

MFR

DATE:

SUBJ: INFO AND ACTION MEMO, REF S. S. (U)

TO: DT

1. PROBLEMS: SOME PROBLEMS WITH S. S. PRACTICES AND PROCEDURES HAVE BEEN IDENTIFIED (ENC 1).

2. ACTIONS NEEDED: MANY ACTIONS ARE NEEDED TO REMEDY ABOVE PROBLEMS, AND TO ACHIEVE OVERALL PROJECT OBJECTIVES OF PRESENTING A CASE FOR OPERATIONAL RV TO THE NFIB (ENC 2).

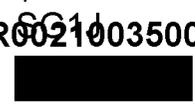
3. RECOMMENDATIONS:

DETAIL FULL TIME TO :

- o NEED FOR THIS ACTION IS INDEPENDENT OF THE LC POSITION BEING FILLED OR NOT.
- o DETAIL WILL NOT INTERFERE WITH DUTIES OF EXISTING PERSONNEL OTHER THAN THRU DATA SUPPORT OR ADMIN REQUIREMENTS.
- o AN SRI STAFFER (STATISTICIAN), OR POSSIBLY , MAY BE REQUIRED FOR OCCASIONAL ASSISTANCE.

IMPLIMENT IMMEDIATELY :

- o DURATION: AT LEAST THRU COMPLETION OF NFIB REPT (9-12 MO.)
- o RA. WILL ASSUME DUTIES AS ACTING CHIEF, DT-ACD (WEEKLY CONTACT WILL BE MAINTAINED, ASSISTANCE PROVIDED AS NEEDED)



DT-ACD

## SOME PROBLEM AREAS :

### 1. THERE IS / HAS BEEN SOME QUEING:

- LACK OF CONSISTENT DOUBLE BUND PROCEDURES FOR UTILITY ASSESSMENTS.
- PROGRESSIVE FEEDBACK, ESPECIALLY WHEN MANY SESSIONS CONDUCTED, LEADS TO "CONVERGENCE" TO TARGET.
- UP FRONT BIASES ON <sup>GENERAL</sup> NATURE OF TARGET TYPE HELPS IN NARROWING DOWN OPTIONS (10; SIT FLAVOR OR PAL).
- MONITOR EXPECTATIONS COULD SKEW QUESTIONING.
- (HOW TO SEPARATE MONITOR FOCUSING FROM QUEING?)
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### 2. NOT ENOUGH UTILITY ASSESSMENT PROJECTS HAVE BEEN CONDUCTED:

- INCREASE SIZE, DIVERSITY
- DO MORE UTILITY ASSESSMENTS FOR NEW METARCOLOGIES (AS ~~RE~~ CALIBRATION OF METHOD..).
- DIFFICULT TO ACCOMPLISH MEANINGFUL OVERALL ASSESSMENTS UNLESS SIZE INCREASED.

### 3. ROUTINE PROCEDURES MAY NEED IMPROVING (eg; FILE ACCESS CONTROL, MONITOR SESSIONS)

### 4. PERSONNEL ISSUES:

- INITIALLY, LITTLE OR NO CONCERN REGARDING PROPER PROCEDURES.
- STAFF LIMITED ON SIT INTEREST (REGARDING TASKS)
- NEED TO SCREEN BETTER. (Some ppl cannot relate!)
- MOTIVATION (for some) ON JOINING U.S.?

5. FUNDAMENTAL ISSUES:

- TARGETING: WHAT IS BEING ACCESSED. ("RV", TEL/CV; LATER TECHS)
- ROLE of feedback PACKAGE, local knowledg, other.
- How best to "ACCESS" TARGET: what include CRV/ECRV?
- RELATIVE MERITS of ERV, EERV, WRV, other (i.e., access <sup>with</sup> inert?)
- IS IT THE TRAINING PROCEDURE, OR THE PRACTICE?
- There appear to be "fundamental limits" to some aspects: what does this mean relative to technical operations.

