps, requirements, and priorities.

How we see the world (philosophical)

How we organize, prepare ourselves (whole of government)

Analytic design -- who participates and what we eVALUEate

Unintended consequences of our activities

Operational/operator constraints

Existing IO/PSYOP Tools

Historical analyses

Wargames (e.g., PSOM, SOFBAT)

M&S Media Influence Modeling (e.g., COMPOEX module; EPIC; SEAS; CAMIO)

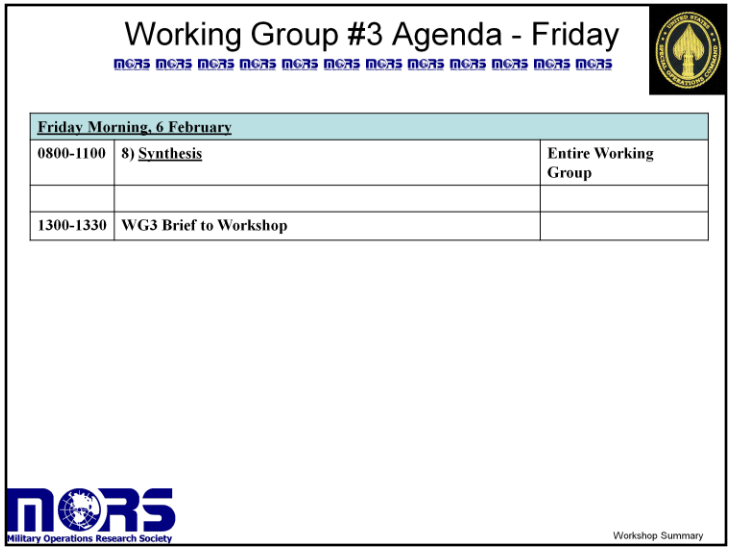
Computer Network Operations (e.g., IO JMEM tools)

Ranges (e.g., IO Range)

Feedback

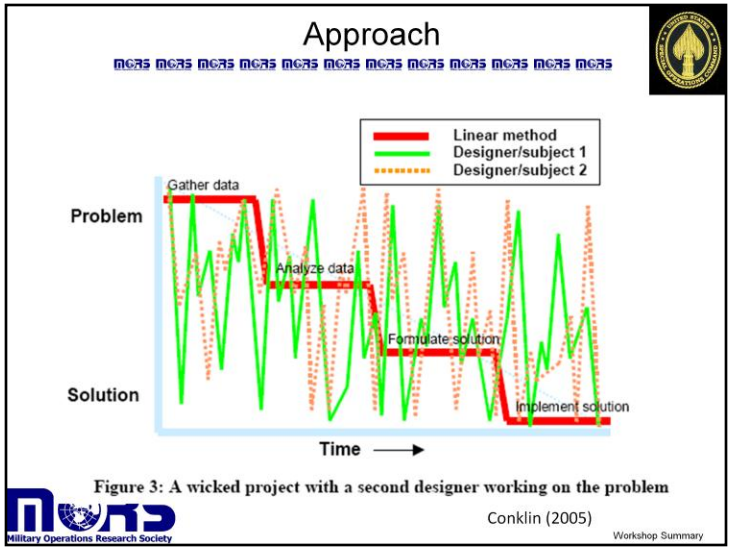
Polling

Social Network Analysis (e.g., Facebook, formal SNA tools)



Observations About Existing Tools

- Limited functionality
- Failure to perform VV&A
- Inadequate data (e.g., metadata, pedigree)
- Expensive (e.g., polling)
- Limited linkage to social science theories
- Difficult to employ

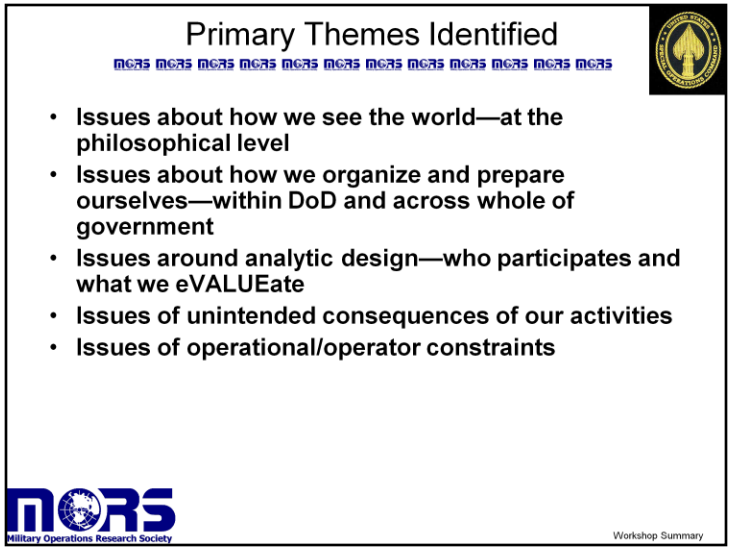


In working with irregular, unconventional and/or hybrid type problems, we are dealing with a great deal of complexity within the problem space. Such problems have been called “wicked” and “messy”, and (consistent with Reb Yancey’s discussion of Systemic Operational Design) we contend that you have to think about the work differently. Traditional problem solving, or solving complicated (versus complex) problems progresses in what we call the waterfall method… where we gather our data, analyze it, and move to our best solution in a relatively systematic way.

The biggest challenge in working with a wicked problem, though is in framing it. With each framing of the problem, we move the project toward a specific solution. In reality, the way we cognitively work in such cases is to move back and forth in the problem-solution space, framing, acting and reframing the problem. I think it is important here to remind ourselves of Col. McMaster’s point (which Reb shared); “if you think you have the solution to this you are wrong, and you are dangerous.” No one person is going to have the answer to IW-like problems. In fact, we know that we need the help of other disciplines in framing and addressing these problems, that is why this working group is also charged with dialoguing with the social sciences and social scientists.

So, that is where this image on this slide comes in: by adding team members, especially team members with different disciplinary cultures, and organizational cultures (as in interagency work), and different epistemological stances (or, approaches to knowledge), we have also added a great deal of **social complexity** to our problem. Now, the work not only includes the complex problem itself, but the social complexity inherent in getting the right teams to address these problems, to work effectively together. So we would add to Reb’s proposition about “thinking” about these problems: We not only need to think about the problems in new ways, we need to think about the **work** (and how we work together) in new ways. We have to think about how we work with each other, across language, cultures and paradigms, to make sense of the problem to get things done.

We found this “two designer” process even playing out between Mike and Karen as co-chairs. There was this desire to use a linear analysis approach toward our workshop: Find out current conditions and capabilities; identify coverage and gaps; identify potential solutions; test solutions against gaps; evaluate solutions; prioritize solutions. We did agree, though, that people look at all aspects of these problems and their related “steps” with near simultaneity, or even out of order. We used a blend of both approaches. Our schedule reflected a rational step-wise approach to our briefings, and we blended in some “social” technologies to make space for problem framing, sense-making and aligning in our efforts to ultimately locate issues, requirements, suitable solutions, and priorities.



