ALLIED COMMAND OPERATIONS

and

ALLIED COMMAND TRANSFORMATION

PUBLIC AFFAIRS HANDBOOK

JULY 2010

Foreword

The face and pace of NATO's operations have changed dramatically in recent years. With the significant increase in operational tempo, and the concurrent explosion in communications technology, the Alliance's need to communicate with its audiences has changed dramatically as well. Commanders at all levels are putting more and more emphasis on communications.

To help streamline, standardise and synchronise NATO military public affairs, Allied Command Operations, with assistance from Allied Command Transformation, has developed the Allied Command Operations Public Affairs Handbook Version 2010. It is a 'hands-on' publication for ACO Public Affairs practitioners on how to conduct the public affairs functions of media relations, internal communications, and community relations, focused on deployed operations. It expands on ACO Directive 95-1 Allied Command Operations Public Affairs and is to be considered an approved collection of tested tactics, techniques and procedures and best practices to guide and synchronise ACO public affairs activities at the strategic, operational and tactical levels of command.

The content of this handbook comprises the public affairs input from NATO member nations and subordinate commands. ACO headquarters at the Supreme Headquarters Allied Powers Europe is grateful for the substantial contribution of content from those nations and headquarters.

This handbook provides a variety of planning considerations, templates and examples for use at the strategic, operational and tactical levels. They are offered as both best practices and as a means of standardisation of public affairs products and process.

The ACO PA Handbook is formatted for either A4 or A-5 sized printing. Updates will be posted on the SHAPE NATO Secret WISE page for user access and SHAPE will disseminate updates periodically.

There are many different and sometimes conflicting names for public affairs products throughout the Alliance. For the sake of simplicity and brevity, this document will use those terms in the Lexicon of Terms at Annex A to MC 0457/1 NATO Military Policy on Public Affairs.

I would like to express my special thanks to Dr. Maureen Taylor, (Professor, Gaylord Family Chair in Strategic Communication, University of Oklahoma), Lt. Col. Web Wright (SHAPE), Capt. J. Elaine Hunnicutt (JFC-Naples), Maj. Martin O'Donnell (JFC-Brunssum) and Mrs. Claudia Foss for their assistance in developing content and revisions of this handbook.

We hope you find this handbook a useful tool. To ensure this handbook meets the needs of the various commands we appreciate your input. Annex M explains how to submit changes.

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Chapter 1

Introduction to Public Affairs in Allied Command Operations

"The Parties to this Treaty reaffirm their faith in the purposes and principles of the Charter of the United Nations and their desire to live in peace with all peoples and all governments. They are determined to safeguard the freedom, common heritage and civilisation of their peoples, founded on the principles of democracy, individual liberty and the rule of law.

- Washington Treaty, 1949

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1.1 Mandate. Public support for NATO's missions and tasks follows from public understanding of how the Alliance makes a difference to international peace and security. Public confidence, in turn, is enhanced by NATO's ability to achieve its mandate in a way that is open, transparent, and consistent with member nation values and expectations. Military public affairs (PA) policy in NATO is derived from the higher principles of democracy that includes freedom of expression and of the media. Commanders and Public Affairs Officers (PAOs) are in theory bound by NATO policies to inform the public and by international law not to impede the media or freedom of expression.

1.2 ACO Public Affairs Mission. Military public affairs is a function that contributes to mission success. The mission of Allied Command Operations (ACO) Public Affairs is:

> "to support Alliance aims and objectives through truthful, accurate and timely public release of information about the operations and activities of forces assigned to, or under operational command or control of the Supreme Allied Commander Europe (SACEUR) and ACO headquarters, consistent with NATO and national policies for operational security."

1.3 Public Affairs Policies. It is vital to remember, however, that military public affairs in NATO will not supersede the civilian public diplomacy leadership of the alliance. Across all functions, NATO policy is directed first by the unanimous political consent of the 28 nations forming the North Atlantic Council and then executed by

the Secretary General and International Staff. From this framework, Military Committee Directives are developed by the unanimous consent of the 28 national Chiefs of Defence. The strategic commanders then translate this guidance into command level policies and direction and guidance for subordinate commands and operational headquarters.

