

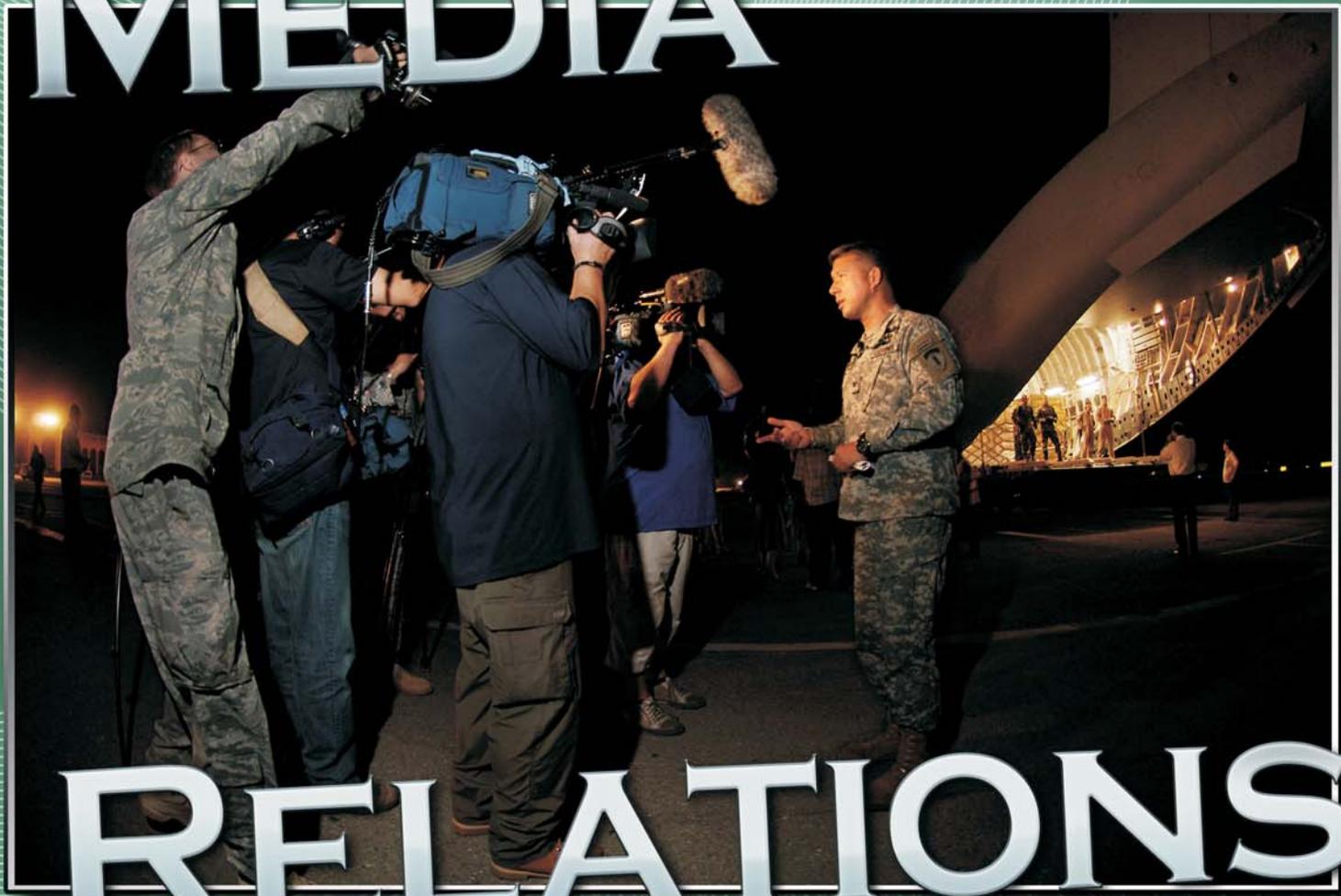


# NEWSLETTER

NO. 09-11

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# MEDIA



# RELATIONS

*Tactics, Techniques, and Procedures*

Center for Army Lessons Learned (CALL)  
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Combined Arms Center (CAC) • Ft. Leavenworth, KS



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## **Foreword**

This newsletter makes the case for changing public relations and media relations to support contemporary operations, especially in a counterinsurgency environment. It explains why commanders, not just the public affairs office, must be involved in public affairs (PA) operations.

The newsletter presents examples of battle-tested and proven PA training guidance and tactics, techniques, and procedures (TTP). These TTP help units and Soldiers gain a better perspective and situational understanding of the battlefield environment. Media operations provide units and Soldiers with an enhanced capability to view the adversary and themselves through someone else's viewpoint—via television, the Internet, or print media.

Key points of this newsletter:

- PA and media relations are a leader's business.
- The roles of the public affairs officers (PAOs) and staff are changing.
- PAOs and PA teams must adopt a proactive and assertive mindset.
- PA teams must get the Army's story out first, before enemy disinformation begins.
- PA teams must understand their audiences and how best to communicate by leveraging new means and new technologies to reach those audiences.
- PAOs are key to the commander's information operations and must be involved in the campaign from planning to execution and through post operations.

Handwritten signature of William B. Caldwell, IV in blue ink.

WILLIAM B. CALDWELL, IV  
Lieutenant General, US Army  
Commanding



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<b>Center for Army Lessons Learned</b>	
<b>Director</b>	<b>Colonel Robert W. Forrester</b>

The Secretary of the Army has determined that the publication of this periodical is necessary in the transaction of the public business as required by law of the Department.

Unless otherwise stated, whenever the masculine or feminine gender is used, both are intended.

**Note:** Any publications (other than CALL publications) referenced in this product, such as ARs, FMs, and TMs, must be obtained through your pinpoint distribution system.

## Chapter 1

### Section I

#### Producing Change in Army Public Affairs: Ideas for Refocusing Operations

LTC James E. Hutton, Public Affairs Officer, III Corps and Fort Hood

**Analyst's Note:** In this article, the author suggests the Army refocus public affairs (PA). The ideas expressed in this article represent only the views of the author and are not to be construed as representing either current or emerging doctrine or policy. This article is intended to provoke thought, engender discussion, and explore possibilities for improving methods for practicing PA. View any tactics, techniques, and procedures (TTP) presented in this article as points of discussion and not as approved replacements for current operational methods.

#### Prologue

This article was written prior to the events of 9/11 and, more importantly, before the numerous operations that have evolved from that event.

Although the need to adapt to the expanding marketplace of ideas and media outlets was clear before 9/11, such adaptation has proven critical in the last five years. Soldiers and the American people and the populations of our allies and our enemies have changed the ways they receive and deliver information. Gone are the days when a local news release stays local. A word uttered at Fort Sill, Iraq, or Afghanistan can rocket across the planet instantly. On the other hand, the overwhelming flow of available information makes being heard and understood a daunting task.

When I wrote "Producing Change in Army Public Affairs: Ideas for Refocusing Operations" for the Center for Army Lessons Learned (CALL) in 2001, telling the Army story often meant pushing stories to reporters. Today, media encounters are nearly constant, particularly in Iraq and Afghanistan. Therefore, the Army must go beyond the quantity of contacts as a measure of effectiveness; maintaining pressure on reporters to cover operations comprehensively is the key to the success of PA operations in the future. One factor that skews coverage in Iraq is reporters who are not as able to move about as they may wish. Consequently, many organizations are satisfied with collecting daily casualty statistics and other items they can easily package. In fact, some organizations rely heavily on "stringers," nonprofessional local nationals who are sent to the streets to capture quotes, photos, and videos that are then brought to news bureaus. The actual reporters then use this material. Obviously, the materials gained through this method are of questionable validity—a facts news organizations are not eager to talk about publicly.

One constant remains: Telling the truth is the only acceptable mode of conduct for public affairs officers (PAOs). Although we need to be innovative in getting information out, we cannot dilute the product by allowing the use of false or misleading items.

One way to get information out is the continued use of "super-reporting" (described below). In addition to the many possibilities listed, Web logs (otherwise known simply as "blogs") are becoming more prominent. Instead of cowering from the possible ill effects of blogging (such as operations security violations), it is important that the Army embraces this new use of technology to tell the Army story.

Commanders at all levels are making tremendous strides in working with reporters for stories. Operation Iraqi Freedom I and subsequent rotations have all included embedded reporters. From

the several hundred reporters that followed troop units as they moved from Kuwait into Iraq, to the several dozen that remain throughout the country today, embedding reporters for the long- and short-term has provided some of the best, most comprehensive reporting of the war. Commanders now fully understand that one substantial duty of command is to meet the press.

The growth of the Army News Service (ARNEWS) has been dramatic. The Army homepage and its multiple functions in support of viewers make it the most impressive Web page in the U.S. government's inventory. As installation and forward-based Web pages continue to follow suit, the Army can expect more strides in functionality.

The most impressive development from the combat theater is the use of the Digital Video and Imagery Distribution System. The system, first used by the 1st Cavalry Division in Iraq in 2004, allows units from virtually anywhere in the operational environment to link with a satellite for live and taped interviews with any commercial media outlet worldwide. The system provides for a direct news feed to local television affiliates in a way that simply was not possible with any prior technology.

It is important that PA practitioners make use of all means at their disposal to tell the Army story. It is clear that if left to chance, the story told will not offer a true and full depiction of what is occurring on the ground.

### **Introduction**

Army PA is facing a stern challenge. As the Army enters a new century, PA must adapt to major advancements in technology, growing expectations for developing information, and a heightened need to communicate ideas. Army PA must adopt a public relations (PR) model to maximize the potential strengths of current force structures in both installation offices and operational PA units, using new practices that effectively present the Army message and are consistent with Army values. This effort will require a focus on PR techniques and a reduction in current journalistic practices.

This article provides a set of ideas aimed at altering the approach of PA practitioners and commanders in PA operations. The new approach will require using PA personnel in ways that do not represent current doctrine and practice. It does not, however, contradict legally mandated edicts for honesty, timeliness, and accuracy.

Despite years of downsizing, the Army remains a large and enduring institution. However, the relevance of the Army as an organization is not always self-evident. What remains for commanders and PA practitioners is the need to remain connected to the American people in a highly visible and ongoing way. Refocusing PA efforts and skills will ensure the Army achieves the connection.

### **Why Does the Force Need to Change?**

Many members of the media, a growing segment of Congress, and a large majority of the American public have never served in the military. Many states have no military installations. In short, the lives of military members and the American public are intersecting less and less.

It is incumbent on our military leaders to engender understanding of and support for the actions taken to prepare and execute the national military strategy.

“In the end, internationally, if adversaries are sure we can (defeat) them, they are more likely to stay in their box. If Americans know how good we are, they will support our needs. If our base/post neighbors know how important our mission is, they will put up with noise and traffic. If each Soldier knows the story, he will be a better Soldier.”<sup>1</sup>

Americans, through the media, are far more inclined to listen to senior officers than junior Soldiers on large, substantive issues such as readiness, efficacy of operations, and future development. Ongoing interviews with both junior Soldiers and senior officers are necessary. Senior leaders must step out of the shadows, take the prudent risks, and talk to the American people.

### **Why Must Army Public Affairs Change?**

PA, like any operation, is a commander’s program. Although PAOs execute PA missions, without direct commander involvement, they only achieve mediocre results. Commanders must establish clear PA objectives. PAOs, adopting some of the ideas below, can develop the commanders’ plans and maximize the use of all means available to effect results.

The U.S. armed forces are populated by the finest military professionals in the world. Soldiers at all levels must understand that they are part of the team that will achieve PA results. A concerted effort to tell the military story should be a vital part of military life. The world of instant media and the reality that the public quickly shifts its attention to other events demands great effort to maintain a PR edge.

“It doesn’t make any difference how good you are if nobody knows it. Take the Marine example. When you hear that word [Marine], it evokes a variety of images, mostly positive. But you are certainly not left without an emotional response. That’s partly because they have 160,000 PR people—their total force.”<sup>2</sup>

### **A World of Ideas**

Commercial organizations compete in a world of ideas through advertising and PR. Radio, television, every form of print publication, the Internet, music, billboards, handbills, and phone banks inhabit a global marketplace, and there is a commensurate ongoing competition among the various media outlets to capture information and deliver it to a widely diverse set of audiences.

Although the Army and other military organizations are not directly competing with national commercial institutions for market shares, commanders and PAOs can harness the competition between the information publishers and brokers to forward the Army’s ideas and positions. The media intensely seek out new information to sell their products. Innovative commanders and PAOs can leverage regularly scheduled and special events for greater media impact by employing a deliberate program of continuous interaction with key members of the media and other influential community leaders.

### **Exploiting the Use of Personalities**

Perhaps the most controversial change in an Army culture that stresses team accomplishment is repeatedly putting certain individuals in the media spotlight. Senior leaders with charisma and media savvy can become media personalities and, therefore, respected spokesmen for the Army.

While this ostensibly runs counter to the institutional desire to avoid a cult of personality, it can provide benefits to the organization for many years. GEN Colin L. Powell, until becoming Secretary of State, was a popular circuit speaker. He related his military experiences to rapt audiences, despite having retired in 1993. GEN Powell may indeed be a rarity; however, many bold personalities are within our ranks.

The Army must make a concerted effort to identify such personalities and use their media talents for organizational advantage. Although this individual focus undoubtedly will cause some discomfort, the advantages are clear:

- The Army gains a credible, consistent outlet for its message.
- In time of crisis, credible figures can make an instant connection with the American public.
- Interviews with high-profile figures will transcend past individual publications or broadcasts and often will be used in multiple outlets.

### **Reorganization**

Effective future Army PA will blend the current triad of community relations (COMREL), internal information (also known as command information), and media relations into a single-minded effort based on a commander's stated intent for PA. This intent, created with the assistance of the PAO, is to describe the commander's goals for providing information to key public groups and the general public, to meet the recurring information needs of key public groups, and to conform to higher-level PA guidance.

Restructuring PA offices with the new focus on conducting PR will require little, if any, changes in the number of personnel. Indeed, current PA manning for COMREL, command information, and media relations is sufficient to create a new PR team.

PA offices cannot and should not compete with commercial newspapers. Small-town newspapers, with little or no responsibilities for COMREL or media relations, publish newspapers with staffs that dwarf most PA offices. Installation newspapers usually have one editor and a small number of reporters. The reporters and to some degree the editors may have only a few years of experience. Reporters on commercial newspaper staffs may have many years of experience and much greater educational backgrounds than Soldier-journalists. Additionally, commercial newspapers may employ sectional editors (i.e., sports, news, and community).

It is apparent that despite the best efforts of installation staffs to prepare newspapers, their current focus on "news" items, irrespective of any commander's intent for PA, cannot yield the quantity or depth of a commercial newspaper. More important, PA staff members in a PR model are part of the team, not roving reporters looking for a scoop.

Installation and operational PA staffs should abandon the current focus on collecting the "news." By employing methods that are focused on the needs of the commander and key public groups, they can refocus post newspapers using a model that provides necessary information, supports the commander's intent for PA, and maximizes the strengths of current PA manning policies.

## **Internal Notes and Publications**

With the emergence of computer communication for providing command information, post newspapers are less important. In seconds, commanders can distribute command information to each key subordinate and quickly gain meaningful feedback. Other relatively new developments, such as the commander's cable channel on continental United States installations, Internet bulletin boards, and public folders on intranets, further limit the usefulness of the post newspaper as a tool for disseminating command information.

However, that does not mean that post newspapers should be eliminated. Indeed, new developments in technology can assist in the new approach suggested in this article. Other than the bulletin-board type of information that appears in every newspaper, many future articles should be designed for internal **and** external audiences. Some articles will, of course, lend themselves to only the internal audience.

Each Army journalist must demonstrate knowledge of the commander's intent for PA. Every article must withstand the scrutiny of the PAO in meeting the requirement to support the mission of the command. The post newspaper is not a venue for attempting to win a Pulitzer Prize for examining society's latest problem, unless such an examination supports the needs of the commander.

Training Army journalists will require adjusting the focus for acquiring news. Soldier-journalists will not approach subjects for articles in the same manner as a commercial reporter. As a member of the organization, Army journalists will work from the commander's intent in developing information articles.

### **“Grip-and-Grins”**

Using “grip-and-grin” photo opportunities (which include Soldiers receiving awards and ribbon-cutting ceremonies) represents a change in the mindset of today's PA practitioners. Many commanders and command sergeants major ask for such efforts from their PAOs, often meeting at least some resistance. Indeed, past regulations suggest such events yield little in the way of newsworthiness.<sup>3</sup> However, concerns about newsworthiness simply miss the point. Such opportunities provide the commander a tool for achieving his information needs.

PAOs should reexamine the reasons for their reluctance. “Grip-and-grin” photos, while not always useful for newspapers, can have a positive internal or external PR effect. Further, with the emergence of digital photography, photo production is much easier. Sharing photos is also quick through e-mail and posting on Web sites.

PAOs may consider creating systems that incorporate “grip-and-grins” in support of the commander's intent for PA:

- Create a short, biweekly newsletter that uses “grip-and-grin” photos. Publish the newsletter only as an e-mail item and send it to an established distribution list. Expand the list to key external recipients when appropriate. Although some PAOs may consider this time-consuming work, once a template is built, it will require little maintenance. The installation COMREL chief can be the newsletter editor. Although this represents a departure from the current responsibilities of the internal information chief, it will further tie COMREL to the overall PA plan and foster solid relationships with key internal and external audiences.

- Within reasonable constraints, furnish copies of photos via e-mail for persons involved as part of the commander's PA plan. Future technological advancements, such as e-mail accounts that are permanently tied to individuals, will increase the ability to make this program grow.
- Use the opportunities to discover useful stories. Ensure the articles can serve internal and external purposes. Stories must support the overall PA plan. Judge each article against that standard.

### **Market Outlets**

Create an electronic file that includes e-mail addresses; Web sites; fax numbers; and points of contact for local, regional, and national media outlets. This data is important in forming the structure of the database, but that is only part of the process. Such lists, while useful, require constant updating, not unlike the improvement of a defensive position.

Working the lists is essential to successfully implement ongoing and future projects. By working the lists, the PA practitioner routinely calls or contacts the primary outlets and, just as importantly, constantly seeks out new media outlets.

Send cover letters and prepackaged material (such as video products, special edition newspapers, and visitors' guides) to a broad range of targeted local, regional, and national media outlets. Often, periodicals with seemingly no apparent interest in military matters (city and county newsletters and newspapers, scientific journals, special-interest publications, and business magazines) as well as documentary writers and producers of various types (consult with the Chief of Army PA, Los Angeles Branch) will see something in your packet they can use.<sup>4</sup> In addition, there may be daily newspapers and television affiliates outside the local installation's normal circulation area (which may not have been considered before) that are interested in various projects.

This effort is endless. There are thousands of media sources that have constant needs for story ideas. It is important to note that many print, broadcast, and Internet reporters have limited knowledge of military matters. Coach them along and develop interest where there may have been none before. Make a strong effort toward providing opportunities for reporters to participate in events to the fullest extent allowable by law and good sense. You may think your three-day Multiple Launch Rocket System live-fire exercise is business as usual. However, it may be the first time the reporters (and the general public) sees the sky ignited by streaking rockets.

### **Staying Current**

Remaining current is the hard work of the PA business. Develop plans that ensure recurring events or key Army strengths are presented forcefully and often. For example, CBS News followed the progress of a student through the Ranger Course one summer. The series of stories that resulted from that coverage demonstrated the commitment, hard work, and sense of duty required to complete the course. It was a great series; however, those stories aired more than 10 years ago. Virtually no potential recruit, Reserve Officers Training Corps student, or West Point prospect has any recollection of the reports. Key Army stories cannot be told "once and for all" through an article, radio broadcast, or a television episode. (See "super-reporting.")

Using the example above, other logical stories have been (or could be) coverage of the Army's Best Ranger Competition, a documentary on Ranger missions or training, or a series of print human-interest stories. Such stories offer a poignant portrayal of the meaningful and rigorous

work of the force and, what is more important, provide a solid, human-face connection between the force and the American public.

Keys to program vitality:

- **Constant pressure.** Regular, deliberate contact with media outlet points of contact bears fruit.
- **Absolute adherence to truth.** No fakery can improve the Army's relationship with the public.
- **Consistent exploration of new venues.** Scour the Internet, go to conferences, subscribe to free news on the Internet, and meet with television producers and newspaper editors. Investigate at least ten new venue possibilities per week.
- **Standing operating procedures that detail recurring opportunities.** Provide plan outlines based on what has worked in the past geared toward maintaining a solid continuity file for future PAOs. Also see the CALL Web site, *Training Techniques*, 2QFY99, "Building a Useful Continuity Book," by Leonel Nascimento. Maintain and pass on a journal that includes lessons learned, planning factors, and important media tips.

### No Manipulation of the Public

In the bygone era of limited media outlets and few key media representatives (reporters), PR specialists sometimes sought to manipulate the public through clever (occasionally deceptive) methods. This could explain developing an Army PA apparatus distinct from PR.

Two factors have largely moved the PR profession away from such practices. The first factor has been the explosion of media outlets, print and electronic, through such means as improved distribution, the Internet, and 24-hour cable television. These factors alone have made it impossible to easily manipulate views over a sustained period (of course, there are exceptions).

The second factor has been the general professionalization of the PR community. PR specialists understand the sustained power of the truth. More important, they see themselves as professional advisors to their clients on business practices. Their advice can sometimes result in a business changing its behavior in a way that maintains its goals and may mitigate potential crises. It also can enhance the public's perception of the company by demonstrating a responsible approach to dealing with potentially explosive issues.

### Use of Conferences

Major corporations employ convention organizers to schedule conventions, conferences, and seminars. Army-related organizations, such as the Association of the United States Army and others, plan and execute similar events.

The Army and its major subordinate commands can develop highly focused, message-intensive events. The goals and purpose of such events cannot be limited to photo sessions and general presentations, although elements of both will occur. Plan the events with definite themes. Establish key media centers.

Follow the event with a media-impact analysis:

- Are command messages coming through?
- What products are receiving the most attention?
- Is the reporting based on the facts as the command knows them?
- Are there differences in print versus electronic media? If so, why?
- How timely are reports?
- Do stateside media outlets respond to submissions from the PAO? What methods are employed to check this? Internet? Phone calls? Other?
- Have there been policy implications? Enemy or friendly (in theaters of operations)?

### **“Super-Reporting”**

“Super-reporting” involves the constant surveillance of electronic broadcasts and printed materials and the anticipation of internal and external information needs and planning factors to maximize opportunities. PAOs must “super-report” to gain and maintain an information edge over the internal and external audiences. PAOs must understand trends and creatively find ways to take advantage of media information needs.

Electronic databases are an essential element of “super-reporting.” PAO databases must contain the following elements:

- A publication/broadcast outlet name
- Key point(s) of contact
- Phone/fax/e-mail, business mail addresses, and street addresses (for overnight delivery)
- A publication focus and format(s):
  - Print publications
  - Frequency (such as daily, weekly, monthly)
  - General theme (general news, or specific topics, such as military aviation)
  - Circulation
  - Geographical area of concern (if applicable)
  - Publication policies (i.e., acceptance of outside material, ombudsman, deadlines)
  - All mentions of the military (or installation/unit) in the past six months
- Electronic outlets:
  - Broadcast schedule
  - News programming format
  - Span of broadcast (i.e., watt emission in the case of radio stations)

All of the items above can be maintained on an off-the-shelf spreadsheet program. At higher levels, database programs may be more desirable. Major commands must share their databases and constantly provide other PAOs with new and promising venues for telling their stories.

PAOs can gain important leading-edge information by joining civic groups, attending town council meetings, organizing and participating in COMREL events, and maintaining personal contacts in the community and the media. PAOs should develop information-collection plans and routinely scour notes for internal and external dissemination. Such a system will allow PAOs to properly target media outlets, prepare useful press releases, and schedule well-timed interviews to support commanders' programs.

When deployed, PAOs usually have the added task of producing an internal information publication (newsletter) but are not tasked with providing COMREL. The COMREL task is much broader in a theater of operations and is conducted as part of information operations by civil affairs personnel. PAOs also have the task of continuing to provide the home installation with internal information. In garrisons or in a theater of operations, PAOs must continue to research and provide for key media opportunities.

### **Commanders Lead the Public Affairs Effort**

Commanders greatly influence the flow of information, as well as the tenor and content of their subordinates' media input, by being conspicuously prepared to encounter the media. The following suggestions provide the basis for commanders and command sergeants major to be more innovative when interacting with the media:

- **“Story-in-a-pocket.”** Develop a program that ensures key leaders have a “story-in-a-pocket.” Leaders in each unit can identify significant actions of the unit that have news value. Most battalions have a Soldier-of-the-Month program, weapons-skills competition, and a multitude of other activities. Units, of course, will answer honestly when meeting the media, but reporters “don't know what they don't know” about Army units at all levels. Help the media find a subject.
- **Integrity is paramount.** While ensuring reporters learn about the great things units are doing, it is important not to create false impressions about a unit's record.

“... promotion of the Army in any form that is deceptive (in fact or source) or ‘puffery’ (gratuitous self-praise) is outlawed as ‘propaganda’... .”<sup>5</sup>

Gratuitous self-praise, however, is easily avoidable by being honest when engaging the media. It is not gratuitous self-praise to introduce the winner of the yearly installation rifle competition to the media or to highlight achievements by the local retention Noncommissioned Officer (NCO) of the Year. Moreover, accomplishments of units in the field are worth knowing by the general public; such knowledge can even be seen as necessary.

- **Meet the press.** Where possible, develop relationships at home station with individuals in the media. Invite them to meet and talk to battalion commanders and sergeants major and “right-seat” annually (or more often) on local exercises. Provide reporters with opportunities to see Soldiers at work.
- **Remain forthright in the face of bad news.** The Army has proven its mettle in providing timely and accurate information about situations that have undoubtedly

caused great discomfort. Almost no private company can boast of such honesty; PAOs should point that out.

- **Power the Hometown News Release (HTNR) Program.** PAOs and commanders must work closely to ensure items are sent to the Army/Air Force HTNR. The adage “all news is local news” takes on added significance for Soldier stories. Local newspapers (and occasionally television stations) are constantly searching for local stories. These local stories include news about Soldiers who are stationed around the world.
- **Use the Internet to make the HTNR grow.** With minor article adjustments, Army journalists can provide hometown newspapers with “local boy/girl-made-good” stories that may not fall under the purview of the HTNR program. Army journalists should capture the hometowns of Soldiers mentioned in local stories. The gathered article can be e-mailed quickly to the Soldier’s hometown newspaper (with digital photos when possible). Newspapers, especially small outlets with little resources for travel, are appreciative of such efforts. This effort, which is extremely low-cost, gives existing stories greater impact.
- **Provide photographs and articles to ARNEWS.** When applicable, PAOs should send photos (preferably digital files) and articles from their units or installations to ARNEWS (<arnews@hqda.army.mil>) and, space permitting, create a photo library on their installation server. Articles should support the commander’s PA intent.
- **Develop and invigorate installation speaker bureaus.** Military thinkers use initiative in all operations. By actively pushing speaker bureau activities, PAOs can seize the initiative and control the high ground. Speaking at local functions provides a chance for unfiltered communications. It also is useful in connecting with the American public at the grass-roots level because one-on-one interaction often has a deeper impact than media coverage. Speakers can include an assortment of officers and NCOs. Working closely with the PAO, each speaker can deliver key command messages to a variety of audiences. The more this program is sold, the more it is used. Local organizations often need outside speakers. Ensure that your own journalists cover the event(s) and write stories.

### Know the Organization

All PAOs must ensure that they are “thoroughly familiar with all facets of (the) command.”<sup>6</sup> The PAO should be able to give a full command briefing that relates a unit’s missions, capabilities, training methods, major weapons systems, equipment platforms, ongoing projects, history, and command philosophy.

A PAO who does not understand the mission of the organization is not a useful member of the staff. Beyond possessing the simple “just the facts” knowledge listed above, it is essential that the PAO understands and can articulate the values of the organization. It is of little worth to a PA program if a PAO has a bundle of media contacts but is unable to deliver key values-based messages. Commanders and PAOs should work to craft solid messages that accurately reflect the organization’s goals and aspirations.

### **Find Populations of Knowledgeable Parties**

With a thorough knowledge of the key public audiences, the organization, and the organization's values, the commander and PAO continually seek out populations of knowledgeable parties and try to communicate with them. PAOs must ensure key public audiences understand the organization's values and that the command understands the audiences' thinking.

### **The Emperor Has No Clothes**

PAOs assist commanders in developing a list of the key public audiences. One of the PAO's major functions is to consistently inform commanders of what these audiences are thinking. How does the public perceive the command? This feedback is gained through media analysis; COMREL event after-action reviews; and a myriad of other sources, including internal and external town hall meeting minutes and civilian town or county council minutes.

While some PAOs will insist that this service is already provided, this new approach to PA will make such efforts much more vital.

### **Advising the Commander**

The following example is fictitious. Its purpose is to provide PAOs with an understanding of the necessity of advising the commander. It illustrates how the PAO, who is not necessarily an expert on the underlying issue, can provide sound, practical information to a commander to limit or eliminate potential PA crises.

**Background.** Fort Columbia had a problem. During World War II, it was a central transportation point for processing troops en route to the Pacific theater. A consequence of this activity was that hundreds of railcars were left in a large holding area after the war. The railcars sat unused for decades with little notice. Meanwhile, advances in environmental knowledge led to the creation of an environmental office on the installation, complete with inspectors and a large set of federal regulations. Inspectors made their way through the installation's training areas; offices; housing areas; and, ultimately, to the rail yard. Upon examination, inspectors discovered numerous major environmental hazards that required a significant cleanup. Local reporters, long suspicious of the environmental state of the railcars, did not know the actual depth of the problem.

