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Executive Summary

As the following cross-functional team's (CFT) after-action review (AAR) indicates, the “Exploring SOF Identity” Future of SOF Forum (FY21, QRT 2) was a resounding success! It was a success in content, capture, and production,

Content and Panels: Overall, the methodology employed in this exploratory learning experience proved to be of value despite being outside many participants' comfort zones. With faculty preparation, identification of best practices, and practice through interviews and exposure to other forums, the exploratory learning forum will continue to be a valuable part of JSOU knowledge production. The JSOU Faculty should be encouraged to participate in myriad aspects of JSOU outreach and to conduct scholar interviews when available. Interview experience will develop a more experienced moderator for future forums and better prepare our faculty for similar engagements and interviews at other institutions.

Rapporteur Reports: Tracing the rapporteur process through the Forums, in the May and Nov 2020 forums, they took notes and reported back to the forum main themes and findings of the event. This did not congruently tie the forum content to potential teaching and learning. For this Forum, the rapporteurs were chosen based on their teaching specialty, and the team focused on collecting information for the purpose of future curriculum development. Greatly assisting the process, was the newly designed rapporteur report format successfully captured the panel's discussion and distilled it into valuable recommendations for future teaching applications. However, the individual reports varied in length and specificity, the tool allowed for capturing categorized feedback and will enable the “connecting the pipes” between research and teaching. It is recommended future rapporteurs are identified earlier and have an opportunity to become more familiar with the report format's intent and purpose. Lastly, there is still some disconnect between requisitioning the rapporteurs and should be directly addressed and captured in the upcoming Forum CFT SOP

Data Analytics & Feedback: In data collection, we would do better by ensuring we isolate individual participant's registration, login, and participation; thus, allowing for more granular measurements and attendee persona construction. Most survey respondents were **satisfied** with the Forum (79%), and all reported it was well **organized** (100%). Respondents indicated the Forum **met its goal** of achieving discourse around each of the four identity lenses (79%-80%), the content was as expected or better (83%), and information would be **useful** in their jobs (73%). Further, a substantial majority of respondents would **recommend** the Forum to others (85%) and are likely to **participate** in a future JSOU forum (89%; 100% of survey respondents who did not participate in the *Exploring SOF Identity Forum* indicated they would likely be future participants).

Marketing and Social Media: Due to our marketing reliance and then our subsequent late separation from Global SOF Foundation (GSF) we did not prepare for marketing the Forum as well as we might have. Our numbers both in overall registration and attendance may show the lack of deliberate plan for marketing. Our recommendation is establishing SOP and Conduct a Marketing Campaign Plan - The campaign should include a long, medium, and short-range forum campaign plan and establish post-forum social media panel video distributions. Already implemented is a focus on the identification of a standardized marketing campaign (See below) including milestones, activities, channels, and their associated requirements of an interactive digital agenda for internal and external distribution via multiple media platforms;

overcommunicate and share. The campaign should include a long, medium, and short-range campaign plan and establish post-forum social media.

Support and Planning: The process of contracting out the live-streaming production of the event returned positive results. The production was professional and polished. JSOU's tech team does an equally professional job; however, the audio, video, virtual backgrounds, and the subsequent .mp4 video recordings were delivered within a few days post event. This reduces our teams time to focus less on production and more on the content and panelist coordination.

Additional, items identified and captured in the document include; incorporating the SOCO-CES for SOCOM leadership and staff awareness, maintaining and scheduling early the JSOU/P IPRs, identifying and requiring better CFT document version control, developing and distributing checklists and templates to provide more efficient and effective communications which will assist in communications with talent and participants/audience, although mentioned above the Marketing (mentioned above), HQ Coordination, Contracting, and Rehearsals.

Content Feedback – Panels

POC: Dr. Joseph Long

Purpose

To provide feedback on the content derived from the Future of SOF Forum series on "Exploring the SOF Identity." This feedback is organized according to the four "SOF Identity" lenses that include SOF utility, SOF ethics, SOF Technology, and Diversity and Inclusion in SOF. As stated in the forum precis, the Forum intended to increase the collective understanding of the SOF identity through these four lenses, with two panels dedicated to exploring each lens. Each panel consisted of a JSOU faculty moderator focused on one of the four identity lenses, combined with three to four panelists representing a deliberate mix of input from senior leaders, SOF operators, distinguished academics, and SOF stakeholders. Each panel intended to provide a vehicle for participants to discuss, in-depth, competing ideas that transform into new knowledge and course material.

The areas explored for each panel will include the panel composition, the panel's conduct, and a broader summary of the forum methodology's effectiveness. For panel composition, feedback will examine the degree to which the panel had the right mix of panelists to foment engaging, relevant, and competing perspectives. For panel conduct, feedback will address the moderator-specific approach to each panel. Feedback includes the influence that the moderator leveraged over the panelists, rehearsals, the types and reasons for asking questions, and the methodologies for controlling each discussion. Feedback on conduct recognizes that each moderator managed a unique environment and seeks valuable lessons from eight distinct approaches. Lastly, the effectiveness feedback section describes the degree to which the forum panel and overall methodology effectively met the event's stated intent.

Lens 1 – SOF Identity

Composition: Positive feedback expressed about the panel members with a recommendation that adding joint participants would have helped understand SOF identity. Participation from one of the senior civilians was inconsistent, and schedule consideration is a must for this type of event. Having the Forum in person could have increased participation, but future forums must consider scheduling senior SOCOM staff officers' scheduling changes.

Conduct: Feedback from moderator participants remains skeptical of this event's forum process, but the audience and other members' observations suggest that the Forum's conduct brought out the unanticipated and unknown perspectives. Doing something new in an academic setting is risky, but this was deliberately a discovery learning event, and the moderators performed well.

Effectiveness: Despite some skepticism from moderators engaged in a new and uncomfortable process, the dialogue and audience participation suggest that engagement's conversational method remained effective at exploring SOF utility. JSOU will get better at this approach as we have more events and more moderators to observe and analyze. As faculty functioning as moderators, there is an implicit bias toward prescriptive teaching methodologies, which infrequently draws on interview skills. Recent interview experience seems to have helped some moderators (across the Forum) perform the role with greater confidence.

Lens 2 – SOF Ethics

Composition: The participants in both SOF ethics panels were diverse and enthusiastic. The second-panel members arrived prepared to discuss the virtues of specific models in use, and the input from outside JSOU and military perspectives was beneficial. The second panel might have been too military and SOF-centric and could have used an ethics expert from a civilian institution. The ones we used were also military retirees, and their conclusions, although good, could have been biased.

Conduct: Rehearsals with panel members proved to be valuable. Moderators should avoid too many rehearsals so that the best parts of the conversation are not lost during the live discussion but initiating a teaming process was critical for establishing rapport and respect for each participants' distinct academic and leadership backgrounds.

Effectiveness: Feedback about both ethics panels has been robust, and the moderators have received invitations to discuss SOF ethics at other institutions. This experience is an excellent advantage of the forum methodology that ensures JSOU presents innovative and institutionally distinct information. Furthermore, JSOU's representation across joint SOF gives us the latitude to offer new ideas that would not emerge in more traditional settings, such as the service academies and PME institutions. The forum approach to ethics reduces risk aversion by reducing an individual panelists' need to singularly present controversial ideas. Audience and other institutional feedback over time will further illuminate the strengths and weaknesses of this approach. The downside to this approach is that ethical discussion occurs in a public and controlled environment where serious dissension is not likely, even with panelists from outside the SOF umbrella. Due to this, the conversation replication did not exist in the live Forum.

Lens 3 – SOF's Relationship with Technology

Composition: This lens took two approaches, with one moderator taking on personal responsibility and leadership in establishing the panel. Despite the best efforts, the moderator found that their chosen tech industry person was less responsive to e-mail and phone correspondence. Although industry leaders' inclusion sounds good in theory, they might require more interaction before the Forum to get them acclimated to the process and the panel's needs. The broad expertise on the second tech panel was better able to explore identity over discussion technology and capabilities. That said, including panelists who are experts on relational topics and not technology would go a long way to minimizing the tendency for all participants and the audience to talk about technology.

Conduct: The panels' conduct was sufficient, with only one industry leader struggling to provide input. That said, the topic of identity and technology remains tricky and requiring extensive strategic communication for the audience, moderators, and panel members to avoid talking about technology instead of identity through the relationship with technology. For that reason, tech-centric panelists were less impactful than they expected to be. Both panels intended to explore relational aspects of technology rather than capabilities, but the audience remained intent on steering the conversation toward tech. This tendency made the moderator role decidedly more complex than other panels; however, the fascination with tech solutions also ironically underscores the degree to which SOF relies on tech solutions despite recognizing that people solutions are potentially more relevant. Follow-on educational events that discuss this paradox would be appropriate.

Effectiveness: Getting people to talk about the SOF relational aspect of technology made specific moderators concerned that the panel "missed the mark." Initial feedback suggests that framing technology with relational verbiage can be misleading and is uncommon. That being said, continuing to pursue SOF relationships to technology in other academic events and classroom discussions should make this topic more familiar to SOF stakeholders. That technology is often seen as the driving force behind operational success, making this exploratory learning event meaningful. With this in mind, the first panel tended to talk more about technology and capabilities than relationships, while the second panel did so more quickly due to panel members being less tech-savvy and more relational. In comparing the two panels, relationship-focused participants better discuss relational aspects of technology, and future panels that explore tech relationships should include fewer tech-heavy participants. Reinforcing the importance of stating and restating this discussion's purpose and distinct nature cannot be overstated, especially given the degree to which the audience steered the debate toward capability.

Lens 4 – Diversity and Inclusion in SOF

Composition: Great effort went into finding the right participants for this series of panels to balance each panel with academic and operational capability while also representing racial and gender diversity. The academic panelists provided thought-provoking commentary and valuable empirical evidence, inspiring discussion or potentially contentious emotional debate. This series of panels required very measured and experienced moderators, and more thought should go into who is best capable of holding such difficult interview discussions. Again, faculty participation in interviews provides valuable experience, and many faculties avoid interviews for being labor-intensive despite being highly developmental. That one of the moderators ended the discussion early speaks to the degree that interview experience should be incentivized at JSOU. The impact that experienced and measured faculty had on the panelists and audience was underscored in the second panel, which brought the discussion's desired issues.

Conduct: Despite the diverse educational and operational backgrounds, panelists and moderators remained hesitant to discuss more problematic areas of diversity which was negatively affected by cutting one of the discussions. Despite reminders about academic freedom, JSOU faculty and panelists have a hard time being critical of the Enterprise concerning D&I, although such criticism is essential to building better SOF formations. The two D&I panels do provide a significant opportunity for reflection on our SOF formations.

Effectiveness: This series of panels successfully opened the dialogue about SOF D&I, and additional JSOU-sponsored events will help JSOU lead the way in exploratory learning related to D&I. This series of panels required the most skill from the moderators, which should consider any future JSOU-led discussions about D&I.

Conclusion and recommendations.

Overall, the methodology employed in this exploratory learning experience proved to be of value despite being outside many participants' comfort zones. With faculty preparation, identification of best practices, and practice through interviews and exposure to other forums, the exploratory learning forum will continue to be a valuable part of JSOU knowledge production. Faculty should be encouraged to participate in myriad aspects of JSOU outreach and to conduct scholar interviews when available. Interview experience will develop a more experienced moderator for future forums and better prepare our faculty for similar engagements

and interviews at other institutions. As observed from the forum has been tremendous as a testament to the degree that other institutions such as USMA and NPS followed the event and found value in this process. As JSOU becomes more capable of generating knowledge, we will become more valuable as faculty guests and educators. Thus, attracting more talent to JSOU it will improve the quality and depth of the educational opportunities that JSOU offers as part of flywheel action.

From a technical perspective, much of the host duties could have been pre-recorded to minimize any effects of nervousness and to ensure the introductory dialog was smooth and intelligible. This fact does not negate the host's need to be available as script changes become necessary but re-recording necessary script changes could also occur simultaneously. Although the dialogue is relatively easy, there is no need for the host to adlib comments. The use of a detailed script and the teleprompter was essential to making the audience feel connected with the host, but there is always an additional risk with a live presentation. Additionally, many of the questions that were not asked during the forums were lost at each panel's conclusion. These questions provide great insight into the audience's reception of the discussion and should be captured and retained by the rapporteurs.

Lastly, the moderators played an invaluable leadership role in this Forum as they took charge of the panelists in small teams and developed their discussion block. Compared to previous forums where the host also did all the questions, the moderators helped reduce fatigue at seeing only one person and hearing only one style for asking questions. This practice helped make the Forum more interesting to the audience and reduce the labor on the host. Once moderators were assigned and panelists identified, the moderator-leader was essential in ensuring their sub-unit made it across the starting line for the Forum, with only 2 of 24 panelists backing out at the last minute.

