



## J8-S Studies Branch Mission -> Vision

30 Sep 2016

The purpose of the document is to outline the J8-S Studies Branch vision, mission, and task organization. Additionally, I will provide my guidance on what you can expect from me and what I expect from you as a member of this team. A vision is a concise, future state or goal. A mission consists of simple repeatable actions that will lead to our vision. If we focus on these actions every day then our vision will emerge. In light of these definitions, here is our Mission -> Vision statements:

**Vision:** Facilitate clear, value-based force employment and resourcing decisions.

We conduct studies and analysis that provide the analytical justifications needed to communicate USSOCOM force employment and resourcing decisions to the Joint Staff and OSD. In order to accomplish our vision we use Operations Research and Systems Engineering methods to synthesize the processes, tools, and analyses that support the USSOCOM strategy. Our analysis must be clear and based on what our leadership values.

*What is the value of Special Operation Forces?* This is the fundamental question that we must answer from the near-, mid-, and long-term strategic perspectives. We will achieve our vision by answering this question and focusing on our mission every day.

**Mission:** Apply Systems Thinking<sup>1</sup>, Value-Focused Thinking<sup>2</sup>, and Excel Expertise.

When we learn and apply these three skill areas every day our vision will emerge.

1. **Systems Thinking.** Systems thinking is about metacognition, or thinking about thinking. When we develop our ability to see, talk, and map information with structure, we will discover new ideas and insights. We know from complexity theory that simple rules interacting together creates complexity. We exercise systems thinking by applying 4 simple rules:
  - a. **Distinctions:** We make distinctions between and among ideas by establishing the things inside a boundary and the other things outside a boundary.
  - b. **Systems:** We organize ideas into systems of parts and wholes.
  - c. **Relationships:** We identify relationships between and among ideas.
  - d. **Perspectives:** We look at ideas from different perspectives.

Applying these simple rules with information provides the structure that will give us a better appreciation of wicked problems and help us identify what our leadership values with respect to force employment and resourcing decisions. I expect you to find every opportunity to make you a better systems thinker.

2. **Value-Focused Thinking.** We are decision professionals that apply our ORSA skills to help our leaders create potential value for our Nation. I expect each of you to become an expert in Value-Focused Thinking (VFT). The most important skill is the ability to elicit from subject matter experts and leaders what they value and what it means to achieve what they care about. The most effective uses of VFT are when the leadership is involved during the development of the qualitative and quantitative models. We must never forget that the numbers that express value are meaningless. It is the process that leads to the value score and the clear audit trail the Value Model provides that illuminates where the key tradeoff decisions reside. ORSAs get a bad reputation when they “play with numbers” for the sake of playing with them. This happens when we fail to identify the fundamental objectives that express what we value. VFT provides our leadership with a structured, transparent, repeatable, and defensible approach to help justify key decisions.

1 Cabrera, D. & Cabrera, L. (2015) Systems Thinking Made Simple New Hope for Solving Wicked Problems. Odyssean Press.

2 Keeney, R. L. (1992) Value-Focused Thinking: A Path to Creative Decision Making. Cambridge, MA: Harvard University Press.



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3. **Excel Expertise.** Some will say that 80% of the decisions that are made in the government and private sector are developed using Excel. Therefore, we must be “Excel Pros” and continue to improve our skills. At a minimum, I expect you to be an expert in cleaning and organizing data, pivot tables, building data models, have enough VBA skills to develop useful dashboards, and learn the features of the PowerPivot Excel add-in.

**Task Organization.** We are a small team of operations research analysts capable of analyzing complex problems using quantitative methods. Our priority is to resourcing (J8) and force employment (J3) decisions. Our Branch operates as a projectized organization that focuses on *learning*. Each of you will act as a Project Manager for the studies assigned to you while others may act in a supporting role. We know from experience that two or more ORSA’s working together can produce three to four times as much output as an individual working alone. In order to leverage each other, we will organize into ORSA cells that will align with our enduring J8 and J3 commitments as well as the emerging study projects related to the USSOCOM strategy. Table 1 outlines each cell’s study efforts and indicates their near-, mid-, and long-term strategy alignment.