Some advised the garrison commander to leave the railcars in place and suppress the results of the report. Obviously, the commander could not do that. He was obligated to start a cleanup effort. The commander then was advised to conduct the cleanup but not to make the matter public. He faced the dilemma of whether to publicly acknowledge the cleanup effort or to conduct the cleanup without advising the public through a media release.

**Advice from the PAO.** Acknowledging the cleanup effort was only one of the things the commander could do to limit the effects of this situation. While he could not possibly placate every faction of the public, a detailed media campaign could satisfy the public that his installation was doing what was required to address this problem. The campaign could start with an announcement of the cleanup effort from the commander, include a tour of the area, have a detailed plan for press packets, and provide background briefings by installation environmental officers in charge of the cleanup. Do this both for internal and external purposes. The commander's initial statement should point out that his installation discovered the problem, took steps to alleviate the problem, and will continue to announce progress of the cleanup.

The commander could activate the speakers' bureau and arrange (through the COMREL program) for senior officers to talk to important civic groups. He could also dispatch briefing teams to speak to key audiences. The installation newspaper, of course, should provide key information about the project.

In the above example, neither the PAO nor the commander is an environmental expert. However, both have applied good sense and integrity to a potentially explosive situation. Had the commander chosen to ignore the problem, the situation details could have leaked to the media and led to a "scandal" angle in the media coverage. Had the commander chosen to start the cleanup and not inform the media, a similar scenario could have played out. By addressing the issue up front, the commander and PAO were able to set the conditions for a message that showed that the installation was conscientiously attacking the problem and dealing with it systematically. Again, this will not satisfy everyone in the public or the media. Such a state is probably not possible with any course of action. However, the key audiences and the general public will not view this issue as a "scandal."

Ensure that feedback given to the commander provides accurate data. This is no time to hold back needed information for fear of upsetting sensibilities. Too often, commanders are told that the military is held in high esteem, and it is left at that. In fact, such general respect is easily displaced by specific negative information. Handled poorly, bad information festers and transcends an otherwise high opinion of the military.

## **Role of the Public Affairs Officer**

As information continues to grow in importance, the role of the PAO must change to support the commander's critical need to know what key audiences think. The PAO can no longer simply function as a funnel through which news clippings pass. The PAO must provide the commander with advice on how to mitigate or eliminate the effects of potentially damaging information, without resorting to deception. This advice should contain definitive behavioral steps to determine the best course of action. PAOs must be willing to encourage commanders to change behaviors that can lead to negative media. Such changes must always be positive and affirm the Army values system, even to the short-term detriment of the organization. The PAO will consult with key staff agencies, develop a PA plan, and proactively approach pre-crisis management.

## **PAO Interaction**

PAOs can improve their understanding of PR through professional memberships and advanced schooling. Consider the following to further professional expertise:

- Join the Public Relations Society of America or International Association of Business Communicators.<sup>7</sup> These organizations hold chapter meetings and provide instructional material (for a fee) and offer a mechanism for professional accreditation.
- Complete an advanced PR degree. Programs that lead to an advanced PR degree have value in producing media and information campaigns.
- Attend PR conferences and workshops. Civilian PA/PR practitioners can teach valuable PA lessons.
- Contribute what you learn to the force. Several publications, including *PA Update*, the *Forces Command I-Opener*, and CALL's *News From the Front* and *Training Techniques*, provide outlets for sharing TTP. Contact CALL at <call@leavenworth.army.mil>.

## **Conclusion**

In the world of ideas, deliberate and repetitive voices are heard. To meet challenges in this world of ideas, Army PA must adapt through refocusing and using current manning levels. The Army can exploit the advantages of using media savvy senior leaders to effectively communicate the Army's message. PAOs must learn to provide commanders with PR products and advice, with the goal of supporting a stated intent for PA. PAOs will provide products and conduct operations that have not been part of the formal conduct of PA in the past.

Old paradigms must change. PAOs will seek out markets, just as PR specialists do for commercial enterprises. PAOs will "super-report"; that is, they will beat reporters to the punch on issues affecting the command. PAOs will provide solid advice during the planning and decision cycles for commanders. Commanders will expand their focus for PA by staying prepared for inquiries and standing ready to spread their messages. All of this will occur within the parameters of honesty and integrity. The public expects nothing less. Presenting the Army message is now harder only because of the endless number of potential venues. Plan well and maximize the benefits to the Army's great Soldiers.

### **Endnotes**

1. Dooley, Alan, Captain (Ret.), U.S. Navy, e-mail to the author, October 27, 2000.
2. Ibid.
3. Headquarters, Department of the Army, Army Regulation 360-81, *Command Information Program*, Washington, D.C., 20 October 1989, p. 8. This regulation, along with other PA-related regulations, is being consolidated and revised.
4. One example includes an article that appeared in a business periodical concerned with management styles and methods: Pascale, Richard, "Fight, Learn, Lead," *Fast Company*, August-September 1996, pp. 65-72. The article, written about the Army's combat training center's method for experiential learning, was crafted by Dr. Pascale to fit the magazine's focus.
5. "Statutory Prohibitions on Public Affairs Activities," *I-Opener*, March 1998, p. 6.
6. Wilcox, Howard S., BG, U.S. Army, "Press Relations and the Commander," *Military Review*, August 1961, p. 6.
7. Headquarters, Department of the Army, Pamphlet 600-3, *Commissioned Officer Development and Career Management*, Washington, D.C., 1 October 1998, paragraph 42.3 B.

## Chapter 1

### Section II

#### In Defense of Military Public Affairs Doctrine

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The simultaneous expansion of information operations (IO) and the effects-based approach to operations is challenging traditional notions of military public affairs (PA).<sup>1</sup> Politicians looking for more support in waging an ideological war against extremism and military commanders seeking more precise effects on the battlefield through the coherent application of all elements of alliance and national power are blurring the boundaries between IO and PA.<sup>2</sup>

The Pentagon's short-lived Office of Strategic Influence (OSI) is an example of the move toward a more propagandistic information model. According to one news report, the aim of this Orwellian organization was to "influence public opinion abroad," a mandate that some U.S. generals felt would "undermine the Pentagon's credibility and America's attempts to portray herself as the beacon of liberty and democratic values."<sup>3</sup>

Although OSI was dismantled (at least in name), the U.S. military and many other armed forces are continuing to invest in IO capabilities. At the same time, commanders are pressing PA to contribute more tangibly to achieving effects or gaining influence on the battlefield and elsewhere. PA doctrine, however, traditionally seeks to inform audiences, not influence them. North Atlantic Treaty Organization (NATO) policy, for example, specifically states that while PA's "overall aim is ultimately to promote public understanding and support of the alliance and its activities, information is provided in such a way that media representatives and the citizens of the countries concerned are able to make their own judgment as independently as possible."<sup>4</sup>

Similarly, U.S. doctrine, as cited in a Department of Defense (DOD) directive, states, "Propaganda has no place in DOD public affairs programs."<sup>5</sup> Some might suggest that this statement only applies within America's borders, but the same directive says, "Open and independent reporting shall be the principal means of coverage of U.S. military operations."<sup>6</sup>

At a glance, these lofty principles seem to offer politicians and military commanders little hope that PA can bring any tangible capabilities to the battlefield or anywhere else. Where are its measurable effects? In contrast, the effects of enemy propaganda seem evident, from decreasing support for U.S. interventions to increasing numbers of suicide bombers.

It may be true that PA "effects" are not always immediately evident, but this is a consequence of Western political ideology, which calls for transparent government, freedom of speech, freedom of the press, and other such principles that militate against shaping public opinion. Therefore, before discarding current doctrine because of a desire to see immediate effects, carefully consider its origins in the democratic tradition.

Modern democracies find their roots in the 17th-century Age of Reason and the 18th-century Age of Enlightenment. The philosophers of those ages nurtured the radical notion that all men and women are created equal. This belief began to erode the long-accepted view that kings, queens, and other nobles were somehow superior and better suited to rule. Early liberal democracies like France and the United States entrenched these notions in their constitutions.

The American Declaration of Independence, written in 1776, reflects this new political outlook: “We hold these truths to be self-evident, that all men are created equal, that they are endowed by their Creator with certain inalienable Rights, that among these are Life, Liberty and the pursuit of Happiness. That to secure these rights, Governments are instituted among Men, deriving their just powers from the consent of the governed.”<sup>7</sup>

Central to the new outlook were the notions of freedom of speech and freedom of the press. One of the most influential arguments in favor of such rights came from the English poet John Milton, whose pamphlet “Areopagitica” assailed the British government’s licensing of books. Milton wrote: “This I know, that errors in a good government and in a bad are equally almost incident; for what magistrate may not be misinformed, and much the sooner, if liberty of printing be reduced into the power of a few?”<sup>8</sup>

The First Amendment of the 1789 U.S. Bill of Rights adopted Milton’s arguments: “Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof; or abridging the freedom of speech, or of the press; or the right of the people peaceably to assemble, and to petition the government for a redress of grievances.”<sup>9</sup>

Two centuries later, the constitutions of most democratic nations include similar provisions, including freedom of speech and freedom of the press as fundamental human rights. The constitution of one of NATO’s newer member nations, Romania, states: “Freedom of expression of thoughts, opinions, or beliefs, and freedom of any creation, by words, in writing, in pictures, by sounds or other means of communication in public are inviolable.”<sup>10</sup>

Of course, such rights do have limits. The Canadian Charter of Rights and Freedoms, for one, “guarantees the rights and freedoms set out in it subject only to such reasonable limits prescribed by law as can be demonstrably justified in a free and democratic society.”<sup>11</sup>

Although limited, these rights extend far beyond national borders. They are found enshrined in international treaties and conventions. Article 55 of the United Nations (UN) charter says that the UN shall promote “universal respect for, and observance of, human rights and fundamental freedoms for all without distinction as to race, sex, language, or religion.”<sup>12</sup> These rights are more broadly delineated in a separate document, the Universal Declaration of Human Rights, which the UN adopted in 1948. Article 9 of the Declaration reads, “Everyone has the right to freedom of opinion and expression; this right includes freedom to hold opinions without interference and to seek, receive and impart information and ideas through any media and regardless of frontiers.”<sup>13</sup>

Freedom of speech and the press are not the only democratic rights stipulated in the UN’s Declaration. According to Article 21, “Everyone has the right to take part in the government of his country, directly or through freely chosen representatives . . . The will of the people shall be the basis of the authority of government; this shall be expressed in periodic and genuine elections which shall be by universal and equal suffrage and shall be held by secret vote or by equivalent free voting procedures.”<sup>14</sup>

NATO nations are doubly bound to honor these human rights by virtue of their simultaneous membership in the UN and the Alliance. The NATO treaty proclaims “the Parties to this Treaty reaffirm their faith in the purposes and principles of the Charter of the United Nations and their desire to live in peace with all peoples and all governments.”<sup>15</sup>

The NATO alliance also adopted the principles of democracy as part of its 1994 Partnership for Peace program, an initiative designed to help former Warsaw Pact countries with post-Cold War

transition. The framework document states: “Protection and promotion of fundamental freedoms and human rights, and safeguarding of freedom, justice, and peace through democracy are shared values fundamental to the Partnership. In joining the Partnership, the member States of the North Atlantic Alliance and the other States subscribing to this Document recall that they are committed to the preservation of democratic societies, their freedom from coercion and intimidation, and the maintenance of the principles of international law.”<sup>16</sup>

That a political-military alliance like NATO committed itself so unequivocally to the principles of democracy is significant, for it implies that such principles are not limited to the national borders of the member nations or the boundaries of the Euro-Atlantic region, but extend to the battlefields where Alliance troops are sent. The Geneva Conventions, also ratified by all NATO nations, offer specific protections of human rights on these fields of battle, including the rights of journalists.

Article 4 of the 1949 Geneva Conventions **relative to the Treatment of Prisoners of War** states: “Persons who accompany the armed forces without actually being members thereof, such as civilian members of military aircraft crews, war correspondents, supply contractors shall be treated as prisoners of war” [boldface added].<sup>17</sup> The term “war correspondent” was found somewhat restrictive, however, and additional provisions for journalists were added to the Geneva Conventions in 1977 under Protocol I, **relating to the Protection of Victims of International Armed Conflicts**.<sup>18</sup>

Article 79 of Protocol I specifically addresses “measures or protection for journalists,” stating that “journalists engaged in dangerous professional missions in areas of armed conflict shall be considered as civilians [and] shall be protected as such . . . provided that they take no action adversely affecting their status as civilians.”<sup>19</sup> (Interestingly, embedded journalists could therefore be imprisoned if captured, while journalists not accompanying armed forces should be accorded the same rights as civilians.)

If any conclusions are to be drawn from the above legacy, foremost would be that the international community views the trampling of fundamental human rights, including freedom of the press, as one of the underlying causes and consequences of war. It was by trampling such rights that the Third Reich rose to power and committed the most horrendous atrocities in history. Codifying such rights was one way by which the international community hoped to avoid “the scourge of war” in the future.<sup>20</sup>

At the Tehran conference in 1943, Winston Churchill told Joseph Stalin that, “in wartime, truth is so precious that she should always be attended by a bodyguard of lies.”<sup>21</sup> The British prime minister was speaking of allied efforts to deceive the Germans in advance of the Normandy invasions. When directed at an enemy, such deceit is justifiable. However, the notion that in wartime the truth should “always” be protected by lies is precisely what the international community was trying to circumvent. Notions like freedom of speech and freedom of the press are the safeguards.

The tension between today’s PA and IO doctrine reflects the historical struggle between truth and deceit. U.S. joint PA doctrine explicitly states in bold letters: “Tell the Truth. PA personnel will only release truthful information. The long-term success of [PA] operations depends on maintaining the integrity and credibility of officially released information.”<sup>22</sup> British joint media operations doctrine also cites the importance of truthfulness: “All communication with the media must be honest, transparent and accurate.”<sup>23</sup>

Romania's military PA policy states: "No information will be classified nor will it be prevented from release in order to protect the military institution against criticism or other unpleasant situations."<sup>24</sup> According to British policy, "Information should be withheld only when disclosure would adversely affect [operational security], force safety or individual privacy."<sup>25</sup>

On the other hand, NATO's IO policy holds that influencing or deceiving one's adversaries is, at times, justifiable: "The primary focus of [information operations] is on adversaries, potential adversaries and other [North Atlantic Council] approved parties."<sup>26</sup> While "approved party" is a vague term, it is understood not to include the Alliance's own citizenry.

Still, many governments do routinely seek to influence domestic public opinion through such things as recruiting advertising or health promotions. Likewise, government communicators routinely develop "messages" designed for target audiences. Such practices differ from IO, however, because they are normally transparent and follow policy decisions openly taken by elected governments. They are also subject to democratic checks and balances, including the scrutiny of the free press, attacks by elected opponents, and legal challenges. Finally, the news media resist being repeaters of government messaging and strive for balance by questioning government policy and seeking alternative viewpoints.

Notwithstanding the existing doctrinal divisions between PA and IO, many commanders still desire the more tangible effects promised by information, deception, and psychological operations; thus, they lean toward integrating PA into IO. Concerns that some of these commanders were blurring the lines between the "inform" doctrine of PA and the "influence" doctrine of IO led by GEN Richard B. Myers, the former chairman of the U.S. Joint Chiefs of Staff, to issue a letter directing the military's top brass to keep PA distinct from deception and influence functions.<sup>27</sup>

Can PA deliver the effects commanders desire without violating current doctrine and all of its attendant liberal-democratic baggage? Like other military disciplines, PA has to adapt to a changing world with asymmetric threats and a ubiquitous media environment that showers the entire planet with streaming multimedia. In this new information world, terrorists can propagate their information faster than Western militaries can respond.

NATO doctrine calls for the "timely and accurate" release of information. Despite this, the Alliance and its member nations have had difficulty getting inside the enemy's so-called observe, orient, decide, act (OODA) loop.<sup>28</sup> In the OODA-loop theory of decision cycles, time is the critical element, but Western forces tend to be hindered by time-consuming processes or decision-making loops that often require approvals from multiple national capitals across a spectrum of time zones.<sup>29</sup> The challenge, then, is not necessarily a doctrinal one for PA; rather, it is predominantly a process issue that requires political will and trust to be resolved.

In terms of tangible effects from PA, many nations are already taking steps to push the doctrine of "informing" to a new, proactive level. Since the 1990s, Canada has been routinely sending its several combat camera teams off to cover Canadian Forces operations around the globe. The video and stills the teams bring or transmit home is then pushed to national and international media.

In 2004, the U.S. military invested more than \$6 million in the Digital Video and Imagery Distribution System hub at Atlanta, which collects and distributes raw video to U.S. and international broadcasters on a daily basis. Additionally, U.S. Central Command, which oversees U.S. operations in Iraq and Afghanistan, has made the move from reactive media relations to a

robust proactive program by standing up a full-time team of PA specialists who suggest story ideas to the media.

While some nations are moving to invest in more proactive PA capabilities, the current trend is to invest robustly in IO and psychological operations (PSYOP). Once IO and PSYOP are activated on operations, there is also a trend to continue applying them to audiences that are no longer adversarial. The term “IO” is even being used to define communication activities where there is no defined adversary.

Given that the majority of what nations and coalitions are communicating is factual information, these trends are counterintuitive. Meantime, PA offices continue to be understaffed, under-trained, and under-resourced. If more resources were invested in simply informing the media and the public, the results could be impressive. The power of the truth, presented factually, should not be underestimated.

Moreover, if target audiences understood they were not the targets of IO or PSYOP, they might find conveyed information more credible. America’s black propaganda program in Iraq, where articles were surreptitiously placed in newspapers by the Lincoln Group (initially contracted through a military PA office), damaged U.S. credibility.<sup>30</sup> It aided and abetted the enemy’s portrayal of America as a hypocritical interloper.

In the face of IO, the obvious questions an adversary might pose are: If Western nations are so confident in democracy, why do they resort to propaganda? If they are so confident in the truth as a moral force, why lie?

It might be justifiable to deceive an adversary for the sake of saving lives and winning battles, but in accordance with national and international laws and conventions, it is not acceptable to violate the human rights of those who have done no wrong. Telling the truth is not a simple proposition in today’s complex media environment where information targeted at an adversary in a remote location will inevitably bleed into media and reach friends and allies in every corner of the globe.

As with lethal weapons, there will be collateral damage in the information war. So long as the military PA arm of government remains true to its doctrine, friendly publics will be told the facts, and the free press will be accorded its place. If the West is so confident that this works at home, then this confidence should be projected into the regions where the West sends its fighting troops. In the meantime, those seeking immediate effects must be reminded that it takes time to build democracy, and that although it can be painful at times, the truth will ensure democracy’s survival.

## **Endnotes**

1. “Effects-based approach to operations” is a term NATO uses, but it is synonymous with similar “effects-based” terminology employed by U.S. forces. The glossary on the U.S. Joint Forces Command’s Web site offers this definition: “The coherent application of national and alliance elements of power through effects-based processes to accomplish strategic objectives.” <[www.jfcom.mil/](http://www.jfcom.mil/)>.

2. The White House’s September 2006 National Strategy for Combating Terrorism refers to both “a battle of arms and a battle of ideas,” stating, “We will attack terrorism and its ideology” and cites the need to neutralize terrorist propaganda, <[www.whitehouse.gov/nsc/nsct/2006/](http://www.whitehouse.gov/nsc/nsct/2006/)>.

3. Tom Carver, "Pentagon Plans Propaganda War," *BBC News*, 20 February 2002, <<http://news.bbc.co.uk/1/hi/world/americas/1830500.stm>>. This is only one example of the many articles and editorials attacking the OSI.
4. Final Decision on Military Committee (MC) 457, *NATO Military Policy on Public Information*, 14 June 2001. For more information, see <[www.nato.int/ims/docu/nmpi.htm](http://www.nato.int/ims/docu/nmpi.htm)>.
5. U.S. Department of Defense Directive 5122.5, "Assistant Secretary of Defense for Public Affairs and Enclosures," 27 September 2000, <[www.dtic.mil/whs/directives/corres/html/51225.htm](http://www.dtic.mil/whs/directives/corres/html/51225.htm)>. The latest version of joint U.S. PA doctrine cites the same principles.
6. Ibid.
7. U.S. Declaration of Independence, 4 July 1776, <[www.ushistory.org/declaration/document/index.htm](http://www.ushistory.org/declaration/document/index.htm)>.
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10. Constitution of Romania, Article 30, "Freedom of Expression," <[www.oefre.unibe.ch/law/icl/ro\\_indx.html](http://www.oefre.unibe.ch/law/icl/ro_indx.html)>.
11. Constitution Act, 1982, Article 1, Part 1, "Canadian Charter of Rights and Freedoms," <<http://thecanadianencyclopedia.com/index.cfm?PgNm=TCE&Params=A1ARTA0001270>>.
12. Charter of the UN, San Francisco, CA, 26 June 1945, <[www.un.org/aboutun/carter/](http://www.un.org/aboutun/carter/)>.
13. UN, Universal Declaration of Human Rights, adopted and proclaimed by the UN General Assembly, 10 December 1948, <<http://ccnmtl.columbia.edu/projects/mmt/udhr/>>.
14. Ibid.
15. NATO treaty.
16. NATO Ministerial Communiqué Annex to M-1(94)2: *Partnership for Peace: Framework Document*, 10 January 1994, <<http://hq.nato.int/docu/comm/49-95/c940110b.htm>>. This document also commits NATO partners to "reaffirm their commitment to fulfill in good faith the obligations of the Charter of the United Nations and the principles of the Universal Declaration on Human Rights [para. 2]."
17. Ratified by all NATO nations, the Geneva Conventions were adopted on 12 August 1949 by the Diplomatic Conference for the Establishment of International Conventions for the Protection of Victims of War. They entered into force on 21 October 1950.
18. Protocol additional to the Geneva Conventions of August 12, 1949 and relating to the Protection of Victims of International Armed Conflicts (Protocol 1), adopted 8 June 1977 by the Diplomatic Conference on the Reaffirmation and Development of International Humanitarian Law applicable in Armed Conflicts, and entered into force 7 December 1979.

19. Ibid.
20. Charter of the UN.
21. Library of Congress, *Churchill and the Great Republic*, <<http://www.loc.gov/exhibits/churchill/wc-unity.html>>.
22. U.S. Joint Publication (JP) 3-61, *Doctrine for Public Affairs in Joint Operations*, U.S. Government Printing Office, Washington, D.C., 9 May 2005, online at <[www.au.af.mil/au/awcgate/awmedia.htm](http://www.au.af.mil/au/awcgate/awmedia.htm)>.
23. British Army, JSP 512, *Joint Services Media Handling Guide*, unknown, March 2006, <[www.army.mod.uk/atgl\\_service\\_pubs/\\_agais/jsp/index.htm](http://www.army.mod.uk/atgl_service_pubs/_agais/jsp/index.htm)>.
24. From documents provided to the author by the Directorate of Public Affairs, Romanian Ministry of Defense.
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26. NATO Policy, MC 422/1, *NATO Military Policy on Information Operations*, 2002.
27. JP 3-61.
28. JP 3-61 states: "The first side that presents the information sets the context and frames the public debate. It is extremely important to get factual, complete, truthful information out first. [Chap. 1, 1-4]."
29. For a discussion of the OODA-loop by its originator, see John R. Boyd, *A Discourse on Winning and Losing*, Air University, Maxwell AFB, AL, 1987.
30. Willem Marx, "My Summer as a Military Propagandist in Iraq," *Harper's*, September 2005, 51-59.



## Chapter 2

### Section I

#### A Successful Brigade Public Affairs Officer

**LTC Randy A. Martin, Public Affairs Officer Observer/Controller,  
Joint Readiness Training Center Operations Group**

It seems like my unit is surrounded by all types of media: unilateral television, print, and radio reporters. There are public radio stations, major market newspapers, and television stations. I can see that there is a propaganda campaign against us or, at the very least, a serious problem with misinformation in my area of operations.

My brigade's mission is to bring stability to the chaos while fighting a determined enemy on the streets. The public is hungry for information. They will devour lies or, in the absence of information, fill the void with rumors unless I provide the truth as I know it.

For the past six months brigades have entered the Joint Readiness Training Center (JRTC) with a resource never before available. The JRTC allows brigades to conduct public and command information in support of combat operations at the tactical level with the media as a condition of the battlefield rather than as a separate training event. Some public affairs officers (PAOs) do very well and others struggle.

#### The Role of the Public Affairs Officer

Brigade-level PAOs are now a part of the norm, and an Army at war requires PAOs to succeed. Clearly, there are lessons learned that should be shared. There are four common themes of successful brigade PAOs at the JRTC:

- PAOs organize for and conduct future and current operations on the staff.
- The PAO team develops stringers and unit public affairs representatives (UPARs) to support command information and public information.
- PAOs are resourced with communications and electronic news-gathering equipment to accomplish their tasks.
- PAOs understand and know how the local information environment works.

Doctrine already describes the role of the brigade PAO. Chapter 8 of Field Manual 3-61.1, *Public Affairs Tactics, Techniques, and Procedures (TTP)*, says, "Working as both a special staff officer and as a member of the brigade's planning team, the brigade PAO acts as the spokesperson for the unit, the advisor to the commander, and provides public affairs (PA) guidance and planning to commanders at all levels." Today, brigade PAOs sit side by side with psychological operations officers, a civil affairs (CA) team, intelligence officers, and information officers as members of the U.S. Army's new modular brigades, who have organized for success in an information environment.

The brigade's staff battle rhythm includes lethal and nonlethal targeting meetings under the emerging doctrine of effects-based operations. Arguably, nearly every operation becomes "a brigade fight with a brigade plan." There are three or more daily briefings to the commander or his designated representative. There are rehearsals of all types: combined-arms rehearsals, logistics rehearsals, communications rehearsals, and rehearsals for rehearsals. Given all the meetings, some PAOs might start to consider public and command information as a distraction. The PAO decides where he should be. Given the gravity of future operations and the need to set the conditions for his battalions' success tomorrow, successful PAOs are serving primarily as planners.

### **Getting the Job Done**

The first dilemma facing the brigade PAO is how to divide and accomplish the tasks at hand. Soldiers are responsible for any perceived success. A successful brigade PAO organizes to conduct future and current operations. He takes the responsibility of planning future operations and allows his Soldiers to conduct current operations. He looks 24, 48, 72, and 96 hours out. In conjunction with other staff officers, he develops plans that direct battalions to perform PA tasks. This planning is accomplished through the effects-based operations process. He continually refines his plans based on feedback and analysis and shares his analysis with other staff officers. In turn, the PAO contributes to or writes fragmentary orders, separate plans, and annexes.

The PAO anticipates challenges and makes recommendations that allow the brigade to fight and win in an environment that is dominated by real-time news and information. He helps shape the environment by conducting embedded media opportunities, hosting media events, and developing public information products—engaging the media personally or through designated members of the unit.

PAOs are only successful because of the superb noncommissioned officers and young Soldiers working alongside them. Often these Soldiers come directly from advanced individual training. They are skilled at broadcast operations and print journalism, but they are new to the process of being on a staff. The PAO trains his staff, and on-the-job experience refines how it functions. The PAO continues planning for the future and relies on his Soldiers to conduct PA current operations (i.e., anything that happens in less than 24 hours). PA Soldiers track the battle in the brigade tactical operations center. They play a major role in producing public and command information. They focus on the close fight by monitoring the local media, receiving media contact reports, analyzing trends, and making assessments. They help staff PA products and keep the PAO informed while the PAO attends meetings, briefings, and planning sessions.

Brigade PA Soldiers create products such as press releases, video news releases, and radio spots in support of the PAO's plan. They read, understand, and enforce PA policies and procedures from the tactical to strategic level. They prepare for and execute media opportunities such as interviews and media events. Likewise, they train others to perform PA tasks.

Recently, one PA Soldier determined through careful tracking using a staff duty log that there was a pattern for misinformation on the local radio station. The Soldier gave the information to her PAO who, in turn, was able to use other brigade resources and minimize the effects of misinformation and propaganda. Some might argue that it was someone else's job. The PA Soldier, however, was the only one besides the public who was paying attention.

The brigade is very large in terms of number of troops and expanse across the battlefield. How does it increase its range and effectiveness?

## **Stringers and Unit Public Affairs Representatives**

PA Soldiers are well-trained in developing news for the commander and enabling a better understanding of lessons learned, tasks, and purposes throughout the Army. Evidence from brigades recently deployed from JRTC directly into theater shows that command information remains crucial. However, the brigade PAO team's time and range are limited. To accomplish the commander's goal, brigade PAOs use stringers and, in some cases, UPARs to support command information and public information. UPARs are trained at home station by PA Soldiers. They learn how to prepare subject matter experts (SMEs) for interviews. UPARs learn and apply communications skills with media embeds or during select media opportunities.

UPARs submit media contact reports during and after scheduled and chance encounters with the media. As part of its current operations function, the PA office refines reports and keeps the chain of command informed of the local media environment. At JRTC, one PA Soldier identified media without credentials through a contact report and with the help of other staff members was able to prevent imposters from gaining access to a forward operating base.

UPARs serve closely with battalion commanders as lower-level SMEs on PA plans and policies on embedding the media, engaging the local media, and conducting media opportunities at the battalion level. This added expertise gives the commander more time and flexibility to engage the media at the time and place of his choosing, often resulting in better preparation.