WG members used the Open Space methodology to examine a set of general questions related to PSYOP. We opened the floor to the entire working group, and asked them to put the critical issues on the table, as they saw them. We gave each issue an "issue card" and turned the group loose to discuss the various issues in small groups. They were asked to capture (on colored index cards) the critical points or framing questions of the issues. After the lunch group a mini synthesis team gathered the cards and sorted them by common theme. This slide reflects the 5 key themes that emerged from the group work.

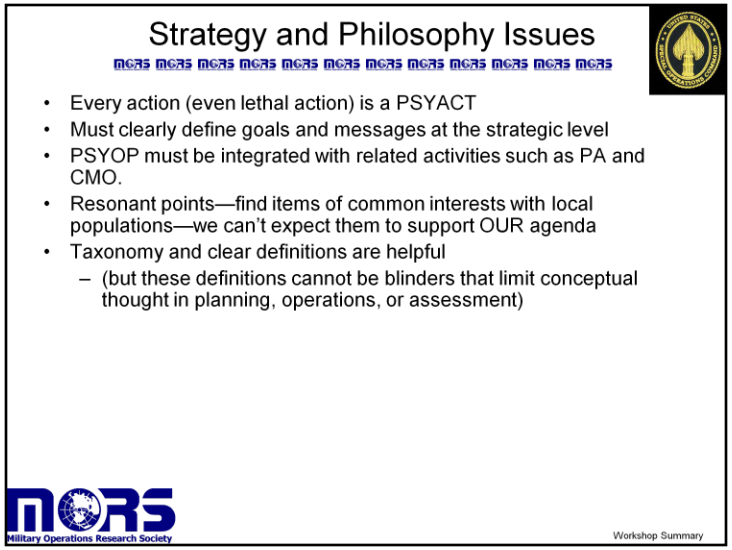
In the afternoon session, we asked groups to return to the work on these themes and consider the following:

1. What are the needs related to this issue. What needs to be sorted out?
2. What are the critical gaps within this theme area, that are limiting our capabilities?
3. What is the role that analysis plays in either addressing key needs or addressing key gaps?

The following slides capture a part of what came out of those discussions.

Primary Themes

- How we see the world (philosophical)
- How we organize, prepare ourselves (whole of government)
- Analytic design -- who participates and what we eVALUEate
- Unintended consequences of our activities
- Operational/operator constraints



Strategy and Philosophy

Is our thinking on influence correct?

What is meant by effectiveness

What do we hope to accomplish

How do we compete with our message

Is our idea of PSYOP a product of the US way of war or the US culture in general?

Every act is a PSYACT and a civil affairs act

At the strategic level who is the audience, what is the message

Course of action should have associated COAs

Plan for failure and unintended consequences

Competing messages – use Red teaming effort to determine how to counter act Red messages

Need Civil Affairs interoperability

Requirement in fashioning the message in accordance with the strategic content

Need discipline to develop and conduct PSYOP as a part of all combat COAs

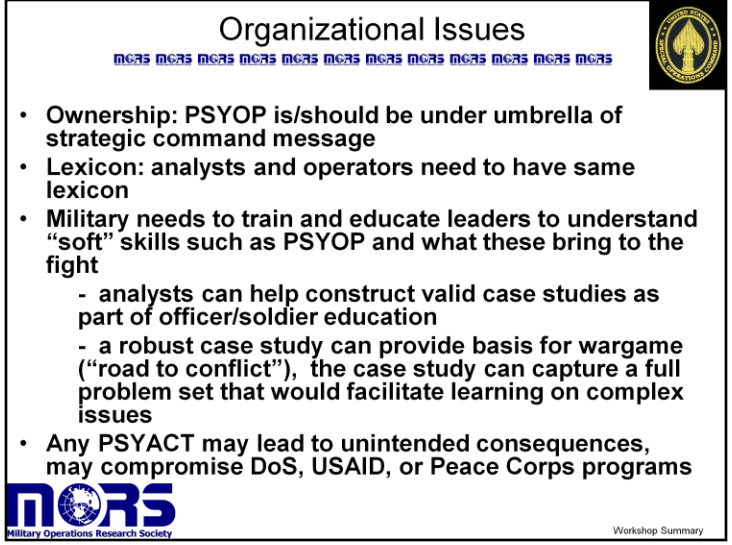
Need success in assessment criteria

Need priority in intelligence to conduct PSYOP BDA

Focus on developing social networks to promote or foster message resonance

Need to understand from the start that the US is biased

A taxonomy to lay out IO duties, responses, and integration/interoperability among all entities conducting IO



Organization

Where is PSYOP executed?

How to accommodate and understand the inter-relationships across the 5 IO pillars

How to coordinate PSYOP and other sources of information

Train and transform PSYOP organizations

Should PSYOP be in charge and control all operations since every act is a PSYACT? No.

Ownership should not change but improve. Use case study approach and focus on human terrain

A common lexicon is required

Institute change where the commander is the combined arms commander to include PSYOP. CMDR needs enlightenment on institutional basis, need to inform commanders at all echelons on the benefits and limits of PSYOP

IO pillars are flawed since they include many disparate, unrelated elements. Public affairs should, but rarely coordinates its actions with PSYOP

Role of analysis should be to provide MOEs, case studies

Black PSYOP function should be moved to another organization to prevent creditability issues

Coordination with inter-agencies is imperative

PSYOP staff officer must be proactive in working with the commander

Case study should be used as a training device, especially focusing on Phase 0 operations. M&S can support wargames

PSYOP must be integrated with related activities such as PA and CMO. PSYOP or PA magnifies the effect of CMO (such as MedCAPS, agriculture improvement programs, projects).

Resonant points—find items of common interests with local populations—we can't expect them to support OUR agenda, and we cannot expect them to sacrifice for OUR agenda

Taxonomy and clear definitions are helpful

-but these definitions cannot be blinders that limit conceptual thought in planning and operations

Ownership: PSYOP is/should be under umbrella of strategic command message

Lexicon: analysts and operators need to have same lexicon

Military needs to train and educate leaders to understand "soft" skills such as PSYOP and what these multipliers bring to the fight