The relevant Public Affairs and Strategic Communications policies and directives are included in this handbook as Appendices to Annex A. The NATO structure, policy and command and control are explained as Annex C.

NATO Public Affairs Doctrine Hierarchy

- NATO Strategic Communications Policy; 29 September, 2009
  - MC 457/1, NATO Military Policy on Public Affairs; September, 2007
    - ACO Directive 95-1, Allied Command Operations Public Affairs; 23 May, 2008
    - ACT Directive 95-10, Public Affairs Policy; 3 September, 2008

1.4 SACEUR's ACO Vision. NATO operations are executed in an ever changing environment over a full spectrum of operations. Public Affairs Officers must therefore remain flexible and adaptive as change occurs. As an overarching guide, the Supreme Allied Commander Europe (SACEUR), in collaboration with subordinate commanders, has developed a Strategic Focus for Military Command and Control Excellence for NATO. This is a collaborated vision of the role of the ACO command structure.

STRATEGIC FOCUS FOR ALLIED COMMAND OPERATIONS
'Military Command and Control Excellence for NATO'
Dated November 2009

PURPOSE

Our purpose is to deliver military command and control excellence for NATO, at strategic distance or closer to home in an unpredictable, complex and dynamic environment in order to safeguard the freedom and unique heritage of the members of the Alliance.

MISSION

Our mission is to prepare for, plan and conduct military operations in order to meet Alliance political objectives.

VISION

Our vision is to be universally recognised as a top-quality command capability for the planning and execution of combined, joint, effects-based operations, beyond and within the Euro-Atlantic area.

CORE VALUES

- Our **conduct** as professionals reflects the values of the Alliance. Throughout, we must demonstrate the essential hallmarks of civility, quiet confidence, expertise, pride, selfless determination, honesty and integrity.

- **Commitment** to the mission and those in harm's way on NATO-led operations is our inherent duty. We must ensure commanders and deployed forces are: given the right objectives, guidance, authorities and freedoms; provided with the necessary resources; properly prepared; and supported relentlessly to successfully accomplish their assigned mission.

- **Creativity** and intellectual curiosity which questions the status quo must permeate Allied Command Operations. Every member of the team must be empowered to seek and explore new ways of accomplishing our mission. We must innovate to improve and maintain the tempo of thought and action necessary for military success.

- By **collaboration** and not competition, Allied Command Operations will be a listening and enabling command at every level, working seamlessly with others. Teamwork across all ranks and services is key. We will seek and listen to other perspectives before deciding.

FOCUS AREAS

- Our continuing core military output is the **preparation**, **planning and conduct of NATO-led operations** to meet Alliance political objectives; within this context, we must provide the military perspective to the political decision-making process. Currently**,** our top operational priority is ISAF, but all missions are essential.

- We need to continually **improve our capabilities** to execute our mission; working seamlessly with and benefitting from the energy of enabling partners such as Allied Command Transformation and NATO Communication and Information Systems Services Agency amongst others. Our priority is delivering a proven, dynamic command and control function through a NATO network enabled capability.

- **Securing the staff and resources** needed by commanders for mission success, and getting best value from them. Our priority is our people: leadership at every level must focus on caring for, providing appropriate training and developing them.

- We must continue to **optimise operational enablers**. A comprehensive approach towards dialogue, planning and crisis resolution is our main line of operation, while we must divest legacy tasks and stove-piped processes. Our priority is working with enduring and emerging partners to expand stability and security and to enable their greater involvement and participation in NATO-led operations.

- **Strategic communication**. We must help people understand what we are about and where we are going. It cuts across everything we do. Internally everyone needs to understand our mission, values and vision, while externally we need the support of the public and those we operate with and amongst. We must enhance our strategic communication capability so we are leading this critical art, acting imaginatively and speaking coherently and truthfully.

Note that the ACO guidance includes communications tasks. At all levels throughout NATO, communications has become a major focus. The requirements and responsibilities on the public affairs community as advisors, operators, and planners will increase significantly. PAOs must strive to be 'value added' to the command and stay pro-active to provide the commander with what he needs in a timely and precise fashion.