The "additional duty" of UPAR is often assigned to the battalion S1. Experience at the JRTC has shown that the best UPARs are not necessarily members of one designated staff section; rather, they are volunteers who are motivated for the task and are reliable. One battalion commander selected his fire support officer to serve as the UPAR. Another chose a CA Soldier assigned to the battalion. In both cases, the UPAR had skills and expertise the commander preferred to his S1. The results were better interviews because both UPARs were better prepared and more comfortable in the media setting.

UPARs and stringers are the brigade PAO's direct link and a liaison of sorts to battalions. UPARs function best when they are equipped with digital cameras and reliable communications equipment. Although UPARs broaden the PAO's effective range, without the necessary equipment, neither the PAO nor the UPAR will effectively aid his commander. A successful brigade PAO is resourced with communications and electronic news-gathering equipment to accomplish his tasks.

Brigade PAOs are constrained by time, terrain, and the enemy. At the JRTC, the PAO operates in an area where battalions are dispersed more than 2,700 square kilometers, with a determined foe who uses all tactics available to kill U.S. Soldiers. The PAO often lacks language skills to communicate with the local media, but he still must accomplish a mission.

## **Tools of the Media Trade**

The brigade PAO uses his own Soldiers, stringers, and UPARs to gather images and stories with digital cameras to support urgent information requirements. Images are passed electronically from the point of action to the release authority rapidly through secure and nonsecure mediums.

Digital cameras are supplied to the brigade and battalions for the specific purpose of gathering and developing news products. The brigade PAO uses the Digital Video and Imagery Distribution System and a dedicated video editing system to produce and distribute video products to local television and the higher headquarters.

One brigade commander chose local television and radio to announce the arrival of his brigade in the area of operations (AO). His message clearly had public information value and did not violate the PAO's integrity. The PAO cleared the release through his staff and the release authority. The public met the brigade commander early by virtue of his PAO.

Dedicated voice communication is a must. One PAO was denied a dedicated phone. This situation frustrated the local media because when they called the tactical operations center either no one spoke Arabic or Soldiers did not want to speak to them. A better-resourced PAO used his phone to contact the media following a deadly attack on a newspaper office. He was able to build rapport with the journalist through an act of compassion.

One brigade commander who saw his PAO as a key asset resourced the PAO with an interpreter. With proper training, time, and trust, the interpreter helped the staff gain cultural understanding, served as an assistant for media analysis, and communicated directly with the media when the PAO could not.

### **The Information Environment**

All the resources in the world are insufficient if a PAO does not understand the capabilities he brings and the dynamics of his information environment. As the staff's expert, the PAO must understand the local information environment in detail. Successful brigade PAOs build estimates for their AO. They consider and use all available resources for gathering news and disseminating information. They know and understand the news cycle in their area so they can make an impact on news products at the right place and time.

One brigade PAO knew the time and place for an upcoming combat operation and prepared preapproved press releases to coincide with the production of the daily newspaper. He anticipated consequences, and when the time was right tactically, he released information to the public and filled the void.

The brigade PAO understands the dominant news media and their constraints. He makes recommendations to the command on how and where to engage the media. He builds information folders on the media in his AO. With the help of his PA Soldiers, he continuously assesses the local media and refines the overall plan.

### **Conclusion**

Doctrine is in place. Brigade PAOs are a powerful addition to the brigade combat team and its staff. Successful PAOs are practicing planning as a primary function with a well-organized staff. They are developing their organizations through training at home station and gaining effective stringers and UPARs. They are resourced with personnel and technology to communicate with their command and the media. Successful brigade PAOs are experts in their craft and prepared to operate at the tactical level of the military information environment.

## **Chapter 2**

### **Section II**

#### **Public Affairs Operations at the Division Level**

##### **LTC Randy Martin**

In January of 2007, the 3rd Infantry Division (3ID) was leaning forward in its foxhole as a war-fighting command and public affairs (PA) practitioners. The division public affairs officer (PAO) accompanied a reconnaissance party from Fort Stewart, GA, to forward operating bases (FOBs) in Iraq. The 25th Infantry Division was scheduled to hand over reins for Multi-National Division-North in June. The 3ID, recognizing the significant role of information on the modern battlefield and in the counterinsurgency fight, took steps to include PA in the operational plan. PAOs were accustomed to taking a back seat and fighting for their positions at the decision table. So this sort of inclusion was a welcome change.

Then news came that the plan to replace the 25th had been scrapped. President Bush announced a “surge” of forces to Iraq on January 10, 2007. A new command was built just south of the national capital. The new organization would command forces and cut the flow of accelerants (i.e., the material that perpetuated instability and violence) to Baghdad. The 3ID would command the Multi-National Division-Center (MND-C).

In the succeeding months, the MND-C earned a reputation for aggressive, proactive PA. It was tough work, but public opinion in the U.S. shifted, and the “surge” was counted as a success, both on the ground as well as in the media.

The formula for MND-C’s success had four components. First, the commanding general (CG) placed a very high priority on PA. Second, the division operated a world-class media operations center (MOC). Third, PAO Soldiers and civilians were well led and carefully managed. Finally, there was a strategy for reaching all audiences from the beginning of the deployment.

#### **Commanding General Emphasis**

At predeployment training, the CG once asked of his staff, “Who here is a PAO?” He surveyed the room and said, “Every hand should have gone up. Every one of you is a PAO.” His point played out in time as nearly every officer seated in the room (more than 30) had conducted at least one major interview while deployed. In the 3ID, media presence was not considered a hindrance. Rather, an engagement with a reporter was an opportunity to tell stories, and telling stories just might help sustain public support at home. That was important.

In the fight against terror, the support of the American people is vital. The CG’s charge to his assembled division PA staff in Iraq was to produce a PAO staff three times its normal size, have stories play in the United States 24 hours after a newsworthy event played out on the ground in Iraq, and tell stories that would appeal to most Americans.

He allocated resources to accomplish the PA mission. He knew the importance of having a MOC, and early on, he made the MOC’s renovation his top funding priority. He designated a single-story office building just across the street from the division headquarters, and it was extensively remodeled for the task. He arranged for both military and civilian contractors to augment the PAO staff.

He invested his time. One hour each Sunday was dedicated to meet with the PAO and his staff. The meeting finalized the CG's schedule to engage media in the coming week. The CG also assessed the previous week's performance and validated the concept for the top MND-C stories. The notes of these meetings were then sent out across the division so that leaders would know where to focus media in the coming week.

The CG instilled a storyteller ethos across the force. His morning battle update briefings presupposed that significant activities from overnight already had a PA exploitation plan. His question was simply, "PAO, what are we doing to get that story out?" He expected his commanders and staff to have told the 3ID story to a designated public within 24 hours. Brigade commanders briefed their own "stories of the week" on Mondays. This practice placed a heavy responsibility on the entire staff.

The PAO had to be nested with the current operations in the division operations center. Daily PAO huddles were held at 1700 in order to synchronize with brigades. Subject matter experts had to be ready for the potential to give a nationally televised interview on short notice. Contributors of specialized imagery—the stuff that sealed the deal with national TV networks—were all drilled to deliver unclassified aerial platform video products to the PAO rapidly. If the CG's staff was struggling to accomplish the task, he offered to take a personal role in the effort.

### **The Media Operations Center**

Based on the shared experiences of the commander and the PAO staff, the unit developed a concept for the MOC building. Engineers took a draft plan and went to work to redeem the dilapidated structure. The final design would service visiting media and afford a pleasant and professional work environment. Space inside was designated for a recording studio and conference room. Engineers installed a customer service counter for efficient distribution of press products such as information packets and identification badges. One room served as workspace to broadcasters who edited videos. The media relations officer and noncommissioned officer in charge (NCOIC) were given a room in the building to provide "command and control." Finally, a room was outfitted with television monitors and computers for continuous media monitoring. The MOC also had indoor plumbing, a break area, and a small kitchen. The building was so well suited to the task that from time to time media would opt to sleep in the MOC rather than the tents used for transient billeting.

The tools for media relations were collected before deployment. Contingency mission planning for continental U.S. deployments and previous Operation Iraqi Freedom experience along with after-action reviews were instructive on best practices and supplies for MOC operations. The NCOIC and PAO developed a list of required material and assembled the MOC kit.

Chief among required equipment was the Digital Video Information Distribution System (DVIDS). DVIDS, in spite of not being a modification tables of organizations and equipment item, remains the best answer for disseminating video and other large files from the frontlines to home. The DVIDS is essentially a PAO pacing item at a time when PA has become operationally significant. A spare DVIDS system was held in reserve at division to be used as a float, which paid dividends again and again. All Soldiers were trained on DVIDS operations before deploying. Maintenance above the operator level required a technical team from outside the division or the system was shipped to the manufacturer.

Other tools, such as a professional backdrop and wide-screen television monitor; TVs; a multiplex box for audio; an AM/FM radio scanner; computers for unclassified and classified

data; and a healthy unit basic load of video tapes, DVDs, batteries, and power converters were packaged for the contingency MOC. To validate that the MOC had all the tools that PAOs would need when deployed, the PAO established the division's MOC during all predeployment field training. PAO Soldiers practiced setting up their workspaces and conducted media events with role play and actual media in training exercises right up to deployment.

The MOC functioned on a 24-hour basis. Soldiers and contractors staffed workstations. An NCO continued coordination for embeds and helped expand the effort to tell stories during prime time in the U.S., long after the sun had set in Iraq. The audience was on east coast time in the U.S., and the MOC had to be aligned with that market.

### **Manning**

The staff section was organized into three major sections: media relations/current operations, command information, and future operations (FUOPS)/plans. A field grade officer or the staff section master sergeant/NCOIC led each section. The deputy PAO was the media relations officer. She was also the contracting officer representative for a supporting contractor who helped with strategic communication. The division PAO plans officer served as the PAO chief of current operations. The PAO NCOIC was responsible for all command information. The attached mobile public affairs detachment (MPAD) commander was the FUOPS planner. All other Soldiers and staff members were aligned under these sections.

The division and its brigades were not fully staffed during the train up and deployment. Help was not immediately available on the ground either. All active component PA units were deployed or in line to deploy when President Bush announced the "surge." Because Army PA relies on reserve component forces, there would be a long lead-time for getting an MPAD to help the division. To correct the shortfall, the Multi-National Corps-Iraq (MNC-I) cross-leveled seven PA Soldiers from three MPADs and one PAD for 45 days. This situation was not sufficient but it was a start. MNC-I later attached half of the 302nd MPAD, a United States Army Reserve unit from Bell, CA. Divisions allocated Soldiers to PAO staff sections according to their skills and training them to compensate for any deficiencies in experience.

An NCO managed embedded media. A contracting agency rounded out the media relations staff with four to five contractors on the ground in Iraq. It also provided a "reach back" capability to the U.S., where five more contractors stationed in Washington, D.C., provided around-the-clock media monitoring. The contracting agency brought commercial experience to the PA staff. The contracting agency provided metrics for outreach both on the ground and in the U.S. and advised the PAO on new methods for communicating with the media. The contracting agency's list of media contacts and understanding of the power of Web logs or "blog" audiences paid dividends. The contracting agency also managed the division's Web page (<taskforcemarne.com>) and assisted in advertising strategies to support the Web site.

The division placed a 24-hour current operations staff on the division operations center floor. The PA current operations section collocated with the G-7 in order to share the Command Post of the Future (CPOF) computer for situational awareness. CPOF also provided a continuous common operating picture, situational awareness of events at the lowest level, and rapid identification of potential news stories. The current operations staff monitored the media, wrote fragmentary orders (FRAGOs), and authored "immediate" press releases.

In three of four brigades, MPAD Soldiers filled vacancies in the brigade PAO staff. At other times, PAO Soldiers were prepositioned to support major operations in a main effort unit. As a rule, PAO Soldiers were under the operational control of the supported unit. The staff issued a

FRAGO so the PAO Soldiers understood their relationship with the supported command and its tasks and purposes.

FUOPS/plans consisted of one officer and one NCO. While current operations focused on 72-hour and less planning, with guidance provided in fragmentary orders, FUOPS focused on the 72-hour and greater plan. FUOPS worked on special projects and developed PA annexes to support major operations in conjunction with the G-5 staff.

### **The Plan**

The information plan wove command information and media relations to tell the division's story to multiple audiences simultaneously. The plan was conceived before deployment but refined in theater to meet the CG's intent.

The division PAO built a four-page newsletter that was distributed six days a week. The *Dog Face Daily* (DFD) contained stories and pictures that came from brigade PA offices. The newsletter published both operational, as well as fewer "newsy" traditional command information stories. Distribution was via the classified and unclassified computer networks, on email, or posted to Web sites. The DFD was also posted to the DVIDS Web site and the task force Web site. Soldiers reported that they perpetuated distribution to their own personal contacts.

The division published *From the Front*, a quarterly photo magazine. A division staffer sorted material that came from the brigades. Each brigade had its own chapter. A digital version of the magazine was then forwarded to an Iraqi publication company. Delivery was made to all outlying bases by traditional logistics convoys. A twice-monthly newspaper, *Marne Focus*, was also published and distributed in a similar fashion. Once published, both were sent in their electronic form to 1,500 email recipients.

The division produced a weekly television newscast called *Marne Forward*. *Marne Forward* aired weekly in dining facilities throughout the MND-C, thanks to careful transfer of DVDs. A digital version of the newscast was sent to DVIDS and downloaded for play on Marne Television at Fort Stewart, GA, and, by special arrangement, the Pentagon Channel. All broadcast products were made available for public viewing on the Internet.

Media relations included live and taped interviews with stateside media, embedded reporters, and battlefield circulation personnel. Lining up media opportunities was everyone's business. The DVIDS staff marketed stories, the division staff cold-called media with story ideas, and the contracting agency helped break into new media markets. Individual officers and NCOs were even encouraged to call their hometown media in order to offer a local perspective of the surge. Late in the deployment, media relations even teamed with the garrison PA office to market potential interviews to local and national television.

The division conducted monthly "Baghdad Bureau Chiefs' Luncheons" (BBCL). These luncheons brought media to a central location where they could meet with the CG for a formal question and answer session on the record. The CG determined the theme for each session. Each session was scheduled to coincide with a major division operation. The BBCL allowed guest speakers, usually brigade commanders or deputy CGs, the opportunity to build relationships with media during the informal lunch session. One objective at each BBCL was to find potential embeds. The division was active at recruiting embedded media all the time. Western media were picked up inside the "Green Zone" and transported to FOBs by helicopter. Then the media representatives were linked with designated escorts. Planning and preparation for embeds was

formalized with the publication of a daily FRAGO that gave a task and purpose for each embed. The CG and the deputies also escorted media as part of their battlefield circulation. Traveling with a member of the command group appealed to reporters because they received access, security, and were guaranteed to get an interview with an authority figure. When a civilian reporter from the national pool was not available, a PAO Soldier would travel along with him.

### **Conclusion**

MND-C was aggressive and focused on storytelling. Storytelling was the business of command, and all resources were applied in order to do so. Success came from having CG emphasis, an effective MOC, PAO professionals well led and carefully managed, and a good strategy for reaching all audiences from the beginning.



## **Chapter 2**

### **Section III**

#### **Public Affairs Officer: What Are We Doing to Tell That Story?**

##### **Tactics, Techniques, and Procedures Associated with Developing a Story from a Public Affairs Perspective**

**MAJ Vinston L. Porter, Jr.**

It is almost midnight Baghdad time when Fox News cuts to breaking news: “Straight to our developing story out of Iraq right now. This picture just in to us from the American military. Take a look at this.”

What follows is a report: Soldiers, acting on a tip from local Iraqis, discovered five rockets aimed at the Soldiers’ patrol base. Included with the report are pictures of the recovered rockets and a taped interview with an officer from the unit. It is just eight hours from the time of the initial push to national TV outlets until the time of broadcast. This broadcast is an actual example of a quick turnaround on a newsworthy event that occurred in the 3rd Infantry Division (3ID) operational area as compiled from the various situational information products.

Several tactics, techniques, and procedures made airing this story possible:

- Knowing where to look for the story
- Working with the brigade public affairs officers (PAOs)
- Coordinating with other agencies inside the division operations center (DOC)
- Using imagery to add context to the story

Knowing where to look for stories made a difference in finding the story moments after the event was reported versus seeing the event reported (much later) in the daily brief to the commanding general (CG) on the following day.

The primary source used to search for the story was the Command Post of the Future (CPOF). Advances in information technology, such as CPOF, enhance war-fighting and battle-tracking capabilities, making it possible for staff sections to view an event occurring on the battlefield in real time. Scrolling over the various icons on the CPOF digital (situational) map allowed for a quick snapshot of each reported event, including a brief event summary.

As a PAO, I used the event summary to identify information that warranted a follow-up call to a brigade combat team (BCT) PAO or a visit to the respective BCT liaison officer (LNO) for clarification. Whether it was a planned operation or an event recently reported via CPOF, in many cases the BCT PAOs had visibility of the same events at their level. Once I identified an event for follow-up, the BCT PAOs gathered the detailed information surrounding the event.

A second source of information was the division G3 operations section. The G3 chief of operations has the most information in the DOC. Unit reporting goes to and through this individual. Maintaining a close relationship with the chief of operations allowed the public

## **CENTER FOR ARMY LESSONS LEARNED**

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affairs section to remain in the loop on issues and events (especially those that may not be displayed in the CPOF).

The division staff conducted a daily synchronization meeting. As the LNO for each BCT briefed its upcoming operations, the PAO representative took note of which were potentially newsworthy operations. Embedded reporter and internal PAO asset coverage options were considered; the former was the priority.

The division PAO section could convey information gathered from scanning the CPOF events and the daily division synchronization (synch) meeting during the PAO daily synch meeting later the same day. This meeting helped ensure the division PAO staff had visibility of BCT events in which the BCT PAOs might need assistance in attracting an embedded reporter. Additionally, the meeting allowed the BCT PAOs an opportunity to talk about their experiences with recently embedded reporters. The CG also passed down any guidance for the BCT PAOs at this meeting.

This daily PAO synchronization provided a focus for the types of events to exploit with internal assets or embedded coverage. If it was an upcoming mission, the background details served to add context to the event when soliciting the interest of the Western media outlets. Knowledge of newsworthy events occurring in the operational environment coupled with vertical and lateral coordination was only possible because of the coordination between the public affairs representative and representatives of other agencies.

Keeping an open dialogue with the LNOs proved beneficial in acquiring specific details about an event or incident. The respective BCT LNO can clarify anything not already delineated in the CPOF summary. The LNO's direct line to the BCT staff facilitated getting accurate numbers for events.

A strong PAO-air liaison officer (ALO) relationship helped the ALO personnel understand the news cycle and how their initiative could help the PAO stay in front. The ALO personnel were vital in their assistance with acquiring weapon systems' video from fixed-wing engagements in support of ground troops and expediting the declassification of this video.

The PAO's relationship with the combat aviation brigade (CAB) LNO helped determine if weapon systems' video from an air weapons team engagement would be a part of telling a particular story. In some cases, the aircraft were still airborne at the time of the reported engagement. The CAB LNO's visibility on aircraft station times helped to determine if video from the engagement would be a part of initially telling the story to Western media outlets.

The contracted operator/analysts monitoring the unmanned aerial system (UAS) feeds across the division's operational area had visibility on many events in real time. This visibility has provided the PAO with another resource for telling the division's stories. There were many occasions in which an unmanned aerial vehicle was flying over an event and the outcome became a good news story. The UAS operators were able to capture still images and record video from the UAS imagery feeds. The most valuable capability PAO had in the DOC was the ability to declassify images and video in less than ten minutes. Because of the quick turnaround, UAS footage became the primary source for footage of many lethal engagements. The relationship worked so well that when there were key lethal engagements overnight, the operator/analysts would have a declassified copy ready for PAO first thing in the morning.

How do we get media interested in the story? There are good news events happening throughout the country, albeit at the local level. So what can increase the media's interest in a story? Imagery, either still or video.

In the case of the 3ID, PAOs used several tools to enhance a story—the unclassified storyboard, still and video imagery, designated speakers, and a media advisory. Upon identifying a good news event in the operational area, PAOs used the storyboard submitted to division by the BCT. Classified information was removed in order to incorporate the new declassified storyboard as part of the story package. In that situation, the BCT PAO ensured the individual .jpeg photos files were sent up as part of the press release. At the same time, the BCT PAO identified and prepared a subject matter expert interviewee about the event via telephone or Digital Video and Imagery Distribution System. While still imagery helped paint a picture of an event, quality video footage enhanced a story's appeal to a media outlet.

Over the course of the deployment, many lethal events involved UAS footage and/or weapon systems' video from the aircraft involved in the event. Before this footage was used for marketing the story, the classified information on the display had to be removed. The owning agency declassified video from fixed- and rotary-wing aircraft. The operator analysts in the DOC declassified footage from the UAS. These proved to be the quickest respondents in providing video footage for use with a story.

Ultimately, the command group needed to approve the footage, but the quick turnaround on UAS footage expedited that process. Whereas a rotary-wing asset would likely still be in the air several hours after the good news event took place, the UAS footage of the event was readily available for possible release as soon as several minutes after the UAS recorded the event. Rotary- and fixed-wing footage had to undergo a lengthier declassification process before it could be used with a story. The diagram on the following page outlines the process for acquiring approval to release video weapon systems' video or UAS footage.

In the end, when it came to story production, the DOC public affairs representative brought all the pieces of the puzzle together in order to provide a detailed story to the media. Serving as the conduit between the DOC and the media operations portion of public affairs, it was paramount for the PAO to know where to look for the story, to know the key points of contact within the DOC, and to quickly process any video imagery associated with the story. If packaged right, the true success was the story playing on the news.

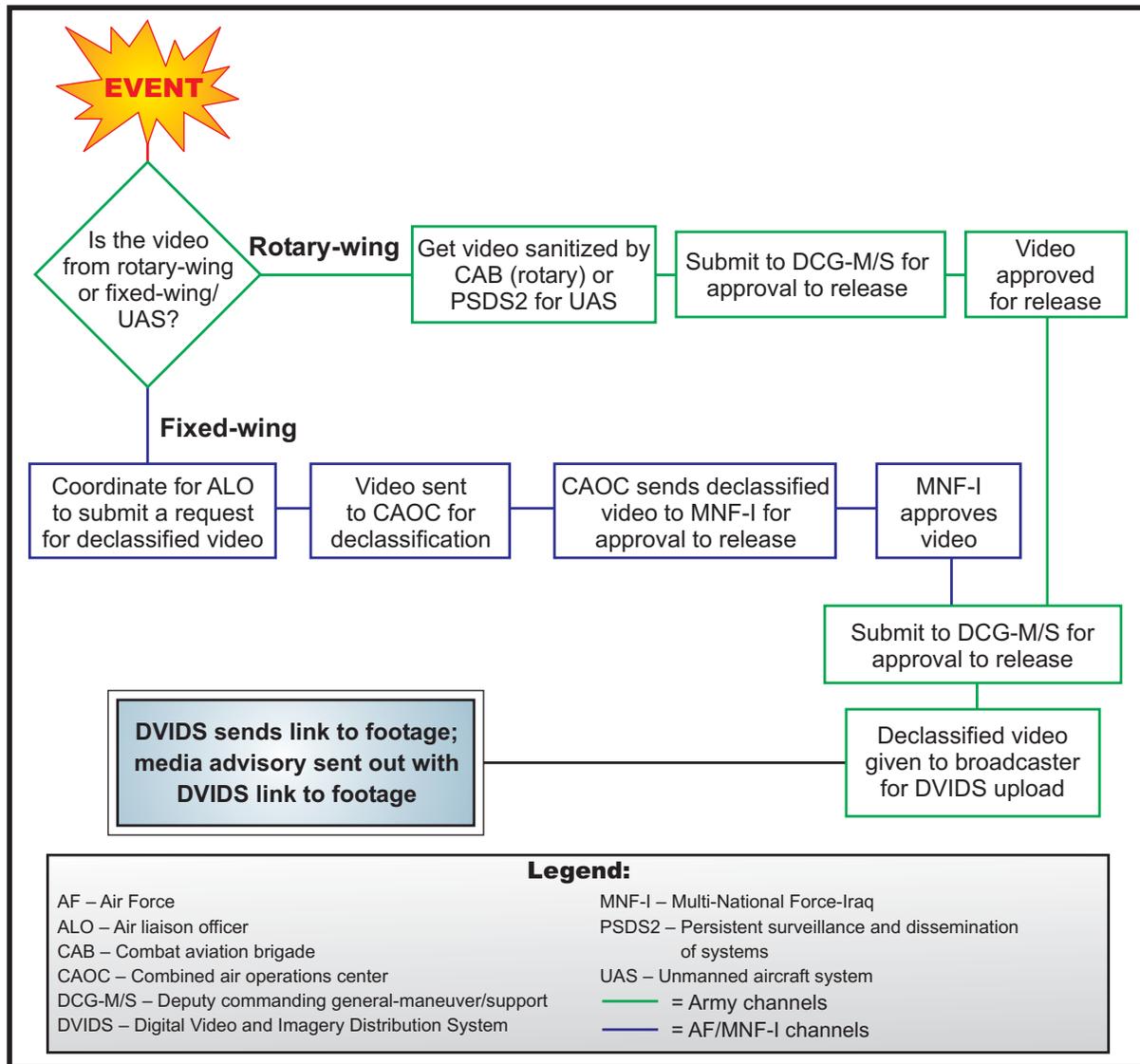


Figure 2-3-1: Weapon systems' video approval process (a way)

## Chapter 2

### Section IV

#### Training a Public Affairs Workhorse

MAJ Kristen Carle

Independent local, national, and international media coverage of our military operations and our enemies' activities is critical to our success in the global information environment. This is particularly true in today's 24-hour news environment. Unfortunately, our enemies in Iraq have won a significant victory by forcing most Western media to report only from secure compounds, to use embeds with coalition forces, or to retail second-hand information gained from local Iraq stringers, some of whom have questionable agendas and loyalties.

*—LTG Peter W. Chiarelli, "Learning from Our Modern Wars: The Imperatives of Preparing for a Dangerous Future," Military Review, Sep-Oct 07*

The most important factor that underpins public support of the armed forces at war is clear articulation of political and military objectives. This step involves truthful and forthright information provided to all press outlets. Each "on-the-ground" public affairs officer (PAO) is important and valuable, regardless of location at the brigade combat team, division, or corps level. Each PAO is a strategic-level communicator (either directly or indirectly) and hence must be thinking as such, no matter what position he/she holds. With this in mind, the mobile public affairs detachment (MPAD) of today is staffed, structured, sourced, equipped, and trained to accomplish the mission that best suits today's information requirements

Training for public affairs (PA) units should support current doctrine. Soldiers assigned to PA units should be trained to perform tasks that support the doctrinal missions of PA units per Field Manual (FM) 46-1, *Public Affairs Operations*. Units deploying to war should anticipate performing increased roles with regard to media relations, often at the expense of traditional command information efforts.

#### **Traditional versus Contemporary Information Mission Requirements: Mobile Public Affairs Detachments as the Workhorses of a Public Affairs Organization**

MPADs are designed as the workhorses of any PA organization. The MPAD modification table of organization and equipment (MTOE) (2007) is structured to support command information and public information requirements. According to FM 46-1, the MPAD's primary tasks are to:

- Monitor and assess the perceptions of external audiences through access to civilian commercial news sources.
- Assess the information environment, and develop a PA estimate of the situation as the initial part of operational planning.
- Assist the PAO in operational planning and policy and ground rules for media, coordination for logistical support to PA, and the coordination of PA operations with higher and subordinate headquarters.

- Plan and develop information products, which will be produced through contracted services and/or the use of organic equipment and facilities.
- Acquire, produce, and transmit information products throughout the theater, between the theater and home station, and between the theater and Headquarters, Department of the Army (HQDA).
- Create and disseminate print, photographic, audio, and video products for external release directly to civilian media who do not have representatives within the theater of operations.
- Conduct media facilitation and develop information strategies.
- Prepare commanders, staff personnel, and other command members for interviews, press conferences, and similar media interaction.

There are 31 PA units in the Army Reserve, consisting of a combination of MPADs, public affairs detachments (PADs), broadcast operations detachments, and public affairs operations centers (PAOCs). All have either deployed in support of a Global War on Terrorism mission (Operation Enduring Freedom, Operation Iraqi Freedom, Guantanamo Bay) and the Balkans or are currently mobilized.

### **Posturing Mobile Public Affairs Detachment Structure to Match Augmentation Demand—Supporting the Corps Public Affairs Requirements**

The 302nd MPAD under MNC-I supported two major subordinate commands: one in support of the 316th Expeditionary Sustainment Command (ESC) (in Balad, at LSA-A) and the other with the 3rd Infantry Division (3ID) as part of MND-C. FM 46-1 states that the MPAD normally augments a corps PA section or a PAOC; however, in this case, the MPAD (as with most MPADs since the start of the war) augmented a division-sized element and provided labor and equipment to establish and operate a media operations center in support of “the surge” contingency operation.

At the division level, PA operations are normally segregated into three sections: media relations, command information, and current operations. In most cases, MPADs are aligned to support command information requirements. Traditionally, this has been “all that is required”—feed the Army internal need for information. Today, command information is just not enough, and PA as an operational practice demands that its PA workhorses bear a greater role in the information fight.