-analysts can help with valid case studies as part of officer/soldier education

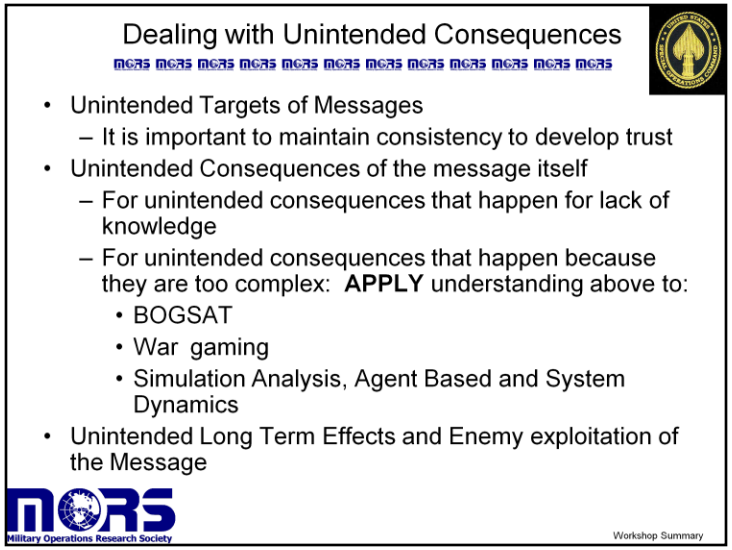
-case study can basis ("road to conflict") for wargame (as opposed to fictional scenario), the case study can capture a full problem set that would facilitate learning on complex issues

-case study on informational dimensions of conflict in Phase -1 or during IPB is more proactive than waiting until engaged

PA and PSYOP don't talk? They need to…

May need to constrain "black" PSYOP to reduce OGA or commander's scruples in working with or using PSYOP

Kinetic ops have a psychological effect…These effects may lead to unintended consequences, may compromise DoS, USAID, or Peace Corps programs



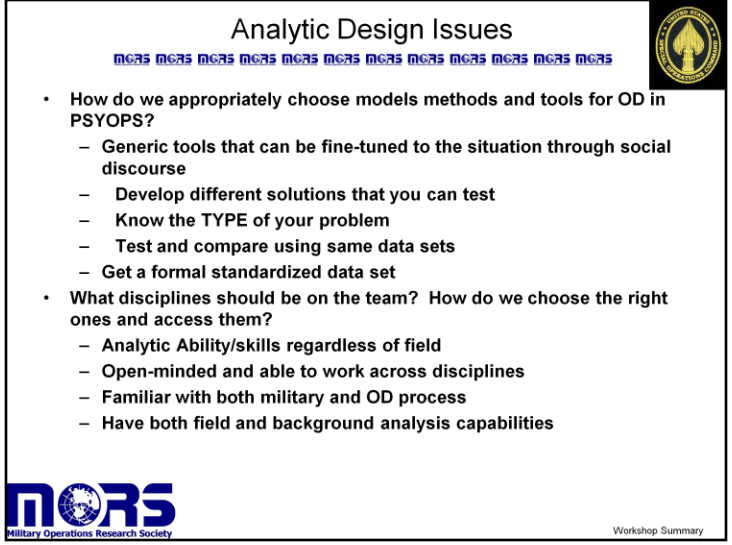
Unintended Consequences

•Message can get to wrong audience- selection of delivery means

•Integration of capabilities from interagency sources- CIA knows things, they need to share

•Analysis can aid understanding complex problems which decrease odds of unintended consequences (including BOGSATT and all sorts of other models and simulations)

•Follow-up on promises with action



1 – How do we appropriately choose models methods and tools for OD in PSYOPS?

Generic tools that can be fine-tuned to the situation through social discourse (like the MpiCE project – Measuring Progress in Conflict Environments which provides a list of MOEs for organization's SMEs to choose from to tailor to specific situation).

Develop different solutions that you can test

Know the TYPE of your problem

Test and compare using same data sets

Get a conformal standardized data set

Use these models in different ways (eg – examination of both links and nodes in network models can provide insights)

Some examples:

SNA tools

Agent-based models

Bayesian

Influence models

Systemic Operational Design

Other issues:

Security Classification problems often prevent sufficient collaboration

CONTEXT matters for social issues

Keep in mind that tools should be crafted to support analysts, they cannot replace analysts

Meta data tagging problems

2 – What disciplines should be on the team? How do we choose the right ones and access them?

Analytic Ability/skills regardless of field

Open-minded and able to work across disciplines

Familiar with both military and OD process

Have both field and background analysis capabilities

Build a reserve corps like Civil Affairs which can be tapped as needed

Some team members must have PSYOPS experience

Comms theory (esp campaigns and influence issues)

Planners

Cultural expertise

FAO

Modeling/Sim etc technical people

Linguist (translation)

Social Sciences

Psychologists

3 – What is the appropriate approach to measure effectiveness? What else needs to be measured?

Step 1: Know the intent of campaign or conditions to be changed

Step 2: then you can set measures up front and constantly refine over time (iteratively)

Notes continued on Analytic Design Issues

4 – How should we study outcomes of our actions?

COORDINATE – form friendly network of interservice, interagency, govt, private partners

Tailor to sub-groups and integrate

Do in steps – eg – how much closer did I get to the goal? (eg – goal 50% positive polling – track trends from beginning)

Give your partners the collection requirements so they can collaborate

Don't rely on a single measure (eg – not just polling)

There should be different measures for different timeframes – short/medium/long

Short – single behavior events (eg – vote, obey curfew, etc)

Medium – trends in behavior (eg. Calling a reporting hotline)

Longer term – attitudes underlying (Must understand what attitudes underly your objectives and then what behaviors reflect these attitudes iot measure them)

Address both good and bad outcomes

Cannot measure attitudes directly (polling can help but is not entirely reliable)

Gap: need to fund longer-term studies on what kinds of observable behaviors reflect the attitudes we are likely to seek (eg – what behaviors underly acceptance of a "market democracy"?)

Further issue:

Giving people something positive, something to say "yes" to –something which reflects their self-interests and values. This approach might be more efective (can sponsor studies to determine) but also more likely to provide the types of objectives which lend themselves to observable/measurable behaviors.

Analytic Design

How to choose the correct tools and methods?

What to discuss?

What are the correct MOE, MOPs?

Develop generic tools that can be modified for specific applications. How should tools be chosen?

What disciplines should be on a PSYOP team depends upon the timeframe. Field experience is a requirement. Analytical skills. Need flexibility. Reserves and contractors. Note that most PSYOP is currently performed by Reserves.

No prediction, only a range of possible outcomes.

How should we study outcomes – see the graph. Easy to measure changes to actions in the short term. Need to measure changes in attitudes, especially in the long term.

Know intent and strategic goals. Fashion MOEs accordingly. Easier to measure changes in action.

A positive message that resonates is required

Use common sense to check on operations. M&S may be of some assistance in examining long term issues.

Country specific plans on the shelf are possible, but are impractical since it is almost impossible to keep them up to date with current conditions within the country.

Measuring PICEnvironment provides menu of possible metrics for data collection, monitoring and evaluation

What disciplines should be on the team? How to select team members?

Planning, experience, analysis in background are all a plus. Varied background in a plus.