1.5 Audiences. NATO Military Public Affairs strives to interact with a variety of audiences, each with different concerns, levels of understanding, and technology capabilities. The need to communicate effectively with a wide range of audiences is not just desirable, it is essential to gain understanding and support for NATO's operations. Some general categories of audiences include:

- External Audiences – those external to NATO nations
- Internal Audiences – NATO nations, chains of command, families, etc.
- Third Party Validators/Key Influencers – Think-tanks, NGOs, etc.
- Key Stakeholders – Organisations, corporations with vested interest
- Theatre or Regional Audiences – Adjacent country populations
- Adversaries – those working to counter NATO efforts
- "Fence Sitters" – those undecided and waiting to be enticed

NATO Military Public Affairs can communicate to these audiences directly, through third party advocates, or through the media which may echo NATO messages in their reporting and analysis. It is important to understand that the media is both an audience and a medium by which PAOs attempt to reach a wider audience. PAOs should advise commanders on the best options to utilise the core functions of media relations, community relations and internal communications and leverage various 'new' media technologies and networks, imagery and training to derive the greatest effect when communicating actions and intent to the various audiences.

1.6 Adversaries. More than ever, NATO faces a 'war of ideas' which is being fought in the information domain. NATO's adversaries use all the tools at their disposal to further their own objectives. They use technology and speed to their advantage, often disregarding truth and accuracy in the process. Multiple adversary groups (perhaps opposed in overall intent) are often unified in their aims to discredit NATO and Western institutions. This collective can very easily coordinate to erode public support for Alliance operations through the use of very simple, effective narratives which challenge the legitimacy of NATO objectives. Overcoming and combating these efforts with an Alliance of 28 national interests and perspectives is challenging and requires thoughtful, comprehensive planning and synchronised implementation of communications plans. This is the environment in which NATO commanders must conduct their missions. In an effects-based approach to operations, enhancing support for the Alliance by maintaining credibility and public trust is *the effect* for the PA function.

1.7 Maintaining Credibility. In order to maintain credibility of the organisation, messages must be truthful, accurate, and timely. Messages must match the actions of the command throughout all levels. Discrepancies in messaging from a PAO or commander versus the actions of the troops on the ground will immediately erode credibility. The message must be coordinated within the other information and communications staff elements and higher and subordinate HQs to ensure there are no conflicting events or actions and that the message is unified. Although NATO policy forbids PAOs becoming involved in planning or executing IO and PSYOP operations, the policy allows coordination to mitigate the risk of de-synchronisation.

1.8 Caveats

a. Unity of Effort/Messaging within the Alliance. There is a special relationship between nations assigning troops to ACO missions and to NATO's Public Affairs efforts. It is understood that nations have their individual national political and operational imperatives, but it is in everyone's interest that NATO and the nations maintain unity of effort and unity of messaging regarding missions, activities and incidents. Lateral coordination between national capitals and Ministries of Defence is, by NATO policy, the role of NATO HQ. Military Public Affairs officers must understand their role in the political/military dynamic and not become involved in the political or diplomatic aspects of the alliance.

b. Advocacy of NATO Public Affairs Policy. Often, without proper understanding of NATO policy and the sensitivities of nations, and in a perceived attempt to streamline process and develop a staff hierarchy, commanders and influencers within the command group will attempt to subordinate Public Affairs to Information Operations or Strategic Communications. Although NATO Military Public Affairs Policy provides for coordination with these staff agencies and functions, NATO Public Affairs and Strategic Communications policy is very clear that Public Affairs will not be subordinated and the PAO will have direct access to the commander. The PAO must act as an advocate within the staff for these policies and should report through the public affairs channels to ensure compliance with NATO policy.

Chapter 2

Role of the PAO

"Public affairs must be well coordinated within the Alliance's military arm vertically through all levels of command and horizontally with national armed forces and other organisations working in parallel with NATO. Effective PA support to commanders including organisational spokesmanship requires that military PA be fully integrated into the operational planning process at all NATO HQs."