Rapporteur Reports

POC: Ms. Robin Casey

Assignment

Discussion: The rapporteur assignment and objectives remain slightly disconnected. Tracing the rapporteur process through the Forums, during the May and Nov 2020 forums the rapporteurs were somewhat ad hoc assigned, and each watched the panels and took notes. At the end of the day, each reported back to the forum main themes and findings. This seemed an unnecessary requirement to verbally re-brief the day's activities. Additionally, and more importantly, this did not congruently tie the forum content to potential teaching and learning.

During this Forum, the rapporteurs were assigned earlier and according to their teaching specialty. The team met, planned, and subsequently focused on collecting information for the purpose of future curriculum development. Greatly assisting the process, was the newly designed rapporteur report format. This format captured the panel's discussion and distilled it into valuable recommendations for future teaching applications. However, even with this new tool the individual reports vary in length and specificity. It is believed that with redundancy and preparation the tool allows for capturing categorized feedback and will enable the "connecting the pipes" between research and teaching. Furthermore, It is recommended future rapporteurs are identified earlier and have an opportunity to become more familiar with the report format's intent, and purpose and are engaged in the content themes and objectives as soon as possible.

Recommendation: The rapporteur process and requirements still are identified earlier and have an opportunity to become more familiar with the report format's intent and purpose and the objectives and themes.

Reports

<p>Session/Event/ Panel:</p>	<p>SOF Utility</p> <p>a. In the context of "Strategic Competition," what is the utility of Special Operations Forces (SOF) for American strategic interests and for the Department of Defense? <u>Moderator:</u> Dr. Isaiah Wilson, Joint Special Operations University <u>Panel Members:</u></p> <ul style="list-style-type: none"> • Dr. Thomas X. Hammes, National Defense University • Ms. Stephanie Funk, USAID • SGM Christopher Vasatka, Joint Special Operations University <p>b. How does SOF's identity promote or prevent strategic effects in the future operating environment? What is distinct and peculiar about SOF and special operations? How do we frame this distinction as being elite, better or different? <u>Moderator:</u> Dr. David Ellis, Joint Special Operations University <u>Panel Members:</u></p> <ul style="list-style-type: none"> • CW5 Maurice Duclos, Ph.D., U.S. Special Operations Command • COL John Sannes, Commander 7th Special Forces Group
<p>Rapporteur:</p>	<p>Robert S. Burrell</p>
<p>Course/Program/Content Area:</p>	<p>College of Special Operations/Low-Intensity Conflict, Competition, and Cooperation</p>
<p>General</p>	
<p>Content Summary:</p> <p>What are the main points of this panel/session?</p>	<p>The following six major themes and provocative arguments encapsulate and summarize the panels' discussion over SOF's current and future utility panels conducted on 15 March 2021.¹</p> <p>1. <u>Make Realistic and Achievable SOF Priorities.</u> SOF cannot solve all global threats and needs to deliberately prioritize its capabilities. In other words, SOF needs to focus on achievable goals while avoiding an idealistic approach that addresses all future risks. For example, conventional forces might address many violent hot spots while SOF concentrates on persistent engagement in certain regions. Additionally, SOF should not attempt to compete with Russia and China in all arenas – instead, it should prioritize and be selective. Foreign internal defense, unconventional warfare, and counterinsurgency remain relevant, but the aims of such activities much remain limited.</p> <p>2. <u>Utilize a Phasing Construct to Explain Irregular Warfare.</u> One approach to understanding the evolution of insurgent objectives over the past century, divides events into three stages: (1) resistance activities following World War II in various African and Asian states to remove European imperialist authority, (2) belligerencies to change or modify governance in an existing state, such as the Angolan Civil War from 1975-2002,</p>

¹ For the purposes of Chatham House Rules, the individual opinions and statements of the participants are not identified in this document.

and the current state – (3) establishing new national boundaries based upon presumed identities.

This third phase of insurgency will include coalitions of angry groups and opportunists without unified ideology attempting to formulate new states which better align with predominate demographics based on religion, ethnicity, and culture. However, as coalitions, these insurgencies will become long and bloody conflicts – as groups within the coalitions fight amongst each other, as well as the regime. An example of this type of conflict includes the Syrian Civil War (2011-present), a violent struggle which includes several belligerents. SOF will have a large role in these types of future irregular wars and must prepare for them.

3. Incorporate the Four Ages of SOF into the Greater Lexicon. The 4th Age of SOF describes the current operating environment of strategic competition and conflict across multiple domains and the evolution of special operations to address it.² Utilizing the four ages of SOF as a framework highlights the importance of recognizing the current strategic inflection point of the organization's evolution (i.e. the Fourth Age). Challenges of the Fourth Age include not only strategic competition but also pandemics, climate change, cyber warfare, and competing coalitions. However, the overarching focus on countering terrorism has come to an end.

What does SOF look like in the Fourth Age? While countering terrorism remains important, SOF needs to reemphasize irregular warfare and indigenous partnerships. Simultaneously, large-scale global conflict remains possible but less likely. At the same time, activities like foreign internal defense and counterinsurgency remain increasingly relevant. In order to prevent a future global conflict, SOF activities to enhance stability through irregular warfare may prove crucial to regional objectives. Meanwhile, resistance operations and unconventional warfare remain useful tools to address strategic competition asymmetrically.

4. Support an Inclusive Approach. There is inherent competition between all the Services and Agencies, as bureaucracies compete for national resources. To combat this, we must elevate the importance of civil-military cooperation at all levels – taking a deliberate approach to making civ-mil teams from the strategic to the tactical echelons. SOF's partnership with other Departments and Agencies can serve as a bridge of cooperation between the Interagency and the Department of Defense.

While SOF solidifies its interagency approach, it also supports strong partnerships abroad. This partnership distinguishes the United States' approach from that of Russia and China – an inclusive approach to strategy that has created a network of allies. Admiral William McRaven often stated, "you cannot surge trust," and this approach to building partnerships must remain a bedrock to partner engagement.³ SOF must remain the partner of choice.

² The First Age of SOF includes the creation of elite forces to address particular needs in World War II. The Second Age begins in the 1960s with the establishing of U.S. Army Special Operations Command by President John F. Kennedy. The Third Age began in the 1980s, perhaps institutionally with the creation of U.S Special Operations Command. For more information on the ages of special operations, see Isaiah Wilson, "White Paper #1: The Future Challenges, and Opportunities, for the Joint Special Operations Profession," *Joint Special Operations University*, accessed on 15 March 2021 at https://www.socom.mil/JSOU/PubDocs/JSOU%20Next%20White%20Papers_Wilson_12%20Jun%2020.pdf.

³ Use of the phrase "you can't surge trust" added by the author and not the panel.

	<p>5. Address SOF's Identity Crisis. Over two decades, the mission of counterterrorism has driven SOF components to resemble each other in function and form. Previously, each SOF component's selection and training remained distinctively dissimilar based on organizational history and tradition. For example, in U.S. Army Special Operations Command, unconventional warfare acted as an identifying principle for Special Forces, Civil Affairs, and Military Information Support Operations. However, twenty years of countering terrorism competed with this unifying philosophy. Unconventional warfare may comprise the central component in USASOC's Fourth Age of SOF. At the same time, USASOC's approach must also evolve to address tomorrow's challenges – not simply "get back to its roots."</p> <p>6. Remember What Makes SOF Unique. What makes special operations "special" is an old one yet remains an essential question to consider. In USASOC, the first explanation revolves around taking an indigenous approach that acts with and through partners; the second explanation centers on USASOC's ability to work in denied areas. Denied areas might encompass multiple barriers in a particular space – whether they be political, cultural, linguistic, physical, etc. To remain "special," USASOC must train, man, and be equipped to conduct operations utilizing these two unique approaches to warfare – working with indigenous partners and the ability to do so in denied areas.</p>
<p>Relevance for JSOU:</p> <p>What knowledge, people, or activities discussed are relevant for JSOU?</p>	<p>Much of the discussion on SOF's utility presented on the panels are relevant to JSOU, but some more than others; the two highlighted below may have limited value to JSOU.</p> <p>a. Making Realistic and Achievable SOF Priorities remains more in the operational force realm than in the purview of training and education. Importantly, education can highlight that SOF has limits, but commanders make decisions regarding priorities. This topic, however, might have value in the <i>Theater Special Operations Command Staff Preparation Course (TCPC)</i>.</p> <p>b. Remember What Makes SOF Unique is an essential component to understanding SOF's identity, but the answer to this inquiry varies based on each SOF component's perspective. While USASOC may believe its ability to work with indigenous partners and in denied areas remains the essential ingredient to what makes it "special," other components like NAVSPECWARCOM may emphasize its elite effectiveness compared to conventional forces in order to distinguish itself. AFSOC might argue its flexibility, not the skill of its pilots, makes it "special."</p> <p>The Theater Special Operations Commands' very existence offers an institutional example of what makes SOF unique at the greater enterprise level. Interestingly, the question of what makes SOF "special" from a JSOU perspective might have more limited value in education – as "special" is generally assumed in the classroom. At the same time, perhaps Remember What Makes SOF Unique would make for an exciting conversation topic within the <i>Theater Special Operations Command Staff Preparation Course (TCPC)</i>.</p>
<p>Future Opportunities :</p>	<p><u>TEACHING AND LEARNING (T&L):</u> Two of the conclusions endorsed by the panel might be considered the most relevant to education within the Department of Special Operations, Irregular War, and Low-Intensity Conflict.⁴</p>

⁴ The Department of Special Operations, Irregular War, and Low Intensity Conflict includes the following classes: Joint Unconventional Warfare Operations Course (JUWOC), Introduction to Special Operations (ISOC), National Resistance Course (NRC), Irregular Warfare Course (IWC), Countering Weapons of Mass Destruction (CWMD),

<p>What further opportunities were identified that merit current or future efforts in the following areas:</p>	<p>a. Utilize a Phasing Construct to Explain Irregular Warfare has excellent applicability to many courses at JSOU. Both state and non-state actors are challenging the current boundaries of nation-states and internationally recognized constraints. The instability caused by challenges to the current world order by non-state actors will remain a significant issue for SOF to address over the next few decades, and this construct has merit for use in the classroom. The verdict, however, on the future of insurgency and whether new conflicts will resemble the Syrian Civil War may not be settled, but this paradigm remains valuable for conversation and learning.</p> <p>b. Support an Inclusive Approach already receives much attention at JSOU at large. Most of the Department of Special Operations courses, Irregular War, and Low-Intensity Conflict exclusively target SOF and SOF enablers – not partners. Nevertheless, several courses are offered in the Department of International Education & 3-Ds Studies which specifically target the Interagency and foreign partners. The remaining question revolves around how much interagency and partner education is enough and if the current curriculum requires further adjustments.</p> <p><u>RESEARCH AND ANALYSIS (R&A):</u></p> <p>Address SOF's Identity Crisis might serve as the most favorable for further research and analysis. U.S. Army Special Operations Command has been wrestling with questions over its identity for the past few years. Meanwhile, Marine Special Operations Command continues to search for a unique niche within SOF. Both Navy Special Warfare Command and Airforce Special Operations Command wrestle under the pressure of more extensive Service mandates. How will all SOF components align with and integrate into the Fourth Age of SOF? Through the lens of "man, train, and equip," how much do the Services influence the SOF components' transformation, and how much does the U.S. Special Operations Command? What is the desired end state regarding the evolution of SOF in the Fourth Age, is that goal well-articulated, and what are the milestones in achieving it?</p> <p><u>SERVICE OUTREACH AND ENGAGEMENT (SO&E):</u></p> <p>Incorporate the Four Ages of SOF into the Lexicon is the most appropriate for JSOU's service outreach and engagement strategy. This construct remains advantageous for SOF components to view their past evolution and current transformation. Simultaneously, making "the four ages of SOF" understood within the larger Department of Defense, the Interagency, and even academia, allows partners outside the Enterprise to understand how SOF views itself – facilitating increased understanding.</p>
<p>Trends:</p> <p>What relevant and emerging trends were identified in this session?</p>	<p>The trends identified in the panel include:</p> <ol style="list-style-type: none"> a. Increased emphasis on irregular warfare with less resources allocated to countering-terrorism. b. A growing unrest globally which challenges the current world order – a chronic instability which strategic competition will compound. c. A need to identify and articulate SOF's evolution in the Fourth Age. d. The importance of maintaining partnerships with other agencies and nations.

Special Operations Intelligence Course (SOIC), SOF Counter Weapons of Mass Destruction Staff Course (SCSC), Cyberspace and Special Operations Forces (CSOF), and Theater Special Operations Command Staff Preparation Course (TCPC).