In hindsight, the 302nd MPAD was best positioned to conduct the 316th ESC mission for several reasons. Primarily, the 316th ESC mission remained focused on command information. The 302nd MPAD (as with all Reserve and National Guard MPADs trained by First Army) trained with a command information focus in mind. There is relatively little formal training for enlisted PA Soldiers in the tasks that the MPAD is designed to perform according to FM 46-1. Typically, the task and, therefore, most training associated with external media relations are relegated to the commissioned officers in the PA unit. Therefore, 15 of 20 authorized personnel are usually dedicated to capturing and creating print and broadcast products to disperse to internal audiences. With 75 percent of the MPAD equipped and trained to focus products toward an internal audience, the remaining 25 percent, the unit’s officers, were left to engage the external media through various other methods of media relations.

The three MPAD PAOs located at 3ID had experience and were placed in a variety of roles at both the division and brigade combat team (BCT) levels. For the 302nd MPAD officers, these roles included the PA future plans officer, the division PA operations officer (night shift), and an assistant BCT PAO. These capabilities included:

- Preparing commanders, staff personnel, and other command members for interviews, press conferences, and similar media interaction.
- Assisting the PAO in operational planning and policy, establishing ground rules for the media, coordinating logistical support to PA, and coordinating PA operations with higher and subordinate headquarters.
- Acquiring, producing, and transmitting information products throughout the theater, between the theater and home station, and between the theater and HQDA.
- Creating and disseminating photographic, audio, and video products for external release directly to civilian media who do not have representatives within the theater of operations.
- Conducting media facilitation and developing information strategies.

### **Posturing Mobile Public Affairs Detachment Structure to Match Different Augmentation Requirements—Looking toward Future Improvements Based on Current Demand**

The mission requirements for the 316th ESC and 3ID, while similar in some ways, were different. While the 316th ESC remained in a “supporting effort” role under MNC-I, 3ID (Task Force Marne) conversely held “main effort” operations in conjunction with other MNDs (in the north and in Baghdad) and demanded a greater emphasis on media relations versus the traditional MPAD focus of command information. While the Soldiers at the 316th ESC and 3ID focused on the command information task of acquiring, producing, and transmitting information products throughout the theater, the 3ID focus promoted greater emphasis on media relations. Eighty percent of the focus for most of the 15 months on the ground was external media outreach.

The 3ID PAO’s primary task was creating and disseminating print, photographic, audio, and video products for external release directly to civilian media both in and out of the theater of operations. Meeting this 80 percent requirement with only 25 percent structural MPAD capability left much to be desired in the area of manning, training, and sourcing. As with most MPADs, 3ID staffed four media relations officers. The rest of the Soldiers were either print or broadcast journalists. The task of external media outreach fell under the media relations division. The media relations division pooled media relations officers and senior noncommissioned officers for all other marketing outreach duties. Most of these Soldiers were not formally trained to the level required to meet the challenging measures of effectiveness demanded by division-level commanders of today.

### **Matching Public Affairs Tasks to the Expanding Role of Public Affairs Outreach**

While traditional PA doctrine outlines capabilities that are supposed to be sourced by a collectively trained MPAD, MPADs today are not trained nor equipped to be commensurate with the tasks. MPADs should be able to assist the division PA staff to aggressively and decisively articulate tactical and operational activities in support of strategic national policy and those

political and military objectives that shape American perceptions. Hopefully, these actions will promote positive organizational recognition. What was needed in 3ID were the PA requirements to: (1) monitor and assess the perceptions of external audiences through access to civilian commercial news sources; (2) conduct assessments of the information environment, to include development of a PA estimate of the situation as the initial part of operational planning; and, (3) plan and develop information products, which will be produced through contracted services and/or the use of organic equipment and facilities. These capabilities do not necessarily come organic in a division PA staff, however, and by doctrinal standards, are supposed to be sourced by an augmenting MPAD.

As development of products and reaching the national media became the measure of effectiveness in 3ID, it became increasingly clear that the MPAD's skill and development level needed more training on media relations and "marketing to external media sources," even if it meant perhaps less in command information product development. On today's battlefield, even at the tactical BCT level, print and broadcast journalists need to "think forward" in order to shape internal products for use with external interests.

MPAD training shortfalls remain in the following areas: (1) management of media approach planning; (2) prototype product development; (3) commercial-quality production; (4) operational media analysis; (5) product distribution and dissemination to external media markets; (6) strategic communications planning and execution; (7) Web site development and interface; (8) "new media" (blog interaction); and (9) media effects analysis. In an age where "independent local, national, and international media coverage of our military operations and our enemies' activities are critical to our success in the global information environment," these lanes are the last where we would want to assume with less than aggressive and decisive effort.

### **The Area of Future Focus**

As "war reporting" will likely continue to drop significantly this year, taking a back seat to the 2008 presidential campaign, it becomes more important to enhance our outreach methods in order to entice and hold media interest. This enhancement starts with expanding the training and expertise of those conduits doing the outreach; namely, MPAD workhorses at the division level. Enhancement in the traditional areas of strategic planning; senior leader talking points preparation, production, and editing; and processing of press releases and other written products for release to the media are imperative during training. Other nontraditional but required actions might include tracking product play and reach; media monitoring of U.S. and international press; reaching "new media" tools; and designing, developing, and managing a comprehensive Web site.

Media outreach and the embed programs are ways to inform the Western public, execute U.S. political objectives, provide public understanding, and garner American support. In the dawn of the sixth year of the fight in Iraq and the 3ID's conclusion of its third deployment, the Reserve forces continue to move through recurring mobilizations. In light of ongoing deployments, MPAD commanders must ensure that MPAD capabilities, training, and expertise match information requirements at "individual division" yet "collective corps" levels. Sustainment of American support demands that these converging information necessities are sourced with Soldiers who can provide successful and insightful strategic communications plans that address complex issues. Assessing global information and media environments through a process that actually implements information campaigns that thoroughly inform decision makers and public audiences may not necessarily be demanded by all commands to the same level that existed in MND-C, but, most certainly, it should.

## Chapter 3

### Section I

#### **Breaking Through the National Media Filter: How to Succeed in Telling the Story through Hometown Outreach**

**MAJ Alayne Conway**

The media continues to play a large role in shaping perceptions both in Iraq and at home in the United States. The footprint of the Western media based in Iraq has dramatically changed from the early days of Operation Iraqi Freedom (OIF), and the 3rd Infantry Division (3ID) witnessed this evolution. This chapter looks at the changes in the media structure and how the public affairs office from the 3ID adapted to these changes, found a way to break through the national media filter, and succeeded in telling the Soldier's story.

#### **The Media Build-up in Iraq**

During the early days of the war, the Pentagon arranged for more than 600 journalists to embed with military units across the battlefield. The intent was to give the media a firsthand look at the war and an opportunity to report back to the American public. Despite criticism that the program would jeopardize the objectivity of media reporting, it was a resounding success. Living rooms across America had front-row seats as they watched the battle for Baghdad unfold. The media were effective tools in telling Soldiers' stories during the early days of OIF.

Over time, media outlets established bureaus in and around the International Zone (IZ), commonly known as the Green Zone. The IZ has become the epicenter for both coalition forces and the Government of Iraq. Once in the IZ, media could obtain their credentials to cover military stories. In 2004, Western media were criticized for reporting from their hotels instead of from the field and encouraged to get out with the military units and get the real story.

The 3ID returned to Iraq in early 2005 and had the important mission of overseeing the transition from the interim government to a freely and fairly elected representative Iraqi government that had the support of the Iraqi people. During this time, journalists reported on good news associated with the Constitutional Referendum in October 2005 and then the elections in January 2006. It seemed that Iraqis were in control of their future, and the U.S. military was building capable and competent Iraqi security forces.

There was no shortage of embedded reporters (embeds) during the 3ID's second deployment. Brigades juggled anywhere between eight and ten media embeds on a weekly basis. Multiple correspondents staffed Baghdad media bureaus and were able to spend adequate time with military units. There was a constant flow of embeds from the United States and international media outlets.

Units reached out to Pan-Arabic media, whose numbers seemed to grow on a daily basis. Multi-National Division-Baghdad (MND-B), led by the 3ID headquarters, managed a Baghdad media club, so there was no shortage of Iraqi journalists available for day trips and press events. To a certain extent, public affairs pursued hometown outreach, but it was usually second or third in the priority of effort. Much of the hometown outreach was geared to the home-station media. In the case of 3ID, outreach with Savannah, GA, media was a weekly occurrence but never matched the daily interactions with the Baghdad media bureaus.

Reporting the war changed after the Samarra mosque bombing in 2006. Attacks against coalition forces were on the rise, and positive news was often hard to get out. The military criticized the media for always reporting the negative story. The media often responded back with, "How can we report on the positive stories when the security situation is so bad?"

### **The "Surge" Brings Change to Media Reporting**

President George W. Bush announced a new strategy for Iraq on January 10, 2007. The announcement of the "surge" brought some optimism for the way ahead and gave the military the necessary leverage to start turning the tide of negative coverage.

By the end of the month, the 3ID received the notice to deploy back to Iraq. The public affairs office deployed with a staff of seven Soldiers and a kit bag full of talking points and messages to tell the story of the "surge." The Iraq conflict became a dominant political story, and during the month of January 2007, coverage of the war consumed a full quarter of the print, television, and online news.

Despite the political debates surrounding reducing the U.S. involvement in the war, there was a lot of media interest in the deployment of the 3ID for its unprecedented third tour to Iraq. After two successful tours to Iraq, the division was called upon to secure the belts surrounding Baghdad. On April 4, 2007, 3ID stood up the Multi-National Division-Center (MND-C) headquarters. Reaching out to the Western audience would be a challenge for the new headquarters. Media were familiar with MND-B and already had relationships with 1st Cavalry Division and its brigades. The 3ID needed to reestablish relationships with the Baghdad media and make sure they knew there were Dog Face Soldiers' stories to be told.

This challenge was coupled with changes. The media landscape was quite different from the previous deployment. Gone were the days of 25 bureaus with multiple crews and correspondents that could embed for a long time. After journalists were seriously injured in the line of duty, media organizations placed stringent travel restrictions on their journalists. In January 2006, ABC News anchor Bob Woodruff and his cameraman were seriously injured when the military patrol they were traveling in was hit by a roadside bomb. Another tragic incident occurred in May 2006 when CBS News correspondent Kimberly Dozier was seriously injured during an Iraqi car bomb attack in Baghdad. Her cameraman and sound man were killed along with a U.S. Soldier and his Iraqi translator.

Media embeds and day visits were closely scrutinized, and some journalists were not allowed to travel in uparmored high mobility multipurpose wheeled vehicles. Some media could only travel in mine-resistant ambush-protected vehicles, and other bureaus mandated that their journalists travel with a battalion commander or senior leader since they usually had a dedicated personal security detachment. Due to security concerns coupled with dwindling broadcast time dedicated to Iraq stories, U.S. based corporate offices for the Baghdad bureaus put a crunch on reporting.

The early days of the "surge" provided an opportunity to tell the story through the national media. Many of the operations were lethal, and MND-C Soldiers took the fight to the enemy using ground and air assets. Soldiers told their stories with press releases, photos, handheld video cameras, and weapons system videos.

The division headquarters had more flexibility to tell the story with Apache gun tape footage, fixed-wing bomb footage, and unmanned aerial system clips that were more appealing to the television networks. This video was also important in telling the American people how the U.S. military was taking the fight to the enemy. The volume of these video releases by the 3ID

prompted CNN to package a story about the Department of Defense's liberal policies for releasing footage.

Despite the potential for good news coverage, Americans still received a grim portrait of the war in Iraq during the first ten months of the year. Almost half of the reporting consisted of accounts of daily violence. There were spikes of coverage throughout the year; the most notable was the coverage of GEN David Petraeus' progress report on Iraq in September 2007. Both the military and media agree that the overall trend of Iraq coverage has been on a steady decline since January 2007.

For the first nine months of MND-C's deployment, priority of effort went toward national media outreach. This outreach was a combination of monthly media lunches in the IZ, daily reach-outs to the Baghdad-based media to market breaking news stories, and battlefield circulation. MG Rick Lynch gave an open invitation to the Baghdad media to travel with him during his visits across the MND-C area. He encouraged the public affairs office to schedule media for these visits throughout the week and determined that the ideal balance was scheduling print journalists the majority of the time and a television crew at least one day per week. These visits built the relationship between MND-C and the media, provided coverage of brigades' events, and paved the way for future embeds.

In addition to battlefield circulations, MND-C scheduled monthly media lunches. The concept of the Baghdad Bureau Chiefs' Lunch (BBCL) carried over from 1st Cavalry Division and proved to be an excellent way of introducing a new military operation to the media. BBCLs were not usually instant news makers but did build rapport with the journalists and assisted MND-C in lining up embeds and day trips for brigades.

Although the media operations center (MOC) operated 24-hours each day, the stateside media cycle kept Soldiers busy into the early morning hours. Stories were marketed to the Baghdad-based media and select Pentagon correspondents. The public affairs office used the Digital Video and Imagery Distribution System regional representatives based in Atlanta to assist brigade PAOs with setting up interviews with national, regional, and local media outlets. The MOC also maintained contacts with the Pentagon Press Corps, and through continuous engagements, the division built mutually beneficial relationships with Fox News Channel and CNN.

There were additional spikes in national media coverage for MND-C during the remainder of the year. As the "surge" began to reduce the violence, journalists produced more feature-style stories. The Baghdad media helped the division carry Soldiers' stories to ever-larger audiences. The 3ID's 90th birthday garnered some national and local area coverage in November 2007. Both Thanksgiving and Christmas provided opportunities to tell Soldiers' stories and connect with the home front.

### **Need for Change**

During the early days of 2008, the division commander was eager to find a way to break through the national media filter and share the hard work of Soldiers with the American public. He tasked the public affairs office with conducting an aggressive hometown outreach program. The approach was three-pronged and implemented at all levels of the command.

One of the programs was called Operation Thank You. This program allowed unit leadership to reach out to their local hometowns and give an update on current operations. All staff sergeants majors; command sergeants majors; battalion, brigade, and division primary/special staff; and

## **CENTER FOR ARMY LESSONS LEARNED**

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battalion, brigade, and higher commanders completed a hometown interview over a 90-day period. The MND-C public affairs office also drafted a hometown thank-you letter that Soldiers were encouraged to send to their hometown newspapers.

In addition to staff interviews and command team interviews, the division also encouraged Soldiers to conduct interviews with their hometown media. Brigades rotated Soldiers through engagements with the home station media to include weekly radio and television interviews. Soldiers from the special troops battalion assigned to the 3ID filled out hometown news releases and the public affairs office released them to hometown media outlets through the Hometown News Service in San Antonio, TX.

At the division-level, the CG directed Fort Stewart, GA, to stand up a hometown outreach cell. This group was responsible for setting up 15 interviews per week for the Top 5 leaders of the division. This group included the CG, division command sergeant major, deputy commanders for support and maneuver, and the chief of staff. Each member of the command group was required to conduct television and print interviews every week. Their schedules were deconflicted by the MOC, whose staff prepared packets with biographies and outlet backgrounds and monitored the interviews.

This component of the program was conducted over an 11-week period with positive results. After conducting more than 140 interviews, the Top 5 had reached out to 32 states. Radio interviews proved to be the most fruitful for getting the message out with a 100 percent air rate. Television and print interviews were not as successful but were still effective with a 50-55 percent air and run rate. Overall, MND-C achieved the desired outcome of reaching out to the American people through the hometown markets and telling the MND-C Soldier's story.

The division still conducted national-level media outreach but on a more selective basis. Breaking news stories were still marketed to the Pentagon-based and Baghdad media. These stories were marketed because of the type of story or the strength of the elements. If there was quality weapons systems' video, the capture of large caches or caches with Iranian munitions, or a need to counter a potential negative story, the MOC developed the package and pushed the story out to the national media. As for battlefield circulations, the public affairs office focused more on getting the right reporter out to the right unit to tell the right story.

The latest initiative has involved reaching out to the national talk show radio hosts in an effort to keep up the drumbeat on the success of the surge and MND-C's transition to capacity-building operations. This has been very successful, and in the first week alone, it was estimated that MND-C sent its message to an estimated 15 million listeners.

Breaking the national media filter has gotten much harder since the early days of the war. It continues to be a challenge for military units as they compete for coverage with the ongoing 2008 presidential campaign. Iraq continues to be a topic of interest but on most days accounts for less than 10 percent of the daily news. Public affairs staffs must get creative and find ways to tell stories associated with the hard work of Soldiers. The Baghdad media are still viable and PAOs should engage them, but they should be not the sole means of getting the story out. Every Soldier has a hometown, and units will find the most success in marketing their stories to those outlets. Many of these news organizations are eager to use the hometown connection to localize the context of Iraq news and, ultimately, tell the Soldier's story.

**Endnotes**

1. “Why News of Iraq Didn’t Surge.” Retrieved March 26, 2008, from Pew Research Center Web site <<http://pewresearch.org/pubs/775/iraq-news>>.

2. “The Portrait from Iraq—How the Press Has Covered Events on the Ground.” Retrieved April 15, 2008, from <<http://www.journalism.org/print/8996>>.



## Chapter 3

### Section II

#### **Reaching Out to an Influential and Overlooked Population: Task Force Marne Partners with Iraqi Media**

**LTC Frank B. DeCarvalho, MAJ Spring Kivett, and CPT Matthew Lindsey**

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Since the beginning of major combat operations in Iraq in March 2003, the media has circulated countless war-related stories and articles of interest across the vast media continuum; reaching out to not only American citizens and military families back home, but to an international community keen on gauging the coalition's progress and gaining insight into the ultimate outcome for the Iraqi people. Public cravings for information about the war are virtually insatiable, from the administration's evolving strategy to achieve success to stories of the many Soldiers, Marines, Sailors, and Airmen executing their daily duties and responsibilities. To satisfy these growing appetites, the media has invested expertise and resources, often in the form of embedded correspondents, to capture and accurately portray events as they materialize.

Although many sensational "bad news" events seem to capture and hold the public's attention for lengthy periods of time, others less dramatic but potentially more important often go virtually unreported or seemingly unnoticed. These events seldom receive international attention as they usually do not depict "spectacular" insurgent-type activities, human suffering, and infrastructure degradation. According to CNN International correspondent Nic Robertson, "There is an awful lot of what might be construed as bad news here [Iraq], but it is the dominant information, it is the prevailing information."

However, in many cases, the "less-than-worthy-of-attention" events have a profound effect on the perceptions, attitudes, behavior, and allegiances of the most influential of all global audiences involved in Operation Iraqi Freedom (OIF). Iraqi citizens are closest to the truth and they are the "tip-of-the-spear" of unfolding events. It is through their eyes that the Government of Iraq (GOI) and the coalition are either working toward improvements and progress or destroying what little they had during previous times and under old regimes. Undoubtedly, influencing the Iraqi point of view is extremely valuable not only in a war of lethal engagements against terrorists and criminals, but in a war of contrasting and conflicting images.

Unfortunately, other than using limited psychological operations (PSYOP) and capabilities, the GOI and the coalition have spent relatively little attention, effort, and capital in communicating with the Iraqi population. For the coalition to make significant progress toward winning the information war, it needs to address two central issues: providing Iraqi media security and, more important, facilitating access to the most relevant stories-of-interest. Should the coalition continue to overlook these two fundamental issues, the insurgents will remain the dominant and most influential groups influencing the Iraqi population's perceptions and behavior.

#### **Breaking the Paradigm**

Doctrinally, public affairs (PA) focus primarily on informing internal, American, and international audiences. Although media pundits could debate whether or not the Iraqi population is considered part of the international media community, it is no secret that its

fledgling and limited pool of credentialed media does not share the same clout and respect as its international or American counterparts. All too often, Iraqi media is an afterthought, and many coalition commanders simply do not see the benefits or feel comfortable including them in their daily battlefield circulations. The language barrier and the need for dedicated media escorts and translators can be resource intensive, making it easier to exclude them when planning media operations. It is for these very reasons that Iraqi media has had limited impact and success in providing relevant news to the general Iraqi population on coalition and GOI improvements along all lines of operations. Breaking this paradigm requires careful thought and changes to the status quo; however, for those who are successful, the positive results will sway even the most stubborn of anti-GOI and anti-coalition critics.

### **Challenges Facing the Iraqi Media**

The Iraqi people are frustrated with being kept in the dark and desire immediate access to the many newsworthy events that are shaping their country and affecting their way of life. Nothing is more aggravating to Iraqis than receiving outdated news from Iraqi media sources, especially if it is a recap of what was already covered by the American or international media. However, before one can say that Iraqi media is truly nonexistent or ineffective, one must look at its recent past and how it is currently operating today throughout much of Iraq.

During Saddam's reign, there were few news outlets and all were government sanctioned, funded, and operated. The news outlets were all pro-government, and attempts to disseminate anything contrary were dealt with harshly. Once the coalition lifted these barriers, a plethora of free media outlets emerged to circulate an abundance of information, some political, some religious, and some unbiased toward any particular group or individual. The ensuing counterinsurgency became the sole focus of these newly formed media outlets; however, as the environment quickly deteriorated, holding an Iraqi media position became and still remains one of the most dangerous jobs in the world.

Modest estimates indicate 118 media deaths and more than 300 media casualties (many through targeted assassinations) in Iraq since March 2003. Most media were killed trying to convey to the world the rampant suffering of the Iraqi people under the hands of nefarious criminals and insurgents. Fox News Channel's Jerry Burke stated: "The media has a very difficult job. We have to cover some aspect of the story so we cover what we can cover without getting our anchors and our reporters blown up." Media correspondents have become targets solely because they portray stories of hope, progress, and offer a glimpse of Iraq's potential future as a stable and prosperous country. Despite the recent successes the coalition and the Iraqi security forces (ISF) have had, working for the Iraqi media is still dangerous. Fortunately, there are still many Iraqis who continue to pursue jobs with the media. It is, after all, an honorable, patriotic, and respectable form of employment for many Iraqis willing to put their fears aside in order to portray the reality of what is happening in Iraq, as well as to better inform their fellow neighbors and countrymen.

In various discussions with Iraqi media journalists, Task Force Marne learned that many were perturbed over their previous experiences working with the coalition. Their perception, to a large degree an accurate reflection of reality, is that they are not given the same opportunities as American or international media correspondents. The truth is the coalition has done very little to include Iraqi media as part of its daily battle rhythm. The amount of attention and, more important, access given to American and international media operating in Iraq on any given day far exceeds that of the Iraqi media. The number of journalists may be fewer for American and international media, but the amount of funding, logistics, and reach-back support to their home

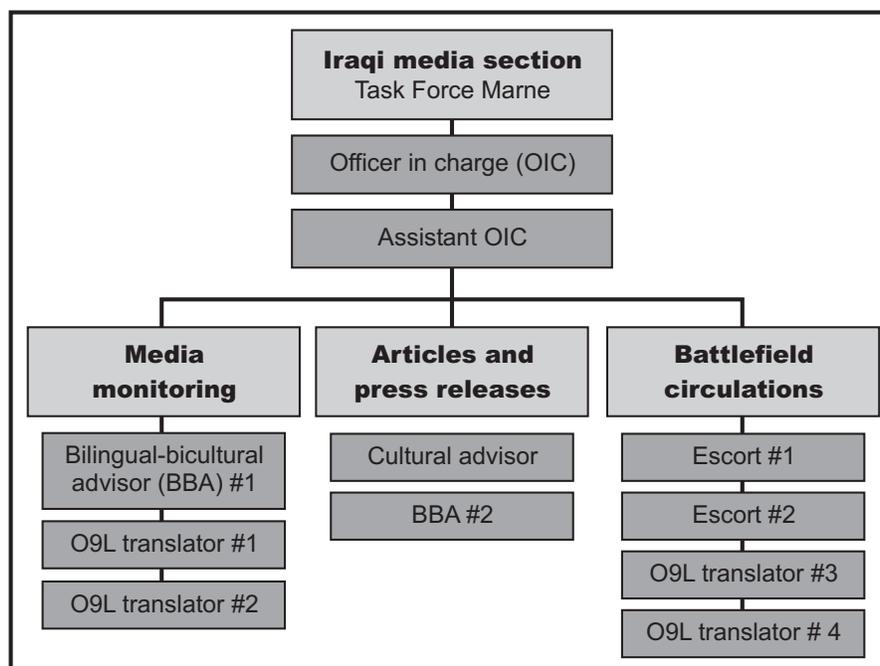
stations places Iraqis in a distant second place. Despite the significant differences, the Iraqi media is a potent shaper of Iraqi nationals' perceptions and attitudes.

The advantages to having Iraqi media cover noteworthy events and publish stories are numerous: placing an Iraqi face on published works, capturing the ground truth in near real-time, countering anti-GOI or anti-coalition propaganda, eliminating the language barrier when conducting interviews with other Iraqis, and gaining instant credibility and acceptance among the Iraqi population. By working together, the coalition has the ability to inform the Iraqi media about events that will most likely impact and shape the information environment. Having stories of progress resonating throughout Iraqi communities serves to mature relationships, achieve acceptance of coalition presence and actions, and strengthen the resolve and commitment to denounce terrorism. Two additional significant advantages for the coalition are the Iraqi media's unwritten guarantees that stories of interest will be accepted, unmodified, and aired in a timely manner and the elimination of a sometimes time-consuming PA approval process. Commanders who discount the capabilities and effectiveness of the Iraqi media and exclude them from daily coalition operations miss opportunities to make a positive influence on the Iraqi populace.

### **Dedicating and Aligning of Resources**

In the International Zone, Multi-National Force-Iraq (MNF-I) resourced a section dedicated to fulfilling coalition requests for Iraqi media embeds. The section, called the Iraqi media engagement team (IMET), serves as the operational linkage between Iraqi media and coalition forces. The IMET, with only three full-time individuals, is a component of MNF-I's larger Combined Press Information Center (CPIC), which focuses support to American and international media. As one can imagine, the IMET is an extremely busy entity; supporting every unit's request for Iraqi media embeds is often problematic. With the priority of support primarily to MNF-I and Multi-National Corps-Iraq (MNC-I), it is a challenge to schedule events for multiple Multi-National Division (MND) customers. Although the IMET is dedicated to working with all coalition organizations below corps-level, there is a significant shortage of credentialed and experienced Iraqi media personnel. This shortage stems primarily from a high level of media turnover, the current lack of coalition interest in Iraqi media, and difficulties associated with correspondents registering and obtaining credentials from the CPIC.

In order to capitalize on the capabilities and advantages of using Iraqi media, Task Force Marne established an Iraqi media section (IMS). The section consists of eleven personnel working in three departments: battlefield circulations, articles and press releases, and media monitoring.



**Figure 3-2-1: Iraqi media section organization**

Veering from current joint and Army doctrine, the IMS does not work for the public affairs officer (PAO), but rather falls under the direction and oversight of the effects coordinator (ECOORD). This non-doctrinal alignment serves two purposes: (1) It allows the PA detachment to focus its resources on its internal and American audiences, and (2) It provides the effects staff another “influencing” tool with which to better coordinate and synchronize PSYOP themes and messages. The IMS link to PSYOP is based strictly on the commonality of the target audience. Enabling the effects and PA elements to concentrate on separate audiences better focuses the command’s “influencing” and “informing” efforts to support the strategic communications plan and the nonlethal targeting process.

During the nonlethal targeting working group sessions, the ECOORD prioritizes and synchronizes IMS efforts with those of all other nonlethal contributors to include information operations, PA, civil-military operations (governance and economics), Iraqi Advisory Task Force, and staff judge advocate (rule of law).

MG Rick Lynch, commanding general of Task Force Marne, stated during a division-level strategic communications conference: “Targeting the American audience is a PA responsibility, and targeting the Iraqi audience is an effects responsibility.” MG Lynch, having worked for GEN George W. Casey during OIF III as the MNF-I strategic effects coordinator, knew very well the benefits of partnering effects with Iraqi media. By separating Iraqi media from PA, the CG established clear lanes of responsibility based on his past experiences working with these different audiences. Moreover, according to current Army counterinsurgency doctrine, the decisive battle is for the people’s minds; hence having effects responsible for engaging and using the Iraqi media greatly enhances the overall effectiveness of operational-level themes and messages.

Contrary to what many doctrine writers and military scholars might believe, this “out-of-the-box” approach has worked extremely well for Task Force Marne. As of this writing,

the IMS has conducted 38 battlefield circulations, brought Iraqi media crews to the story, and translated and disseminated more than 300 “good news” stories in Arabic. Market penetration for IMS-translated articles remains constant at more than 50 percent and battlefield circulations average more than 98 percent. When it is critical to get news out quickly, the IMS generates a media alert. For example, when coalition forces executed a warrant on a corrupt city councilman, the media alert advised the local population that an Iraqi judge had issued a warrant for the councilman’s arrest. Of note, the Iraqi media has picked up 100 percent of IMS’s media alerts. All efforts have served to increase market penetration while improving the Iraqis’ situational awareness of coalition and GOI initiatives and strengthening partnerships with concerned citizens groups (CCGs) throughout Task Force Marne’s operational environment. Although the IMS is separate from PA, it is held to the same standards; relationships between the IMS and the Iraqi media are founded on professionalism, credibility, and trust.

### **From Media Monitoring to Battlefield Circulations**

The IMS initially began as a two-person operation that focused solely on Pan-Arab media monitoring, also referred to as open source intelligence (OSINT). The media monitoring function, handled by Army O9 Lima Soldiers, was designed to obtain information on what the media was reporting (atmospherics) on the coalition and to identify any particular “slants” or trends to the reports. Having up-to-date insight on Pan-Arab and Iraqi sentiments and perceptions of the coalition serves to validate or adjust the division’s strategic communications plan.