MC 0457/1 NATO Military Policy on Public Affairs

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2.1. Introduction. In order for a PAO to succeed within Allied Command Operations, understanding the ACO and NATO environment and the opportunities and constraints placed upon the public affairs community is critical. NATO has prescribed policies and a framework within which a PAO must operate. The PAO must also be knowledgeable and sensitive to national policies which will over-ride NATO policies in most cases.

2.2 Functions and Principles of NATO Military Public Affairs. Military Committee Policy Directive 0457/1 is the overarching policy for both Allied Command Operations and Allied Command Transformation for Public Affairs. It is the Alliance agreed policy which drives public affairs in the Military Command Structure of NATO.

a. MC 0457/1 defines the Functions of NATO Military Public Affairs as:
   - Media Relations (Operations)
   - Internal Communications
   - Community Relations

b. MC 0457/1 defines the Principles of NATO Military Public Affairs as:
   - Tell and show the NATO story.

- Provide accurate information in a timely manner.
- Ensure that information provided is consistent, complementary, and coordinated.
- Practice appropriate operational security.
- Conduct work mindful of multinational sensitivities, and respectful of the local and regional cultural environment.

c. National policies differ widely on many of these aspects and for a new PAO many of the policies prescribed by the MC might seem conservative, but they are unanimously agreed by all of the Alliance Chiefs of Defence, and therefore are the definitive NATO doctrine for Public Affairs.

2.3. Relationship to the Commander and Staff

a. MC 0457/1 states that Public Affairs is a commander's responsibility. Commanders and staffs must communicate in a timely manner with the internal and external publics of NATO and non-NATO nations in order to gain understanding of the Alliance's objective and missions. Ultimately, the commander sets the command's tone for outreach and communications.

b. To assist commanders with this mandate, Chief Public Affairs Officers are tasked with directing, planning, and executing military Public affairs in support of NATO operations or other activities under their respective commander's direction and responsibility. The CPAO is the chief advisor on public affairs within the command. As per MC 0457/1, AD 95-1, AD 95-2, and ACT Dir 95-10, the CPAO will retain a direct reporting relationship to the Commander and will not be subordinated to any other staff element.

c. PAOs must be able to 'operationalise' public affairs to be value added to the organisation. PAOs must integrate themselves and their staffs into every major aspect of the organisation and operation. PAOs should be tied into the major staff functions (i.e. Operations, Intelligence, Planning, CIMIC, etc.) in order to maintain visibility on operations and other activities, to interject advice to the command group from the communicator's perspective, and to remain proactive in integrating communications plans and strategies into the operational planning process. If the PAO remains separate from the rest of the staff, the PA efforts will always be reactive and will not sufficiently support the commander or the organisation.

d. The PAO, in addition to remaining integrated within the organisation laterally, must also integrate into the vertical command structure. The PAO should maintain frequent communication, both up and down the formal organisational PAO hierarchy, and remain a constant entity within the PA technical network (PA TechNet). Often, information is passed through these networks much faster than the traditional operations command and control chain and can be very useful to not only the public affairs practitioners, but also the command and staff members.

Maintaining situational awareness laterally and vertically is a prime example of the PAO adding value to the organisation.

e. The CPAO is the lead advocate for public affairs doctrine, training, manning and resources within the organisation. The PAO must be authoritative and proactive when advising senior leaders on public affairs doctrine, policy and strategies. The PAO must ensure that commanders and senior leaders are aware of NATO policies in order for them to make informed decisions.

2.4. PAO Principle Duties. To be effective, a PAO must be able to:

a. Provide expert advice to assist leaders in making and communicating decisions that affect the organisation's ability to accomplish the mission.

b. Employ communication tools and techniques to link the command to its audiences, opinion leaders and news media in order to promote public understanding and support.

c. Ensure readiness of the organisation's PA personnel, resources and tools.

d. Act as the advocate for public affairs doctrine, manning, resourcing and issues within the command.

e. Coordinate public affairs activities, laterally and vertically, within the organisation's area of responsibility.

2.5. PA Relationship to STRATCOM, IO and PSYOP.

a. Relationship to STRATCOM. At SHAPE, the Chief of Strategic Communications (CSC) is responsible for:

…the development and integration of Strategic Communications plans in support of NATO current operations and ACO activities, in accordance with the overall Strategic Communications direction from NATO HQ; for the coordination of military PA, InfoOps and PSYOPS outputs in support of those plans and outputs; for overseeing the execution of the plans, in coordination with NATO HQ and subordinate ACO HQs.