Maintain a corps of qualified people to be available for deployment (like DoS CRC)

Measuring effectiveness/ studying outcomes

Must be related to desired, explicit outcomes/ objectives

Identify which attitudes are related to outcomes; what behaviors stem from those attitudes

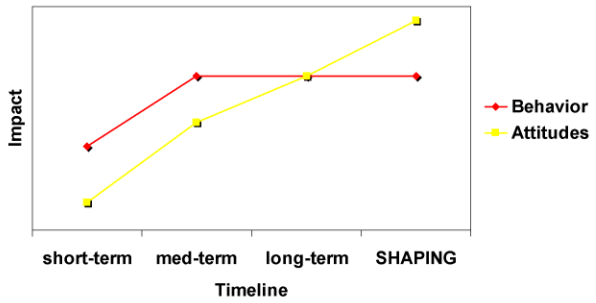
Messages should be "positive"—we should be FOR something that is in the interest of local national populations

Effective assessment plan could demonstrate RoI which can garner additional resources

"prediction" is too lofty a goal; forecasting, learning, developing understanding, understanding a phenomenon are much more feasible

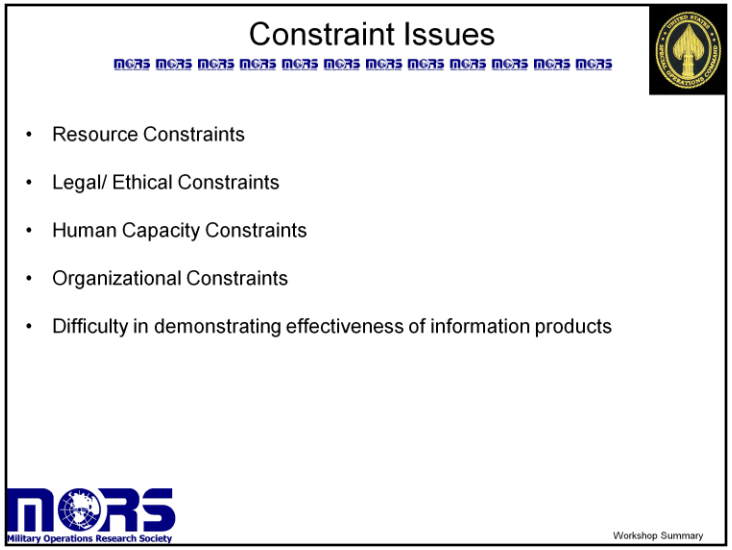
Analytic Design Issues

Measuring Outcomes in Influence Operations

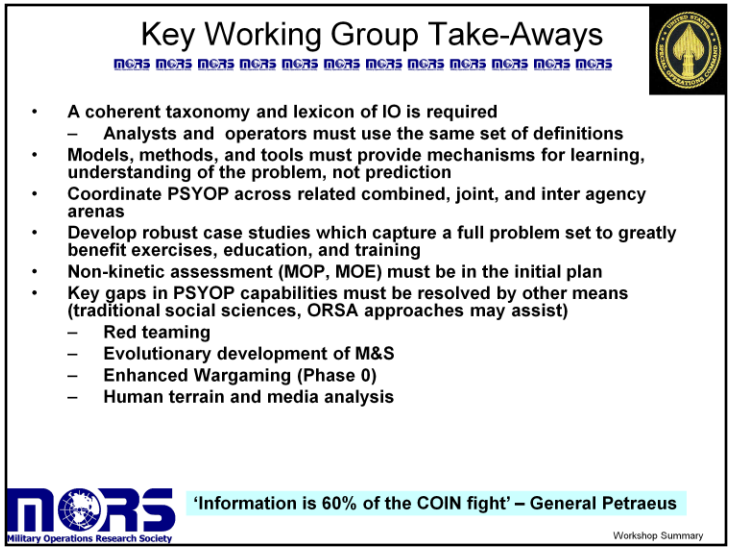


Military Operations Research Society

Workshop Summary



See background slides for details.



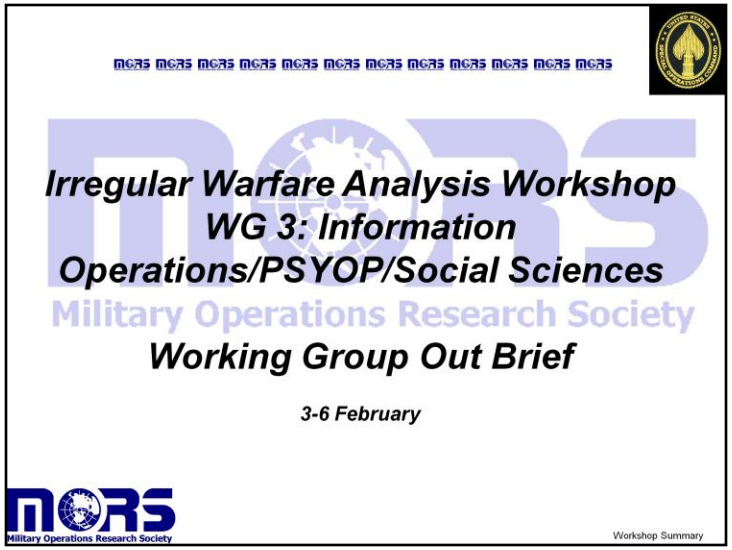
As noted. See background slides for additional take-aways.

JOCs and Joint Publications have been produced, but there is still confusion among the actors in the community.

Models do not predict; they provide insights, especially when excursions are compared to an accepted baseline.

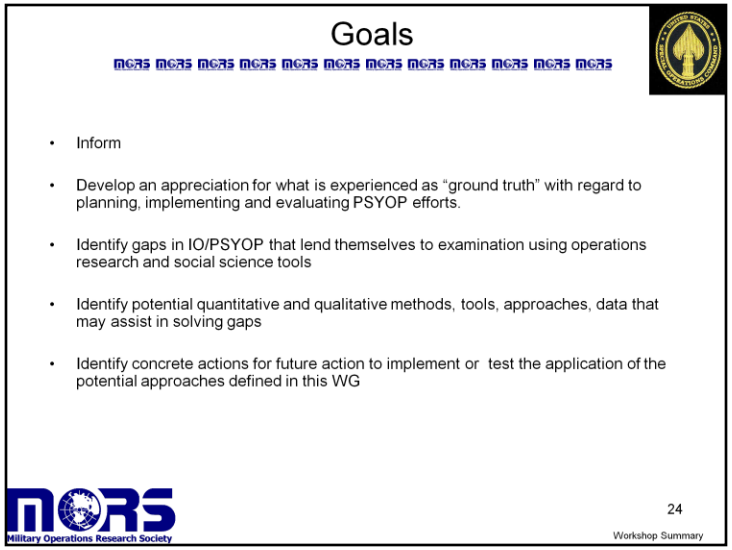
PSYOP and all IO must be coordinated among all practicing departments, echelons, etc

Traditional ORSA approaches (M&S, optimization, etc) will be of assistance in resource allocation within PSYOP; social science and ORSA will NOT be of much use to solve fundamental authorities and policy issues.


Irregular Warfare Analysis Workshop
WG 3: Information Operations/PSYOP/Social Sciences
Military Operations Research Society
Working Group Out Brief
3-6 February
Military Operations Research Society
Workshop Summary

Questions?