ACTIONS NEEDED

1. REVISE UTILITY ASSESSMENT PROJECTS AND PROCEDURES.
2. IMPROVE OPERATIONAL PROJECT RECORDS, PROCEDURES.
3. REEVALUATE ALL PROJECTS AND UPDATE OR COMPLETE ALL ~~EVALUATIONS~~. DEVELOP "IN DEPTH" FOR SOME.
4. EXAMINE DATA BASE FOR TRENDS, PATTERNS.
5. IMPLEMENT DATA BASE ANALYSIS PROCEDURES FOR ALL PROJECTS.
6. REEVALUATE ALL PROJECTS TO LOOK FOR POTENTIAL BIASING.
7. REEVALUATE TRAINING METHODS & IMPLEMENT ADVANCED TRAINING PROJECTS.
8. BEGIN FORMULATION OF WHAT IS NECESSARY FOR THE NFIB PROGRAM PACKAGE (N. 9 MONTHS), & INITIATE SOME ASPECTS.
9. UPDATE AND/OR COMPLETE ALL PROJECT DOCUMENTATION
10. REVIEW "OLD CL DATA BASE" (SUMMARIZE, ASSESS)
11. REENERGIZE "ICTASK REVIEW GROUP", + "OVERSIGHT PANEL".
12. IMPLEMENT RANDOM MONITORING/RECORDING OF ALL SESSIONS.
13. VARIOUS ADMIN ISSUES.

- 14. PROVIDE IMPROVED LIAISON WITH RFD SECTOR & INCORPORATE WHERE APPROPRIATE, WITH SS.
- 15. PROVIDE ROUTING LIAISON WITH CI [unclear]
- 16. DEFINE INT. NEEDS THAT RV COULD ADDRESS, & QUANTIFY.

ACTIONS NEEDED -- REEVALUATE

## 1. REVISE UTILITY ASSESSMENT PROJECTS &amp; PROCEDURES:

- 50-100 PROJECTS
- VARIOUS CONDITIONS, OBJECTIVES
- REVISE DATA SUMMARY, PROVIDE INTERPRETATIONS,

## 2. IMPROVE OPERATIONAL PROJECT RECORDS, PROCEDURES

- ALL PERTINENT DATA, SUMMARY MOD (GEN, SPECIFIC, QUAL/QUANT)
- PROVIDE IMPROVED "INTERPRETATIONS" FOR SUMMARY DATA.

3. REEVALUATE, COMPLETE ALL EVALS..

- DT, OTHERS (DA...)
- DEVELOP "IN-DEPTH" EVALUATIONS, USING SEVERAL PROCEDURES FOR A REPRESENTATIVE NO. OF CASES (10, 40334 SET, LIVE-LINE COMPARISON, TOPIC-CONTENT, CONCEPT ANALYSIS..)

## 4. TRENDS, PATTERNS

- WHAT WORKS, WHAT DOESN'T
- SENSITIVITY TO VIEWER TYPES, PREFERENCES, BACKGROUND.

## 5. DATA BASE ANALYSIS

- ON GOING CHARTS, TABLES, ALL CATEGORIES

## 6. REEVALUATE TO LOOK FOR POTENTIAL BIASING

- TYPE, DEGREE OF FEEDBACK IN SESSION NO.
- INITIAL MONITOR KNOWLEDGE & PROGRESSIVE KNOWLEDGE

## 7. REEVALUATE TRAINING METHODS

- METHOD VS PRACTICE ; ROLE OF GOAL, MOTIVATION...?

## 8. BEGIN FORMULATION OF NFIB PACKAGE

- TRENDS, PATTERNS, WHAT CAN DO, WHAT CAN'T DO...

- 9. UPDATE ANVIL COMPLETE AND PROJECT DOCUMENTATION:
  - SECURITY GUIDELINES PROCEDURES
  - SESSION PROTOCOL (DEFINE ALL STEPS, CONTROLS, ....)
  - EXPAND TRAINING MANUAL
  - DEFINE VARIOUS EVALUATION METHODOLOGIES
  - REFORMAT DATA SHEETS, DATA REPORTING FORMAT (INCLUDE GENERAL, SPECIFICS, QUALIFIERS...)
  - EXPAND "INCIDENCES" (COST OF MCTV, OTHER FACTORS...)

- 10. REVIEW OLD CL DATA BASE:
  - RETAIN SUMMARY
  - KEEP FILES WHERE OPS PROJECT IS LISTED IN REPORTS
  - PROVIDE OVERVIEW, LESSONS LEARNED, ETC.