– NATO Strategic Communications Policy – PO(2009)0141

The PAO should look to STRATCOM for overarching strategic information objectives, themes, messages and coordination of other information activities within the headquarters. The CPAO should develop media, COMREL and internal communications plans within the framework provided by the CSC.

b. Relationship to IO and PSYOP. As per NATO doctrine and directive, Public Affairs is forbidden from planning or executing Information Operations or Psychological Operations. However, PA is expected to coordinate. The Military Committee recognises that:

"PA and Info Ops are separate, but related functions. They directly support military objectives, counter adversary disinformation and deter adversary actions. They both require planning, message development and media analysis, though the efforts differ with respect to audience, scope and intent. All military information activities must be closely coordinated in order to ensure consistency in the messages to external audiences and to promote overall effectiveness and credibility of the campaign. Info Ops is a military function to provide advice and coordination of military information activities in order to create desired effects on the will, understanding and capability of adversaries, potential adversaries and other NAC approved parties in support of Alliance mission objectives. PA is not an Info Ops discipline. While coordination is essential, the lines of authority will remain separate, the PA reporting relationship being direct to the commander. This is to maintain credibility of PA and to avoid creating a media or public perception that PA activities are coordinated by, or are directed by Info Ops. Beyond coordination of efforts, messages and being informed of these activities, PA will have no role in planning or executing Info Ops, Psy Ops, or deception operations." - MC 0457/1

c. To maintain the separation between Public Affairs and Information Operations the NATO STRATCOM Policy re-iterates, "*there shall be no personnel overlaps during operations of staff designated for Information Operations on the one hand, and Public Affairs officers on the other."*

2.6. PA Relationship to the Spokesperson

a. ACO policy directs Commanders to be the primary Spokespersons for the organisation with CPAOs directed as designated Spokespersons. The CPAO serves as Spokesman at SHAPE and the majority of the subordinate ACO commands.

b. Commanders have the authority to designate a Spokesperson to speak on their behalf. In this situation the exact relationship between the CPAO and Spokesperson must be developed. There is no formal ACO policy on this relationship.

c. The relationship between CPAO and Spokesperson is driven by:

d.

- Rank. The general trend in NATO operations is to appoint a general officer from the operations career path to the position of Spokesperson. In almost every case, the Spokesperson will outrank the CPAO. As such, the CPAO will be expected to support the spokesperson to fulfil information requirements and, at times PA manpower might be required to accomplish the Spokesperson's mission. These are legitimate uses of PAO resources as they are furthering the communications objectives. It should be remembered, however, that

NATO policy mandates that the PAO cannot be subordinated to any other staff officer.

- Complementing abilities. The CPAO and Spokesperson will have to develop a working relationship based on their own strengths and weaknesses, experience and personalities. There is little doctrinally which prescribes this relationship, leaving the two officers to develop this relationship.

- Commander's direction. Ultimately, the commander will determine how each staff position will be used. Once this decision is made, and providing it is not inconsistent with NATO policy, the Spokesperson and CPAO will be expected to comply to achieve the best possible results.

e. Regardless of the relationship, the CPAO and Spokesperson must work hand in hand when developing communications plans and in the daily execution of media operations and outreach. Uncoordinated messages and conflicting information will immediately discredit an organisation.

2.7. PAO as a Trainer.

a. PA Staff Training. The PAO must also ensure that his staff is trained and prepared to execute the PA mission. In this respect the PAO takes the role of mentor and trainer for the organisation. Likewise, the PAO must ensure the PA staff is resourced with the required and appropriate tools and technology to accomplish the mission.

b. Service Member PA Training. Service member interaction with the media in contemporary operations is not only likely, but almost probable. As such service members must be trained on how to interact with the media. The training will most likely be the immediate commander's responsibility, but the PAO should be the advocate and subject matter expert for that training.

b. Senior Leader Training. The PAO, as the SME on communications, should advise the commander and staff on speaking techniques and presentation approaches.

c. Host Nation Mentoring. The PAO will, at times, be called upon to mentor host nation and indigenous agencies. NATO operations are rife with examples where PAOs were called upon to train and mentor host nation governmental public affairs agencies. In Afghanistan, for example, the ISAF public affairs staff was instrumental in standing up the Afghan Government Media Information Centre. In both Kosovo and Afghanistan, Public Affairs personnel are actively involved in planning and conducting training for their host nation counterparts. PAOs should be prepared for such tasks as the situation and higher headquarters direct.