Backup slides provide additional details on the slides presented in the main body of the presentation.



What specific items are we trying to achieve in this WG?

Assessment:

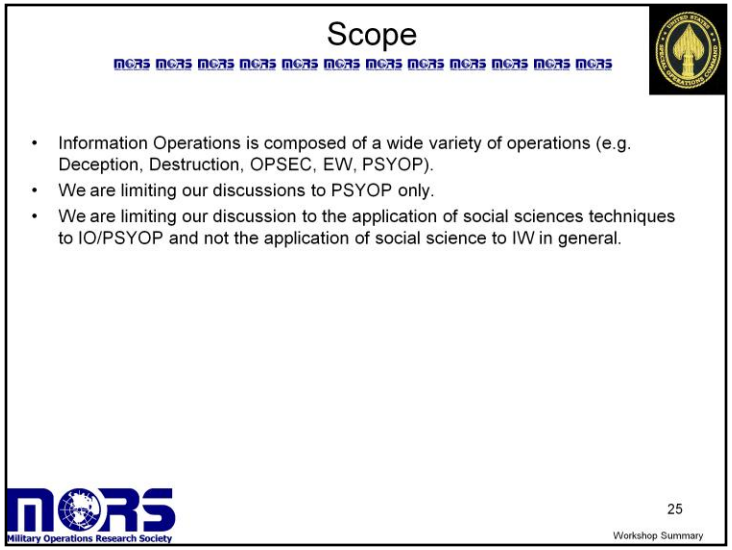
-Achieved Goal #1

-Achieved Goal #2

-Achieved Goal #3

-Partial achievement of Goal #4. Showed several sample quantitative and qualitative methods, tools, approaches; was not comprehensive.

-Did not achieve Goal #5



How are we scoping our efforts in the WG to achieve our goals?

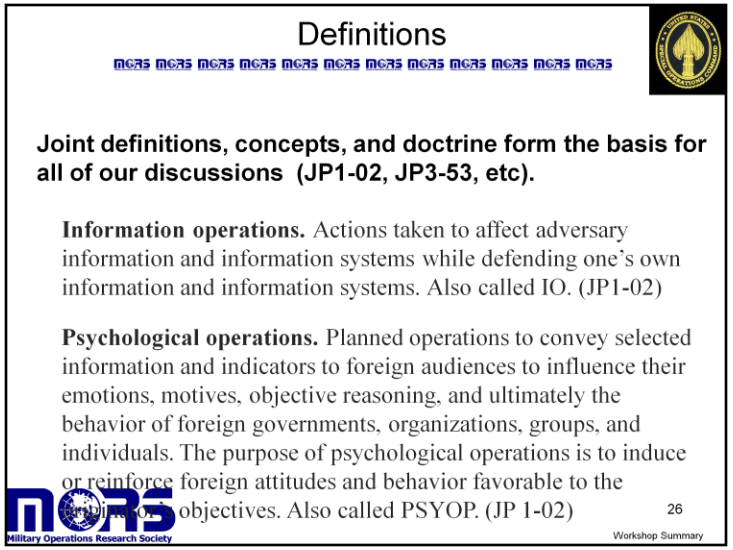
Strategic communications and IO cover a wide variety of topics. IO alone is composed of 5 pillars: Deception, Destruction (CNO), OR, EW, and PSYOP.

Our original WG charges were focused on the impact of social science techniques on all aspects of IW in addition to those techniques that could be applied to PSYOP.

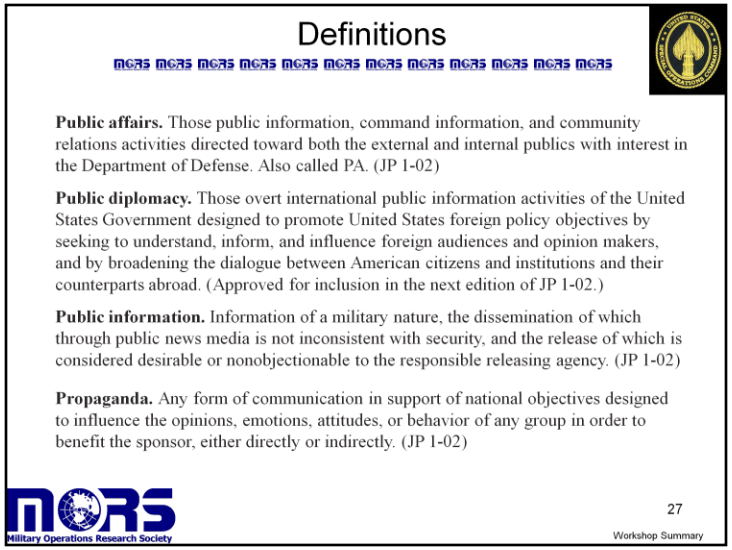
Hence we are limiting our discussion to the time available:

•PSYOP

•Social Sciences and ORSA related to IO/PSYOP



Basic Definitions we will use are those found in JP1-02 and JP3-53.