The IMS’s media monitoring cell captures a majority of its atmospheric through viewing Iraqi and Pan-Arab television; reading various MNF-I, MNC-I, and independent media reports; and scanning the Internet. Every day the IMS correlates, analyzes, and provides all media monitoring information, to include stories particular to Task Force Marne, to the Division Commander for situational awareness.

With the addition of two personnel, the IMS expanded its mission to include developing, translating, and disseminating coalition-related stories to a host of Iraqi media outlets. The IMS quickly established itself as a credible and timely source for articles and information with 7 radio stations, 8 television stations, and 13 newspaper outlets. As the IMS continued to disseminate its stories to its Iraqi media contacts, the list quickly expanded as more journalists became aware of the quality and value of information the IMS was providing. Today, the IMS has contacts with 11 radio stations, 13 television stations, 27 newspaper outlets, and a host of media Websites. Additionally, the IMS established an exclusive contract with the very popular al-Sabah newspaper. This dedicated contract guarantees that Task Force Marne “high priority” stories of tactical and operational importance are disseminated to a large segment of the public.

The IMS regularly receives requests for military-type information, updates to developing stories of interest, and interviews. Stories and articles are published with full Task Force Marne attribution, leading to frequent unsolicited tips from concerned citizens on insurgent-type activity. Although the IMS is currently not staffed or equipped to accommodate television interviews, cross talk and leveraging of organic division-level PA capabilities adequately accomplish the mission.

In order for the IMS to effectively interact with the Iraqi media, it needed to first understand its unique organizational dynamics. Significant cultural and language barriers were only two of the many challenges. The right mix and amount of personnel resolved some early “growing pains”; however, having the training and expertise in media operations is a work in progress. Iraqi media personnel are no less demanding than American or international media. They expect the same

level of professionalism, cooperation, treatment, and courtesies. Knowing the media's concerns and quickly handling any issues that may arise can make the difference between a great media event and a complaint upon its completion. The IMS, in order to lessen the likelihood of mishap during execution of a media event, accompanies Iraqi media crews with dedicated military escorts and linguists. This procedure ensures Iraqi media crews are treated fairly and with respect while interacting with coalition forces throughout the event. It also keeps the Iraqi media crews on schedule, focused on the mission, and out of harm's way.

Another major IMS challenge is coordinating logistical aspects of battlefield circulations. Battlefield circulations are resource intensive; however, the payoff in media penetration is tremendous. Freedom of movement is currently limited throughout most of Iraq, and it is no small feat to get Iraqi media crews out to cover stories that the coalition wants highlighted. Delays with aircraft, tight security measures at the International Zone (IZ) and IMET, last-minute changes to missions, and occasional media cancellations cause frustration and inconveniences for Iraqi journalists and IMS escorts. The preferred and safest method for transporting media crews on battlefield circulations is using rotary-wing assets; however, there are times when ground convoys become a necessity. In either case, having detailed back-up plans usually alleviates much of the stress and disappointment of change while on the go. A typical battlefield circulation entails IMS escorts and translators flying from Camp Victory to the IZ in Baghdad to link up with the designated Iraqi media crew. From there, the team continues air travel to the forward operating base closest to the event. The requesting maneuver unit uses a personal security detachment to provide ground movement to the event. The mission is not complete until the IMS safely escorts the media crew back to the IZ and the escorts, in turn, return to Camp Victory.

For example the IMS conducted a successful battlefield circulation in al-Rashida, a small town southwest of Baghdad, which was previously an al-Qaeda safe haven. The local Sunni population had become tired of al-Qaeda militants freely roaming the area, attacking coalition forces along Route Malibu, intimidating peaceful citizens, and committing heinous crimes. The townspeople banded together and formed a CCG. They members manned several key intersections and checkpoints and kept vigilant watch over their neighborhoods day and night. Within a short period of time, the CCG was successful in forcing al-Qaeda out of the area. Since then, al-Qaeda has had no significant presence or activity in al-Rashida or along that portion of Route Malibu.

The IMS felt it important to capture this "good news" story as it highlighted the positive effect that CCGs have on preventing terrorism and securing neighborhoods. Additionally, this battlefield circulation allayed neighboring Shi'a fears that the coalition was arming Sunni CCGs. Task Force Marne also felt this story would encourage the Shi'a population to see the value in developing their own CCGs to assist in the fight against Shi'a extremism.

Having Iraqis report this "success" story underscores the importance of having an Iraqi face on vital messages supporting coalition efforts. The IMS escorted al-Iraqiya and al-Fayhaa television crews out to the site where they conducted multiple interviews with the CCG leaders and its citizens. The segments aired for several days on Iraqi television. The story highlighted Iraqi citizens of al-Rashida taking a stand against criminals and securing their neighborhoods. The battlefield circulation was so influential that al-Fayhaa produced a 15-minute special program on CCGs, which aired the following week. To keep the momentum going in the press, the IMS published several articles on the event and disseminated them to its Iraqi media contacts. Numerous Iraqi print and Internet outlets picked up the stories, indicating a significant public interest in CCGs. Since the airing of the special segment, other CCGs around al-Rashida have sprouted and today total approximately 8,000. Leaders from 2nd Brigade, 10th Mountain

Division, have reported a dramatic decrease in insurgent-type activity and equate this recent downturn to the involvement of the CCGs within its operating environment.

One of the greatest benefits of a battlefield circulation is putting an Iraqi face on the story; an Iraqi reporter talking to fellow Iraqis has a much greater effect on the Iraqi psyche than if the coalition told the story. Having representatives from the local government or ministries during the planning, building, and media event dramatically increases the impact of the interview. To ensure success, a goal of the IMS is to establish trusted relationships with the Iraqi media; however, this is a slow and long-term process. The vast majority of first-time Iraqi media journalists the IMS works with have little experience interacting with coalition forces. It is important to understand that Iraqis are constantly forming and refining their opinions of the coalition and its interaction with the populace. For this reason, it is important for the IMS and its escorts to do whatever is necessary to make the Iraqi journalists' initial experiences positive. Maintaining their levels of enthusiasm, optimism, and dedication in providing a valuable service to their nation is paramount to winning the war of images.

Another important factor during the coordination phase is to provide the designated media crews with as much information about the upcoming mission as possible. Of course, to ensure the safety of both Iraqi journalists and coalition soldiers, operations security measures are factored into each media event. When the IMS informs the Iraqi media members on what to expect, they are less likely to get upset should the mission parameters drastically change. The key to success in communicating with the Iraqi media and developing the battlefield circulation plan is to remain both optimistic and flexible.

### **Enlisting the Help of Experts**

The IMS could not function without the dedicated support of its four O9 Lima translators. These Soldiers are the workhorses of the section and support all three departments. There are times when the O9 Limas cover down on multiple tasks simultaneously. It is common for an O9 Lima to serve as a translator on a battlefield circulation in the morning, spend the afternoon coordinating events telephonically with the Iraqi media, and translating articles in the evening. Their insights into streamlining processes and offering recommendations have contributed immeasurably to the IMS's overall success.

To bridge the gap between Iraqis and the coalition and to better understand the cultural, religious, and ethnic differences that could potentially affect a good working relationship, the IMS acquired an Iraqi cultural advisor. This individual provided the important and necessary function of interacting directly with the various media outlets. Acting as the IMS's initial face, the cultural advisor was also charged with reviewing all stories and transcripts for proper translation and conformity with cultural sensitivities. Having an Iraqi cultural advisor communicating directly with the Iraqi media established the IMS's credibility and increased the media's willingness to partner on future events.

In addition to the cultural advisor and the four Army O9 Limas, the IMS hired two bilingual bicultural advisors (BBAs) to author and translate articles and serve as media analysts. By having BBAs on its staff, the IMS ensured that articles were written in such a fashion as to resonate acceptably among the target audience. Some English words, phrases, and titles simply do not translate into Arabic. Failure to recognize these subtle linguistic nuances has caused friction and misunderstanding in the past. For example, the term "foreign fighters" generated a considerable amount of negative feedback from the IMS's readership. To a majority of Iraqis, the term "foreign fighters" also refers to the coalition, hence the obvious misinterpretation. The

erudite eyes of the story writers and cultural advisor have greatly reduced these types of issues. They are also adept at preparing articles so the audience better understands the intent of a story.

By emphasizing issues the Iraqis find most interesting, the IMS increases market penetration and acceptance. Although large parts of coalition operations revolve around rebuilding and providing essential services, it is important that the IMS not overly advertise these acts. Iraqis understand the coalition is here to assist the GOI and its population, but they do not necessarily want to be reminded of all the coalition reconstruction efforts ongoing throughout their country. Also, where PA articles mention units and Soldiers by name, the IMS "Iraqifies" its articles for better translation and simplicity. Given the target audience, providing specific details on Soldiers and their backgrounds does little to enhance the IMS's stories. After all, the main goals of the IMS are to accurately portray the coalition's efforts, positively influence the Iraqi population, and to change any negative perceptions that may exist because of misinformation.

### **Teamwork and Communication**

The IMS does not operate autonomously from within the division headquarters. It works in conjunction with each of the brigade combat team's (BCT) ECOORDs to identify events worthy of media coverage. There are times, however, when the IMS plans events based on division-level input. This is the exception, not the norm. The BCT ECOORDs synchronize planning efforts with each of their maneuver battalions and nominate events for Iraqi media coverage. Once approved by the BCT commander, they develop a detailed concept of the operation (CONOP) plan and submit to the IMS for scheduling. Typical events planned for and covered by Iraqi media include school openings, combined medical engagements (CME), civil project completions, community leader interviews, and other events of general interest. In the event the IMS receives multiple CONOPs requesting media for the same day, requests are prioritized based on significance and supportability. Currently, the IMS can support two battlefield circulations per day. On several occasions during battlefield circulations, the Iraqi media crews were able to capitalize on other newsworthy opportunities, including interviews with concerned citizens and tribal leaders and "spur-of-the-moment" community events. The IMS carefully reviews each BCT's battlefield circulation request as it is not always a simple process to allocate media to particular events.

The IMS, working closely with the IMET, must also take into account certain religious considerations before assigning Iraqi media crews. Sunni reporters may not feel comfortable entering a Shi'a community or covering a Shi'a event and vice versa. Due to operations security requirements not to disclose exact locations prior to the events, correspondents, due to their religious affiliations, sometimes chose to cancel the day of the event. The IMS works diligently with the IMET to accommodate the Iraqi media's religious concerns and to prevent potential friction. This is especially crucial during Islamic religious holidays and the month of Ramadan. Additionally, some journalists, despite significant coalition force presence, perceive certain areas as simply too dangerous and will not support the mission under any circumstances. Some contentious areas that have frightened off Iraqi media are former al-Qaeda sanctuaries, areas with high levels of criminal activities, and areas with high numbers of extremist militias.

### **Continuing Progress**

The future for the IMS holds much promise for continued growth. However, expanding the IMS is dependent largely on two factors: changing coalition perceptions on Iraqi media, especially at the company through brigade-level, and increasing the fidelity of deliberate media planning. Commanders must embrace the reality that Iraqi media is a powerful "influencing" tool and should steer away from viewing it as a second-rate or "low-payoff" force multiplier. Coalition

forces should treat the Iraqi media on par with its American or international counterparts. Once the coalition recognizes the value and potential of Iraqi media, the IMS can better align and utilize its limited resources to support “high-payoff” events. In line with supporting high-payoff events, the IMS is currently exploring the feasibility of hiring independent Iraqi media correspondents and developing a sustainable network of informed journalists.

Using “out-of-the-wire” media facilitators will significantly reduce the expenditure of IMS resources in the form of translators and escorts and decrease the time required to provide Iraqi media coverage on the battlefield. Developing an external IMS Web page is another initiative that has merit. The IMS hopes to create a venue and repository for all its articles and media alerts on par with many of the current Pan-Arab media online sites. Public access to historical articles will allow the Iraqi populace to gauge forward momentum and progress within Iraq. Lastly, the IMS plans to offer a mobile media credentialing program to expedite vetting and registering potential Iraqi media journalists. Currently, this service is only provided by the CPIC and is often problematic and time-consuming. The IMS taking on this function will reduce CPIC involvement and spare Iraqi reporters from traveling long distances to reach the IZ. Additionally, the IMS will benefit by expanding its pool of Iraqi media contacts available for dispatch on future battlefield circulations.

As the coalition transitions its focus from security to governance and economics, the need for cooperating with Iraqi media becomes paramount. Having a credible and capable “influencing-tool” with which to convey GOI and coalition successes will greatly enhance the visibility of the stabilizing and rebuilding efforts within Iraq. The IMS has shown the benefit of engaging and partnering with the Iraqi media. Reaching out to the populace through the Iraqi media has shown an overall acceptance and understanding impossible to achieve with PSYOP assets alone. The sheer market penetration and continuous dissemination of factually-based stories by Iraqi media enhances the local population’s awareness of the labors of both the GOI and coalition. Stories of reconstruction, partnership, and progress show the Iraqi populace there is more transpiring in Iraq than combating insurgents. The IMS, through continued partnership with the Iraqi media, is increasing the level of optimism throughout Task Force Marne’s area of operations. Once governance and economics become Task Force Marne’s main effort, the IMS will, no doubt, experience a sharp increase in the number of requests for Iraqi media coverage. Telling the story in true Iraqi fashion will continue to have a positive influence on the population while increasing its support for the GOI and its efforts to unify the country. Task Force Marne’s IMS is optimistic that the future holds much promise for Iraq. The IMS will continue to forge new ground in promoting Iraqi media as a competent and value-added entity while assisting in telling the story of a stable, prosperous, and enduring Iraqi environment.



## Chapter 3

### Section III

#### Becoming an Effects-Based Communicator

##### LTG William B. Caldwell, IV

**Note:** Based on an address by LTG William B. Caldwell, IV, Commander, Combined Arms Center to the Worldwide Public Affairs Symposium, March 2008.



**Figure 3-3-1: LTG Caldwell is interviewed by Iraqi media**

You should understand that a couple of years back, when I got the word that I was going to be the primary spokesman in Iraq my initial thought was, “I’m an operator and I’m really not interested in being a game show host.”

But the 13 months I spent as the spokesman in Iraq not only changed me as a communicator, but changed me as a leader more than any other job I have had in the Army.

I have gained a real understanding and respect for the difficulty of the job the Army continuously asks you to do. Telling the story of the United States Army and our Soldiers is not only a noble calling, but in today’s information environment, it is essential to the success of our mission and to the overall success of our nation in this era of persistent conflict.

I want to speak about what it takes to be **effects-based communicators**. In doing this I hope to say a few things today that will challenge you to think outside of your traditional public affairs officer (PAO) skill set. What I mean is this—if your idea of being a successful public affairs officer can be boiled down to writing news releases, visiting the local mayor, dusting off the occasional responses to query, and recycling the plan for last year’s Fourth of July celebration, then you are obsolete. And if we, the Army’s senior leaders, do not see our public affairs professionals as an essential combat multiplier, then we are stuck in the mentality of the ‘90s and will also quickly become obsolete.

There is a reason that commanders like me have reached out almost desperately to understand the strategic communication concept. Today’s commanders understand that **reactive** public affairs provides no real added value toward the accomplishment of our missions. In order to be

effective in our operations, we need the ability for our communications to be **proactive** or as we call it, “effects-based communication.”

Today I want to share four tools with you for your public affairs toolbox that I feel will help you become an “effects-based communicator.”

### **Tool 1: Be an Active Listener**

If you think back to your basic communication theory classes, you will remember that in order to communicate you must have a sender, a receiver, and that you split about half of your time sending a message and the other half receiving a message.

This means that to be effective communicators, we need to dedicate 50 percent of our communication effort to **active listening**.

Do not underestimate the importance of stopping to listen. As a PAO, you need to know what the word is on the street. Listen to what is being said and read what is written about your organization. From listening, comes understanding, because you need to understand your audience if you are going to be able to effectively communicate to them.

This concept of listening should also include reading—consume everything that you lay your hands on to gain a more well-rounded view of the topics that affect your command.

In an attempt to be a better listener, every now and then, you need to un-tether yourself from your e-mail. Step away from the desk, and go out and listen to others, both inside and outside of your organization. That is why I take my director for strategic communications everywhere with me.

Of course, it is not enough to just listen, but you need to capture and use those best practices and lessons learned. For instance, as part of our Combined Arms Center engagement strategy, we recently took a trip to New York City, arguably the center of the news media universe. But we made it a point to spend half of our time listening and learning. Following the New York City trip, my team returned with new ideas and corporate best practices that they used to restructure our StratComm Office. Our new organizational structure more closely replicates a collaborative organization as opposed to the traditional hierarchical structure.

So being an active listener is critical.

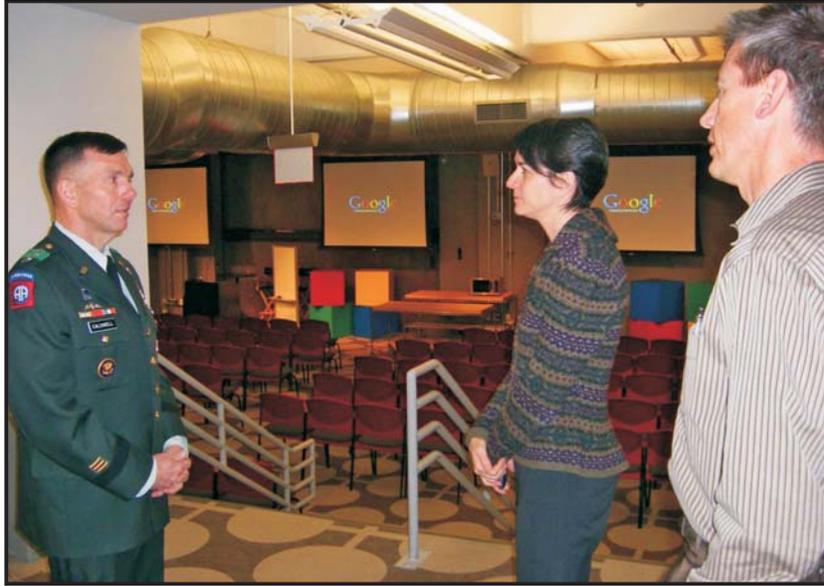


Figure 3-3-2: LTG Caldwell visits with the staff of Google

## Tool 2: Be an Adaptive Learner

This leads us into the second tool I believe you need in your public affairs toolbox, which is to be an adaptive learner.

To be an adaptive learner implies continuously assessing your strengths and weaknesses and recognizing the most effective means to improving your ability to become a better communicator. This is not an easy or painless process. Much of this learning results from painful lessons and new and unfamiliar experiences.

Experiences like those that I had when the 82nd Airborne was called in to conduct relief efforts in New Orleans following Hurricane Katrina. I have to admit it was uncomfortable and unfamiliar terrain. However, I had a great PAO who encouraged me and prepared me to operate in this foreign environment (yes, foreign even in the United States). What made her effective was her ability to help me build on my strengths, recognize my weaknesses, and **learn** from each engagement. Although it was uncomfortable at first, the more engagements I performed, the more I was able to adapt to new and changing environments.

These experiences and those from Iraq were so important and influential to me that I felt it was necessary to build opportunities for our majors at the Command and General Staff College (CGSC).

Today, every CGSC student must conduct at least one media engagement, one public outreach, and must post at least one blog. Notice I said “at least.” What I would hope is that they see the tremendous benefit of doing these engagements and learn from each opportunity to share their story.

What we are finding are these students are embracing their abilities to be adaptive learners and are better able to articulate our Army’s story.

### Tool 3: Be a Creative Thinker

Being an adaptive learner and an active listener are only part of the equation. With so many messages floating around so many mediums, how do we as an Army get our message across? One of the keys to reaching your target audience is my next tool for your toolbox. You need to be a **creative thinker**.

As an effects-based communicator, you need to understand and be able to articulate to your boss, “What is the desired end state?” of every planned engagement. One of the questions my team asks me during preparation for a media visit is, “What is the headline you want to see in tomorrow’s newspaper?” Thinking this way helps focus me in on those messages that will hopefully provide the context that will help frame the way the story is told.

Another aspect of creative thinking is understanding whom you are talking to. When you are talking to the *New York Times*, you should not be talking to the reporter but instead be talking through the reporter to your audience.

There is no better example of this than my recent experience with “The Daily Show.” When we were invited to share about Field Manual (FM) 3-0, *Operations*, on “The Daily Show,” I must admit, I was less than convinced that we should do it. It was not until the Army’s chief of public affairs reminded me of Jon Stewart’s primary audience, an audience of men and women between the age of 17 and 35, the most attractive advertising demographic and, **coincidentally**, the same demographic as our Soldiers. He reminded me that our Soldiers more than anyone needed to understand the importance of FM 3-0, and this clearly was a golden opportunity to reach them.



**Figure 3-3-3: LTG Caldwell and Jon Stewart during the taping of “The Daily Show”**

Not only is it important to understand our audience in America, but it is also critically important to understand the audience where we are operating. For example, in Iraq, I believe we had surrendered the information battlefield to the enemy in the Arabic media. When I arrived, we were doing two separate news conferences each week. One on a Wednesday for the Western press and one on Sunday, several days later for the Arabic press using the same news information for both. Because of this realization, we decided to think creatively and seek alternate methods to reach out to this key and essential audience.

Along with developing creative ways to deliver our messages and understanding the audiences we are delivering them to, we need to understand that traditional news outlets are losing valuable air time to new media outlets. Blogs, YouTube, Wikipedia, and podcasts are frequently becoming the news source of choice for many people. As effects-based communicators, you need to be in tune with this new media. Embrace these changes and learn to creatively and actively deliver our messages using these new communication portals.

#### **Tool 4: Be a Global Communicator**

Tied closely to this discussion on new media and blogging is my fourth and last tool for your toolbox today—you need to be a **global communicator**.

As Soldiers, we understand the maximum effective range of our primary weapons systems and exactly what that means.

With the emphasis on information as an element of combat power, we need to understand that, the maximum effective range of a message is unlimited. All communications have the potential to be global, and we need to expect that our messages will be heard and understood in multiple countries, in many different languages, and more important, through many various cultural filters. Always think through the implications of your messages and how they will be interpreted on a global scale. Remember that in many parts of the world, an American Soldier will be the only contact that many people will have with our great nation. Where before we had the “strategic corporal,” today we have the “strategic private.”

A tactical action on the battlefield today can have strategic consequences in living rooms tomorrow. Understanding this dynamic is critical to how we operate in this “information battle space.”

We also must understand the power of language and the words we choose to say.

Understanding how to communicate globally also implies we must be culturally astute and understand the importance of training and transitioning not only combat forces, but also spokespersons for the countries we are assisting. These spokespersons, much like you, can become combat multipliers if resourced, trained, and empowered properly.

We saw this first hand in Iraq when training the Government of Iraq (GOI) communication teams. It was actually easier to get a GOI rep for these new conferences than a State Department rep.

This is why it is imperative that we take a whole of government approach not only for contingency operations, but also for strategic communication if we truly want to be effective global communicators.

If we are to take this comprehensive approach, then I can see a time in the future when perhaps in the Defense Information School there is a metamorphosis into something like the **National Center for Public Affairs and Public Diplomacy**, allowing our government to train and educate to speak with one voice. Simply put, “many messengers, but one message.”

In closing, never before in the history of our country has your vital mission been more important than it is today. Never before have the people in this room had the ability to impact and protect our national interests more than you do today.

## **CENTER FOR ARMY LESSONS LEARNED**

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To seize this opportunity, your call to action today is to transform yourselves to become effects-based communicators, who are **active listeners, adaptive learners, creative thinkers,** and **global communicators.**

## Chapter 4

### Section I

#### Information Operations, United States Strategic Command, and Public Affairs

**LTC Pamela Keeton, U.S. Army Reserve, Retired, and MAJ Mark McCann**

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In 2004, watershed events (successful registration of more than 10 million voters, a successful presidential election, and the president's subsequent inauguration) gave rise to a fledgling democracy in Afghanistan after more than 25 years of war and violence. Replacing the rule of the gun with the rule of law signaled the end of an era, gave hope to millions of Afghans who had lived through years of oppression.

These events also signaled a change in military strategy in Afghanistan from combat operations and counterterrorism to counterinsurgency, reconstruction, and development. This shift required Combined Forces Command-Afghanistan (CFC-A) to rethink how it would meet the challenges of the new political, military, diplomatic, and economic environments. The command's operations required close coordination with Afghan government agencies, the U.S. Department of State, and the North Atlantic Treaty Organization. An effective information campaign was critical to the command's success.

The command found itself in a public affairs (PA) campaign to maintain local Afghan and international support to help rebuild an Afghanistan ravaged by years of war and establish the country's new democratic government. Information operations (IO) were critical in discrediting insurgents and what remained of the Taliban to ensure Afghanistan would never again become a cradle for despots or a haven for international terrorists.

#### Theater-Wide Interagency Effects

To approach the diverse requirements of running a communication operation in this strategic environment, CFC-A created a new organization called Theater-Wide Interagency Effects (Effects) to synchronize communications-based PA, IO, psychological operations (PSYOP), and political-military operations. Effects was designed to generate nonlethal effects in support of coalition military operations. One might compare the organization to the Strategic Communications Office that provides the same type of support for operations in Iraq.

Both organizations use nonlethal IO effects to help commanders achieve operations success. Both have generated discussions about a "crisis of credibility" that PA might encounter if and when the media discover how closely it is aligned with IO and PSYOP.

An initial challenge for public affairs officers (PAOs) within the Effects organizational structure was to gain access to the commander for guidance and directives. Traditionally, PAOs serve as special staff officers and report directly to the commander. However, within the Effects organization, reporting can get lost because of the additional layers of bureaucracy. The organization was also not without risk, because by aligning PA so closely with IO and PSYOP, there was a chance PA would lose its credibility with the media.

### **The Role of Public Affairs**

The importance of strategic communications creates a challenge for commanders to develop strategies, processes, and organizations that lead to effective communication. In Iraq and Afghanistan, commanders created new organizations to better synchronize communications and achieve certain desired effects in operations. Some commanders modeled their communications operations after those the Pentagon envisaged for the Office of Strategic Influence. This stirred debate between the PA, IO, and PSYOP communities about how to create a synergy that leverages the effects of all three into a coordinated, synchronized, comprehensive communications effort. To do so, they had to answer three questions: What, if any, role remains for PA? Where should PA fall within the organization? How can PA be made more effective?

In theory, the idea of merging PA, IO, and PSYOP appears to make sense; however in practice, the goals of these three functions are quite different. PA is charged with informing the public with factual, truthful information, while IO and PSYOP seek to influence their audiences to change perceptions or behavior.

Doctrinally, IO and PSYOP functions have been aligned with operations within a headquarters. PA has always been an independent special staff section that reports directly to the commander. PA is the voice of the commander and a conduit of information between the command and internal (command information) and external audiences, including but not limited to the media. The function of PA is to provide factual, timely information, not to affect public opinion by leading grassroots efforts or engaging in lobbying. PA does not exist to create news or overtly influence public opinion; it exists to provide factual information so its audience can make informed opinions.

In the Global War on Terrorism, information is almost as powerful as bullets and bombs. Winning this war is as much about winning the trust and confidence of the people in Afghanistan, Iraq, and throughout the world as it is about winning tactical battles on the ground. Therefore, commanders must tailor IO to achieve desired effects with critical audiences and help ground commanders achieve success in tactical operations. However, they must take care not to use the news media to effect change in people. This is not the media's purpose; however in today's global information market, there is a growing temptation to do just that. The important lesson here is that in attempting to win the information battle, the military must ensure it does not lose the strategic war. In trying to win people's trust and confidence, it must not lose the people—whether they are the ones it is trying to affect or whether they are the ones it must rely on for support.

### **Coordinating Public Affairs, Information Operations, and Psychological Operations Functions**

The challenge is to coordinate PA, IO, and PSYOP functions so each maintains its own integrity while maintaining credibility with the media. A problem arises, however, when PA and IO are aligned too closely. The basis of information used for IO purposes might be truthful, but it might also be manipulated to achieve an outcome. And, if the altered information cannot be substantiated with verifiable facts, credibility comes into question. For instance, while in Afghanistan, an IO officer claimed through the news media that the Taliban was "fracturing." The media asked for specific facts to substantiate the claim, but the substantiating facts were not releasable and, therefore, not verifiable. When the Taliban denied the claims, the media became incredulous, and the people were left to decide whom to believe. This is only one example, but if this action is repeated multiple times, the result could be the perception that the United States is no more credible than the enemy.

To avoid a crisis of credibility and to maintain the command's integrity, the PAO should always report directly to the commander and be free from outside influence. Rather than create new structures to combine PAO, IO, and PSYOP, it is best to adhere to established, proven doctrine. While the PAO maintains integrity by reporting directly to the commander, IO and PSYOP should remain in the realm of the operators.

U.S. Central Command (CENTCOM) headquarters appears to be creating a synergy among the three functions without upsetting the natural balance. Rather than creating a new organization to coordinate and synchronize communications, CENTCOM is using a committee approach to bring the right people together to develop plans and coordinate efforts.

For most PAOs, the debate would end here. But for those who have lived during "real world" operations, separating PA, IO, and PSYOP will not solve the challenge of communicating strategically using all the resources available to the commander. So how do commanders better synchronize all of the communications assets at their disposal? One way is to study and emulate industry.