2.8. Unit Public Affairs Representative (UPAR). Whether a unit is authorised a Public Affairs Officer or not, the commander still has a responsibility to conduct a public affairs program. If a unit is not authorised a public affairs officer in either its Peacetime Establishment or Crisis Establishment, a prudent measure would be for a commander to appoint a UPAR to conduct public affairs duties on a reduced scale. The UPAR would be the liaison between the unit and the higher headquarters for public affairs issues. The UPAR can bring public affairs issues to the attention of the higher headquarters PA staff and can construct initial drafts of PA planning products, PA annexes, news releases, or talking points for submission for approval through the PA chain of command. As the UPAR is not a trained PAO and he is most likely conducting these responsibilities as an additional duty to his full time job, the duties of the UPAR should be limited and the higher headquarters should maintain situational awareness over his actions. Training of UPARS is covered briefly in Chapter 7.

2.9 PAO Responsibilities in Multi-national Environments. The NATO CPAO has the responsibility to reach out and coordinate the PA activities within the organisation's area of responsibility which includes NATO PAOs at subordinate headquarters, but should also be mindful of PAOs deployed in support of individual national contingents. PAOs of national contingents report and coordinate PA activities within national chains, and, because they are in a national chain of command vice a NATO one, may overlook the value-added that coordination with the NATO Public Affairs chain can bring. To increase the likelihood that national PAOs in deployed NATO operations are aware of NATO PA policies, guidance and messaging, NATO CPAO's at the deployed level should establish lines of communications with national contingent PAOs in the AOR. For example, if a NATO CPAO has three separate national contingents working within his region, the CPAO should habitually coordinate with these national contingent PAOs to gain situational awareness of their activities, inform them of the applicable NATO policies and guidance, and provide situational reports to the higher headquarters, all the while coordinating efforts to maximise effects.

2.10 Lessons Learned. PAO should make every effort to pass lessons learned to higher headquarters and to ACT in order to capitalise on both the positive and negative real-world and exercise experiences. This is a critical but often overlooked aspect which definitely makes an impact on future public affairs training and execution.

Chapter 3

PAO Planning and Staff Integration

"He who fails to plan, plans to fail." - Anonymous Public Affairs Planner

"In preparing for battle, I have always found that plans are useless, but planning is indispensible." – General Dwight D. Eisenhower, SACEUR

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3.1 Introduction. Planning and preparation is the key to success in any military operation. This is likewise true with military public affairs. PAOs must develop detailed, easily understood plans in order to be effective. Those plans must be integrated with the command's staff as well as the higher and subordinate headquarters.

3.2 Integration into the Command's Planning Process

a. The PA section must maintain a presence in the various planning cells and working groups within the headquarters to ensure that PA is planned and integrated into all future operations. This is critical to ensure that unity of purpose is met.

b. Early involvement of the PA function in the operational planning process ensures that the Commander's PA intent is addressed and integrated into the

operation. Early involvement will also ensure that the required resources are incorporated into the mission service support requirements. Transportation, security, access and other resources are rarely 'owned' by public affairs and must be allocated or tasked to support public affairs operations. Full integration into the staff and planning processes are the preferred method to ensure such assets are allocated.

c. Although PA and STRATCOM perform different functions, PA should complement STRATCOM plans to further the Commander's objectives. PAOs should also coordinate with IO and PSYOP to ensure unity of message, but care should be taken to maintain separation from execution of IO and PSYOP. See MC 457/1 for the Military Committee's direction.

d. The commander will always set the tone for the staff. If the PAO convinces the commander of the worth of the function, the commander will direct to the other staff divisions to assist in accomplishing the communications mission. To this end, it is vital that the PAO win the trust and confidence of the commander.