**Table 1:** J8-S Studies Branch efforts.

Near-Term Strategy	Mid-Term Strategy		Long-Term Strategy
J3 Cell	J8 Cell	JMA Cell	SOF AT&L Cell
<ul style="list-style-type: none"> <li>• Train, advise, and assist J35 with the development qualitative GSOS value model</li> <li>• Develop, manage, and execute the quantitative GSOS value model and Voting Tools</li> <li>• Manage the GFMAP Assessment Tool</li> <li>• Develop Expertise in Global Force Management Process</li> <li>• Support the J35 and J32</li> <li>• Coordinate with J51 Assessments Branch</li> </ul>	<ul style="list-style-type: none"> <li>• Develop, manage, and execute the Suite of Resource Tools (P-RCL, Value Model, Sledgehammer, LP model, Screwdriver, Voting Tools, TreeMaps)</li> <li>• Develop expertise in the PPBE process</li> <li>• Support the J8A Assessment Directors</li> </ul>	<ul style="list-style-type: none"> <li>• Support J8S-A with simulation output analysis to assist with force sizing and shaping</li> <li>• Support the CT scenario development</li> <li>• Develop expertise in Joint Mission Analysis</li> <li>• Understand SOFAMS, and SCRAM</li> </ul>	<ul style="list-style-type: none"> <li>• Develop the 30-Year Investment Planning Tool Project. Refine the model with input from SOF AT&amp;L.</li> <li>• Support the SOF AT&amp;L S&amp;T Campaign Planning Project with a qualitative and quantitative value model.</li> <li>• Support the Road Map development.</li> </ul>

The seams between these cells are where I think we can have the most impact on the Command. Our goal is to clearly identify what USSOCOM holistically values across the near-, mid-, and long-term strategies.

**Expectations from me**



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My role as the Studies Branch Chief is to lead our team to successfully achieve our vision. Central to this role is for me to establish a culture of learning that inspires you to apply the skills stated in our mission so that our collective effort will have a high impact on key USSOCOM decisions. I will act as a Program Manager that will oversee, provide direction and guidance while coordinating efforts between projects. I will find opportunities (along with your help) throughout the HQs that will support our vision. It is my job to manage our work capacity to ensure that we are not overcommitted. When needed, I will help you during surge periods to meet our deadlines. I will make every effort to provide you with the autonomy you need to realize your full potential.

**Innovation.** We must never settle by simply doing the same processes and methods each year. We should always strive to innovate our processes and methods to keep pace with the evolving technology and analytics. I encourage all of you to find ways to enhance our capabilities. The following are some innovation opportunities I intend to explore this year.

1. Incorporate the best practices of the latest Decision Management Framework published in the 2015 Systems Engineering Body of Knowledge in order to help identify what we value across the near-, mid-, and long-term strategies.
2. Investigate the possibility of developing an optimization model for the J32 that optimizes the sourcing of SOF subject to the constraints of regional alignment, ceilings, floors, and other considerations. This effort is contingent of the development of a quality GSOS value model that can effectively assess Campaign Activities.
3. Explore opportunities to incorporate Microsoft Power BI tools (power pivot, power map, and power view add-ons) for our data analysis work.
4. For the JMA models, leverage the methods of experimental design to explore a wider range of solutions and identify the inputs that drive model behavior.

### **What I expect from you.**

We are in a Joint profession within the ORSA community and are expected to do things that no one else can do. I encourage you to seek out new opportunities to improve and learn new ORSA skills while developing yourself as a professional through self-study. I expect you to develop short and long term goals with a plan to acquire these new skills that will benefit you and USSOCOM. Your primary mission is to develop your systems thinking, value-focused thinking, and Excel expertise skills. I encourage you to obtain the Project Management Professional (PMP) certification. Understanding the PMP framework will lead to a better project outcome and benefit your career. For each of your projects, I expect you at a minimum to develop a scope statement (problem definition) and work breakdown structure. Be sure to develop and nurture relations throughout the HQs and Enterprise. Establish a good reputation with the people we partner with by acting proactively to support their needs. All of us have unique skill sets and operational experiences that collectively can be very powerful.

**Battle Rhythm.** Due to the nature of our work we often are consumed with reading and responding to emails, sitting in meetings, and creating slides. Although these activities are necessary, they distract us from the deep thinking, framing, reading, coding, analyzing, and writing that will lead to a high impact study. Each week we should reflect on the time we spend doing things and make every attempt to prioritize our most important activities. When appropriate, we will have synchronization meetings in order to find opportunities for our team to assist each other when needed.



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**Train, advise, and assist.** We support key leader decisions by properly defining the problem, designing solutions in the form of tools, processes, and models that reveal insights, delivering products to our clients, and sustaining them. Much like SOF develops partner nation capacities, we should strive to train, advise, and assist the USSOCOM HQ staff on the tools, processes, and models we develop so that they can sustain them independently.