Course/Program/Content Specific

<p>Relationship:</p> <p>What is the relationship of this session content with your course/program learning outcomes?</p>	<p>The Department of Special Operations, Irregular War, and Low-Intensity Conflict might incorporate several lessons learned from the panel discussions. These are articulated in the teaching and learning section above. I plan on including both suggestions in the Joint Unconventional Warfare Operations Course.</p>
<p>Utility:</p> <p>What parts or portions of this session support the learning outcomes of your course or program? (Please be specific)</p>	<p>The panels' results on SOF Utility might assist the evolution of several JSOU courses, from which the Joint Unconventional Warfare Operations Course (JUWOC) might serve as an example. The objective of (JUWOC) is to ensure students can:</p> <p>"understand the topic of unconventional warfare and the associated procedures and techniques, in order to effectively plan, support and command and control unconventional warfare operations."</p> <p>a. In JUWOC, the course already includes Address SOF's Identity Crisis. In the discussion of Special Forces, students learn varying perspectives from Special Forces experts in their own words on the organization's evolution from two factions within Special Forces arguing for distinctly different futures.</p> <p>b. Currently, JUWOC does not include the Utilize a Phasing Construct to Explain Irregular Warfare as identified in the panels. While the course already discusses Syria and Kurdistan as examples of future insurgencies, it does not illustrate them as an evolutionary change. However, the next iteration will do so.</p> <p>c. Based on this course's current classification as secret/no foreign, Support an Inclusive Approach would prove a difficult objective in including international partners. However, there is an opportunity to include the Interagency in one or more of the JUWOC, and this has been discussed with the Department of International Education & 3-Ds Studies. Although, no final decision was made.</p> <p>d. Incorporate the Four Ages of SOF into the Greater Lexicon might serve as a suitable discussion module within JUWOC. The inflection points from a focus on countering terrorism to one more focused on international partnerships below the threshold of large-scale violence is an important awareness. Perhaps the President of the University would make a good guest speaker on the topic.</p>
<p>Instructional Strategy:</p> <p>How would you use or incorporate those parts of this session into your</p>	<p>Several methods could be utilized to include the points from these panels into JUWOC. In Address SOF's Identity Crisis students read published documents from Special Forces experts, followed by guided discussion. Inclusion of Utilize a Phasing Construct to Explain Irregular Warfare might best be included into current presentation on irregular warfare. Expanding the student audience to include interagency participation, to Support an Inclusive Approach, requires University approval. As discussed in the previous section, Incorporate the Four Ages of SOF into the Greater Lexicon might best be incorporated by a guest speaker/discussion. However, it could also be accomplished through a lecture/discussion.</p>

course or program? (Please be specific)	
Research Opportunities: In what areas of this lesson would additional research benefit your course or program?	As discussed previously, the theme of Address SOF's Identity Crisis poses the best area for further research. The Joint Unconventional Warfare Operations Course discusses the contemporary challenges to Special Forces identity. However, providing further conversation on the future of the other components would add value to JUWOC and many other courses. Additionally, understanding how the four SOF components interoperate and complement one another in the future force would prove useful, as well as how those forces interact within the TSOC? In some ways, while the components may be experiencing an identity crisis following the War on Terror, SOCOM has never fully realized its own roles and responsibilities in relation to the components.
Recommendations: In what other courses or programs would you recommend incorporating content from this session?	Other courses which might consider the inclusion of the results from this panel include: <ul style="list-style-type: none"> a. Introduction to Special Operations (ISOC) b. Introduction to Special Operations Forces (ISOF) c. Special Joint Operations Course (SJOC) d. Joint Special Operations Forces Enlisted Academy e. Joint Forces Special Operations Component Commander Courses (JFSOCC) f. Theater Special Operations Command Staff Preparation Course (TSPC) g. National Resistance Course (NRC) h. Irregular Warfare Course (IWC)
Notes or Comments:	Any questions regarding the Joint Special Operations University Future of SOF Forum should be directed to FutureofSOFResearchForums@jsou.us . The e-mail/contact information below is offered for any comments or questions regarding this Rapporteur Report. ///Robert S. Burrell/// robert.s.burrell.ctr@socom.mil

Session/Event/Panel:	Topic 2 – SOF Ethical Considerations
Rapporteur:	Laura Stenger
Course/Program/Content Area:	Department of the SOF Profession: Ethics Education
General	
Content Summary: What are the main points of this panel/session?	Moral Fitness: We need a structured systemic approach and regular touchpoints over time, so moral fitness can become normal conversation. Mid-level leaders are key (NCOs) – "The culture of an organization is defined by the worst thing the leader will tolerate." How do we grow ethical SOF operator apprentices? By consistent messaging across all ranks and teaching the leadership. How does the community rebuild after recent ethical scandals? 1) We need to

	<p>acknowledge it 2) Then follow up with action, accountability and education.</p> <p>Moral Injury: Moral injury occurs when a person does wrong/observes wrong/lacks a sense of control. It is an attack on the core of one's moral beliefs and leads to guilt, shame and suffering. We need to acknowledge it is real, provide a safe place to discuss and designate resources to assist. Individuals need to be clear about their values and know when to draw the line. We need to bring the conversation on moral injury to the forefront with up-and-coming recruits.</p> <p>Education: To assist in educating and preparing the force, the SOCOM Chaplain's Office along with JSOU faculty, assisted in creating the SOF Ethics Field Guide. We need to continuously educate and examine the environment where SOF operates. For the last 19 plus years we valued competency over character. <i>Moral fitness is just as important as physical fitness and technical competency.</i></p>
<p>Relevance for JSOU:</p> <p>What knowledge, people or activities discussed are relevant for JSOU?</p>	<p>JSOU was asked to create a SOF Junior Officership Course because of the findings in the Comprehensive Review (January 2020). Prior to the report ethics education was present in JSOU programming, but not to the depth and frequency needed to impact SOF culture.</p>
<p>Future Opportunities:</p> <p>What further opportunities were identified that merit current or future efforts in the following areas:</p>	<p>Teaching and Learning (T&L): We are not looking at moral responsibility upstream. What about the partner force or other agencies? SOF members feel a personal investment and feel responsible for them. Proxies help us wash our hands of unsavory behavior, but if the connection is exposed it hurts us. People parlay political risk and put it on the backs of the lower echelon. It is necessary to promote transparency and honesty to account for one's actions to explain it to a reasonable person. We need to grow healthy skepticism in the force.</p> <p>Research & Analysis (R&A): A research topic for consideration - Examine the long-term health effects of moral injury.</p> <p>Service Outreach & Engagement (SO&E): There are opportunities for collaboration and engagement with the Australian Defence Force School of Special Operations.</p>
<p>Trends:</p> <p>What relevant and emerging trends were identified in this session?</p>	<p>When working in urban areas there are unsavory actors – organized crime/open/underground. Does SOF need to "manage" their ethics as they navigate that environment? When is it OK to do unsavory things? Use narrative to make sense of the world – challenge comes in the form of classification of information – lack of narrative undermines the trust of the public.</p>

Course/Program/Content Specific

<p>Relationship:</p> <p>What is the relationship of this session content with your course/ program learning outcomes?</p>	<p>This content is embedded in the course suite of the Department of the SOF Profession, College of SOLIC³ and in the Enlisted Academy.</p>
<p>Utility:</p> <p>What parts or portions of this session support the learning outcomes of your course or program? (Please be specific)</p>	<p>Developing moral and ethical SOF leaders is a moral responsibility and an operational imperative. The Department of the SOF Profession contains the suite of leadership courses touching participants from O1s-O8s. Growing leaders who understand the damaging effects of moral injury will help preserve the utility of SOF.</p>
<p>Instructional Strategy:</p> <p>How would you use or incorporate those parts of this session into your course or program? (Please be specific)</p>	<p>Storytelling and the use of case studies would be ideal methods. The Ethical Model highlighted in the session is a great tool for discussion. Students could use the model to discuss various scenarios/case studies or relay personal anecdotes using the "quadrants" (Positive/Negative Outcomes and Low/High Moral Drift.) The SOF Ethics Field Guide is another tool. It provides information on the fundamentals of handling character challenges with honor. It also contains 13 "Battle Drills" to promote confidence and to provide "reps" to students in ethical decision making. Each "drill" is a mini-case study complete with questions and follow-up information for the facilitator.</p>
<p>Research Opportunities:</p> <p>In what areas of this lesson would additional research benefit your course or program?</p>	<p>There are opportunities for collaboration and engagement with the Australian Defence Force School of Special Operations. The Inspector General of the Australian Defence Force – Afghanistan Inquiry Report highlights some similar issues facing U.S. junior SOF leaders.</p>
<p>Recommendations:</p> <p>In what other courses or programs would you recommend incorporating content from this session?</p>	<p>Ethical discussions should permeate all JSOU courses/events. We need to continue the cross-pollenate content and faculty, inside and outside of JSOU. JSOU is uniquely positioned to become the "hub" of ethics exploration and education across the DoD and with our unified action partners. Other militaries and organizations are dealing with the same fallout from moral injury. JSOU can provide the platform to link outside organizations to ensure this topic remains at the forefront in educating SOF and its partners.</p>
<p>Notes or Comments:</p>	<p>Link to Small Wars Journal Article: Ethics in Special Operations and the Joint Special Operations Forces Senior Enlisted Academy Small Wars Journal Thyne, K., & Long, J. E. (2020). Ethics Quick Look. <i>Joint Special Operations University Press Publications</i>, February, 1–4. Home IGADF Afghanistan Inquiry (defence.gov.au)</p>

Session/Event/Panel:	JSOU Forum – SOF Identity
Rapporteur:	Lydia Kostopoulos
Course/Program/Content Area:	Emerging Technologies

General

<p>Content Summary:</p> <p>What are the main points of this panel/session?</p>	<p>KEYNOTE</p> <p>China is the priority. U.S. spends twice of what all of NATO countries spend combined.</p> <p>Lessons learned from war.</p> <ol style="list-style-type: none"> 1. Ungoverned spaces in the Muslim world will be exploited by extremists 2. Need to do something about it. (otherwise, instability, migrants etc) 3. Need to lead with strengths (C.T., ISR): U.S. needs to advise, assist, enable Needs to be a coalition – coalitions is hard, takes time, but its worth it. 4. Can't counter extremists with just C.T. operations. Can't Delta force your way out of the problem. Need comprehensive civil-military (counter insurgency) campaign. BUT "we don't want to do the tasks associated with that". Have host nations do the front line fighting (+dealing with local grievances etc) and U.S. can assist with ISR etc 5. This fight is the fight of a generation(s). There is a substantial continuing need for SOF of all types (civil affairs, MISO) etc which will be part of the irregular warfare part of the continuum. Support to civil authorities, enable host nations, security force assistance <p>Ownership, mentorship, assistance SOF may not be the main effort in major combat operations.</p> <p>Future – its going to be robot against robot Doesn't see anything that is broken</p> <hr/> <p>TOPIC 1, SESSION 1</p> <p>Hammes – Strategic empathy. Stay small, stay indirect and don't make it our fight. Avoid over arrogance Funk – Whole of government inter-agency approach and coalitions with partners. Below threshold of armed conflict. Be intentional about civ-mil cooperation. Vasatka – compete to be the partner of choice. Enable other nations to do things so it is not the U.S. doing everything.</p> <hr/> <p>TOPIC 2, SESSION 2</p> <p>Duclos – every 20 years there is a new identity crisis Analog is important as more tech comes into the picture SOF Peculiar – operating in "denied area" – that is the capability set of SOF. If it wasn't a denied space then conventional military would go in. Operating in denied spaces is what makes SOF "unique" and that is part of its identity. Politically, culturally, etc denied (many ways to get through barriers of denial – could use the "through" approach with others to overcome/penetrate denied space. Ex: could be language capability, technological capability</p>
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Sannes – a lot of SOF identity is derived from what you see in social media about "kicking doors"
Working by, with and through or operate in denied spaces.
SOF Unique: Train, man and equip for denied spaces in the future and what the unique capabilities are and need to be.
Can rapidly modernize and innovate to solve problem sets.
Improving SOF cyber capabilities will be part of the future.

TOPIC 2, SESSION 1

- conditions on the ground and values in country may not always match U.S. values.

TOPIC 2, SESSION 2

Basik: The culture of an organization is defined by the worst thing a leader will tolerate.

The roadmap of how to succeed in SOF should change and adapt, but the ethical roadmap should not change but be more deliberate in our new understanding of the environment.

TOPIC 3, SESSION 1

Gibson – All we need is a Mcgyver type person (regardless of tech). This will change selection. A rapid cultural adjustment is needed for technology. Not just code, use UAS and call for fire with multiple means. The kind of individuals needed are those who can engage in these extremely complex and dynamic environments. Hybrid individual – those who have a level of technical expertise and a hint of policy. Folks who can operate in the middle – having people who can bridge the gap is required but it takes experience.

Want tech but – what is the training cycle, what is the maintenance, contract support etc.