3.3 ACO PA Planning Policy.

a. Every NATO operation and activity under SACEUR's authority must have a PA plan detailing the objectives of the PA activity, the intent of the PA activities, the PA approach to be taken, and the tools and resources needed to communicate. The PA plan must support the overall mission objectives and SACEUR's vision. The Public Affairs annex is always designated as Annex X and will be put forward to the NAC for approval as part of the larger OPLAN.

b. Tactical level operations orders PA annexes will not be required to undergo the scrutiny of NAC approval but should still follow the prescribed format found at Annex 3-D. This format provides the continuity and memory aides to address the important and relevant issues for public affairs planning.

3.4 Planning Cycle. There are numerous planning models and each nation's process differs slightly. Currently, NATO abides by the Comprehensive Operational Planning Directive (COPD) for developing strategic and operational OPLANs. This process is used at the highest levels of NATO to drive political decisions to begin military planning and is beyond the scope of this handbook. It is important to recognise, however, that regardless of the specific planning model used, there are generally recognised steps in the planning cycle. Each planning model will use different nomenclature but the basic steps are included in a model as Annex 3-B:

a. As the title states, the planning process is a cycle just like other commonly used targeting models. Changes can only be made through critical feedback and analysis. That feedback is then used to re-adjust the plan. It is a continuous cycle. Evaluation should also look at the planning process to seek efficiencies within the organisation.

b. All planning models will generate certain products throughout their process, namely warning orders, operations orders or fragmentary orders. These orders are intended to inform subordinate commands of the key tasks, intent, and timings, early enough to begin parallel planning or to initiate required actions. This information can be put out as paragraphs within the larger base order or can be disseminated as PA annexes to those orders.

c. Key to the success of public affairs planning is to ensure that the PA aspects are integrated and synchronised with the larger plan and that the PA plan is signed and issued through the Operations and Command groups. **PA planning conducted purely through the PA-TechNet or through informal agreements will not carry the weight of a legally binding order.**

3.5 Planning Hierarchy.

a. High level guidance. Generally, military PA planning is informed by guidance from either of two sources: the Political/Military level or the military strategic command level. In either case, the guidance might be provided informally through the PA TechNet, as a directive from the SECGEN of strategic commander or published in a higher level PA strategy or StratCom framework. Often, however, requirements for PA planning are done through analysis or identifying requirements as situations develop. Do not let the lack of formal guidance delay the initiation of planning for important issues.

b. PA Outputs. Based on the higher level guidance or the identified requirement, PA outputs will take the form of a PA Strategy, PA Plan or PA guidance. Each of these products should be directive in nature and provide clear and concise guidance, tasks and purposes and coordinating instructions for ease of understanding and unity of effort.

1) PA Strategy. Public Affairs Strategy – This document provides a broad public affairs approach that sets overall themes and goals for an organisation or initiative, and usually covers one through several years. The strategy should include enduring themes and overarching messages. Action-oriented PA plans derive their guidance from PA strategies approved by higher authorities.

2) PA Plan – Public affairs plans are the details relating to the planning and conduct of a PA-related activity; in other words the “execution” guidance detailing the what, where, when, how and by whom. A PA plan can also specify what needs to be done in year one or year two of a multi-year public affairs strategy, in effect ‘operationalising’ the strategy. On the operational level, a PA plan is presented in a five paragraph OPLAN or OPORD Annex format. When developing an organisational or institutional PA plan, the format is less formal and can be presented in memorandum or policy paper format.

3) PA Guidance (PAG) - A package of information to support the public discussion of organisational issues and events. Such guidance can range from a prescribed response to a specific question to a more

comprehensive package. Included could be an approved public affairs policy, news statements, answers to anticipated media questions, and community relations guidance. The public affairs guidance also addresses the method(s), timing, location, and other details governing the release of information to the public. A PAG example is included at Annex 3-F.