Leading a strategic communications operation takes educated, experienced, seasoned communicators. In the civilian world, whether for political campaigns or for consulting or conducting business, those looking for leaders for important or strategic communications programs seek seasoned communications professionals with the requisite education, industry contacts, and years of experience. The Army tends to label senior PA and communications personnel as generalists and assigns people with virtually no communications education, training, experience, or contacts to lead the Army's communications operations.<sup>1</sup>

A report from the Defense Science Board on strategic communications notes that "strategic communications requires a sophisticated method that maps perceptions and influence[s] networks, identifies policy priorities, formulates objectives, focuses on 'doable tasks,' develops themes and messages, employs relevant channels, leverages new strategic and tactical dynamics, and monitors success."<sup>2</sup> A generalist, even with U.S. Department of Defense schooling or training with industry (TWI) experience, is not qualified to lead a strategic communications effort. Becoming a strategic operator/communicator takes time, training, and years of practical, relevant experience, and it requires officers who seek nontraditional tracks and are groomed and promoted in the military. To this end, the Army PA community has not achieved the level of respect afforded other specialists and might soon find itself subsumed within the larger, nebulous community of strategic communications.

### **Training Skilled Communicators**

A second key point is that one or two jobs in PA does not make one a strategic communicator. Commanders are quickly frustrated when their PAOs do not have the experience, skills, and knowledge to run PA operations in a strategic environment. Understanding cause and effect, building effective international press operations, dealing with multinational and international agencies, and managing a large PA staff requires an officer's leadership qualities, a campaign manager's political acumen, and a senior executive's vision.

Creating a career model for PAOs based on competencies inevitably leads to dealing with a rigid Army culture. PAOs simply have not achieved the level of importance bestowed on lawyers, doctors, nurses, or even signal officers. Their perceived inferiority perpetuates the erroneous idea that any officer from any background can do the job of strategic communications.

While writing this article, I solicited opinions about PA from others, including senior officers. The attitudes I encountered were often surprising. When the topic of growing PA leaders among PAOs arose, one senior officer replied bluntly that one does not normally find the Army's best and brightest officers in PA, so they normally do not make good leaders. He also said the best PA chiefs have come from outside the ranks of PAOs. He might be right, which is why it is incumbent on the PA community to develop officers who have the skills, acumen, and experience to lead the Army's strategic communications efforts.

Producing leaders with the right skills at the right levels for strategic communications during the Information Age requires more and varied training opportunities, improvements in leader development, and better resourcing of all communications-related operations. The PA community must take a greater role in providing opportunities for its officers to grow and develop into seasoned, experienced communicators. PAOs must have the opportunity to serve in positions that provide increased levels of challenge and experience—from division through corps and up to major command. The Army can provide such opportunity by alternating PAOs through operational jobs like command of a PA detachment or a mobile PA detachment, service as division or corps staff PAOs, and duty in major theater commands. Deployments as PAOs are essential to understanding how the system works and where it can be improved.

### **Training with Industry**

PAOs also must have greater opportunities to work with larger media organizations and with firms that have broader PA practices, not just straight public relations. This step requires rethinking and opening up the TWI program to a larger pool of officers, not just the four or five people selected each year. TWI should focus on giving officers a broader understanding of strategic communications and how they can apply it in support of organizational goals.

Officers' TWI experience will provide better benefit if they focus more on selling ideas and issues to important constituencies than selling cans of cola to teens or learning how the media operate. Officers attending advanced civil schooling should focus on mass communications, journalism, advertising, and political science to better help them understand the areas that make up the broad spectrum of communications and to gain the insights they will need to deal with the myriad challenges strategic communicators face. While this might be too much to ask, it is still worth considering if the trend continues toward better strategic communications operations Army-wide.

Another radical approach might be for the Secretary of the Army to appoint a civilian PA chief and a military deputy, similar to the organizational construct of the Army's Acquisition, Logistics, and Technology Office. The civilian chief should be an experienced communicator who can develop and lead the overall program, while the uniformed deputy leads the schools and serves as the branch proponent. A combination of uniformed military, Department of Army civilians, and consultants from the public relations industry would carry out the functions within PA, provide valuable strategic and tactical counsel, and be the arms and legs needed to reach the various audiences interested in defense.

While organization and training are important in strategic communications, another critical point should be its focus. Any strategic communications effort should begin with a plan that clearly states communications goals, strategies, and tactics and assigns roles and responsibilities between the staff and supporting elements.

If commanders are frustrated by communications, they should take the longer view, as well as a few lessons from industry rather than create new bureaucracies and chase after experimental

processes. To win the information and communications war, the Army must maintain doctrinally sound structures while improving processes and investing in a new generation of smart, experienced communications leaders who are able to tap into outside resources as missions dictate.

**Endnotes**

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## Chapter 4

### Section II

#### Massing Effects in the Information Domain

**LTG Thomas F. Metz with LTC Mark W. Garrett, LTC James E. Hutton,  
and LTC Timothy W. Bush**

**Note:** Previously published in *Military Review*, May–June 2006, and reprinted with permission.

. . . I say to you: that we are in a battle, and that more than half of this battle is taking place in the battlefield of the media. And that we are in a media battle in a race for the hearts and minds of our Umma.<sup>1</sup>

–*Ayman al-Zawahiri to Abu Musab al-Zarqawi, 9 July 2005*

If I were grading I would say we probably deserve a “D” or a “D-plus” as a country as to how well we’re doing in the battle of ideas that’s taking place in the world today.<sup>2</sup>

–*Secretary of Defense Donald Rumsfeld, 27 March 2006*

In 1995, the Department of the Army, Forces Command, and the Training and Doctrine Command began a joint venture called Force XXI, which focused on how information-age technology could improve the U. S. Army’s war-fighting capabilities. While the Army conducted many experiments with information technology and theory, the Task Force XXI (TFXXI) and Division XXI Advanced Warfighting Experiments (AWE) were the capstone events of this venture. More than 70 initiatives were reviewed in the TFXXI AWE, which culminated with the 1st Brigade Combat Team (BCT), 4th Infantry Division’s (4ID) National Training Center rotation in March 1997 at Fort Irwin, CA.

At the heart of this experiment was the near real-time knowledge of the location of friendly units down to individual vehicles and, in some cases, individual Soldiers. The experiment proved that knowing “where I am and where my buddies are” is powerful information for a combat leader. Leaders at all echelons became convinced that information-age technology would help Soldiers, leaders, and units become much more capable.

Post-AWE, the Army decided to reduce its combat power in combat and combat sustainment units. The Army has not fully exploited the available technology, especially in the domain of information and knowledge management operations.

#### **Information Operations in the Advanced Warfighting Experiments**

After graduating from the U. S. Army War College and serving as a division G3, brigade commander, and division chief of staff, I was assigned to the Training and Doctrine Command with duty at Fort Hood, TX, in the 4ID to support the Force XXI Joint Venture. Although I had no background in information technology or acquisition experience, I was involved with the preparation, execution, and after-action reviews of the TFXXI AWE and the preparations for the Division XXI AWE.

In the summer of 1997, I was assigned as assistant division commander for support of 4ID. As I took on this assignment, I was optimistic that the results of the Division XXI AWE would support what we had learned with the TFXXI AWE and that the Army would continue to

aggressively pursue applying information-age technology to improve war-fighting capabilities. Although I lacked a technical background in information technology, I was confident that we were only beginning to understand the potential improvements to warfighting. I believed that funding, developing, understanding, and maturing these capabilities were certainly going to be challenging. I was excited about their prospects. However, I was not prepared for the management of information operations (IO).

Shortly before the Division XXI AWE, an objective was added to the experiment, focusing attention on IO. Because the simulation that would drive the Division XXI AWE was not designed to train this new aspect of warfighting, a “Green Cell” was established that would inject information operations events. MG William S. Wallace, commanding general of the 4ID at that time, gave me the task to manage this new IO challenge.

I wasted no time gathering all I could find on the subject of IO and began to study it. At this stage of the division’s preparations, standing operating procedures, battle rhythm, and command post drills were well established. Adding IO at this late date seemed to be a good idea added too late. Nevertheless, in the short time available, I learned as much as I could about the five disciplines that make up doctrinal IO: psychological operations (PSYOP), deception, operations security (OPSEC), electronic warfare (EW), and computer network operations (CNO).

### **Information Operations Importance in Iraq**

Although I do not think we enhanced the AWE by adding IO, the opportunity to focus on this new doctrine did pay dividends six years later when, as the commanding general of III Corps, I found myself preparing the corps headquarters to deploy to Operation Iraqi Freedom. Although IO doctrine had not changed over those six years, its importance to a successful campaign in Iraq and to the Global War on Terrorism was crystal-clear to many in and out of uniform.

On 1 February 2004, III Corps relieved V Corps. LTG Ric Sanchez remained the commander of Combined Joint Task Force-7, and I became his deputy. Over the next 13 months, 5 months as Sanchez’s deputy and 8 months as the commander of Multi-National Corps-Iraq (MNC- I), the staff, subordinate units, and I gained a healthy respect for IO and knowledge and perception management, primarily because the enemy was better than the U.S. Army in operating in the information domain, certainly in perception management. Although little has formally changed in IO doctrine, many leaders, both friends and foes, understand its awesome power. So is the U.S. Army not the best at IO as it is in so many other areas? Where is its initiative? Where is its offensive spirit?

In April 2006, with the help of the Battle Command Training Program (BCTP), III Corps conducted a constructive simulation to train the headquarters of the 1st Cavalry Division (1CD) as it prepared for its potential return to Iraq. As the exercise director of this Warfighter, I was disappointed at what little progress had been made in IO. The capabilities to move information not only around the battlefield, but also around the world have grown exponentially; IO’s importance grows daily; and our enemy, who recognizes that victory can be secured in this domain alone, has seized the opportunity to be the best at operating in the information domain.

The Green Cell had matured over the eight years since the Division XXI AWE, and although its formal objective for the 1CD’s BCTP Warfighter was to drive IO, it spent little time in the five disciplines of doctrinal IO. It did, however, spend time helping division headquarters prepare for the perception of the war it might face in Iraq—regretfully by being reactive instead of proactive.

I am absolutely convinced that we must approach IO in a different way and turn it from a passive war-fighting discipline to a very active one. We must learn to employ aggressive IO. We cannot leave this domain for the enemy; we must fight him on this battlefield and defeat him there just as we have proven we can on conventional battlefields.

### **The Current Information Situation**

In an open letter to President George W. Bush published in the January 2006 issue of the *Armed Forces Journal*, Joseph Collins, a former Deputy Assistant Secretary of Defense for Stability Operations in Bush's administration, predicted that "[i]f our strategic communications on Iraq don't improve, the strategy for victory will fail and disastrous consequences will follow."<sup>3</sup> The U.S. military is not consistently achieving synergy and mass in strategic communications (IO, public affairs [PA], public diplomacy, and military diplomacy) from the strategic to the tactical level, but blaming the IO component for the overall situation is too convenient and too narrow. The perception that IO should shoulder the blame is based on expectations that are beyond the doctrinal charter or operational capabilities of IO as currently resourced. The collective belief is that the Army lacks the necessary skills, resources, and guidance to synchronize IO in order to achieve tangible effects on the battlefield.

Further complicating efforts in the information domain is the fact that units are facing an adaptive, relentless, and technologically savvy foe who recognizes that the global information network is his most effective tool for attacking what he perceives to be the center of gravity—public opinion, both domestic and international. The enemy is better at integrating information-based operations, primarily through mass media, into his operations. In some respects, U.S. forces seem tied to legacy doctrine and less than completely resolved to cope with the benefits and challenges of information globalization and too wedded to procedures that are anchored in the Cold War-Industrial Age.

Nevertheless, there appears to be an emerging recognition among warfighters that a broader and more aggressive, comprehensive, and holistic approach to IO—an approach that recognizes the challenges of the global information environment and seamlessly integrates the functions of traditional IO and PA—is required to succeed on the information-age battlefield. Furthermore, a clear need exists for strategic and operational commanders to become as aggressive and as offensive-minded with IO as they have always been with other elements of combat power and war-fighting functions—movement and maneuver, fire support, intelligence, and so on. Given the follow-on successes of XVIII Airborne Corps and the current success of V Corps, units are clearly making progress, but they still have much to do to ingrain these advances into the institutional structure.

Examples abound of failures to mass effects and leverage all of the available tools in the information domain; likewise, units have effectively bridged the gap between IO and PA to achieve integrated full-spectrum effects. Comparing Operation Vigilant Resolve and Operation Al-Fajr clearly illustrates the power of an aggressive, holistic approach to integrating IO into the battle plan. A careful study of IO in support of Operation Al-Fajr suggests three imperatives for the future of full-spectrum operations:

- The successful massing of information effects requires the commander to articulate his intent clearly for the integration of all the available elements of operations in the information domain into the battle plan.
- The successful massing of information effects requires precise and disciplined execution from shaping operations through exploitation.

- Commanders at all echelons must serve as the bridge across the doctrinal gap between IO and PA in order to synchronize efforts in the information domain. This step is the only way to achieve the intended effect.

### **Information Power**

In April 2004, in response to the murder and desecration of Blackwater contractors in Fallujah, coalition forces led by the I Marine Expeditionary Force (I MEF) launched Operation Vigilant Resolve, an assault to restore control of Fallujah. In spite of the superior combat power of I MEF—in leadership, movement and maneuver, and fire support—the operation failed because operations in the information domain were not integrated into the battle plan; the warfighter-on-the ground was not given the best opportunity to achieve a decisive victory. Steps to prepare the information battlefield, including engaging numerous and varied Iraqi leaders, removing enemy information centers, and rapidly disseminating information from the battlefield to worldwide media, were not woven into the plan.

U. S. forces unilaterally halted combat operations after a few days due to a lack of support from the interim Iraqi Government and international pressures amid unsubstantiated enemy reports of collateral damage and excessive force. Marines won virtually every combat engagement throughout the battle and did so within the established rules of engagement. The missing element was an overall integrated information component to gain widespread support of significant influencers and to prepare key populations for the realities of the battle plan. Without such advance support, the finest combat plan executed by competent and brave Soldiers and Marines proved limited in effectiveness. The insurgent forces established links with regional and global media outlets that had agendas of their own. The failure to mass effects in the global information sphere proved decisive on the battleground in Fallujah.<sup>4</sup>

### **Raising the Information Operations Threshold**

As the summer of 2004 passed and the Fallujah brigade experiment failed, it became imperative that the city's festering insurgent safe haven had to be removed. Planning began for Operation Al-Fajr, an assault to decisively clear Fallujah of insurgent activity. A key task for MNC-I planners was to ensure that the information defeat of Vigilant Resolve was not repeated in Operation Al-Fajr. Accordingly, they focused planning to avoid replicating Vigilant Resolve and to prevent the worldwide media clamor and international public condemnation that would negatively impact operations.

To articulate a clear intent in the information domain, planners developed "the IO threshold." Its purpose was to enable the MNC-I commander to visualize a point at which enemy information-based operations (aimed at international, regional, and local media coverage) began to undermine the coalition forces' ability to conduct unconstrained combat operations. As Operation Vigilant Resolve proved, the enemy understands the idea of an IO threshold. He is capable of effectively using the global media to impede operations by creating the perception that combat operations are indiscriminate, disproportionate, and in violation of the rules of war.

Using the commander's intent for massed effects in the information domain as expressed in terms of the IO threshold, planners illustrated to subordinate commanders that they had to conduct lethal shaping operations underneath the IO threshold; that is, they could not remove a city block to prepare the battlefield because such an act could create negative effects in the information domain. Any resulting negative international and local media coverage could impair the conduct of the overall campaign, as had happened during Operation Vigilant Resolve.

Planners used the same concept to brief the operation to Multi-National Force-Iraq (MNF- I) commander GEN George Casey and to convince him that when I MEF executed the decisive operation, crossing the IO threshold could not distract the division from its tactical and operational objectives. Once across the threshold, the division planned to achieve success in days and hours.

Using this intent as a guideline, MNF-I, MNC-I, and Multi-National Force-West (MNF-W) developed courses of action to mass effects in the information domain, thereby raising the IO threshold and creating additional “maneuver” room for combat operations in Fallujah. They deliberately countered enemy information campaigning; planned and executed IO shaping operations; and executed carefully planned senior leader engagements, military diplomacy, and public diplomacy activities. Because of these synchronized, integrated, and complementary actions, they were able to mass information effects and build a strong base of support for combat operations in advance of the operation; in other words, they were able to raise the IO threshold by preparing key influencers and agencies for the impending operation.

This offensive mindset and aggressive massing of effects resulted in two additional complementary effects: (1) MNC-I placed additional pressure on the enemy throughout Iraq through the elimination of widespread support for his activities, and (2) Decision makers were prepared for the pending operation and given the necessary information to prepare their constituencies for the operation.

### **Information Operations in Operation Al-Fajr**

As with other operations, massing effects in the information domain requires disciplined execution by leaders, Soldiers, and staffs at all echelons. In Operation Al-Fajr, this meant precise, painstaking execution of all the core elements of traditional IO, as well as other elements of combat power that had information implications. Doctrinal IO—PSYOP, deception, OPSEC, EW, and CNO—played a significant role in shaping operations. Fallujah became a textbook case for the coordination and use of the core elements of IO capabilities in support of the tactical fight.

**Deception and OPSEC.** MNF-I, MNC-I, and MNF-W used deception and OPSEC to conceal the buildup of forces north of Fallujah. They attempted to focus the enemy’s attention on the south by constant and aggressive patrolling and feints from the south, while simultaneously executing precision strikes in the southern parts of the city. Movement by the British Black Watch Battle Group and employment of a maneuverable BCT in a dynamic cordon also aided in this effort.

**PSYOP.** MNC-I conducted effective PSYOP encouraging noncombatants to leave the city and persuading insurgents to surrender. These doctrinal PSYOP might have been the most important aspect of operations to defeat the enemy in Fallujah, as some estimates showed that 90 percent of the noncombatants departed the city.

**Electronic warfare.** MNC-I and MNF-W also controlled the enemy’s communications capabilities by restricting his access to select communications, which not only denied the enemy a means to communicate but also directed him to a means that could be monitored.

**Computer network operations.** The enemy must not be allowed to win the battle in cyberspace. The massing of information effects in Al-Fajr was apparent in the incorporation of information considerations into the application of other elements of combat power. The seizure of the Fallujah hospital by Iraqi commandos during the early stages of the battle provides an excellent

example of the integration of full-spectrum planning, rehearsing, and executing IO in support of overall campaign objectives. During the military decisionmaking process, MNF-W identified a piece of key IO terrain that it believed had to be secured early in the operation to begin eliminating the enemy's ability to disseminate misinformation and propaganda. The Fallujah hospital had long been used as a propaganda organ by insurgent forces and had been one of the most significant sources of enemy information during Operation Vigilant Resolve. By securing this key IO terrain, MNF-W could significantly disrupt the enemy's access point to disseminate information.

The Iraqi 36th Commando Battalion captured the Fallujah hospital in the first major combat operation of Al-Fajr. Documented by CBS reporter Kirk Spitzer, this operation established coalition control of the enemy propaganda platform, while building the legitimacy of the Iraqi security forces as well as the interim Iraqi Government. Although this small attack garnered only a footnote in history, it was decisive to winning the IO battle—without this portal, the enemy had a much weaker voice.

**Bridging the IO-PA firewall.** In order to mass effects in the information domain and effectively integrate IO into the battle plan, the warfighter must find a way to bridge the doctrinal firewall separating IO and PA without violating the rules governing both. This firewall is essential to ensuring PSYOP, deception operations, EW, and CNO do not migrate into PA and discredit the PA effort. The military needs to be proud of its values and prepared to underwrite the risk that it will expose too much in the service of transparency; this risk is counterbalanced with an implicit trust that its values and the truth will eventually prevail. Truth and transparency are strengths and not hindrances. Truth and transparency in PA are the military's legal obligation, and they reinforce the effectiveness of IO by providing a trusted source of information to domestic and international media. Providing information is only effective in the end if the information is truthful and squares with the realities faced by its recipients.

The challenge is getting the truth out first and in an appealing package before the enemy does. Timing is critical. Furthermore, current global media gravitate toward information that is packaged for ease of dissemination and consumption; the media will favor a timely, complete story. The enemy knows this, but he is not encumbered by the truth or regulations, which makes the challenge that much harder.

As the main force entered Fallujah from the north (which the enemy did not expect until 2,000-pound precision weapons breached the railway berm and the main attack launched), they did so with the following guidance:

- Be prepared to execute actions specifically tailored to capture photographic documentation of insurgent activities.
- Be prepared to pass that information quickly up the chain to MNC-I, which would then turn that documentation into products that could be disseminated by the Iraqi Government and PA elements.

Specific guidance was handed down to key elements to develop bite-sized vignettes with graphics and clear storylines.<sup>5</sup> An example of massing effects, this small component of the battle enabled the coalition to get its story out first and thereby dominate the information domain. For example, MNC-I used information from combat forces to construct a document that illustrated insurgent atrocities discovered in Fallujah. To borrow a football analogy, MNC-I flooded the zone with images and stories that the media could—and did—use.

The PAO and other staff sections can use information gathered from external sources. For example, the 1CD, operating as Task Force Baghdad, used information gained from multiple sources to create a product for public distribution. On the eve of the January 2005 election, insurgents attacked the U. S. embassy with rockets and killed embassy personnel. Media outlets fixated on the event. Some media coverage initially focused on the coalition's inability to stop the insurgents even in the most secure areas. Even though the truth of the matter was that the insurgents had no targeting capability and had merely struck the building through luck, the storyline still had resonance.

The division simultaneously recorded the event, and the recording was quickly taken to the public affairs officer (PAO) and edited for delivery to media. The product showed the rocket firing, the insurgents attempted escape from the area, and their capture. Using the relatively new capability for posting such items to a publicly accessible Web page via the Digital Video and Imagery Distribution System (DVIDS), the division alerted the media to its availability.<sup>6</sup> Media outlets downloaded the product, and the storyline in the media shifted from the coalition's inability to stop insurgent activity to how successful the coalition was in detaining the insurgents.

Was this PA or IO? Developing a packaged product for dissemination might appear more like IO than PA, but it was clearly a PA action to utilize the DVIDS's capability. No media outlet could have collected this information independently. The PAO is charged by the commander to determine how best to provide information about the conduct of operations within the construct of doctrine and law. Surely, close cooperation with IO officers fits within doctrinal and legal parameters. Of course, such work should be done in conjunction with embedding reporters and encouraging senior leader to access the media as often as possible. Firsthand reporting by reporters from commercial outlets is indispensable to commanders seeking transparency; in fact, embedded reporters were critically important in the media coverage of Operation Al-Fajr. Over 80 embedded reporters worked with MNF-W during combat operations.

In reality, these two vignettes (Al-Fajr and the embassy attack) are clear examples of how units can mass effects in the information domain by leveraging all available tools. The 1CD PAO decided to use available technology to deliver a clearer public message about the course of events. Why should units not use situational awareness technology and network-centric warfare to give them an asymmetric advantage over their enemies? In Fallujah, when enemy forces used a mosque, a minaret, or some other protected site as a sniper position, the rules of engagement rightfully—and legally—enabled Soldiers and leaders to engage with lethal force.

Units must have the ability to use their technological advantage, too, so that as a main gun round moves downrange to destroy a sniper position, simultaneously the digital image of the sniper violating the rules of war plus the necessary information to create the packaged product can be transmitted for dissemination to the news media.

Anecdote:

In the weeks leading up to the historic January 2005 elections in Iraq, we in the MNC-I public affairs office had developed a comprehensive plan to publicize important aspects of pre-election preparations together with whatever events might unfold during that historically important day. Part of that plan included having obtained clearance to have Fox news reporter Geraldo Rivera cover events from the command's joint operations center in Baghdad. During the preparation phase of this plan, we arranged for Rivera to visit several units "outside the wire," including accompanying mounted and dismounted patrols in Mosul. This preparation phase culminated with us dropping him off in Tikrit two days prior to the election for a final sensing of the Iraqi population.

However, on the evening just prior to the election, the MNC-I chief of staff called me in to inform me that higher headquarters had made a last-minute decision not to permit interviews with MNC-I forces on election day. This was a stunning development owing to the many commitments we had made to the media. Fortunately, we were able to negotiate a modification to the guidance that permitted interviews with battalion and lower level elements. However, we were unable to clear media access for interviews at headquarters MNC-I. This placed us in a very difficult position with Rivera, potentially putting him and his network in a bad position at virtually the last minute and compromising our ability to show an immensely important dimension of what we believed was going to be a great and vitally needed story.

Both concerns weighed heavily on me as we scrambled to find alternatives. I viewed the situation as a matter of honor, believing that the broken commitment could easily be perceived as a betrayal of trust. The anxiety apparently showed on my face as I went to the helipad the next day to meet Rivera coming from Tikrit. As Rivera saw me walk towards him, he asked me what was wrong. I paused, and then said, "Geraldo, I've got some bad news."

His chin dropped, his face became tensely serious, and his eyes narrowed with concern. He said: "What's wrong—what happened?"

"Well," I began "though I know that we committed to support your coverage of the election from here, for reasons I am not at liberty to explain, we have to cancel your access to the MNC-I operations center."

At that point, his eyes opened, his face regained its composure, and he let out a gasp of relief. He then grabbed my head, with his hand behind my neck, placed his forehead on my forehead— skin to skin—and said: "Is that all?" Continuing, he said, "Man, you had me worried. I thought you were going to tell me another helicopter with troops was shot down or something like that—man, am I relieved." After briefly discussing our efforts to find alternative ways to cover the election, he then said, "Don't sweat it—this is just bureaucratic B.S.—we'll figure something out."

As it turned out, the 1CD's public affairs officer, LTC James Hutton, was able to set up a visually-rich opportunity at a police station in Saba al Boor, supported by the 256th Enhanced Separate Brigade of the Louisiana National Guard. Ironically, the change of venue resulted in some of the most dramatic and famous coverage of election day. Rivera reported from polling stations and featured the work of the Soldiers of the 256th, who demonstrated the great effort that had gone into making the election a resounding success.

Subsequently, Rivera continued to provide some of the most consistently comprehensive, informed, and accurate reporting that we saw during III Corps' entire tour in Iraq.

**Editor's note:** The above anecdote was solicited by the editor of *Military Review*, from the public affairs officer, COL Dan Baggio, who served under LTG Metz in Iraq during the period encompassing the first Iraqi election.

### Implications for the Future

The big issue in our world is whether our doctrine and our policy are up to date. We owe more thinking to the combatant commanders. What are the things that should be balanced when you look at information and communications issues?<sup>7</sup>

—Lawrence Di Rita

MNF-I, MNC-I, and MNF-W were successful in massing effects in the information domain in Operation Al-Fajr for three reasons: They articulated an achievable end state; they took pains to integrate, synchronize, and execute all of the elements of combat power (leadership, movement and maneuver, intelligence) and all elements of the information domain (traditional IO, PA, engagement, and political actions); and they were able to bridge the firewall between IO and PA to achieve their desired end state without violating the rules of either discipline.

This integration has broader implications. How will tactical actions influence the operational and strategic levels? Because of its failure to influence important audiences, Operation Vigilant Resolve offers a cautionary tale for anyone who would downplay the significance of information in modern warfare.

If units are expected to compete and win the information battle in the global media environment—and this appears to be the general perception within the Army—then the Army must reshape its doctrine and develop ways to train in the new domains in ways that will evolve with the Information Age. The Army should restructure the definitions of IO and PA and the relationship between them and develop a considerable global mass marketing and public-relations capability. There is no other option because “winning modern wars is as much dependent on carrying domestic and international public opinion as it is on defeating the enemy on the battlefield.”<sup>8</sup>

This idea is not without controversy. The recent debate in the media concerning the use of the Lincoln Group to push written opinion-editorials to Iraqi news outlets by paying for their placement illustrates that there are no clean lines in this discussion. Despite this situation, innovation and the use of new techniques will help win future campaigns. The new reality simply will not enable Cold War methods to figuratively outgun technologically-able enemies unfettered by cumbersome processes for disseminating information.

In an article published in the *New York Times* on 22 March 2006, Lawrence Di Rita, co-director of a Pentagon panel studying communications questions for the *Quadrennial Defense Review*, said Rumsfeld and other senior officials were considering new policies for regional combatant commanders. Di Rita noted that “[t]he big issue in our world is whether our doctrine and our policy are up to date. We owe more thinking to the combatant commanders.”<sup>9</sup>

Massing effects in the information domain can be achieved, as evidenced by Operation Al-Fajr. Functional progress within the realms of the communications professions (IO and PA) requires that the Army accommodate the globalization of information. After III Corps departed and XVIII Airborne Corps took over as the new MNC-I in early 2005, it remains clear that in Iraq, U.S. and coalition partners have inculcated the lessons of Vigilant Resolve and Al-Fajr.

The Army must address the challenges an interconnected global media/communications environment and its processes pose to information-related operations, an environment in which timely and fully packaged stories are far more valuable than mere imagery. While acknowledging continued greater levels of globalization, the Army must be able to harness all of the elements of national power in an integrated manner. Doing so is critical if the United States is to defend itself successfully. Failure to do so could be ruinous.