Babich - Discover, Engage and Accelerate. What is the balance of discovering tech and implementing it. Need transformational tech that gives advantage in the battlefield. Technology that is appropriate for one theater is not appropriate for another. Different people are at different stages of tech adoption within the Enterprise (early adopters, etc). Need to create need and understanding through education and awareness about the benefits of technology to help everybody understand – culture.

McLaine – Facial recognition becoming more common in the marketplace. Technologies in industry should be familiar to SOF. Tech that is going mainstream should be something familiar inside SOF. Technology that used to be available to only operators is now available in the market, that should not be unappreciated. Battery operated vehicles (quite, range) + automation in logistics + human machine teaming.

Exposure is important – get people exposed to technology and get them comfortable.

Thorny questions around A.I./Data Interpretation/ML – keeping humans in the loop is a strong ethical consideration.

TOPIC 3, SESSION 2

Zais – architecture of data matters. Decoupling AI/ML is important.

Singer – "Ready now and future ready." Challenge of (1) understanding technology (2) visualization – how does it matter for the context.

Nutsch- also important to know how to perform without technology

TOPIC 4, SESSION 1&2

No technology take-aways

	<p>CLOSEOUT – FORESIGHTING THE FUTURE OF SOF Engelmeier - Need to coordinate growth and understand policies. Capabilities need to be layered and synchronized. Hayers -</p> <hr/> <p>Exploring SOF Identity – Dr. Wilson & VADM Szymanski Re-imagined X Hyper enabled operator Human Machine Teaming will be Accelerators.</p>
<p>Relevance for JSOU: What knowledge, people or activities discussed are relevant for JSOU?</p>	<p>Everything is relevant for JSOU. See utility section below for the relevance for our Pathway</p>
<p>Future Opportunities: What further opportunities were identified that merit current or future efforts in the following areas:</p>	<p>Teaching and Learning (T&L): Looking into the non technology solutions. Research & Analysis (R&A): Facial Recognition and COTS surveillance Service Outreach & Engagement (SO&E): N/A at the current stage of the Pathway's development.</p>
<p>Trends: What relevant and emerging trends were identified in this session?</p>	<ul style="list-style-type: none"> - Ubiquitous facial recognition and surveillance - Increasing interest and use of A.I.
<p>Course/Program/Content Specific</p>	
<p>Relationship: What is the relationship of this session content with your course/ program learning outcomes?</p>	
<p>Utility: What parts or portions of this session support the learning outcomes of your course or program? (Please be specific)</p>	<p>Through the lens of the Emergent Technologies Pathway here are some items that are relevant from the conversations in the Forum:</p> <ul style="list-style-type: none"> - The A.I. demand signal remains strong - Validation: Analog can be more important than technology. This is something we are already considering in the pathway and something we need to look into more in terms of how we present that information. - The McGyver reference was useful in terms of "Education" vs "Training". At JSOU we are providing them with education about technologies and posturing their technological mindsets so they can solve problems on the ground. This is something we could weave into scenarios and wargaming.

	<ul style="list-style-type: none"> - Facial recognition was highlighted. We are tracking this and already plan to incorporate this into the A.I. concentration. However we should also include a lesson on just the COTS availability as this was something that was flagged as important for SOF to know in order to be able to leverage in theater. - Validation: Ethics and A.I. – this is something we already have in our A.I. concentration. - Imagination: the talk about the re-imagined X and hyper enabled operator with human machine teaming is something that is being developed right now and in the coming years. The scenarios and wargaming should offer vignettes of what that may look like or is shaping out to be.
<p>Instructional Strategy: How would you use or incorporate those parts of this session into your course or program? (Please be specific)</p>	<p>Potentially use Mark G's panel discussion.</p>
<p>Research Opportunities: In what areas of this lesson would additional research benefit your course or program?</p>	<p>See future opportunities section R&A above (this could potentially be a redundant question)</p>
<p>Recommendations: In what other courses or programs would you recommend incorporating content from this session?</p>	<p>Not sure if I was taking notes for the Emerging Tech Pathway</p>
<p>Notes or Comments:</p>	

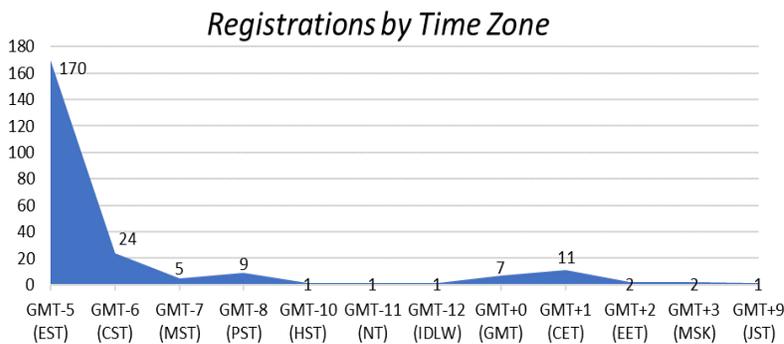
Data Analytics

POC: Mr. Eddie Edwards and Dr. Beth Fidermutz

A total of 234 valid non-duplicative participants registered for the Joint Special Operations (JSOU) Future of Special Operation Forces (SOF) Forum Series on *Exploring SOF Identity* held virtually from 15-16 March 2021.

The final registration pull contained 260 entries; 23 duplicate registrations were removed, along with two registrants (one U.S. and one Canadian) who failed to provide e-mail information and thus did not receive login details. The Iranian registrant was deemed ineligible to participate.

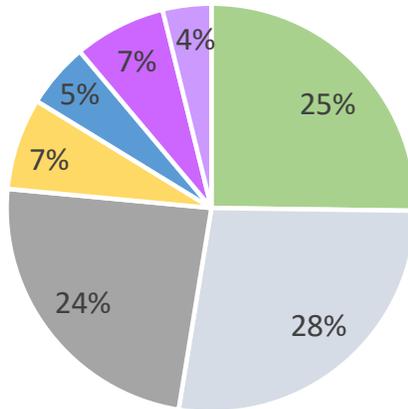
Country	# of Registrants
Canada	2
Czech Republic	2
Egypt	1
France	1
Germany	1
Iran	1
Italy	1
Japan	1
Jordan	1
Netherlands	3
Norway	2
Poland	1
Portugal	1
Spain	3
Sweden	1
Turkey	1
United Kingdom	4
United States	208
Grand Total	235



Registrations were across a total of twelve time zones. U.S. time zones of EST, CST, MST, and PST accounted for 89%. The other 11% came from eight additional zones. The majority of those registered came from the EST zone, at 73%.

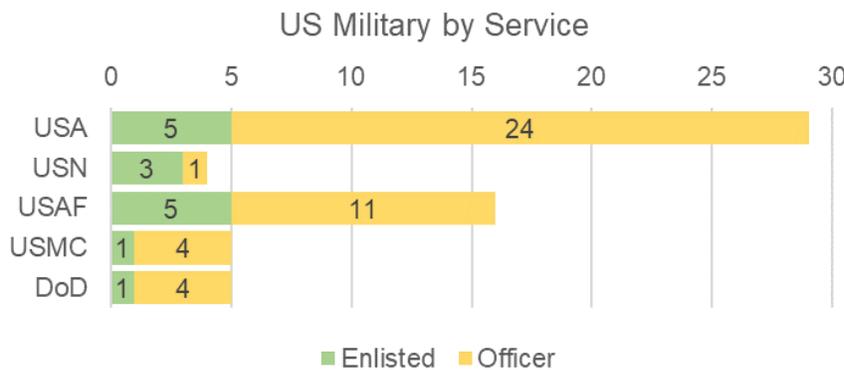
Registered	#
US Military	59
US GOV CIV	64
US CTR	56
US CIV (Non-GOV)	17
US Other	12
Int'l Military	17
Int'l Other	9

Total 234



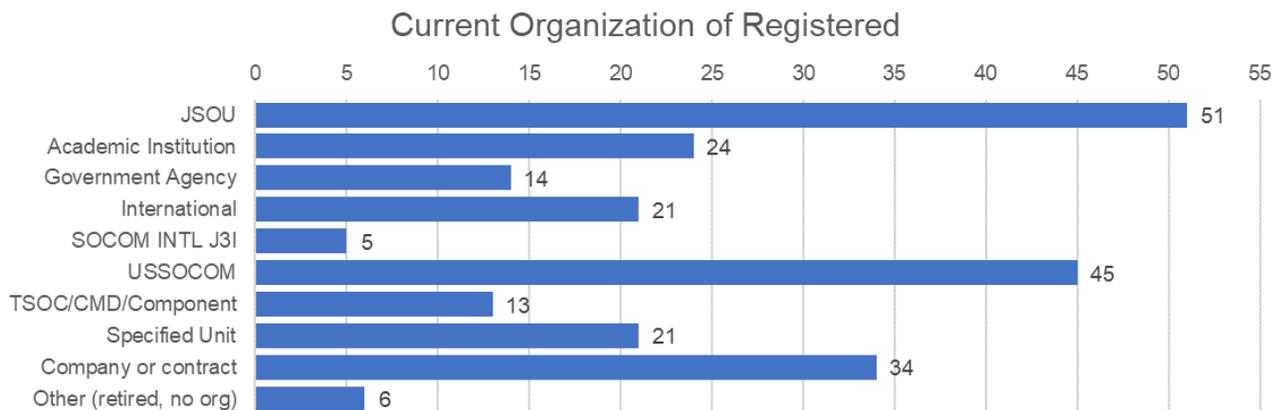
We gathered basic demographics from the Forum's registration process. International registrations accounted for 11% of the total. Many U.S. registrations were from Government Civilians (28%), Military (25%), and Contractors (24%). Those listing themselves as "Other" or Non-Government listed various schools, and LLCs or were

retired/ independent. A few select cases listed SOCOM but did not identify earlier as a contractor, military servicemember, or civilian.



Of those who identified as U.S. servicemembers, almost half (49%) identified as Army. Overall, 75% of the U.S. military servicemembers registered were officers and 25% were enlisted. Five of those registered did not specify a service and instead selected DoD.

As part of the registration, each member had to identify the current organization. Some list the overall organization, while others choose to list a particular office within that organization. Overall, there were over 150 unique organization titles listed for the 234 unique registrations.



Organizations were reviewed and consolidated into ten generalized groups. JSOU employees were the largest group, followed by USSOCOM. This was to be expected as JSOU includes all personnel used to host, speak at, or facilitate the event.

Individual companies and contractors followed along with academic institutions to include the Air War College, Army War College, Auburn University, George Washington University, Institute of World Politics, Marine Corps University, National Defense University, Naval Postgraduate School, the Naval Research Laboratory, Naval War College, RAND Grad School, the Citadel, the United States Military Academy, University of Massachusetts Lowell, University of South Florida, and the University of Michigan.



All 234 personnel registered were asked to select their current specialties. Although many may identify as having multiple, they could choose only one as a primary specialty. Those in **training, doctrine, and education** were the top selection at 21%. SOF Operators made up 17%, Operations 15%, and Strategy/Plans had 13%.

Forum Participation

Discussion: Of the 234 registrants, we cannot identify which registrants logged in and participated in the Forum. Login information, including associated demographic variables, *is critical to tracking forum participation and developing an appropriate participant persona.*

With such data, the goal for these events (and similar) is to establish three distinct key metrics;

registered, logon and participated. The counts to each decrease, in that order. The #Participated must also be defined. In this case, the essential requirement for a count is to be logged in at least one day for more than one continuous hour.

Recommendations: Additional statistics may be pulled from the usage data to detail the individual/all participant's average time, total time, windows of participation, including day, IP addresses, and the number of logins.

When data is detailed down to the user, it is essential to separate distinct logins/users attending the event by each distinct event participant as facilitators, administrators, speakers, or hosts can be culled out to provide a more accurate representation of participants.

Analysis of Forum Chat. Of the unknown total participants who logged into the Forum, 26 individuals contributed one or more comments/questions via the chat feature, resulting in 53 comments/questions during Day 1 and 66 comments/questions during Day 2 (numbers exclude individuals/comments associated with moderator roles, e.g., JSOU Information, Question Curator).

	# of unique comments	# of unique contributors
<i>Topic 1 – Session 1</i>	23	10
<i>Topic 1 – Session 2</i>	16	9
<i>Topic 2 – Session 1</i>	7	6
<i>Topic 2 – Session 2</i>	7	6
<i>Topic 3 – Session 1</i>	21	8
<i>*Topic 3 – Session 2</i>	10	5
<i>*Topic 4 – Session 1</i>	8	4
<i>Topic 4 – Session 2</i>	9	4
<i>Practical Impact /Closeout</i>	18	7
<i>Total</i>	119	26

*Sessions experienced technical difficulties

Most comments were substantive and posed questions to the panel or provided input to the discussion. Several unsolicited compliments were received and are provided below for reference (comments appear verbatim and not edited).