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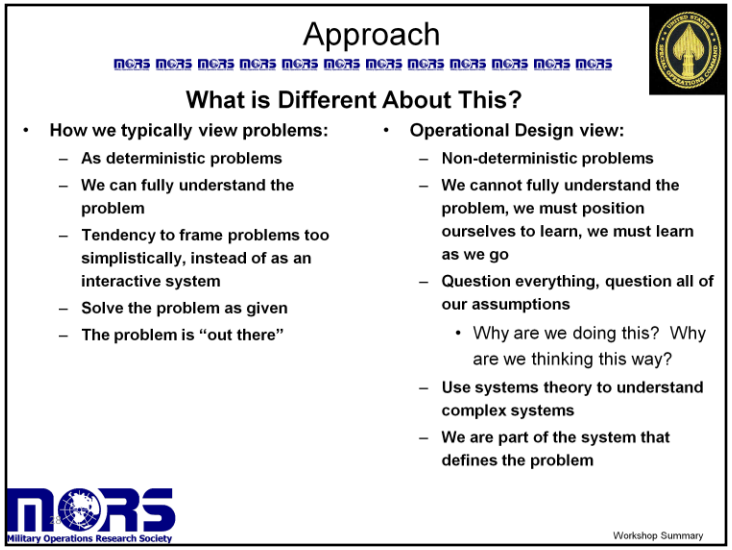
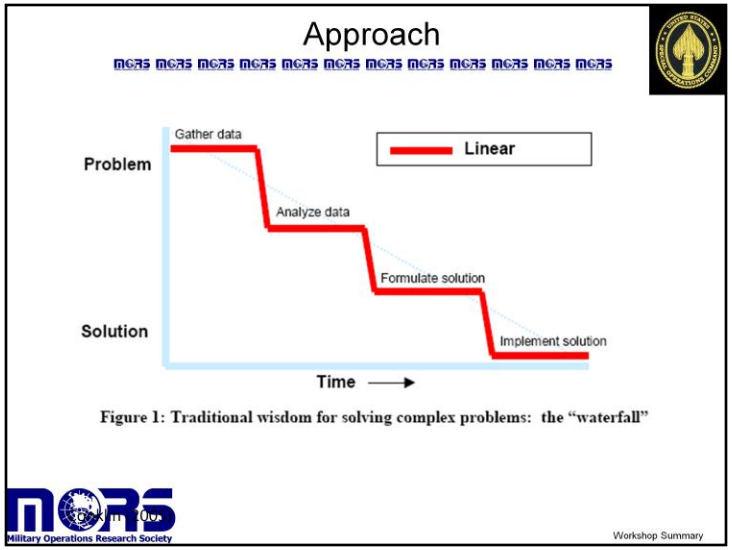
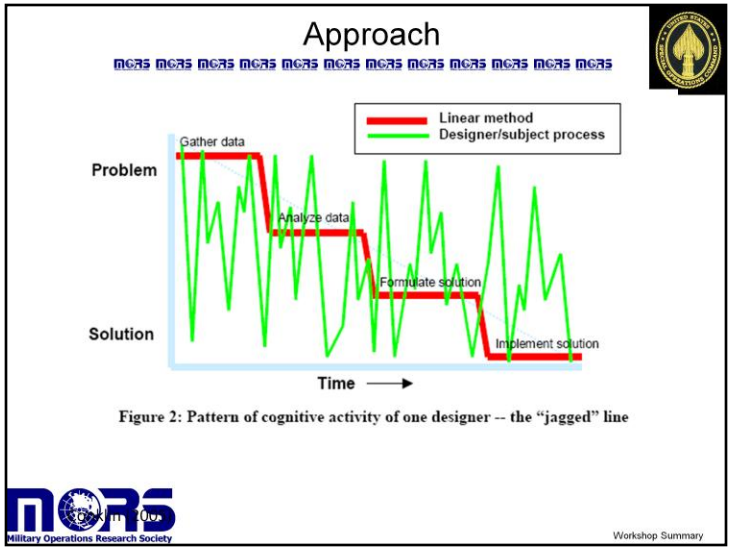


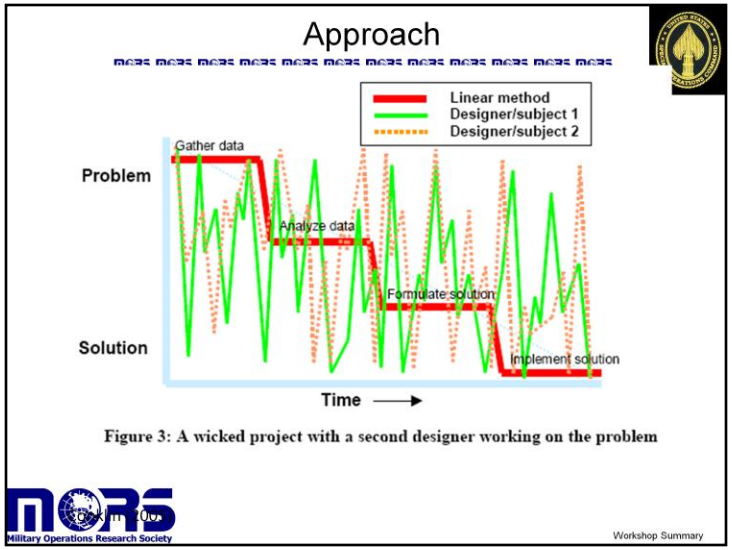
This slide was borrowed from Reb Yancey's presentation at the workshop to draw out the distinctions between the approaches we often take, where we "tame" a wicked problem as quickly as possible so that we can get on with the business of solving it… and the approach, that we need to take in a complex problem space like IW. We have to be willing to question our assumptions and radically reframe the problem if we need to.



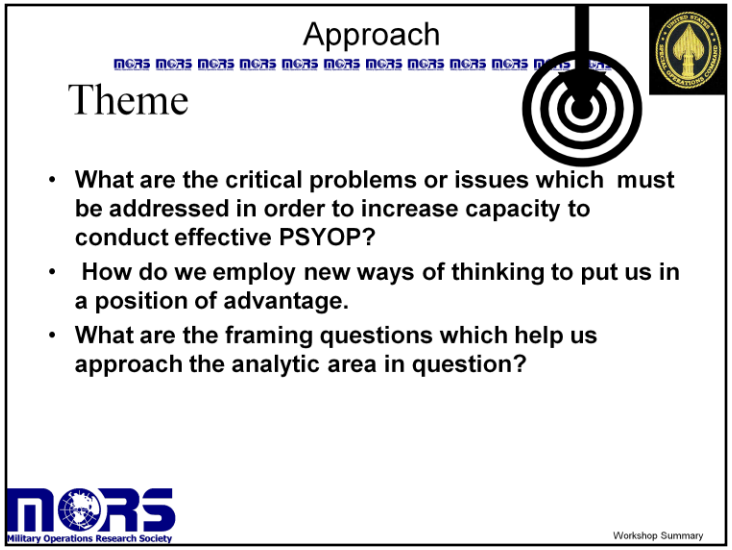
Typical rational decision making approach to analyzing problems.



This is the way an analyst will work in cases where the problem is multi-dimensional and highly complex. This jagged line reflects the true cognitive activity of this kind of work, where there is significant iteration between the context and problem framing.



This slide gives us an image of how a team of two would work with a complex problem. The will not be on the same exact cognitive path. Much of the work to be done in a team is the sort of sense-making and alignment so that the team can move effectively together. This is how we might think of problem complexity amplified by social complexity.



WG members used the Open Space methodology to examine these general questions. The results of this effort produced the 5 major issues that formed the basis for additional discussion after the presentation of the potential qualitative and quantitative solutions. We opened the floor to the entire working group, and asked them to put the critical issues on the table, as they saw them. We gave each issue and "issue card" and turned the group loose to discuss the various issues in small groups. They were asked to capture (on colored index cards) the critical points or framing questions of the issues. After the lunch group a mini synthesis team gathered the cards and sorted them by common theme.