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2. Secretary of Defense Donald Rumsfeld, in response to a question after a speech at the Army War College, Carlisle Barracks, PA, 27 March 2006.
3. Joseph J. Collins, “An Open Letter to President Bush,” *Armed Forces Journal* 143, No. 6 (January 2006): 28, online at <[http://www.armedforcesjournal.com/story.php?F=1403423\\_0106](http://www.armedforcesjournal.com/story.php?F=1403423_0106)>, accessed 1 May 2006.
4. Ralph Peters, “The Counterrevolution in Military Affairs—Fashionable Thinking About Defense Ignores the Great Threats of Our Time,” *The Weekly Standard*, Volume 11, 2, 6 February 2006.
5. LTG Thomas F. Metz, “The Battle of Fallujah: A Case Study for Warfare in the Information Age,” briefing to the Capitol Bohemian Club, Washington, D.C., 26 October 2005.
6. The DVIDS feeds a signal from a portable machine to a satellite. News stations can pull the signal from the DVIDS Web site either live or from stored data on the site. It was first used in Iraq in 2004.
7. Thom Shanker, “No Breach Seen in Work in Iraq on Propaganda,” *New York Times*, 22 March 2006.
8. Kenneth Payne, “The Media as an Instrument of War,” *Parameters* 35, 1 (Spring 2005): 81, online at <<http://www.carlisle.army.mil/usawc/Parameters/05spring/payne.htm>>, accessed 1 May 2006.
9. Shanker.

## Chapter 4

### Section III

#### Information Operations in Task Force Marne

LTC John Peterson, Center for Army Lessons Learned,  
Theater Observation Detachment

There's a war out there, old friend. A World War. And it's not about who's got the most bullets. It's about who controls the information. What we see and hear, how we work, what we think. . . it's all about the information.

—Cosmo, *Sneakers*, MCA Universal Pictures, 1992

Task Force (TF) Marne, Multi-National Division-Center (MND-C), 3rd Infantry Division, recognizes the vital nature of gaining and maintaining information superiority and allowing the commanding general (CG) and his subordinate commanders to use information to seize, retain, and exploit the initiative. As the focus in TF Marne's operational environment has shifted from security to governance and economics (lethal to nonlethal operations), information operations (IO) is playing an ever-increasing role.

In TF Marne, as in other divisions, the Assistant Chief of Staff G7 is the principal staff officer for all matters concerning IO including plans, current operations, and IO-related targeting. The G7 has coordinating responsibility for IO and coordinating and synchronizing the many elements and related activities of information.

This article will focus on TF Marne IO task organization and two components of IO: psychological operations (PSYOP) and the Iraqi media.

#### Task Organization

In TF Marne, the G7 section falls under the nonlethal effects cell (see Figure 4-3-1). The division created the cell prior to its deployment in March 2007. The CG provides guidance and input to the nonlethal effects cell as part of the nonlethal targeting process, and he is the ultimate decision maker.

Nonlethal effects task organization

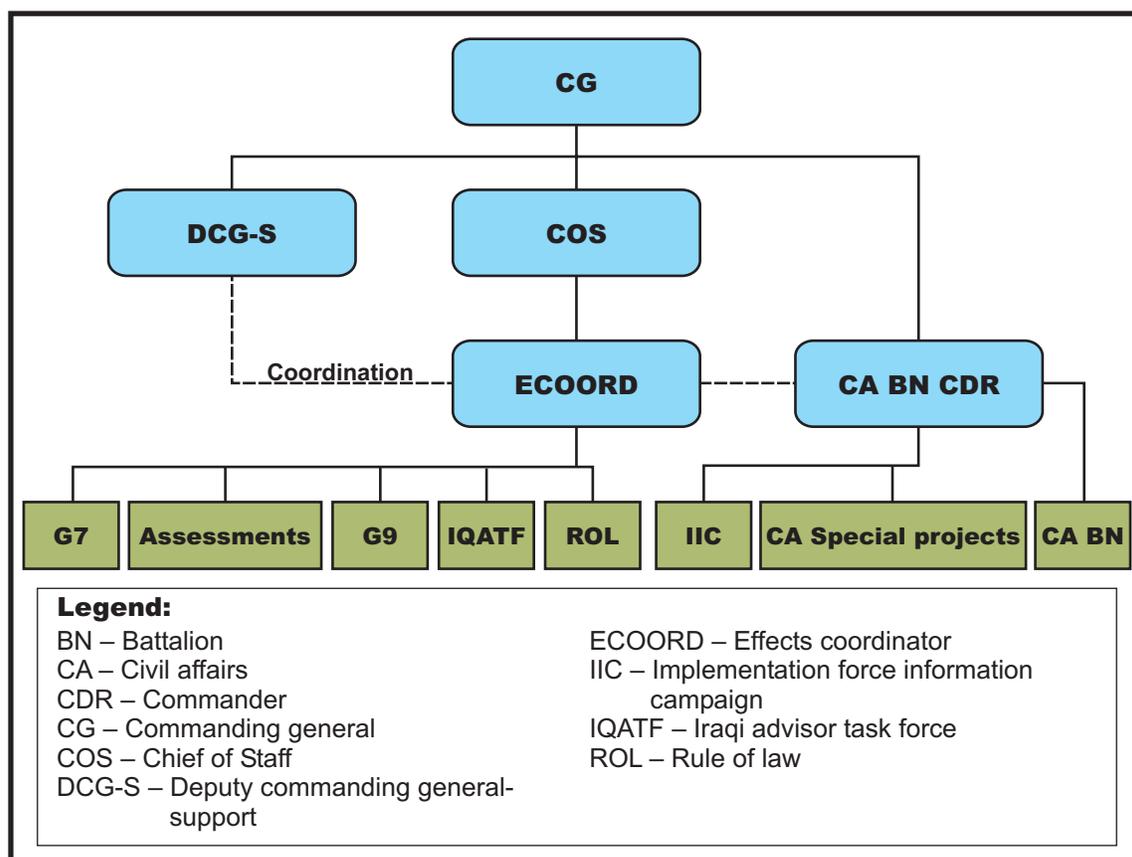


Figure 4-3-1

The key task of the nonlethal cell headed by the effects coordinator (ECOORD) is to integrate all available nonlethal means. The G7 is responsible for conducting thorough target audience analysis to better focus PSYOP series, themes, and messages. Nesting PSYOP series, themes, and messages with those of corps and other multinational divisions yields quantifiable results and shapes the operational environment. Leveraging Iraqi media by targeting local audiences with coalition “good news” stories while developing and executing IO rapid response battle drills expedites product development and dissemination.

The G7 section is organized into six areas: current operations, PSYOP, Iraqi media, future operations, military deception, and the attached PSYOP company (see Figure 4-3-2). The current operations section is responsible for the IO working group (IOWG), rapid response battle drills, operations security (OPSEC), and the IO video teleconference (VTC).

Information Operations (G7) Task Organization

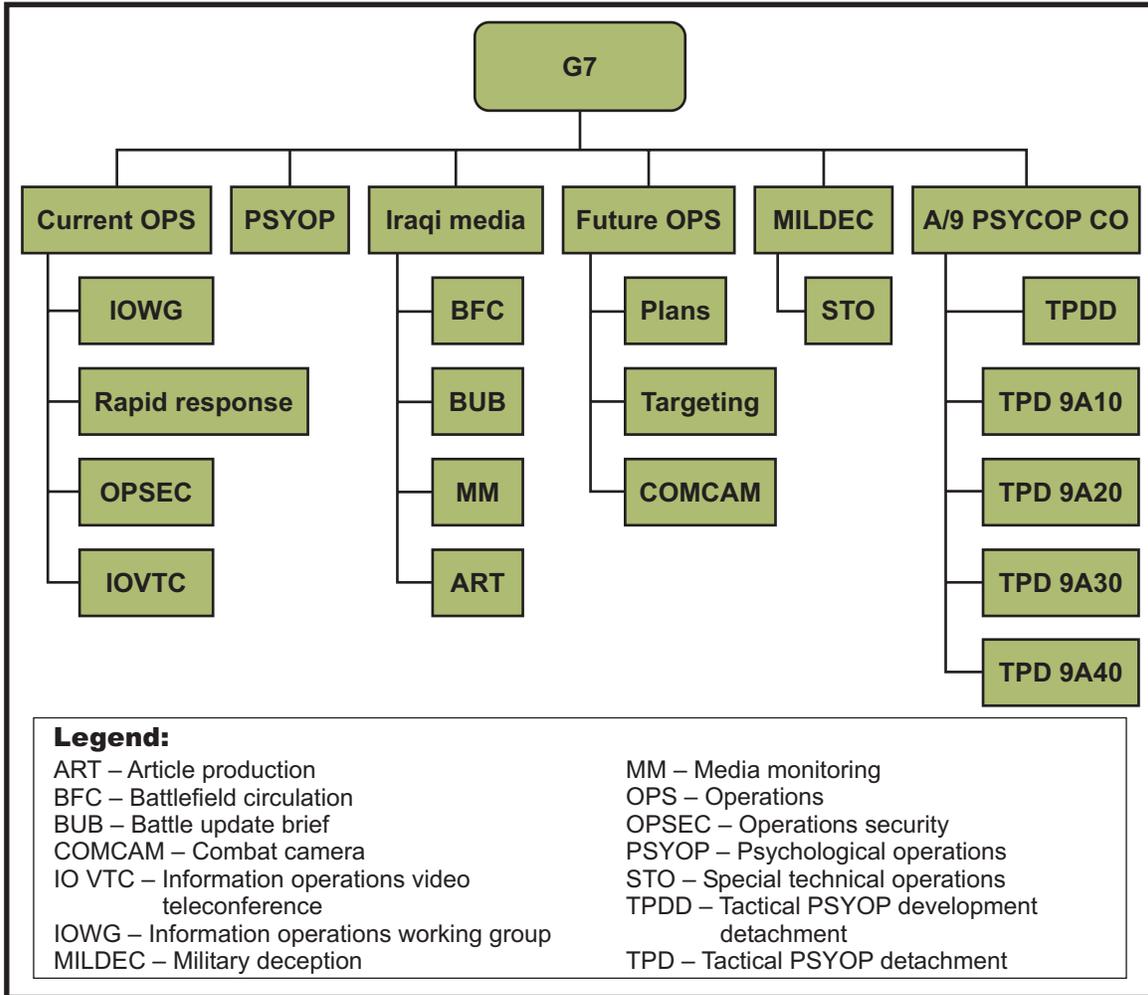


Figure 4-3-2

Psychological operations

Product development and dissemination in PSYOP continue to be an important part of TF Marne nonlethal operations. Current series, themes, and messages focus on countering al-Qaeda in Iraq (AQI), influencing local nationals not to support insurgents, and promoting job opportunities throughout TF Marne’s operational environment (see Figure 4-3-3). To date, The G7 section has supported 11 division-level operations, developed more than 750 PSYOP products, and disseminated more than 12 million copies of these products. Planning is ongoing for current and future operations to continue the fight against AQI, deny the enemy sanctuaries, and target malignant foreign influences.

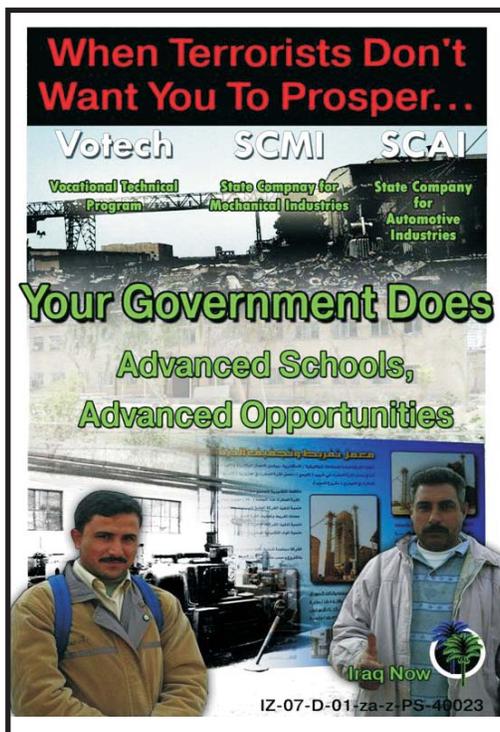


Figure 4-3-3: Example of current series, message, and theme

### The Iraqi Media Section

TF Marne made a conscious decision to capitalize on the capabilities and advantages of a previously underutilized capability, the Iraqi media, by establishing an Iraqi media section (IMS). The IMS in TF Marne falls under the direction and oversight of the G7 and the ECOORD, not the public affairs officer. Although this veers from current joint and Army doctrine, the CG developed clear lanes of responsibility for both sections, allowing public affairs to focus on Western and internal audiences and the IMS to focus on the Iraqi audience. The IMS produces press releases, works with the Iraqi media, and monitors the publication and perception of stories in the Arabic media. The IMS was created in order to align Iraqi media correspondents with “high payoff” brigade-level events. The goal is to influence Iraqi local nationals to support the coalition, Iraqi security forces, and the Government of Iraq. The section captures atmospherics by monitoring Iraqi and Pan-Arab television, reading various media reports, and scanning the Internet.

For the CG’s situational awareness and potential realignment or allocation of combat power or nonlethal resources, the section also correlates, analyzes, and provides all media monitoring information daily to include stories particular to TF Marne. The IMS disseminates its stories and pictures to its Iraqi media contacts (see Figure 4-3-4). The section currently has contacts with 11 radio stations, 8 television stations, 27 newspaper outlets, and a large number of media Web sites. The IMS has an exclusive contract with one popular Baghdad newspaper in order to maximize dissemination of key stories of interest or of strategic importance.

Because many Iraqi journalists have little experience with coalition forces, it is important for IMS and its escorts to make their initial experience a positive one. The Iraqi cultural advisor and bilingual, bicultural advisors are important in establishing credibility and ensuring that translations are correct. The advisors can recognize subtle linguistic nuances, such as the use of the term “foreign fighters,” which includes coalition forces. This puts the battle for the minds of the Iraqis in the hands of the ECOORD and IO officer to effectively coordinate operational themes and messages.

**Sample section of an Iraqi media section press release**

**RELEASE #20080121-01: “Night Air Raid Destroys 34 Targets,  
Makes Arab Jabour a Safer Place”**

ARAB JABOUR, Iraq—More than 30 targets were hit Jan. 20 during a nighttime air raid on suspected al-Qaeda safe havens in Arab Jabour. (Number) bombs were dropped, with a total weight of 21,500 pounds. The joint operation involved precision air strikes by F-16 and F-18 fighter jets and B-1 bombers. Coalition forces took careful consideration and coordination to prevent damage to private property, schools, mosques, and civilians. . . .For queries, contact the Multi-National Division-Center Iraqi Media Section at <MNDC-IMS@iraq.centcom.mil>, or by phone at Iraqna 0790-110-5244.

**Figure 4-3-4**

The IMS continues to disseminate stories of interest pertaining to division combat operations, improvements in the economic situation, governance, and the rule of law. Although they are resource intensive, the IMS does coordinate battlefield circulations, support brigade combat teams (BCTs), and highlight BCT-level high payoff events across all lines of operations (LOO). Additionally, IMS covers the planned and controlled release of Iraqi detainees. Standard “good news” stories include school openings and the grand opening of a local Iraqi radio station.

**Conclusion**

IO as part of nonlethal activities has proven decisive in the current counterinsurgency fight in Iraq. The way TF Marne has task organized to conduct IO, the use of PSYOP, and the unique nature of the IMS have enabled MND-C and TF Marne to shape the information environment and set the conditions for success across all LOO.

Remember actions always speak louder than words—every Soldier and Marine is an integral part of IO communications. IO are executed every day through the actions of firm, fair, professional, and alert Soldiers and Marines on the streets among the populace.

—Field Manual 3-24, *Counterinsurgency*, December 2006



## Chapter 5

### Section I

## Will the Army Ever Learn Good Media Relations Techniques?

### Walter Reed as a Case Study

COL James T. Currie

**Note:** Previously published in *Military Review*, May–June 2008, and reprinted with permission. The views expressed in this article are the author’s and are not necessarily those of the Industrial College of the Armed Forces, the National Defense University, or the Department of Defense.

If you ever wanted a near-perfect case study of how not to deal with the press, the Walter Reed Army Medical Center (WRAMC) controversy would be a great place to start. Of course, the WRAMC episode also offers lessons in leadership and accountability. Some of those lessons manifest themselves in this article, but the focus here is on the Army’s bungled interaction with the news media and on how to avoid a repeat of this nightmarish fiasco.

On Sunday, 18 February 2007, *The Washington Post*—with a circulation of just over 900,000—carried a major story by Dana Priest and Anne Hull, two of the newspaper’s staff reporters. Titled “Soldiers Face Neglect, Frustration at Army’s Top Medical Facility,” the story ignited a firestorm in Congress and the Department of Defense (DOD). The opening paragraph of the story was an eye-catcher: “Behind the door of Army Spec. Jeremy Duncan’s room, part of the wall is torn and hangs in the air, weighted down with black mold. When the wounded combat engineer stands in his shower and looks up, he can see the bathtub on the floor above through a rotted hole. The entire building, constructed between the world wars, often smells like greasy carry-out. Signs of neglect are everywhere; mouse droppings, belly-up cockroaches, stained carpets, cheap mattresses.”<sup>1</sup> Duncan had suffered a broken back in Iraq, lost an ear there, and had been brought to WRAMC to be treated for his injuries and to recuperate.

The *Post* story went on to describe how the two reporters had spent four months visiting WRAMC, talking with patients and their families, and seeing for themselves the conditions at what they dubbed “the other Walter Reed.”<sup>2</sup> The reporters had interviewed the WRAMC’s commander, MG George W. Weightman, and included his comments and explanations as part of the story.<sup>3</sup>

The story was a nightmare for the Army, and the *Post* reprised it the following day with a lengthy piece about the WRAMC’s Mologne House and the Soldiers housed there. A facility originally designed for housing families of WRAMC patients, Mologne House now accommodates recuperating Soldiers and their families. Although the story describes Mologne House’s wingback chairs and fine chandeliers in its first paragraph, the story’s emphasis was not on the physical surrounding, but on the bureaucratic intransigence convalescing Soldiers and their families encountered: “Mostly what the Soldiers do together is wait—for appointments, evaluations, signatures, and lost paperwork to be found”. The reporters quoted the wife of one Soldier as saying, “If Iraq don’t kill you, Walter Reed will.”<sup>4</sup>

The Army’s handling of this public relations disaster began before the *Post* even printed the initial story. The *Post* sent a long list of questions to the Army six days before publication of the Priest/Hull article.<sup>5</sup> According to the Army, none of these questions dealt specifically with the conditions patients experienced at WRAMC. The questions related solely to the process and

paperwork of medical disability claims and how the Army handled them. None of the questions alerted the Army to issues that would be the focus of the *Post's* story—the condition of the facility in which it housed patients. COL Daniel Baggio, the chief of media relations for Army public affairs at the time, noted that, “Building 18 was not even mentioned in the questions from the *Post*.”<sup>6</sup>

The Army took advantage of its receipt of the list of questions from the *Post* to stage what the newspaper's media critic, Howard Kurtz, labeled a “preemptive news briefing.”<sup>7</sup> Calling in six rival news organizations, the Army offered them what it knew about the forthcoming *Post* story and the Army's response to it, asking them not to publish anything—“embargo the story” is the term used in the news business—until the early Sunday edition of the newspaper hit local grocery and convenience stores on Saturday afternoon.<sup>8</sup>

The preemptive briefing succeeded in part. The Associated Press (AP) ran a story on Saturday that cited MG Weightman several times. The Army is aware, said Weightman, of complaints from some of the patients at WRAMC. “From our internal reviews of these perceptions,” he was quoted as saying, “we have been modifying our policies and procedures as necessary to address these perceptions.”<sup>9</sup> The AP story did not mention conditions in Building 18, apparently because the Army did not know that the conditions there would be part of the *Post* story and, therefore, did not brief the other news organizations on the subject.<sup>10</sup> The AP story did not receive much play, however, because there was not much news in it. Problems with bureaucracies, after all, are nothing new in Washington.

Of the six news organizations the Army alerted, only the *Los Angeles Times* was problematic. On the positive side, the *Times* quoted Weightman acknowledging many of the problems at WRAMC and noted that he was increasing the number of personnel assigned to care for wounded veterans, a detail the AP story omitted. From the Army's perspective, this was a good revelation. It demonstrated the first rule in dealing with a negative story: admit when you have made a mistake, and tell the world what you are doing to correct it.

On the other hand, the *Times* quoted extensively from the *Post* story, giving the *Post's* effort a presence on the West Coast that might not otherwise have been there. The *Times* also advanced the *Post's* account by reporting Paul Reickhoff, the head of Iraq and Afghanistan Veterans of America, as saying that he had a “friend who had suffered ‘catastrophic injuries’ in Iraq and was forced to ‘carry his paperwork through the snow’ when he became an outpatient.”<sup>11</sup> Reickhoff's comments did not appear in the *Post* story, so this new detail added to the Army's public relations problems, rather than reducing them.

To make matters worse, the Army's preemptive briefing spurred the publication of yet more investigative reporting on WRAMC. One of the newspapers invited to the briefing was the *Army Times*, which declined to attend. Instead, the *Army Times* decided to release its own story on WRAMC, which it had been working on for several months. According to the *Columbia Journalism Review Daily*, *Army Times* had intended to publish its story several weeks later, but the timing of the Army's briefing caused this Gannett-owned weekly to post its story online immediately, with the print version coming out on Monday, 19 February, doubling the Army's media troubles.<sup>12</sup>

The Army's attempt at media manipulation through the “preemptive news briefing” thus assumed a problematic life of its own. COL Baggio insisted, however, that the Army had done nothing wrong in calling in the outside reporters. “I wish I had invited in more of them,” he related when asked about the matter.<sup>13</sup> His take on the episode was that the briefing allowed the Army to get its message out simultaneously with the publication of the *Post* story, rather than

waiting for the next news cycle. That view is one way of looking at the situation, but sharing the *Post* story with rival news organizations, even with the embargo provision, caused distress in press circles that led to unpleasant ramifications.

Peter Spiegel, who wrote the *Los Angeles Times* story, told Kurtz, author of the *Columbia* story cited above, "It made us feel very uncomfortable that we were being set up to be the Army's public affairs arm."<sup>14</sup> The briefing also drew a negative reaction from the lead reporter on the *Post* story. "How do you think this is going to affect our relationship?" Priest asked an Army public affairs officer. "Do you think I'm going to be willing to give you that much time to respond, if you're going to turn around and tell my competitors?"<sup>15</sup>

One can also assume that various editors at the *Post* will now be wary about dealing with Army public affairs officers in the future, as will other journalists. They will think to themselves, "If the Army did this to as powerful a newspaper as the *Post*, what will they do with me and my story? Maybe I shouldn't give them a preview of it." This, of course, is pure speculation, but it is realistic to assume a normal person would react that way.

So, what should the Army have done when it received at least a partial heads-up from the newspaper, conditions in Building 18 not included? When given such a preview, most organizations would use the time to alert higher-ups as to what was coming, prepare counter-points to the story, and prepare to point out any factual mistakes. Waiting until the publication of the story before calling in other news organizations is not only the right thing to do, but also the pragmatically prudent thing to do. Not engaging in manipulative, preemptive briefings might mean never having to address a story at all. At the very least such forbearance avoids the potential for unintentionally spawning tangent stories that can compound the difficulties.

Three days after the *Post*'s initial story, the news got worse for the Army. On Wednesday, 21 February, the *Post* ran an editorial addressing problems at WRAMC. Titled "Rotten Homecoming," the editorial skewered the Army for the "bureaucratic contempt and physical squalor that too often await badly injured outpatient Soldiers" at WRAMC. It also cited Weightman's pledge that "conditions on the post will improve rapidly," calling the WRAMC commander's response "commendable."<sup>16</sup>

I should interject here that, of all the high-level Army officials involved in this story, only Weightman seems to have understood how to deal with the press on a series of negative stories like these. Unfortunately, he became the first designated fall guy for the problems at WRAMC—even though he had apparently begun to clean up the mess he found when he took over the command in August 2006.<sup>17</sup>

The same two reporters who wrote the initial story and its Monday follow-up (Priest and Hull) had another piece in the newspaper that same day. "Top Army officials yesterday visited Building 18 . . ." the reporters wrote. "Army Secretary Francis Harvey and Vice Chief of Staff Richard Cody toured the building and spoke to Soldiers as workers in protective masks stripped mold from the walls and tore up soiled carpets." Weightman was quoted as saying that "all of the staff increases he had requested would be met." Army Secretary Harvey was also quoted on the causes of the problems at WRAMC: "It's a failure . . . in the garrison leadership . . . that should have never happened, and we are quickly going to rectify that situation."<sup>18</sup> It was clear that the search for a scapegoat had begun, but at least people at high levels in the Army were beginning to acknowledge that there were problems at WRAMC.

By Thursday, Army Surgeon General Kevin Kiley felt that the situation at WRAMC was under control. In what was clearly the beginning of his problems in dealing with the public relations disaster, Kiley offered his thoughts at a news conference on the grounds of the medical facility. Referring to the building the *Post* had identified as filled with “mouse droppings, belly-up cockroaches, and stained carpets,” he told assembled reporters, “I do not consider Building 18 to be substandard.” Minimizing the conditions at WRAMC and ignoring the systemic problems identified in the *Post*’s stories and addressed by his subordinate, Weightman, Kiley reported, “We frankly fixed all of those problems.”<sup>19</sup> In making such statements, Kiley violated another of the key rules in addressing a public relations disaster: do not try to deny the obvious. If high-ranking officials did not see mouse droppings and mold-encrusted walls as a problem at a medical facility, then the Army is in worse shape than anyone thought.

Kiley then offered a theme of detachment that proved all too revealing and eventually led to his downfall. In doing so, he provided another example of how not to address real problems. Referring to the *Post*’s stories as “one-sided representations,” he defended the conditions in Building 18, saying, “This is not a horrific, catastrophic failure at Walter Reed.”<sup>20</sup> The “one-sided representation” comment is what stands out. One wonders what he thought the other side of the story was. Was he thinking it would excuse the situation if some rooms in the building did not have mold, or rodents, or dead cockroaches? This theme would surface again.

The WRAMC episode clearly damaged the Army’s credibility. The best approach would have been for Army leaders to understand and accept the reality that WRAMC had issues with its physical plant, with the conditions in which some recuperating Soldiers and Marines were living, and with DOD bureaucratic procedures for designating levels of disability. The *Post*’s accounts never made clear, however, that the Army’s medical department was not responsible for these bureaucratic inconveniences. Had the principals involved responded more deliberately, addressing such inaccuracies would have ameliorated the cumulative impact. Instead, their defiance born of dismissive arrogance prevented constructive engagement of the problems themselves. Kiley evinced an attitude that the story was the problem, not the conditions at WRAMC.

On 1 March, the *Post* reported that the Army had “relieved of duty several low-ranking Soldiers who managed outpatients”—presumably shortly after the initial story had come out. But there was no leadership *mea culpa* from the Army’s medical department.<sup>21</sup> That same day, the higher-level scapegoating began. Weightman was removed as WRAMC commander. However, his firing again compounded the Army’s problems because his replacement, Kiley, had been in charge at WRAMC before becoming Surgeon General in 2004.<sup>22</sup>

The *Post*’s story pointed out that Weightman had only been in command at WRAMC since August 2006 and had attempted to correct some of the deficiencies he found there. The *Post* noted that Kiley’s appointment “surprised some Defense Department officials because Soldiers, their families, and veterans’ advocates have complained that he had long been aware of problems at WRAMC and did nothing to improve its outpatient care.” In an ominous portent, the *Post* report also observed that Defense Secretary Robert Gates “was not involved in the appointment of Kiley.”<sup>23</sup>

By the next day, Army Secretary Harvey was also gone, presumably because of his role in naming Kiley as interim commander at WRAMC. Secretary Gates was quoted as saying, “The problems at Walter Reed appear to be problems of leadership.” Gates, who never served in the military, seems to have understood intuitively that heaping all of the blame on Weightman, while placing Kiley back in charge of WRAMC, was simply not going to wash.

Kiley, meanwhile, continued to dig in with greater defiance. “I want to defend myself,” he said. “It was . . . yellow journalism at its worst . . .”<sup>24</sup> Almost immediately, Kiley was replaced at WRAMC by MG Eric B. Schoemaker, younger brother of the Army’s Chief of Staff.<sup>25</sup> However, the damage had been done. The Army had already lost a major general and a service secretary, plus various lower-ranking Soldiers, and the bleeding still had not been stopped.

Secretary Harvey violated a key principle of leadership: find out who is actually responsible before you start firing people. Taking action for its own sake is rarely appropriate, although it seems common enough in Washington. As Secretary of the Army, Harvey should have been more deliberate, realizing that the problems at WRAMC had to have developed over a period of years. Kiley had recently served an entire tour of stewardship, and there had not been enough time since then for those conditions to fester out of nothing.

At this point in the story, two things stand out clearly: Secretary of Defense Gates “got it”; he understood the problems, and much of the Army’s leadership did not. For example, the same day that he fired Harvey, Gates was quoted as saying, “I am disappointed that some in the Army have not adequately appreciated the seriousness of the situation pertaining to outpatient care at WRAMC. Some have shown too much defensiveness and have not shown enough focus on digging into and addressing the problems.”<sup>26</sup>

Long before matters had reached this point, however, President Bush’s office weighed in. He was “deeply concerned,” said Press Secretary Tony Snow. Members of Congress also expressed concern. House Speaker Nancy Pelosi asked the Armed Services Committee to investigate the matter and several presidential contenders decried conditions at the facility.<sup>27</sup> But some folks in the Army—or recently part of the Army—still did not seem to understand.