- "P.S. loved the clarifications on denied environments...outstanding!"
- "I am impressed by the great work JSOU is doing in ethics..."
- "great session! Greets from the Netherlands!" [Topic 4 – Session 1]
- "Impressive panel. Very enlightening. I hope a video could be made available to a wider audience. It will be educational." [Topic 4 – Session 2]
- "Great Forum, JSOU. Thank you for all of the work pulling this all together. Awesome."
- "Agreed, great Forum. Lots of thoughtful discussions these past two days. Well done"
- "Cannot thank [JSOU] enough, leaving with more questions and readings. Outstanding Speakers, Moderators, and Events Team. A Graduate Level course simmered into Two-Great Days. Thank you, JSOU."

Forum Survey Results

A request to provide feedback on the *Exploring SOF Identity Forum* was sent to the primary and secondary e-mails provided by the 234 valid registered participants. A total of 55 individuals completed the survey for an overall **response rate of 24%**. Of those respondents, 49 (89%) attended the Forum. Reasons for non-participation from the six individuals who registered but did not attend included scheduling conflicts (3), emergency/illness (1), forgot (1), traveling (1), and could not get through the firewall on SOCOM or personal computer (1).

The majority of survey respondents were **satisfied** with the Forum (79%) and all reported it was well **organized** (100%). Respondents indicated the Forum **met its goal** of achieving discourse around each of the four identity lenses (79%-80%), the content was as expected or better (83%), and information would be **useful** in their jobs (73%). Further, a substantial majority of

respondents would **recommend** the Forum to others (85%) and are likely to **participate** in a future JSOU forum (89%; 100% of survey respondents who did not participate in the *Exploring SOF Identity Forum* indicated they would likely be future participants).

Qualitative analysis of the open-ended feedback was aligned with quantitative findings that the *Exploring SOF Identity Forum* was a success and provided value to participants. Several example comments are provided below for reference.

- “My academic research intersects with SOF in various ways, from terrorism/CT to influence warfare. Was definitely beneficial to hear these different perspectives on four key aspects of SOF present and future, particularly the discussions about technology.”
- “The experience of having panel discussions on these topics is very beneficial. Often things like diversity and inclusion comes in the form of formal online training. Having a live panel discussion enables people to challenge their beliefs in real time, and seems more effective.”
- “The very valuable discussions which took place among the members of the different panels and the level of Q & A. It was quite interesting to hear so many different perspectives and points of view.”

Detailed analysis of the JSOU Forum Survey can be found on the subsequent pages of this report.

Demographics. The table below displays a breakdown of survey respondents who attended the *Exploring SOF Identity Forum* by role and specialty. Approximately 88% of respondents were U.S. citizens. The six international respondents were from Canada, Norway, Portugal, Spain, Sweden, and Turkey. The most significant representation in survey responses was from U.S. government civilian employees and contractors in the training/doctrine/education field. All military respondents were Army (5 officers, 2 enlisted).

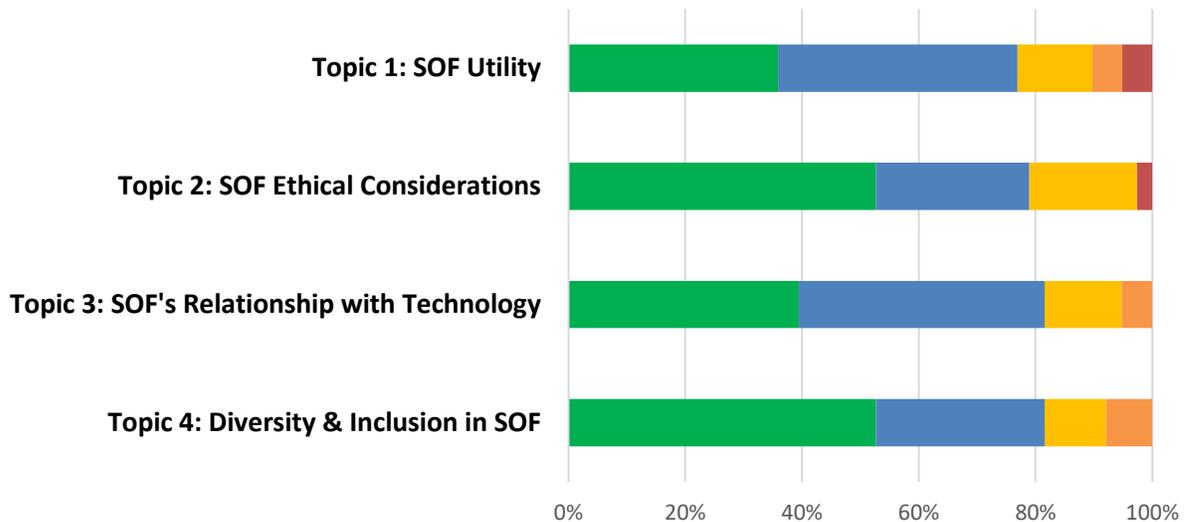
Role/Specialty	Government, Civilian	Government, Contractor	International	Military	Non-Govt, Civilian	Unknown	Total
<i>Acquisitions</i>	1						1
<i>Civil Affairs</i>			1	4	1		6
<i>Communications / IT</i>	1						1
<i>Intelligence</i>	1						1
<i>Logistics / Maintenance</i>	1						1

<i>Operations</i>	2		1	1			4
<i>SOF Operator</i>		2	1	2			5
<i>Strategy / Plans</i>	1		1				2
<i>Training / Doctrine / Education</i>	10	10	2		2		24
<i>Unknown</i>		1				3	4
Total	17	13	6	7	3	3	49

Forum Goal

The JSOU Future of SOF Forum aimed to elicit discourse among divergent minds to explore SOF identity through the lenses of: 1) SOF Utility, 2) Ethical Considerations, 3) Relationship with Technology, and 4) Diversity & Inclusion.

The Forum goal of achieving discourse around _____ was met.



Topic 1: SOF Utility

Strongly Agree Agree Neutral Disagree Strongly Disagree

	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
Topic 1: SOF Utility	35% 15	44% 19	12% 5	5% 2	5% 2	43	4.00

Please provide your rationale for disagreeing with **Topic 1: SOF Utility**.

- Each panelist praised their own organizations' capabilities and successes without discussing solutions to real challenges that face SOF such as the current state of permissions and authorities, the divided perspectives of DOS and DOD, the disconnected lines of effort of country strategies and GCCs, absurd shortsighted 4-year strategies driven by careerism, and A.I./cyber/information warfare was barely touched on.
- The speakers on SOF utility each had a very stereotypical JSOC DA-focused view of SOF. Though the SOF "network" was mentioned, it was more lip service and U.S.-centric. Most of SOF, USAOC, is not platform-centric and not unilateral in nature, and the speakers did not demonstrate an understanding of this nor how it fits. For example, one speaker mentioned Japan as a partner that SOF does not need to bother with. This comment demonstrated a lack of understanding concerning the US-Japan relationship, the role SOF plays, the threats Japan faces, and the massive SOF capability and capacity gaps in the JSDF. There were also several assumptions put forth in the discussion that any seasoned ARSOF operator would find preposterous. In particular, the people of the world desiring peace. This is a classic example of getting high on your own supply. The U.S. preaches peace and prosperity and in order to receive U.S. support, many nations regurgitate that mantra, but it is not true. For example, no two countries in Asia should be closer than Malaysia and

-
- Singapore, yet all their negotiations are acrimonious, and their main war plans concern each other. SOF is a key part of the glue that the U.S. uses to keep the world in line and to benefit the U.S. and the global system we created. There is a need for greater knowledge and understanding that facilitates honest discussion. That was missing.
- The panelist mostly agreed with one another, and the audience was not allowed to speak.

Topic 2: SOF Ethical Considerations

	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
Topic 2: SOF Ethical Considerations	50% 21	31% 13	17% 7	0% 0	2% 1	42	4.26

Please provide your rationale for disagreeing with **Topic 2: SOF Ethical Considerations.**

- This portion did not get to the heart of the problem within SOF, in that SOF must operate with non-Americans who do not share and most often despise or consider our values and ethics idealistic or an outright fraud. On top of this the issues within SOF that are at issue concern a large gap between the leadership and rank and file concerning what SOF does. Only now are senior leaders who actually operated on the ground rising to the ranks who have a dirty understanding of the work that SOF does with our partners. SOF leaders must face the issue that they take a generally smart, moral, ethical, middle class American and train them into a professional killer, thief, seducer, liar, and cheater but expect them to only employ those skills when the government implies they are needed and only when deployed under certain conditions. Then bring those same professional killers, thieves, liars, and such back to the U.S. and treat them like any other enlisted or company or field grade officer. This creates a great amount of frustration and sense of betrayal in the ranks because it always appears that senior leaders never want to talk honestly about what SOF does with our partners to get the "job" done.

Topic 3: SOF's Relationship with Technology

	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
Topic 3: SOF's Relationship with Technology	38% 16	40% 17	17% 7	5% 2	0% 0	42	4.12

Please provide your rationale for disagreeing with **Topic 3: SOF's Relationship with Technology.**

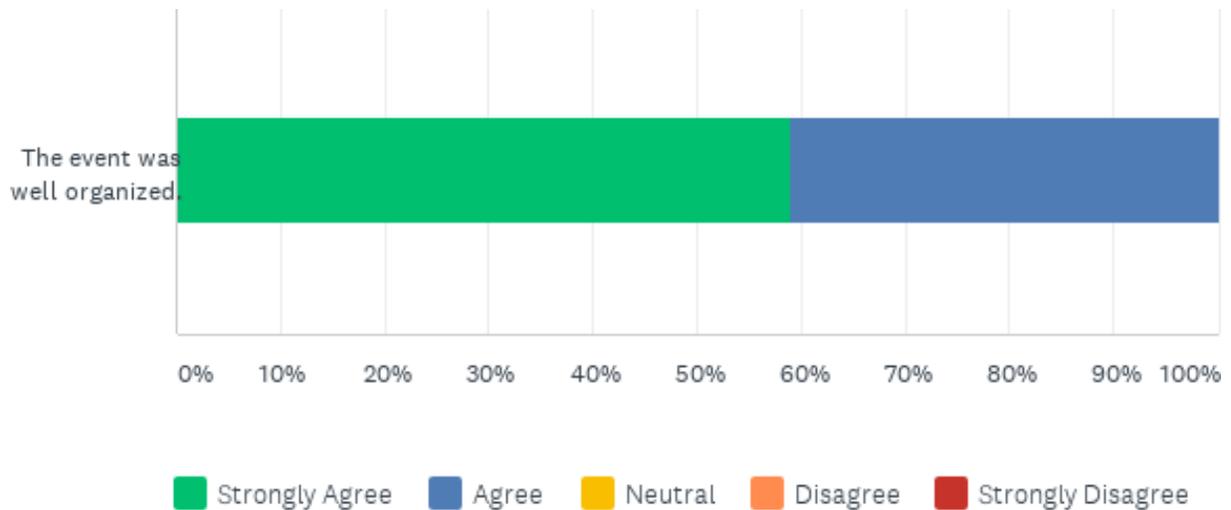
Topic 4: Diversity & Inclusion in SOF

	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
Topic 4: Diversity & Inclusion in SOF	48% 20	33% 14	12% 5	7% 3	0% 0	42	4.21

Please provide your rationale for disagreeing with **Topic 4: Diversity & Inclusion in SOF.**

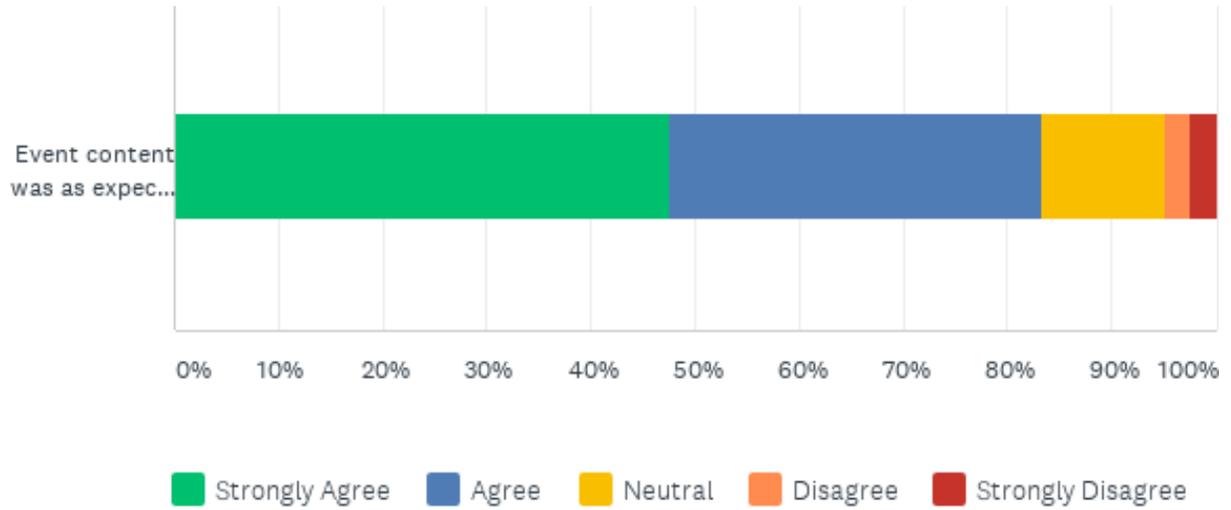
- Only one of the panelists represented SOF. All the others were from other organizations, who not only was not SOF but admitted to having to look up what SOF was. So not qualified to make judgments regarding the topic.