- 11. REVIEW GROUPS (IC TASK GROUP, EX OVERSIGHT PANEL) -- REACTIVATE
  - ESPECIALLY FOR EVENTUAL NFIB PACKAGE ...
  - SET UP ADDITIONAL TECH PROTECT REVIEW (FIELDS? ...)

12. MONITORING (RANDOM SAMPLE FOR ALL)

- 13. ADMIN ISSUES.
  - RULES ... CLEARLY DEFINE
  - SCHED & CONDUCT MONTHLY "DETAILED" REVIEWS
  - REEXAMINE ALL FILES (FILTER OUT NON-RELEVANT ISSUES)
  - CLARIFY FILE SECURITY; IMPLEMENT NEW PROCEDURES IF REQUIRED
  - DEVELOP FOLLOW-ON PROCEDURES FOR PREVIOUS BTRAM MEMBERS
  - MISC PERS ISSUES (BE ALERT TO POT. DIFFICULTIES, PD-EFFECT OF METHODOLOGY, TARGET TYPES ... OR VIEWERS...)
  - IMPROVE FILES / RECORDS

- WHO HAS ACCESS TO FACILITIES  
 - INSURE APPROPRIATE MAX. NO. OF SESSIONS  
 - OR ASSESS OPS ADV. ETC. OF THE USE

R/D INTEL

- INCORPORATE APPLICABLE RESULTS FROM SRI WORK,  
OR FROM FINDINGS IN OTHER LABS
- SET UP "MUTUAL EXCHANGE", EVEN JOINT EXP., WITH  
SRI
- COOPERATE WITH "DEMO TYPE" PROJECTS OF INTEREST  
TO DARPA...
- PREPARE SUMMARIES, etc OF RESEARCH FOR SS FILES.
- SET UP FREQUENT MTGS WITH RESEARCHERS WHEN  
APPROPRIATE (10, SRI STAFF ...)
- MONITOR IMIC (10-COTR)

REVISE UTILITY ASSESSMENT PROJECTS AND PROCEDURES

1. PROJECTS:

- SET UP ~100 TARGETS / PROJECTS (inc. several groups <sup>control</sup> <sub>exploratory</sub> <sub>predictive</sub>)
- DEFINE WHO DOES, HOW ~~SELECTED~~ &
- DEVELOP TO BE "HOMOGENEOUS"
  - E.V. MIX of S/T, TACT/OPS, NOT TEC, PEOPLE, OTHER LOCATIONS <sup>search</sup> <sub>PLACES</sub>
- WHO, HOW TO EVALUATE, SUMMARIZE
- HOW CONTROLLED? (1/2 IN DT-S, 1/2 IN ET, 3/2000 AT SRI?)
- HOW SELECTED? (RANDOM, 2 PLIM BINSES)
- DERIVE TARGETING METHODS, INSTRUCTIONS, WHAT IS KNOWN, BY WHOM & WHEN..
- EXAMINE FOR VARYING TARGETING PROCEDURES, MULTIDISCIPLINE
  - ERV, WOV ... background?)...

2. CONTROLS / CONDITIONS:

- SET LIMITS TO SESSION NO'S.
  - RECORD DATA FOR SESSION; range of frequencies (online).
- VARY ~~DATA~~ CONDITIONS FOR INITIATION:
  - (CLASSIC) DOUBLE BLIND (for some, INITIALS), (CLASSIC VARYING DEGREES)
  - TRANSITION TO CPS CONDITIONS (LOADING...)
- RECORD ALL SIGNIFICANT BACKGROUND DATA. (INCIDENCES, DISTRACTIONS)
- DEFINE WHAT IS DESIRED (the int. question, gen or specific)
- Define what is important (gen, specific); intent, external, analysis/... <sup>results</sup>
- VARY LOCATION OF focused packages
- Show how these relate on transition to CPS, out of control <sup>results</sup>
- if (ev) with cps ... etc..

3. ASSESSMENTS

- LOOK for <sup>trade</sup> variables (to help in assessing people's potential... <sup>ops</sup> <sub>acceptance or not... known inclinations, motivation...)</sub>
- SIGNIFICANT INPUT FOR WIP report, predicting utility for potential CPS projects...