Primary Themes Identified by the WG

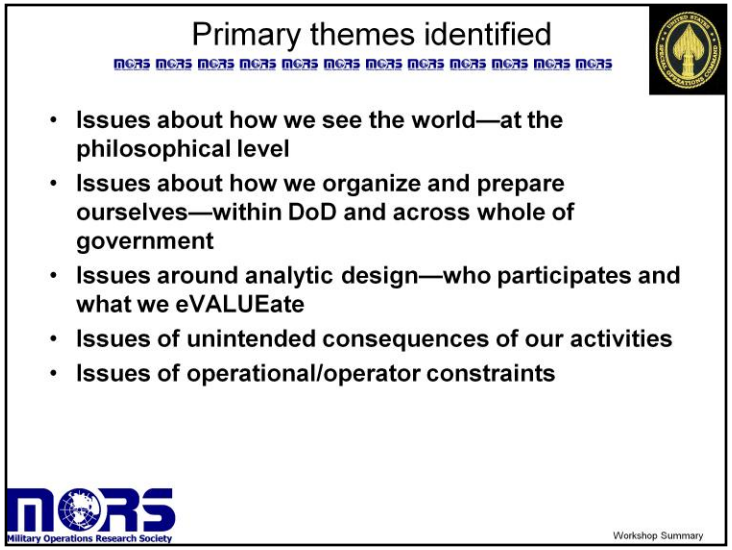
•Issues about how we see the world—at the philosophical level

•Issues about how we organize and prepare ourselves—within DoD and across whole of government

•Issues around analytic design—who participates and what we eVALUEate

•Issues of unintended consequences of our activities

•Issues of operational/operator constraints



These were the themes that the group generated. In the afternoon session, we asked groups to return to the work on these themes and consider the following:

1.What are the needs related to this issue. What needs to be sorted out?

2.What are the critical gaps within this theme area, that are limiting our capabilities?

3. What is the role that analysis plays in either addressing key needs or addressing key gaps?

Strategy and Philosophy Issues

- M&S outstrips social science, needs evolutionary approach as conceptual models improve, build the models … not universally held
- Must integrate with civil affairs to ensure

Strategy and Philosophy Issues

- Every action (even lethal action) is a PSYACT
- Must clearly define goals and messages at the strategic level
- PSYOP must be integrated with related activities such as PA and CMO. PSYOP or PA magnifies the effect of CMO (such as MedCAPS, agriculture improvement programs, projects).
- Resonant points—find items of common interests with local populations—we can't expect them to support OUR agenda, and we cannot expect them to sacrifice for OUR agenda
- Taxonomy and clear definitions are helpful
  - but these definitions cannot be blinders that limit conceptual thought in planning, operations, or assessment

Strategy and Philosophy Issues

Philosophical Requirements (1 of 3)

- **Leadership should establish a strategic vision / concept for PSYOP; at least in a theater or campaign**
  - **Operational objectives and effectiveness follows**
- **Determine what our message should be and intended audience**

Strategy and Philosophy Issues

Philosophical Requirements (2 of 3)

- **Course of Action (CoA) development should include PSYOP assessment for each COA**
  - **How does the analyst assist the planner with COA development?**
    - **Effect on audiences**
    - **Task accomplishment**
    - **Kinetic versus non-kinetic**
    - **Success assessment criteria**
    - **Prioritization**
    - **Plan for failure and unintended consquences**

Strategy and Philosophy Issues

Philosophical Requirements (3 of 3)

- **Red Teaming to account for adversary PSYOP/counter-Strategic Communication**
- **Identify resonant points in key aspects of belief/value system and work your Strategic Communication message to work with them**
  - **Social network modeling**
- **Assume US views/perspectives on influence is biased to US values -- must counter balance**

Organizational Issues

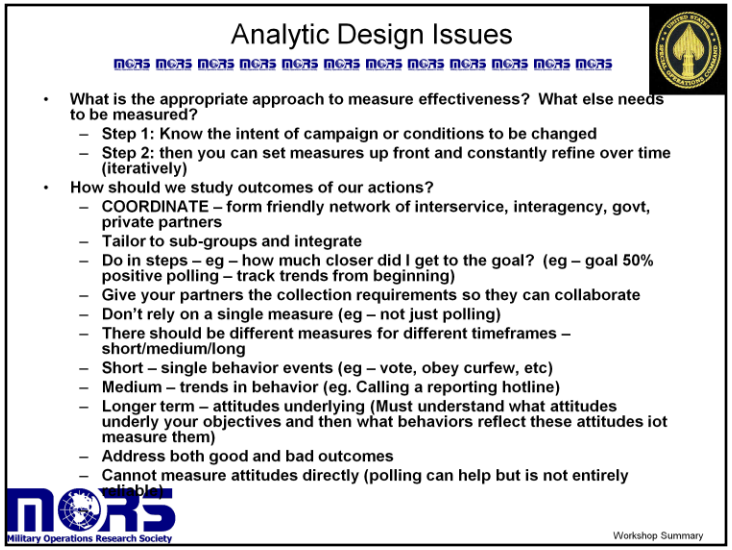
- Ownership: PSYOP is/should be under umbrella of strategic command message
- Lexicon: analysts and operators need to have same lexicon
- Military needs to train and educate leaders to understand “soft” skills such as PSYOP and what these bring to the fight
- -analysts can help construct valid case studies as part of officer/soldier education
- -a robust case study can provide basis for wargame (“road to conflict”), the case study can capture a full problem set that would facilitate learning on complex issues
- -case study on informational dimensions of conflict in Phase 0 or during IPB is more proactive than waiting until engaged
- PA and PSYOP don’t talk? They need to…
- May need to constrain “black” PSYOP to reduce other agencies’ or commander’s scruples in working with or using PSYOP
- Kinetic ops have a psychological effect…
- PSYOP may lead to unintended consequences, may compromise DoS, USAID or Peace Corps programs

Dealing with Unintended Consequences

- Unintended Targets of Messages
  - Tailor the way the message is presented to different groups, but not what message is sent. It is important to maintain consistency to develop trust
- Unintended Consequences of the message itself
  - For unintended consequences that happen for lack of knowledge
    - More understanding of possible consequences by getting more people who know the population looking at it
      - Better cooperation with IA and Intelligence community
      - Employ Academics/Social Scientists
      - Make better use of operational experience
      - Serve the population more, so that they tell you.
  - For unintended consequences that happen because they are too complex: **APPLY** understanding above to:
    - BOGSAT
    - War gaming
    - Simulation Analysis, Agent Based and System Dynamics
- Unintended Long Term Effects and Enemy exploitation of the Message
  - For unintended consequences that happen for lack of knowledge
    - Have people on the ground and population monitor effects and re-spin for damage control
    - Keep promises (especially by knowing when a promise was made
  - For unintended consequences that happen because they are too complex: **APPLY** understanding above to:
    - BOGSAT
    - War gaming
    - Simulation Analysis, Agent Based and System Dynamics

Analytic Design Issues

- How do we appropriately choose models methods and tools for OD in PSYOPS?
  - Generic tools that can be fine-tuned to the situation through social
  - discourse (like the MpiCE project – Measuring Progress in Conflict Environments which provides a list of MOEs for organization's SMEs to choose from to tailor to specific situation).
  - Develop different solutions that you can test
  - Know the TYPE of your problem
  - Test and compare using same data sets
  - Get a conformal standardized data set
- What disciplines should be on the team? How do we choose the right ones and access them?
  - Analytic Ability/skills regardless of field
  - Open-minded and able to work across disciplines
  - Familiar with both military and OD process
  - Have both field and background analysis capabilities



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Get a conformal standardized data set

Use these models in different ways (eg – examination of both links and nodes in network models can provide insights)

Some examples:

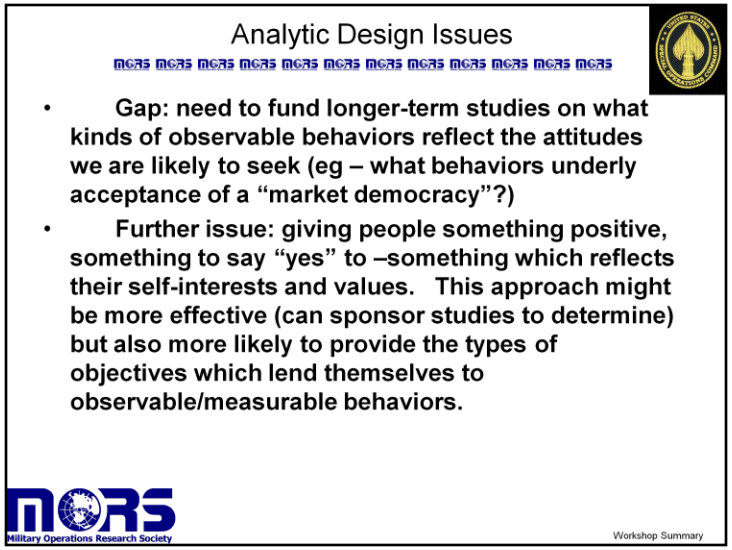
SNA tools

Agent-based models

Bayesian

Influence models

Systemic Operational Design



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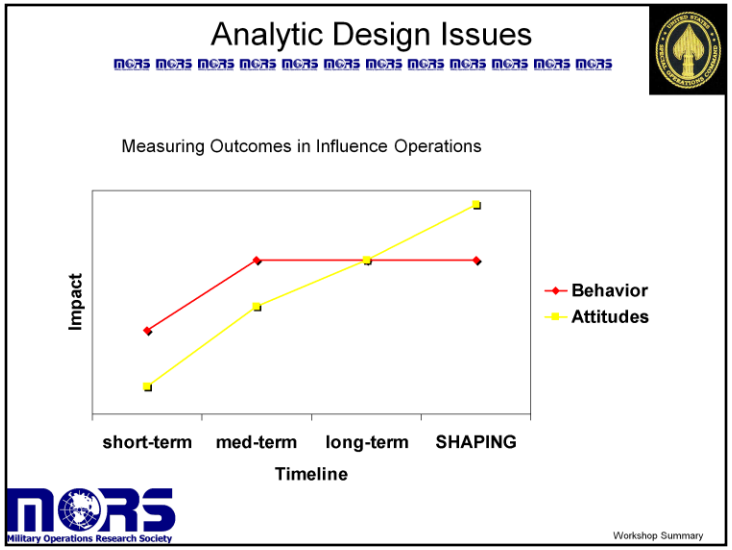


Easier to measure changes in action during the short term.

A means to measure changes in attitude are required for the long term.

Constraint Issues

Resource Constraints
- Time
- Money
- Number of people
- Access to media outlets/ share of voice

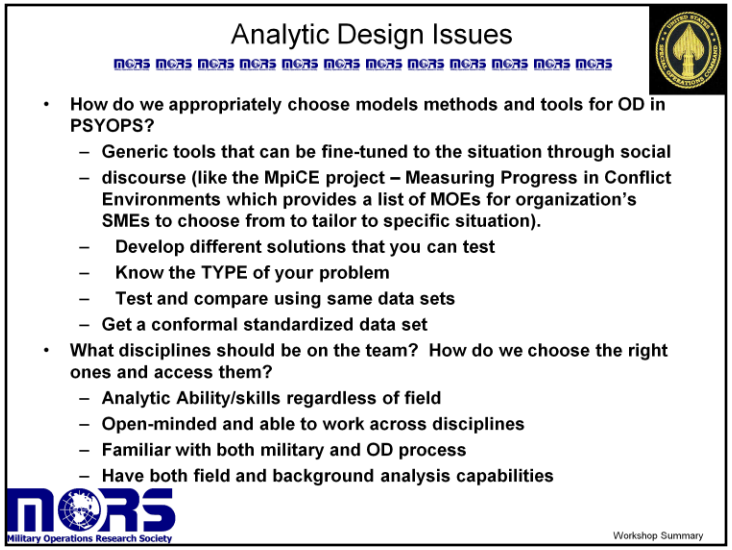
Legal/ Ethical Constraints
- Smith-Mundt(?) Act and other US laws and regulations
- Host nation restrictions/ SOFAs
- RoE
- Scruples- PSYOP is nasty business, right?
- Local national govt control of media outlets (non-permissive)

Constraint Issues

- Human Capacity Constraints
  - People who know how to do PSYOP
  - Advocacy for the discipline
    - Convincing leadership that PSYOP is useful and appropriate
    - Converting high-ranking advocates
  - "Know Yourself"- must understand own culture to make comparisons
  - "Know the other"
    - Cultural Awareness
    - Language/ Translation/ Cultural Literacy (beyond mere translation)
    - Understanding local attitudes (HTT work, CMO, F2F)
  - Capturing/ Transmitting learning
    - TTPs
    - Training/ Education of operators, leaders, "strategic corporals"

Constraint Issues

- Organizational Constraints
  - "Kinetic culture" within US military
  - Career paths do not encourage development skill sets for "era of persistent conflict"
  - Inadequate organizational structures to accomplish missions within time constraints
  - Approval process for products
  - Strategic integration of PSYOP, PA, public diplomacy, and other strategic communications
  - Joint, interagency, combined, multi-national integration
- Difficulty in demonstrating effectiveness of information products
  - Difficult to show commander's return on investment



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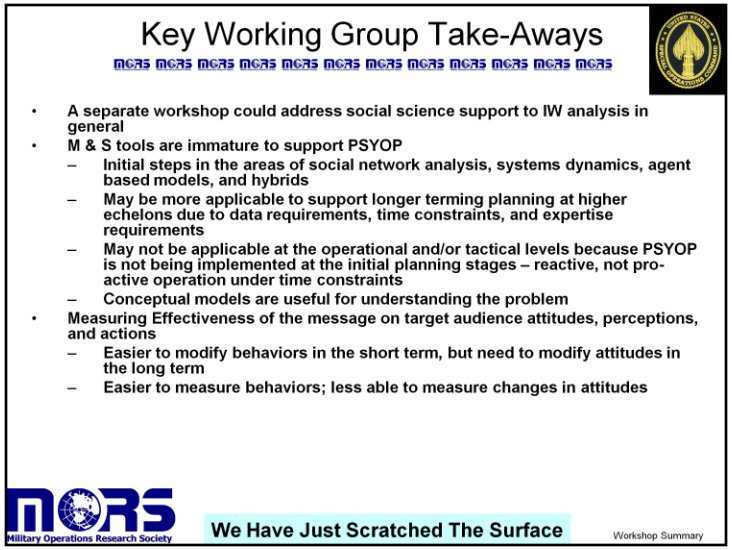

Additional Key WG take-Aways