Organization



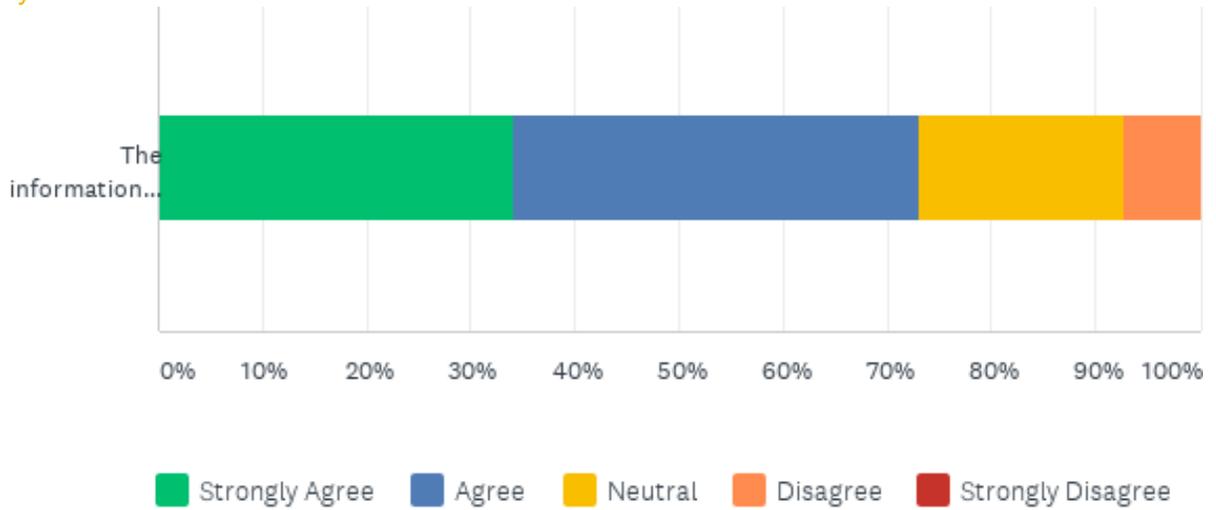
	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
The event was well organized.	59% 26	41% 18	0% 0	0% 0	0% 0	44	4.59

Content



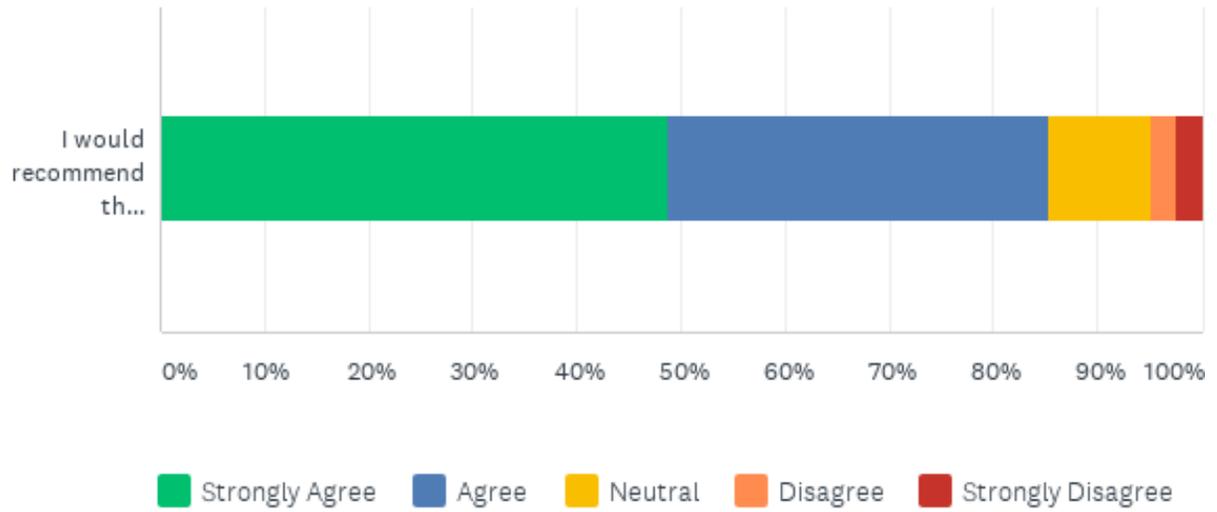
	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
Event content was as expected or better.	48% 20	36% 15	12% 5	2% 1	2% 1	42	4.24

Utility



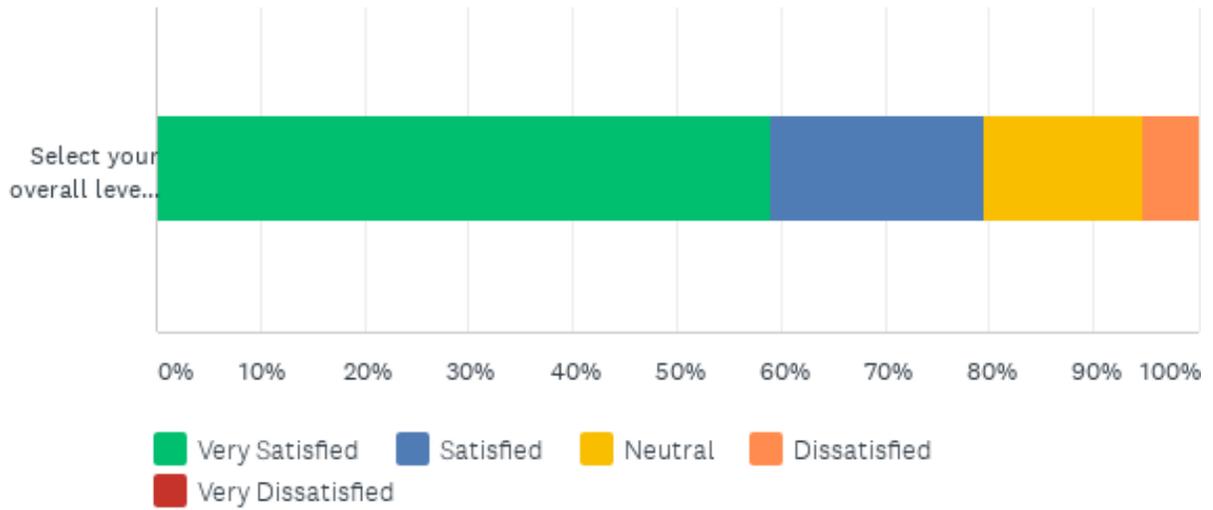
	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
The information provided will be useful to me in my job.	34% 14	39% 16	20% 8	7% 3	0% 0	41	4.00

Recommend



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
I would recommend this event to others.	49% 20	37% 15	10% 4	2% 1	2% 1	41	4.27

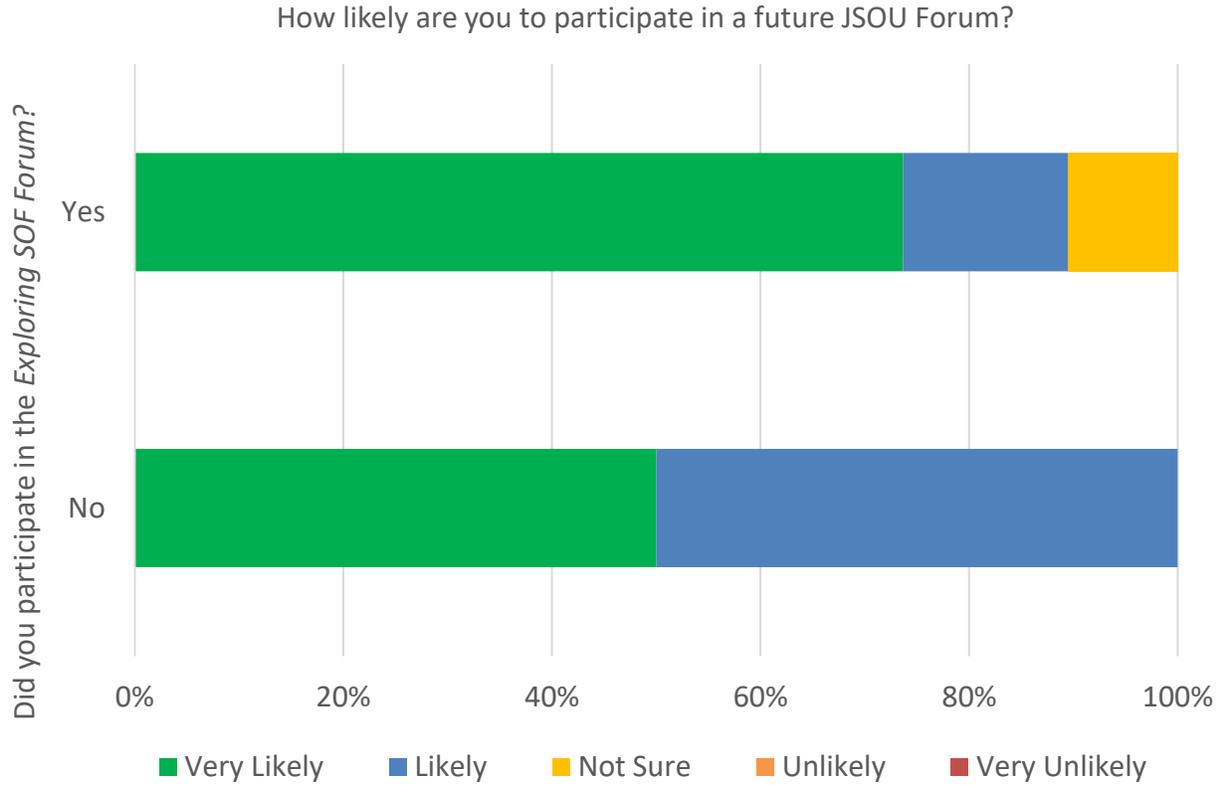
Satisfaction



	VERY SATISFIED	SATISFIED	NEUTRAL	DISSATISFIED	VERY DISSATISFIED	TOTAL	WEIGHTED AVERAGE
Select your overall level of satisfaction with this event.	59% 23	21% 8	15% 6	5% 2	0% 0	39	4.33

Future Attendance

Both survey respondents who did and did not attend the *Exploring SOF Identity Forum* on 15-16 March were asked to rate their likelihood of participating in a future JSOU forum. Nearly all respondents reported they were likely or very likely to engage.



	VERY LIKELY	LIKELY	NOT SURE	UNLIKELY	VERY UNLIKELY	TOTAL	WEIGHTED AVERAGE
How likely are you to participate in a future JSOU Forum?	70% 31	20% 9	9% 4	0% 0	0% 0	44	4.61

Most Valuable

Approximately 57% of respondents provided open-ended feedback on what contributed most to their forum experience/what was most valuable. Roughly 32% of the 28 responses were multifaceted, identifying more than one area of value. Analysis of the comments identified the below themes.

- Quality of the speakers/panels, including diversity in panelists' opinions and backgrounds – 43%
- Forum format, including the ability to ask questions, virtual attendance, chunking of topics, and use of panels – 18%
- Specific session topic/person: Technology – 14%, Keynote/GEN (ret) Petraeus – 11%, Ethics – 7%, Diversity & Inclusion – 4%
- General praise on forum topics/lenses – 11%
- Good production/technical execution of the Forum – 7%
- International SOF comparisons – 7%

What contributed most to your forum experience? What did you find most valuable? (comments appear verbatim and have not been edited)

Government, Civilian

- All subjects
- Format and chunking of material.
- I believe the diversity of opinions and backgrounds contributed to the overall experience. I found the ability to ask questions to the SMEs allowed for a valuable experience.
- I thought that the technical aspects were better than usual.
- Insight from GEN Petraeus
- n/a
- The quality of the speakers and panel members contributed most to my experience.
- A couple of the speakers and panelists were amazing. I really liked the diversity of opinions and the fact that the people on the panels were from varied backgrounds and areas of expertise - that made some of the discussions very informative and educational - the discussions on ethics as well as diversity AND inclusion were very enlightening especially.