As if he were not listening and had not heard the statements of concern from the country’s political leaders, former Secretary Harvey—perhaps understandably, given his fate—continued to place the blame on the news media and not on those running WRAMC or on himself for his poor choice of Weightman’s successor. The *Post*’s stories lacked balance, said Harvey. He then mirrored Kiley’s fateful and incomprehensible detachment by asking, “Where’s the other side of the story?”<sup>28</sup>

At a hearing before a congressional committee, Kiley issued a convoluted admission of responsibility of sorts: “I’m trying not to say that I’m not accountable,” said the Surgeon General. Then a reporter asked him how Kiley could have failed to know about problems that existed directly across the street from his quarters. In one of those four-second sound bites that so often become the emblematic video clips that make the evening news, Kiley’s ironic detachment sealed his fate. “I don’t do barracks inspections at Walter Reed,” said the general.<sup>29</sup> While there might have been some hope for Kiley’s survival before that moment, those eight words—featured with his photo on the front page of the next day’s *Post*—signaled his demise. He uttered the words on Monday, 5 March 2007, and handicappers were betting that he would not last a week. They were right. On Monday, 13 March, Kiley announced he was retiring, having submitted his request to do so to acting Army Secretary Pete Geren the previous day.<sup>30</sup>

According to the *Post*, Geren, a former Democratic Congressman from Texas, “had sought Kiley’s removal in recent days.”<sup>31</sup> MG Gale S. Pollock, Kiley’s deputy, was quickly named interim Surgeon General. Unfortunately, she, too, immediately had her problems with the press.<sup>32</sup>

At no time over the several weeks that this debacle took place did anyone representing the Army ever point out a factual error in the reporting. There were accusations of exaggeration, but never

any concrete examples demonstrating that any reporter had written anything misleading or inaccurate—for instance, the fact that the Byzantine bureaucracy has nothing to do with Army medicine. The profound inference that emerges from this and other aspects of the debacle is that the Army must be doing a terrible job of preparing its general officers to work with the press.

The “press-as-enemy” syndrome, so common during and after Vietnam, is still alive and well among general officers in today’s Army. This is true despite the fact that not one of them served while the Vietnam War was going on.<sup>33</sup> This inherited fear of the press betrays an untoward fear of transparency. One wonders if it stems from a corrosive lack of confidence in the rightness of one’s aims and the strength of one’s abilities. It certainly reveals a skewed attitude toward public service. Following are some lessons Army leadership can take away from this fiasco.

- **When confronted with allegations of malfeasance, misconduct, or just plain negligence, admit them if they are true.** How many times in your Army career have you responded to a personal failure by offering a lame explanation or excuse to a superior? Not many, I would bet. I realize it is a bit simplistic, but a more sophisticated version of the old, “Yes, sir,” “No, sir,” and “No excuse, sir” should still be the basis of your answers. Offer the mitigating circumstances if there are any, but then explain what you are doing to correct the problem. In this case, there really was no excuse for mouse droppings and dead cockroaches in rooms where wounded Soldiers were recuperating.
- **Do not blame the messenger.** Claiming “yellow journalism” or lamenting that the press never writes about the good will never suffice. There have been plenty of stories, for example, about how good the care is at WRAMC, and Bethesda, and the Brooke Army Medical Center (San Antonio, TX) burn facility.<sup>34</sup> It is the job of the fourth estate to report on the foibles and the follies of government officials.
- **Realize that reporters are human, too.** If you double-deal them, they will resent it and you. Trying to scoop them by alerting their rivals ahead of publication is not acceptable.<sup>35</sup> The karmic blowback from such tricks can be bracing. These reporters will not be apt to forget or forgive, and the next time you go to them with a request, they are probably going to respond immoderately and question your lineage.
- **It really does not matter if you do not like the press.** The Constitution you swore to defend protects them; they are going to do their jobs; and your career—as some of our Army officials have learned to their dismay—may depend upon how you interact with them. You do not have to like them, but you need to learn to work with them in a reasonable, civilized fashion.
- **Cultivate the reporters who cover your area of responsibility.** If they know you personally, they are much less likely to write something without getting a full and fair understanding. Such familiarity could well persuade them that there is no story.
- **Remember that in most situations you only need to survive one day’s news cycle.** Unless your fiasco is truly monumental—and WRAMC was in that category, as few others are—you will be bumped from the front page by someone else’s fiasco. WRAMC was eventually bounced from the front pages by stories about Attorney General Alberto Gonzalez and the fired federal prosecutors, but its aftermath remains highly visible. Of course, you can, if you wish, keep the coverage going by attacking or trying to manipulate the press.

In the final analysis, if senior leaders can see what went wrong in the Army's handling of this abysmal series of revelations and then draw the right conclusions, perhaps some good will have come out of this episode, painful as it was. For example, will Army officers continue to whine about press coverage, or will we realize that the press is always going to be there, doing a necessary job for a free republic? The press has a right to be there, and the sooner we embrace it, the better off we will be. We have to accept that having the press watching what we do and reporting on it will make us more accountable to our citizens and to Soldiers under our stewardship. Failing to accept that fact is the zenith of hypocrisy.

The upshot of this entire mess is that it was, indeed, a mess, and the Army is now doing what it should have done years ago: cleaning up. Would the Army have done so without the press revelations? Would commanders support the Army Wounded Warrior program with garrison budgets the way they do now had the WRAMC situation not surfaced? One would hope so, but the *Post's* stories certainly accelerated the process. Former DOD Assistant Secretary for Public Affairs Torie Clarke wrote a book on this subject titled *Lipstick on a Pig*.<sup>36</sup> If what you have is swinishly dirty, as Clarke says, putting a shine on it will not fool anyone in an open society. Even states without a free press do not always get away with that.

### **Endnotes**

1. Dana Priest and Anne Hull, "Soldiers Face Neglect, Frustration at Army's Top Medical Facility," *The Washington Post*, 18 February 2007, A0.
2. Ibid.
3. Ibid., A03.
4. Anne Hull and Dana Priest, "The Hotel Aftermath," *The Washington Post*, 19 February 2007, A01.
5. Telephonic interview, James T. Currie with Howard Kurtz, 29 March 2007.
6. Telephonic interview, James T. Currie with COL Daniel Baggio, Chief of Media Relations, Army Public Affairs Office, 28 March 2007.
7. Howard Kurtz, "The Army's Preemptive News Briefing," *The Washington Post*, 24 February 2007, C1.
8. Telephonic interview, James T. Currie with COL Daniel Baggio, Chief of Media Relations, Army Public Affairs Office, 28 March 2007.
9. "Head of Army's Walter Reed Hospital Acknowledges Outpatient Complaints," *The Associated Press*, 17 February 2007.
10. Telephonic interview, James T. Currie with COL Daniel Baggio, Chief of Media Relations, Army Public Affairs Office, 28 March 2007.
11. Peter Spiegel, "Walter Reed Couldn't Handle Wounded from Iraq, Leader Says," <<http://latimes.com>>, 18 February 2007.
12. Alia Malek, "Army Tries to Spin Walter Reed Story, Gets Bitten in the Ass," *CJR Daily*, 1 March 2007.

## **CENTER FOR ARMY LESSONS LEARNED**

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13. Telephonic interview, James T. Currie with COL Daniel Baggio, Chief of Media Relations, Army Public Affairs Office, 28 March 2007.
14. Howard Kurtz, "The Army's Preemptive News Briefing," *The Washington Post*, 24 February 2007, C1.
15. Ibid.
16. "Rotten Homecoming: This is No Way to Treat a Veteran," *The Washington Post*, 21 February 2007, A14.
17. The senior chaplain at WRAMC, John R. Kallerson, sent out a broadcast e-mail on 11 March in which he stated that immediately after assuming command, MG Weightman had requested funds for repairs at WRAMC and that it had taken the Army four months to come through with such, which was not very long before the stories broke in the press.
18. Dana Priest and Anne Hull, "Swift Action Promised at Walter Reed," *The Washington Post*, 21 February 2007, A08.
19. Dana Milbank, "Painting Over the Problems at Walter Reed's Building 18," *The Washington Post*, 23 February 2007, A02.
20. Ibid.
21. Anne Hull and Dana Priest, "Hospital Officials Knew of Neglect," *The Washington Post*, 1 March 2007, A01.
22. Steve Vogel and William Branigin, "Army Fires Commander of Walter Reed," *The Washington Post*, 2 March 2007, A01.
23. Ibid.
24. Thomas E. Ricks and Ann Scott Tyson, "Defense Secretary Sends Stern Message About Accountability," *The Washington Post*, 3 March 2007, A08.
25. Ibid.
26. Michael Abramowitz and Steve Vogel, "Army Secretary Ousted," *The Washington Post*, 3 March 2007, A01.
27. Dana Priest and Anne Hull, "Swift Action Promised at Walter Reed," *The Washington Post*, 21 February 2007, A08.
28. Ibid.
29. Dana Milbank, "Two Generals Provide a Contrast in Accountability," *The Washington Post*, 6 March 2007, A01.
30. Josh White, "Surgeon General of Army Steps Down," *The Washington Post*, 13 March 2007, A01.
31. Ibid.

32. Ibid.

33. Said General William Tecumseh Sherman: "I regard all these newspaper harpies as spies and think they could be punished as such." James M. Perry, *A Bohemian Brigade: The Civil War Correspondents, Mostly Rough, Sometimes Ready* (New York: John Wiley & Sons, Inc., 2000), 176.

34. I found the following stories, for example, with just a few minutes of effort with Google and a troll through *The Washington Post* archives:

- "A Resource Too Valuable to Close," *The Washington Post* Editorial, 14 June 2005, A20.
- Aci Connolly, "U.S. Combat Fatality Rate Lowest Ever," *The Washington Post*, 9 December 2004, A24.
- "Taking Care of Our Own," *The Washington Post* Editorial, 13 October 2004, A20.
- Steve Vogel, "Wartime's Lifesaving Technological Advances Given Their Due," *The Washington Post*, 20 November 2003, T05.
- Stephen Barr, "On Memorial Day, a 12-Hour Shift and an Extra Dose of Respect," *The Washington Post*, 26 May 2003, B02.
- Clarence Williams and Martin Weil, "Wounded Servicemen at Area Hospitals," *The Washington Post*, 29 March 2003, A28.
- "Center for Amputees Opens," *The Washington Post*, 30 January 2007, A09.
- National Public Radio, 15 March 2007, "Army Burn Center Sees Some of the Worst War Wounds."
- Associated Press, 9 March 2007, "Brooke Army Medical Center Addresses Soldier Care."

35. Howard Kurtz does relate a similar occurrence involving a 2006 exchange among the Treasury Department, the *New York Times*, and the *Wall Street Journal*. See Kurtz, "The Army's Preemptive News Briefing," *The Washington Post*, 24 February 2007, C1.

36. Torie Clark, *Lipstick on a Pig* (New York: Free Press, 2006).



## Chapter 5

### Section II

#### The Al-Qaeda Media Machine

Philip Seib, J.D.

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Like an aging rock star who has dropped out of the public eye, Osama bin Laden occasionally decides to remind people that he is still around. He makes video appearances that first appear on Arabic television channels but which the world quickly sees on television or on multiple Web sites. Bin Laden’s message is “Hey, they haven’t caught me yet,” which cheers up his fans, but his threats and pronouncements are mostly terrorist boilerplate. For all the parsing of his sentences and scrutinizing of the color of his beard, hardly anything in his videos helps us better understand and combat terrorism.

Meanwhile, significant al-Qaeda media efforts go largely unnoticed by news organizations and the public. This myopia is characteristic of an approach to antiterrorism that focuses on bin Laden as terrorist-celebrity, while ignoring the deep-rooted dynamism of a global enemy. Most *jihadist* media products make no mention of bin Laden, but they deserve attention because they are vital to al-Qaeda’s mission and to its efforts to extend its influence. Al-Qaeda has become a significant player in global politics largely because it has developed a sophisticated media strategy.

Lacking a tangible homeland—other than, perhaps, scattered outposts in the wilds of Waziristan—al-Qaeda has established itself as a virtual state that communicates with its “citizens” and cultivates an even larger audience through masterful use of the media, with a heavy reliance on the Internet. For every conventional video performance by bin Laden that appears on *Al-Jazeera* and other major television outlets, there are hundreds of online videos that proselytize, recruit, and train the al-Qaeda constituency.

#### Growth of Media Machine

The al-Qaeda media machine has grown steadily. Al-Qaeda and its *jihadist* brethren use more than 4,000 Web sites to encourage the faithful and threaten their enemies. The al-Qaeda production company, *As-Sahab*, released 16 videos during 2005, 58 in 2006, and more than 90 in 2007. Like a Hollywood studio, *As-Sahab* understands what will attract an audience and how to shape the al-Qaeda message.

You will not get *As-Sahab*’s videos from Netflix, but any Web user can easily find them, and the selection is wide. In 2006, the Global Islamic Media Front, an al-Qaeda distribution arm, offered “Jihad Academy,” which includes footage of attacks on U.S. troops, insurgents assembling improvised explosive devices (IEDs), prospective suicide bombers reading their last testaments, and general exhortations to join the war against the United States, Israel, and other foes.

Another distributor with ties to al-Qaeda, Ansar al-Sunnah’s Media Podium, produced “Top 20,” a selection of filmed IED attacks on U.S. forces in Iraq “in order to encourage the *jihad* and the competition between the *mujahideen* to battle and defeat their enemy.” For this greatest hits video, criteria for selection included “the degree of security conditions while filming the operation’s site” and “precision in hitting the target.”<sup>1</sup>

With the stirring music and graphic images of an action movie, the videos fortify the resolve of the al-Qaeda faithful and, even more importantly, capture the attention of 15-year-olds in cyber cafes—the next generation of al-Qaeda warriors. Al-Qaeda takes recruitment seriously, recognizing that potential martyrs require convincing that their sacrifice will be noble and worthwhile. Once inspired by the videos, the prospective *jihadist* might move on to a Web posting such as “How to Join al-Qaeda,” which tells him: “You feel that you want to carry a weapon, fight, and kill the occupiers . . . . Set a goal; for example, assassinating the American ambassador—is it so difficult?”<sup>2</sup>

### Spreading the Message

*As-Sahab* is part of the media department bin Laden established when al-Qaeda formed in 1988. The first message to emerge was that al-Qaeda was a brave underdog facing the monstrous Soviet Union. Soon thereafter, al-Qaeda announced its resolve to take on other purported enemies of Islam. In 1996, bin Laden issued his “Declaration of War on the United States” and used the al-Qaeda media machinery to spread the call for *jihad*.

Before a U.S. air strike killed him in June 2006, Abu Musab al-Zarqawi, the self-proclaimed head of al-Qaeda in Iraq, took this kind of media work to a new level. He first displayed his grisly flair for using media when terrorists abducted American businessman Nicholas Berg and beheaded him in Iraq in 2004, with Zarqawi apparently the executioner. The terrorists videotaped the beheading and presented it on a Web site, from which it was copied to other sites and downloaded 500,000 times within 24 hours.<sup>3</sup>

The following year, Zarqawi began an online magazine, *Zurwat al-Sanam* (“The Tip of the Camel’s Hump,” meaning ideal Islamic practice), which featured 43 pages of text, including stories about fallen *jihadists* and photographs of Osama bin Laden and George W. Bush.<sup>4</sup> Later, Zarqawi’s “information wing”—which included his own online press secretary—released “All Religion will be for Allah,” a 46-minute video with scenes including a brigade of suicide bombers in training. As *The Washington Post* reported, the video was offered on a specially designed Web page with many options for downloading, including Windows Media and RealPlayer versions for those with high-speed Internet connections, another version for those with dial-up, and one for downloading it to play on a cell phone.<sup>5</sup> Production quality has become more sophisticated, with many videos now including subtitles in several languages and some featuring 3-D animation.<sup>6</sup>

Al-Qaeda-related operations outside the center of the Middle East have also copied the *As-Sahab* look, as we can see in the al-Qaeda organization’s video productions in the Islamic *Maghreb*. Videos of the December 2006 attack in Algeria on a convoy of employees of Halliburton’s subsidiary Brown & Root-Condor and the April 2007 attacks in Algiers featured the professional technical quality of *As-Sahab* productions. Terrorism experts speculated that an al-Qaeda condition for affiliating with the North African Salafist Group for Call and Combat was an upgrade of the local group’s media competency.<sup>7</sup>

Even cartoons depicting children as suicide bombers are easily available on the Web, and Hamas’s *Al-Aqsa* Television has featured children’s programming that extols martyrdom. On one popular program on this channel, “Pioneers of Tomorrow,” a Mickey Mouse-like character becomes a martyr when he refuses to turn over his family’s land to Israelis. In another episode, the child host of the show sings, “We can defeat the colonialist army. We have regained our freedom through bloodshed and the wrath of fire. If we receive good tidings, we will meet our death with no hesitation.”<sup>8</sup> It is hard to calculate the damage that the poisonous residue of such fare may cause over time.

Through news reports, satellite television provides al-Qaeda and the public with graphic representations of al-Qaeda's work and occasional glimpses of bin Laden himself. More significantly, the Internet supplies more detailed versions of what the news media have covered, all the while furthering operational connectivity and a sense of cohesion. Michael Scheuer observed that "the Internet today allows militant Muslims from every country to meet, talk, and get to know each other electronically, a familiarization and bonding process that in the 1980s and early 1990s required a trip to Sudan, Yemen, Afghanistan, or Pakistan."<sup>9</sup> As author Gabriel Weimann noted, *Sawt al-Jihad* (Voice of Jihad), an al-Qaeda online magazine, reflects the multiple purposes of such ventures: "Orchestrating attacks against Western targets is important, but the main objective remains that of mobilizing public support and gaining grassroots legitimacy among Muslims."<sup>10</sup>

### **Training Opportunities**

A further aspect of this effort to build a Web-based constituency is an online library of training materials explaining how to mix ricin poison, how to build a bomb using commercial chemicals, how to sneak through Syria and into Iraq, and other such advice. Experts who answer questions on message boards and chat rooms support some of these items.

Another al-Qaeda online magazine, *Muaskar al-Battar* (Camp of the Sword), underscored the value of online instruction: "Oh Mujahid brother, in order to join the great training camps you don't have to travel to other lands. Alone in your home or with a group of your brothers, you too can begin to execute the training program."<sup>11</sup> To enhance cyber security for such connections, the online *Technical Mujahid* magazine was begun in late 2006 to instruct its readers about electronic data security and other high-tech matters.

During the past few years, the online training curriculum has expanded to include small-unit infantry tactics and intelligence operations such as collecting data, recruiting members of state security services, and setting up phone taps. Readers have downloaded this material in places such as Australia, Canada, Germany, Great Britain, and Morocco, and it has turned up when law enforcement raided cells in those countries. Some intelligence experts argue that online training has its limits—that technical skills and tradecraft require more than Web-based instruction. However, although al-Qaeda's students might be able to glean only rudimentary knowledge from Internet sources, it is enough to make them dangerous.<sup>12</sup>

### **Information Operations**

The al-Qaeda leadership has stressed Internet use in directives to its citizens/followers, as was illustrated in this message carried on one of its Web sites:

Due to the advances of modern technology, it is easy to spread news, information, articles, and other information over the Internet. We strongly urge Muslim Internet professionals to spread and disseminate news and information about the *Jihad* through e-mail lists, discussion groups, and their own Web sites. If you fail to do this, and our site closes down before you have done this, we may hold you to account before Allah on the Day of Judgment . . . We expect our Web site to be opened and closed continuously. Therefore, we urgently recommend to any Muslims that are interested in our material to copy all the articles from our site and disseminate them through their own Web sites, discussion boards, and e-mail lists. This is something that any Muslim can participate in easily, including sisters. This way, even if our sites are closed down, the material will live on with the Grace of Allah.<sup>13</sup>

This appreciation of the value of the Internet is nothing new for al-Qaeda. Even when under attack by U.S. forces in late 2001, al-Qaeda fighters in Afghanistan clung to their high-tech tools. A Pakistani journalist who was on the scene wrote that while retreating, “every second al-Qaeda member was carrying a laptop computer along with his Kalashnikov.”<sup>14</sup>

The Internet allows access to an almost infinite array of information providers and is attractive for other reasons, as well. For terrorist organizations, the Internet is preferable to satellite television because it provides unmatched opportunities to reach a global audience with video productions without having to rely on any particular television channels. In addition, using the Internet avoids problems associated with distributing a physical product. Instead of establishing clearing houses to mail videos—a process that law enforcement agencies were able to disrupt—these groups now rely on pirated video-editing software and Web sites onto which material may be uploaded for their followers to access. These sites feature items such as the 118-page “Comprehensive Security Encyclopedia,” which was posted in 2007 with detailed instructions about improving Internet and telephone security, purchasing weapons, handling explosives, transferring funds to *jihadi* groups, and other useful hints.<sup>15</sup>

One of the masters of this craft was Younis Tsouli, a young Moroccan whose *nom de cyber-guerre* was “Irhabi007.” Based in England, Tsouli provided technical skills needed by al-Qaeda after it left Afghanistan and established an online headquarters. He assisted Zarqawi when he used the Internet as part of his war plan in Iraq. Tsouli was adroit at hacking into servers that he then used to distribute large video files. (One of his hacking victims was the computer system of the Arkansas Highway and Transportation Department.)

Arrested in London in 2005 and sent to prison by a British court in 2007, Tsouli understood the effectiveness of the Internet in reaching potential recruits for al-Qaeda’s cause. The 2006 U.S. National Intelligence Estimate acknowledged the importance of this: “The radicalization process is occurring more quickly, more widely, and more anonymously in the Internet age, raising the likelihood of surprise attacks by unknown groups whose members and supporters may be difficult to pinpoint.”<sup>16</sup>

By mid-2007, some al-Qaeda-related Web sites were broadening their agendas. “Media *jihadi*” included entering online forums with large American audiences in order to influence “the views of the weak-minded American” who “is an idiot and does not know where Iraq is.” The “weak-minded” were to be targeted with videos showing U.S. troops under fire and with false messages purportedly from American Soldiers and their families lamenting their involvement in the Iraq war. At the same time, Web forums for Islamist audiences featured information gleaned from Western news reports, such as poll results showing lack of public support for the war and, occasionally, information about weapons systems that news stories published.

### **Worldwide Recruiting**

Beyond the material directly addressing warfare, such Web sites devote some of their content to ideological and cultural issues that are at the heart of efforts to win the support of young Muslims. Because al-Qaeda’s leaders believe this will be a long war, they see appealing to prospective *jihadists* and enlarging their ranks as crucial to their eventual success. The number of English-language *jihadi* sites has been growing, with approximately 100 available as vehicles for militant Islamic views. Some of these operate overtly. In October 2007, the *New York Times* profiled a 21-year-old Saudi-born American living in North Carolina whose blog extols bin Laden’s view of the world. He includes videos designed to appeal to North American and European Muslims who are angry about the Iraq war and are responsive to claims that Islam is under siege.

This blogger had apparently not violated any U.S. laws, so he continued his online efforts, reaching—he claimed—500 regular readers. Although some law enforcement officials want to shut down such sites and prosecute their proprietors, some terrorism experts propose that such sites be allowed to operate in public view because they may provide insights into terrorist thinking and operations.<sup>17</sup>

Al-Qaeda's recruiting efforts have targeted British and American Muslims, such as a 2006 video that described rapes and murders allegedly committed by U.S. Soldiers in Iraq. Released to mark the first anniversary of the 7/7 bombings in London, the video featured bin Laden's deputy, Ayman al-Zawahiri; Shehzad Tanweer, one of the London bombers who died during the attack; and Adam Gadahn, also known as "Azzam the American," who grew up in California.

Tanweer, delivering his final testament in English with a Yorkshire accent, said: "We are 100 percent committed to the cause of Islam. We love death the way you love life. . . . Oh, Muslims of Britain, you, day in and day out on your TV sets, watch and hear about the oppression of the Muslims, from the east to the west. But yet you turn a blind eye and carry on with your lives as if you never heard anything, or as if it does not concern you. . . . Oh, Muslims of Britain, stand up and be counted. . . . Fight against the disbelievers, for it is an obligation made on you by Allah." To this, Gadahn added, "It's crucial for Muslims to keep in mind that the Americans, the British, and the other members of the coalition of terror have intentionally targeted Muslim civilians."<sup>18</sup>

Among more recent videos aimed at a U.S. audience is "To Black Americans," which features Zawahiri criticizing Colin Powell and Condoleezza Rice and introducing video clips of Malcolm X talking about the unfair treatment of African-Americans. (These video clips date back to the Vietnam War years.) This video resembles Cold War-era communist propaganda, and it does not appear to have caused much of a stir, but it gives some indication of where al-Qaeda's propaganda efforts are heading.

Terrorist organizations see young Muslims in non-Islamic countries as likely prospects for recruitment, and so they use media tools to stoke anger about purported economic and political discrimination. Al-Qaeda is apparently trying to create an online community where members of the Muslim diaspora will feel at home. Once they are part of this "community," they can view a steady stream of *jihadi* messages of varying degrees of subtlety.

Al-Qaeda recognizes the value of developing online networks. Chris Zambelis wrote, "The Internet enables like-minded militants to associate and communicate anonymously in cyber social networks. This process reinforces their sense of purpose and duty and encourages solidarity with the greater cause."<sup>19</sup> Extending such efforts beyond an Arabic-speaking core of support is a crucial part of al-Qaeda's expansion.

YouTube and other such sites make videos like "To Black Americans" easily available, which differentiates today's propaganda from its antecedents during the Cold War and earlier. It can reach a global audience instantly. Just how big that audience really is remains open to question, but as al-Qaeda increases its video production output, it seems to be operating on the theory that at least some of its messages will reach its desired viewers.

During the second half of 2007, U.S. forces in Iraq shut down at least a half-dozen al-Qaeda media outposts in that country. One house the U.S. raided in Samarra contained 12 computers, 65 hard drives, and a film studio. The American military effort to halt such media operations relied in part on the belief of GEN David Petraeus that "the war is not only being fought on the ground in Iraq but also in cyberspace."<sup>20</sup> Petraeus's concern relates to an issue raised in U.S. Army and Marine Corps Field Manual, *Counterinsurgency*—insurgents attempt to shape the

information environment to their advantage by using suicide attacks and other such tactics to “inflate perceptions of insurgent capabilities.”<sup>21</sup>

## Cyberspace Warfare

Information dominance is a modern warfare tenet that is increasingly important, particularly if conventional military strength accompanies the effective exercise of soft power. Al-Qaeda understands the limitations of its own use of “hard power”—the coercive force of terrorist attacks—and continues to expand its conceptual approach to information warfare. Recognizing the pervasiveness of the information delivered by satellite television and the Internet and the influence of news organizations ranging from the BBC to *Al-Jazeera*, al-Qaeda is now offering, in the words of Michael Scheuer, “a reliable source of near real-time news coverage from the *jihad* fronts for Muslims.” From Iraq and Afghanistan, wrote Scheuer, Iraqi insurgents and Taliban forces produce, on an almost daily basis, combat videos, interviews with their commanders, and graphic footage of retaliatory measures against locals who cooperate with American or U.S.-backed forces.<sup>22</sup>

This effort reflects al-Qaeda’s dissatisfaction with Arab news organizations as vehicles for its media products. Zawahiri has criticized *Al-Jazeera* in particular because it refused to be a mere conveyor belt for al-Qaeda videos, dared to edit bin Laden’s pronouncements rather than show them in their entirety, and gave airtime to al-Qaeda’s critics. Because of *As-Sahab*’s video producers’ technical expertise, al-Qaeda can now set itself up as a third force that provides a message different from Western media and the new generation of Arab news providers.

Zawahiri has said that what he calls “*jihadi* information media” have been “waging an extremely critical battle against the Crusader-Zionist enemy” and have “demolished this monopoly” by confronting conventional media organizations. Taking things a step further, in late 2007, Zawahiri offered to participate in an online interview in which he would take questions from individuals and news organizations.<sup>23</sup>

To some extent, this might be mere gamesmanship on the part of al-Qaeda. By making himself available for a cyberspace chat, Zawahiri taunts those who have been hunting him for years. By holding a “news conference,” the al-Qaeda leadership positions itself on a plane comparable to that where “real” governments operate. By using new media to communicate with the rest of the world, al-Qaeda stakes a claim to being an exponent of modernity.

One is tempted to dismiss these maneuvers as just another distracting ploy by murderous thugs, but for those who see al-Qaeda’s cadres as heroic defenders of Islam—and their numbers are substantial—this exercise is evidence of legitimacy, despite al-Qaeda’s vilification by much of the world.

The inadequate responses to al-Qaeda’s media messages heighten the danger. Even a flawed argument has appeal when we allow it to stand in an intellectual vacuum. Moderate Muslims and non-Muslims who do not accept the idea that prolonged conflict is inevitable must recognize this reality and act on it in a sophisticated, comprehensive way.

This means providing a steady stream of videos and other materials through the new media that many members of the al-Qaeda audience use. This counter-programming should not feature defensive, pro-American content, but rather should concentrate on undermining al-Qaeda’s purported nobility, such as by reminding the audience how many Muslims have died in the terrorist attacks and insurgent warfare al-Qaeda instigated.

Osama bin Laden will undoubtedly pop up in another video before long. Note what he says, but then look to the always expanding reservoir of *jihadist* media to see what al-Qaeda is really up to.

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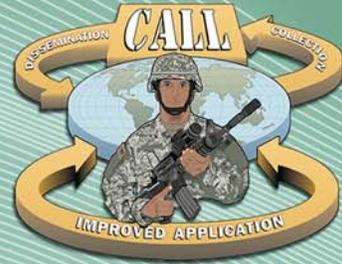
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