**Culture.** An organizational culture is when individual team members share the same mental models that support the mission and vision. We use mental models to understand reality and continually update them as we learn more information. An organization that learns to do its mission every day and shares the same mental models will achieve its vision. The enclosure to this document has the Studies Branch mission and vision mental models that we will share in our day to day work together; please study and embrace them. We are a team that has a culture of *learning*. I encourage you to learn the skills stated in our mission statement so that we can adapt together as a winning team.

**Closing Remarks.** Please take the time to do PT and make it a priority. You should have the liberty to do it at any time during the day. It is my hope that each of us feels valued and fulfilled with the work we do and the time we spend together. Effective teams require trust, shared understanding/mental models, and commitment to accomplishing a common mission. The intent of this document is to provide the foundation for our team's development into a highly effective organization.

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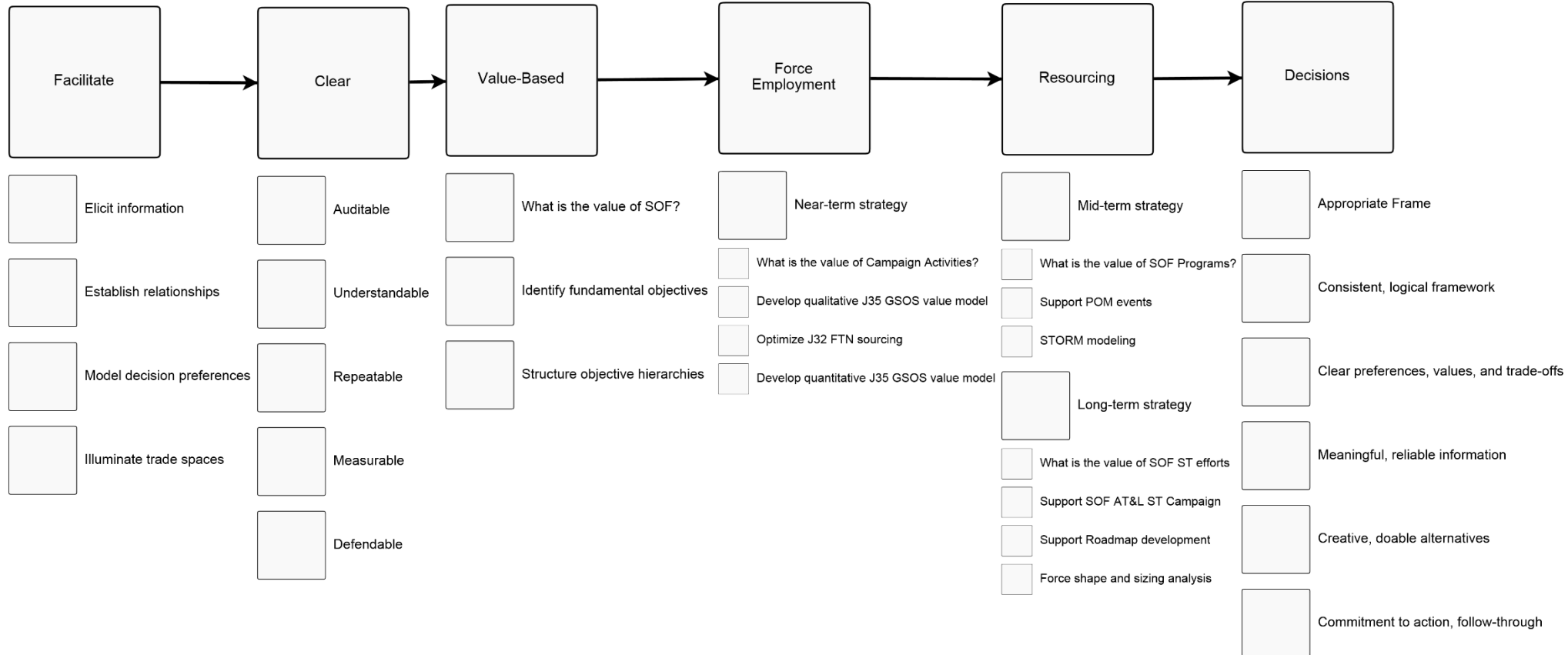
Enclosure: Studies Branch vision and mission mental models.



# J8-S Studies Branch Mission -> Vision

## Enclosure

### Studies Branch Mental Model of our Vision





# J8-S Studies Branch Mission -> Vision

## Studies Branch Mental Model of our Mission