Government, Contractor

- Curation of SMEs
- Gen (ret) Petraeus and Dr. Wilson keynote. Dr. Knarr's panel on SOF and Technology was very valuable with a panel of special operators like Mark Nutsch (T.F. Dagger) and a mad scientist was an awesome blend of panelist with no-nonsense discussions of A.I. and future SOF on the battlefield
- General Petraeus interview
- Integrating speakers from industry, education, and SOF
- questions from the audience
- The ability to attend virtually.
- The different "lenses" through which the important issue of SOF's future provided a useful context to the Forum. I thought that the panel members were well prepared and contributed in balanced ways to the consideration of the issues. In an age of remote gatherings, the production values were high and avoided any major disruptions or pauses that I noticed. Someone went to a lot of work to make sure that the technology worked.

- The discussion on professional vs. elite and how this is a false dichotomy.
- The varied speakers from outside SOF. This allowed for viewpoints that were not just self-licking ice cream cones. This has the potential to be a new way to reach others beyond SOF for new ideas.
- Topic 3, Session 2

International

- JSOU not only talks talk but walks the walk. SOF intention to humbly and welcomingly reaching out to broader audience. The Forum in its entirety.
- Solid program with devoted speakers. Interesting topics
- The American insight on SOF
- The experience of having panel discussions on these topics is very beneficial. Often things like diversity and inclusion comes in the form of formal online training. Having a live panel discussion enables people to challenge their beliefs in real time, and seems more effective.
- The most valuable for me is to see and do the comparison with my own SOF experiences and similar topics in Sweden and Europe. It is also very valuable for me as my current position as EXO in USSOCOM.
- The very valuable discussions which took place among the members of the different panels and the level of Q & A. It was quite interesting to hear so many different perspectives and points of view.

Military

- The panel discussions.

Non-Government, Civilian

- How very holistic the approach to addressing the goals and current issues.
- I enjoyed the technology discussion.
- My academic research intersects with SOF in various ways, from terrorism/C.T. to influence warfare. Was definitely beneficial to hear these different perspectives on four key aspects of SOF present and future, particularly the discussions about technology.

Recommendations for Improvement

Just over half of the respondents provided open-ended feedback on recommendations to enhance the forum experience. Of the 25 responses, 24% included no recommendation, 72% included a single recommendation, and 4% identified multiple enhancements. Responses varied, with multiple recommendations on the areas below.

- Increase opportunities for audience interaction and participation – 16%
- Deeper dive into topic areas – 12%
- Continue to refine technology and production capabilities – 12%
- More SOF operators as speakers/panelists – 8%
- Modifying the format/length – 8%
- Read ahead – 8%
- Forum proceedings/key takeaways – 8%
- In-person event – 8%

What would have enhanced your forum experience? (comments appear verbatim and have not been edited)

Government, Civilian

- 1. reducing the scope and looking deeper into one topic. 2. having panelist that were SOF operators or enablers-there were too many "experts" providing generic answers. 3. allowing input from the audience. This could have been recorded and played at any time- the audience played no role in the discussion (which is what a "forum" is supposed to be)
- Flywheel #2. Continue with a follow-on seminar for dive deeper.
- I understand the difficulty in coordinating this action: Representation from all of the Components from USSOCOM. NSW, MARSOC, AFSOC, USASOC & JSOC.
- n/a
- Panel lengths should be shortened.
- Some sort of read ahead or organizing question.
- if the even was in person or we were able to network with the panelists and attendees; but given the fact that it was virtual, there were a lot more people that could attend.

Government, Contractor

- A more honest conversation about SOF and its role in national strategy.
- Basic read a heads to help with context.
- Expert connections to SOF
- I think the technology for the forum execution needs to be continually refined as JSOU goes forward with the next Forum in May.
- If it was broken up over 3 days, instead of 2 full days.
- I'm a person who believes that "criticism" is a neutral word and can be either positive or negative. The Forum provided an excellent experience; I look forward to being able to attend similar sessions in the future.
- In the absence of any meaningful way(s) to engage with forum organizers, panelists, and peer attendees, there's limited utility to this offering in its current format. For example, I can go back and watch the videos at my convenience so juggling my calendar for 2-days of sustained, synchronous video consumption becomes more liability than time-limited asset.

- More time for audience questions / real interaction vs speeches
- The production was "amateur hour," particularly Day 2. Fortunately none of the speakers spoke out of turn. But that has to be fixed.
- NA

International

- Being present
- Hard to say. Experience was great, it was a sustain for me.
- I missed out on a part of the Forum so my feedback regarding this will not be appropriate.
- Nothing to add
- Perhaps syndicate break out rooms that will be 10-20 Percent can be included to explore further.
- I believe that a couple of key take away slides from each panel would have enhanced the Forum within the outstanding level it has reached

Military

- Notes from the panel discussions to send out to members of my command.

Non-Government, Civilian

- Whenever someone provided a URL or other information in the chat window, it would have been helpful to be able to just click on the link, or copy the information from the chat window to a text file on the desktop, instead of trying to retype stuff while still listening to the speaker.

Marketing and Social Media

POC: Dr. Karla Mastracchio

Marketing

Discussion: Due to our marketing reliance and then our subsequent late separation from Global SOF Foundation (GSF) we did not prepare for marketing the Forum as well as we should have. Our numbers both in overall registration and attendance may show the lack of deliberate plan for marketing the Forum.

LinkedIn Performance Metrics

The tables below show some performance metrics that assist us in determining engagement, geographic, actual daily visit, and the visitor's job functions for the dates leading up to the Forum.

Performance: On table 1, please note any engagement metric above 2% is considered by industry very good. Engagement was very strong at the initial announcement and then again three days prior to the Forum. For this Forum the post's content resonates with the LinkedIn Audience.

DATE	LIKES	ENGAGEMENT	IMPRESSIONS
3/12/21	18	5.783%	1,412
3/10/21	24	3.792%	1,635
3/7/21	10	2.441%	1,188
3/3/21	24	4.135%	2,128

Table 1 LinkedIn Social Media Performance

Demographics: On table 2, for this Forum, Tampa and the National Capital Region are the strongest represented geographic regions. Table 3 shows the number of unique visitors to JSOU's LinkedIn page leading up to the Forum. On Table 4, the military continues to be the strongest profession to engage with us. Most people seem to also use their phones vs desktop to interact with JSOU's posts.

Visitor demographics Time range: Mar 3, 2021 - Mar 16, 2021 Data for: Location

Top locations

Location	Visitors	% of Visitors
Tampa/St. Petersburg, Florida Area	65	14.1%
Washington D.C. Metro Area	53	11.5%
Miami/Fort Lauderdale Area	22	4.77%
Fayetteville, North Carolina Area	20	4.34%
Colorado Springs, Colorado Area	16	3.47%
Greater Denver Area	11	2.39%
Greater New York City Area	11	2.39%
Greater San Diego Area	10	2.17%
Norfolk, Virginia Area	9	1.95%
Raleigh-Durham, North Carolina Area	9	1.95%

Table 2 Geographics on LinkedIn

Aggregate desktop and mobile traffic Off

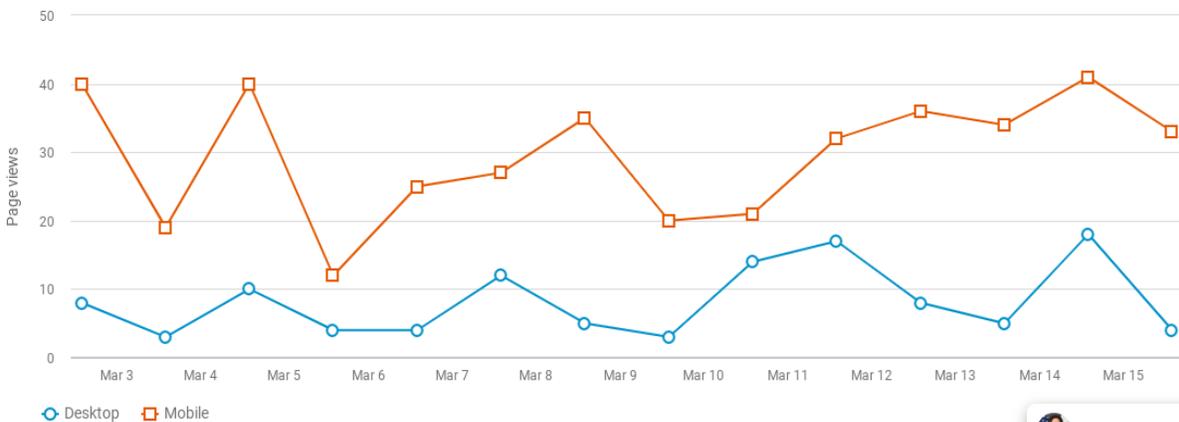


Table 3 JSOU's LinkedIn page views leading up to the Forum.

Visitor demographics Time range: Mar 3, 2021 - Mar 16, 2021 Data for: Job function

Top job functions

Job Function	Visitors	% of Visitors
Military and Protective Services	92	21.75%
Operations	69	16.31%
Business Development	53	12.53%
Education	43	10.17%
Human Resources	22	5.2%
Information Technology	21	4.96%
Finance	13	3.07%
Engineering	12	2.84%
Legal	12	2.84%
Program and Project Management	11	2.6%

Table 4 JSOU's LinkedIn Top Job Functions of individuals visiting the page between 3 – 16 March.

Recommendation: Establish SOP and Conduct a Marketing Campaign Plan - The campaign should include a long, medium, and short-range forum campaign plan and establish post-forum social media panel video distributions. .

Forum Marketing Action Items

The following recommended conference action items are broken down into Pre and Post Forums.

Actions Taken: Moving forward with forums JSOU will focus on the identification of a standardized marketing campaign (See below) including milestones, activities, channels, and their associated requirements of an interactive digital agenda for internal and external distribution via multiple media platforms; overcommunicate and share. The campaign should include a long, medium, and short-range campaign plan and establish post-forum social media panel video distributions.

Pre-Forum Marketing Action Items

6 Weeks (or greater) Establish Landing

- Establish Event's Website Landing Page and Registration
- Establish Forum Organizational E-mail Box and Monitoring
- Post "Sizzle Video(s)" (Social Media Channels)

5 Weeks – Campaign Kickoff

- Establish and Promulgate Forum Slide for weekly SOCO-CES Meeting
- Post "Save the Date" (Social Media Channels)
- E-mails – Post Forum Attendees, Email Service, J-Dir, VIP Stakeholders,
- Post Registration (Social Media Channels)
- Advertisement JSOUNOW newsletter

4 Weeks – Registration Push

- JSOU All – Faculty and Staff Targeted E-mail distribution
- JSOU All – Social Media Share "Share" reminder
- Post Forum Announcements (SOCOM Announcement NIPR & SIPR)
- Post Panel(s) or VIP Hype (Social Media Channels)

3 Weeks Out: Create Urgency

- Post 3 time – Time and Space Limited
- E-mail panelists – Social Media and E-mail package for their use
- E-mail registrants "Get Excited" attendance instructions & social media package.

2 Weeks Out – Final Push

- Post 4 times include weekends – (Social Media Channels)
- E-mail panelist, speakers, and participants (NO VIP) social media package

1 Week Out: Final Push

- E-mail Registrant Final Reminder and Login Information
- JSOU All – Faculty and Staff Targeted E-mail distribution
- JSOU All – Social Media Share "Share" reminder
- Request Amplification SOCOM PA and other strategic partners

Post-Forum Action Items

- Hang Panel Videos – JSOU YouTube – NIPR Delve
- E-mail Panelists Social Media Package for their social media networks

The list below represents a potential schedule for panel video postings and posts on all social media channels.

Keynote (Wilson/Petraeus) 1 April

Panel 1.1 (Wilson) 6 April

Panel 1.2 (Ellis) 8 April

Panel 2.1 (Long) 13 April

Panel 2.2 (Thyne) 15 April

Panel 3.1 (Grzegorzewski) 20 April

Panel 3.2 (Knarr) 22 April

Panel 4.1 (Mastracchio) 27 April

Panel 4.2 (Marsh) 29 April

Each JSOU posting should include panelists names, photos, and overall topic – with an advertisement for JSOU's upcoming Forum.

Support and Planning

POC Ms. Molly Quintero

Forum Planning and Support

This topic is broken down into planning, execution, and postproduction. It will identify best practices as well as unplanned contingencies and corrective/preventative actions related to planning, rehearsal, execution, delivery methodology, and postproduction activities. This will identify new sustaining requirements that inform future adjustments Identify major production milestones as input to draft Plan of Action & Milestones (POAM) Forum #3.

(John Byrd (Consolidate), Molly Quintero, Joe Whittington, and Mark Raney)

Planning Generation Phase (1)

Upon notification of event dates confirmed, the CFT lead should be appointed. They should be briefed on the purpose of the event, objective, topic, measurable outcomes (surveys), target audience (demographics & psychographics block geographically unwanted participants "Iran") and ensure vision curation. Additionally, CFTL will need to generate a "**CFT Team**" which will include the following positions:

- Content Manager
- Logistics Manager
- Strategic Communications Manager
- Production Manager
- Execution Coordinator

During this Generational Phase (1), designation of "**Role Players & Contract obligations**" should be identified in conjunction with the previously mentioned (Team Development). It's highly encouraged that all parties {Role players/CFT Team/Contract Awarded Participant (CAP)if applicable} effectively collaborate from concept to completion of the event. Observations deem that it is necessary to effectively communicate, mitigate shortfalls and last-minute injects.

Recommendation

From the initial phase of generation, once a week both (CFT Team/Role players/CAP) should conduct an IPR to engage swift meeting points i.e. Script revisions, Panelist & Power Point (P.P.) Presentations added. This will streamline the development of the plan of succession and the communication amongst all parties involved leaving room for less misperception. Essentially, alleviating barriers and communication breakdowns. Once all essential components are in place each person should be given specific (**TASK-CONDITIONS-STANDARDS**) for contribution of main objective (Forum Success). Phase (1) coordination is a critical element as to framing the foundation on deliverables in order to effectively complete mission requirements for SOF community *Theory of NEXT*.

DCE Productions

Depictions were prominent **day 1** that were miscommunications and or at times lacking attention to detail. They didn't have the manpower to monitor and or provide a basic component

(greenroom capability). Our maneuverability enhanced their capability by having one of our personnel execute, monitor, and instruct breakout-room for the attending panelist. There were missed cues on when to roll (30 second introduction voice over for the entirety of day 1), update 3 quarter panel name highlights missed and or delayed, DROPBOX in-op, delayed responses from Customer Service Representative, Chat box in-op at times, distractions from others talking loud in office carrying over to production recording room (had to close door), and last-minute personnel dropouts with NO backfills besides the Project Manager (PM) himself.

This may have caused some of those discrepancies since we were instructed during the walk through that each one from their staff had a specific responsibility. On **day 2** their systems failed completely for about 5 minutes. There was no logical explanation just our service went out and we, "apologize". Not specifically sure if that derailed the time for our host however, she concluded her moderation 15 minutes early after that occurred. We must ensure that the (CAP) can provide a backup system if such occurs and or a speedy recovery to limit distractions for both the audience and participants. There were a few additional items that can make the next iteration smoother such as:

- Teleprompter if Lead host is in person.
- Earlier integration of (CAP) 2 full run-throughs
- Continue to have our team at (CAP) facility for last minute shortfalls 2-3 personnel at a minimum.
- Record Lead Host in advance
- Have a cutoff date for P.P. slides to be sent to CAP.

Overall, they were pleasant to work with and I'm sure after our AAR we will explicate exactly what we need moving forward and vice versa. I recommend continued practices with them in order to establish continuity.

Execution Generation Phase (2)

We need to ensure that there are cutoff timelines with minimal exceptions (when to have products in). It will leave all components scrambling last minute trying to accommodate for one. I highly encourage **NLT** dates be requested when requesting items such as: bios/PP-slides. It looks unprofessional when we are doing things last minute injects unless it's truly needed. In order to execute I believe it's necessary for some personnel to keep same roles and responsibilities ways forwards (generate a master of ceremonies list/Roles Players with contact information). Same goes for having contact information for all panelist participants.

Script Curation

As we build the agenda, we should build the script simultaneously. The development was spot and well detailed giving the (CAP) clear guidance as to when to execute. However, we had multiple changes up until the last day of the event. Solidification of the script earlier through team collaboration we be more of an efficient practice. Once it's complete there can just be quick inputs if needed i.e. panelist annulment.

Scrolling Slides

For the background picture I recommend having the graphic designer make the image darker. It was an exceptional photo however, it seemed to blend in with DCE backdrop and our rolling slides. The information on the rolling slides were efficient and had limited changes. The **QR code** was also a great bonus for the audience members. It was quick and efficient and

enhanced our technological efforts for those transmedia application to be reached faster. During the lunch break, if a video is played let's ensure it matches what the lunch break times are. The Chat box had questions that were needed however, DCE seemed to have a prioritization issue i.e., lag time. Keep slides the same and if any changes are made perhaps consolidation.

Recommendations

For continuity there should be a (Primary and Alternate) for main positions. This is in case a last-minute change of events occurs and the individual must back out. We need to be able to adapt, adjust, and improvise only when extremely necessarily. When it comes to execution continuity is crucial. If everyone knows their role and responsibility, the only thing will be left is to just strategically refine.

Postproduction Generation Phase (3)

Day 1 Went well overall just discussed shortfalls throughout the day via HOTWASH chat room. **Day 2** Spoke to PM about anything they recommended and essentially just what was previously mentioned. Also discussed conducting AAR, getting forum materials to them earlier, keeping a team at the CAP production studio for quick accessibility, and continuing CAP services. Upon receiving the rest of the AAR's I will consolidate and work with the team on a POAM.

Rapporteur Coordination Process

Initially, the Forum Leads met with Lonas, Casey, and all the rapporteurs, with the purpose of explaining expectations. From there, the rapporteurs were turned over to Lonas and Casey, who led the process of collection and distillation of information. See rapporteur section of this report. The process worked well from a project management perspective.

Moderator Coordination Process

Another new process we tried for this Forum was as follows. Forum Leads call initial meeting with Moderators. Forum Lead (Joe Long) explains the vision and agenda to the Moderators, as well as expectations, trying to focus on the nuances of what we are trying to really get out of this Forum at the end of the day. Moderators are each sent a separate e-mail - To: Moderator, and CC: each panelist. The e-mail introduces the moderator to the panelists, thanks them all for their participation, and suggests they meet and prepare for their panel via virtual or other means, also attach bios of all members and agenda. Most panels seemed to appreciate this process – the feedback was that they were able to become comfortable with each other and prepared. The Forum Leads favor this process because it effectively takes a lot of communications effort off the Leads. It was a different way of doing things, and for this team it worked well. No recommendation, other than considering it for future iterations.

DCE Productions

The process of contracting out the production of the event to a production vender turned out to be favorable. The production was professional and polished. JSOU's tech team does an equally professional job. However, the virtual backgrounds, and the packaging of recordings delivered within a few days post event, are worth the contract.

Audience Participation and Experience

POC: Mr. Craig Hodges

Audience Experience and Live Streaming Considerations: the following are perceptions and observation of audience engagement related to the Live-Streaming and Chat functions collected by our team and are not qualitative comments nor quantitative surveys. The information is important to consider when planning future events.

a. **Negative**

- Live-streaming file share capability was limited. The live-stream push format required the team to refer the audience to the Forum's website and not immediately available for posting in chat—Zoom delivery permits audience being visible.
- The live-streaming push methodology did not allow for speakers to see the audience and did not allow for participants to speak.
- This live streaming required 2 different logins for the panel speakers and one for logging into
- Attempt to share direct link to SOF Ethical Handbook link for Event Page in chat would not post.
- The commercial live-streaming push creates NIPR VPN connectivity an issue.
- Numerous times during the production the chat function was inoperable and several delays – this created problem for relaying questions to panelists.
- Panel member names on feed, saw them up front but not throughout...I am sure there is a science to when and how long to show name/title/honorifics...
- Mid-Panel there was a Zoom disconnect; although the audience was unaffected, the talent/panelist/speakers require a prescribed immediate action drills to recover and immediate action drill for the production team to have a "Technical Difficulties" slide prepared.

B. **Positive**

- Video Stream to audience is crisp and professional.
- Cleaner than screen share
- Panelists focused on conversation and not trying to monitor chat or slide sharing.
- Copy Paste from live-streaming directly to zoom worked well and kept a clear chat box for the moderator—when chat worked.
- Recorded Content Available next day for review – Working on adding the video Tops and Tails as we go – so that the videos or queued and ready for social media release the following week.

C. **Miscellaneous**

- Recommend utilizing commercial internet connection with either Chrome or Firefox browsers—the Edge browser was not successful for some.
- Require developing templated email response each issues for participant e-mail requests.
- Forum Audience Login – should be ready in email forum for quick distribution to registrants.
 - <https://www.dceproductions.com/JSOUForums>
 - Access Code: FY21JSOUFORUMSQ3 (this is case sensitive)

Virtual IPRs with Dr. Wilson

I preferred the virtual IPRs with Dr. Wilson because we were able to include more guests. Although some guests did not understand the intent was for their understanding, not their participation, (some guests offered suggestions that would be meant for a different venue), I found it valuable for the rapporteurs and moderators to be able to hear Dr. Wilson's thoughts themselves – this helps the whole team to be working toward the exact same outcomes, and I found this opportunity to listen in to be invaluable. Additionally, allowing the extra guests to attend provides a sense of belonging to the team, which is not to be undervalued at JSOU. Dr. Wilson asked that the rapporteurs attend, a few weeks from event time.

Teams / Document Control

Microsoft Teams was employed and used effectively by most of the team. However, when one person is unfamiliar with Teams (or whatever system you decide to use) it can become a breakdown in communication. In this case, it caused issues with version control of the agenda. Recommend using Teams as the main communication venue for planning, OR using NIPR while managing documents on Teams, but there needs to be clear understanding that the documents in Teams are THE OFFICIAL set of documents on any given day.

Communication with Talent

This Forum's talent communications were hampered first, by a late identification and assignment of a talent manager, second by the subsequent transfer of responsibility to a second member, and third, by not having a meticulously prepared and available communications roster. As such, there was a late effort to create the roster.

The recommendations are First, request of remote talent, during the initial invitation and coordination emails, request their phone contact information. Second, talent manager must be identified and employed earlier and no later than the rehearsal period. Lastly, add to the talent roster a column for phone numbers and break the talent roster—in the case of the occasional DV, include their assistant's information on the roster, as well.

Communication w/audience

The forum team established automated emails to ensure registrants of the upcoming forum start time. This worked for the most part, but there were issues with firewalls redirecting .mil addresses. Recommend that the emails that are sent out, come from a .mil account e.g., to deal with this issue is to resend the e-mail to the .mil addresses

Marketing

This event was marketed to: JSOU, USSOCOM (NIPR announcements / USSOCOM All), attendees from Nov 2020 event, USF Government and Intl Relations Dept., LinkedIn, Facebook. Recommend for next Forum, we intentionally target our audience. Who do we want there? Who does Dr. Wilson want there? How do we get ahold of contact info for these guests? Recommend doing all the things above + the targeted invites + Granicus e-mail, which never sent this time b/c it was broken. See additionally, marketing section of this report. – See Marketing Section

Coordination w/ USSOCOM HQ

Planning for this event was disrupted at the 30-day mark, after the H.Q. directed that we decouple the event from the GSOF Symposium. This left us with no marketing, no website, and no means of registration. All the major pieces of planning had to be thrown together in crisis mode, and it became unduly stressful. The issue has been addressed and guidance provided from COL Guilbeault -- at higher leadership level, COL Guilbeault will send a heads-up e-mail to the SOCO office, including agenda, poster, etc. This should mitigate last minute legal issues. Strategic Engagements will submit the Conference Package 60 days out, with whatever information is available at that time.

Any further changes will be updated and coordinated personally with Mr. Perales and Ms. Bender in the SOCO office.

Recommendation: Regardless, of any planned Top 5 involvement in the Forum, Build and submit a SOCO-CES slide and provide that with an agenda to Mr. Paul Durkin. Additionally, Mr. Durkin is included in any "Save the Date" and subsequent forum updates. The purpose is to provide the TOP 4 access to the Forum. Specific direction has been given by Dr. Wilson and COL Guilbeault to hold hands with SOCO and CES throughout the process of these strategic level events, so oversharing and frequent touchpoints are advised.

Contracting

Contracting was not confirmed until 7 days out. This caused a lot of scrambling and late receipt of necessary links. We pulled it off but would prefer the links at least 2 weeks out so we can plan better and communicate better with panelists and guests / audience.

Rehearsal

Most panelists did not attend rehearsal. Not sure if this was due to time of rehearsal, late on a Friday, or communication. Also, when checking in, the panelists and moderators were asking whether they need to do anything or if they could leave. Recommend better communication of intent and expectations of rehearsal in Rehearsal Invite.

Presenter Do's and Don'ts: Below is a collection of observations of presenter's actions that assist in the professional delivery. It is recommended that that talent is provided with a list

- i. Chair that swivel or rock.... don't
- ii. Camera Height---eye level—set laptop up on box/books/stand.
- iii. Back Drop—professional in nature, provide JSOU Backgrounds and instructions on how to modify.
- iv. Slides: app for slide clicking need link to push to panelist with caveats
- v. No headsets/ear buds if possible, well in advance of show time
- vi. Plan for normal household distractions (e.g., dogs barking). While we love dogs, this can be distracting to the audience and the presenters.