4) Messaging Products – Frequently, situations will dictate an immediate need for media response lines (MRLs), talking points (TPs), or lines to take (LTTs). These products do not constitute PA plans or PAG in that they do not address issues such as timings, coordination measures or provide issue context to the PA practitioner. Avoid the lure of merely providing such lines, en lieu of a formal, coordinated plan. Conversely, a good PA plan or PAG will include these messaging products proactively.

c. Advanced Planning

1) Specific Issue or Event Planning. Events will arise that require separate planning. Examples might include changes of command, announcements for restructuring of headquarters, command directives, etc. These events may be tied into larger strategic issues but require focused attention in the short to medium term. Categories of PA planning might include timings of media advisories, photographic and video support, news releases, media facilitation, preparation of subject matter experts (SMEs) and handling interview requests and development of talking points. Such plans might also be referred to as PAG.

2) Contingency Planning. Events or problems which might arise which were identified during the planning process can be addressed in contingency planning. If for instance, an operation is conducted in an area known for earthquakes, the planners can develop contingency plans to deal with this event, should it happen. Having a plan ‘on the shelf’ will assist in rapidly addressing the problems which can keep such emergencies from developing into a crisis. Contingencies should be rank ordered by probability and by severity. An event which has a very high likelihood of occurring but little to no impact on the operation or public opinion should be ranked as a low priority for planning. Conversely, high probability, severe events should get the immediate attention of the planners.

d. Crisis Management Planning. Unforeseen events occur. Sometimes these events are so serious or severe that they challenge the future or legitimacy of an organisation. For these circumstances, there is a need for managing the crisis before it becomes overwhelming. A detailed discussion of Crisis Communication Planning is included as Annex 3-J to this chapter.

3.6. Higher and Subordinate HQ Coordination During the Planning Process.

a. It is imperative that the higher HQ keep the subordinate commands informed of the planning progress to ensure that parallel planning takes place. Without this critical step, the subordinate command could be taken by surprise and will have to quickly react to the higher HQ's intent. A good rule of thumb is the "One Third, Two Thirds Rule", in which the higher HQ will take one third of the time prior to the start of the operation to develop its plan. If, for example, an operation is to commence in 90 days the higher HQ would strive to complete its plan by day 30 to leave the remaining 60 days for the subordinate command and the subordinate commands below them to complete their plans. By providing as much information as possible through warning orders and open communication early in the process, the subordinate commands will have even more time and insight to ensure they can fulfil the higher HQ's intent and vision.

Example Planning Timeline – One Third/Two Thirds Rule

Begin Planning	Available Planning Time		Mission Execution
	Higher HQ Allotted Planning Time	Subordinate HQ Allotted Planning Time	

b. Within manning and resource constraints, Public Affairs planners should attempt to utilise liaison officers (LO) as much as possible. Having a dedicated LO at either the higher or subordinate HQ increases the possibility of communications dramatically. Even if the LO is only in place for critical planning events, the dedication of such an officer is most likely worth the effort.

3.7. Planning Considerations.

a. Regardless of the model, the following key questions guide all PA planning:

- Who is your audience?
- Why are you communicating the messages – what effect is sought?
- What is the overall environment into which you are communicating?
- What is your message?
- How are you going to tell them?
- When are you going to tell them?
- How do you measure progress or success?
- Are there security, privacy or other limiting factors?
- How does this fit into the overall NATO picture, and how does it relate to Info Ops and PsyOps plans?

b. Other planning considerations include.

- What are the PA centres of gravity and decisive points?
- What are the critical points that show public opinion or media environment are changing?

- Developing a “Public Affairs Collection Plan” conducted by thorough research and analysis to identify shifts in trends. Changes in trends could dictate changes to plans.
- What assets are required? Assets could include dedicated Combat Camera, transportation, exception to policy for media to fly on military aircraft, download and transmission of images on military computer systems, etc.
- Developing a visual imagery dissemination plan. How will PA get images to the media and general public?
- What are the potential issues and who are the trusted SMEs to speak to these issues? Are they willing to speak, prepared to speak and available to speak at the decisive points?
- What are the national restrictions to the release of information, images, etc.?

Conducting a thorough Mission Analysis and Staff Estimate will inform the PAO to accurately answer these considerations.

The following annexes are provided as guides for the public affairs planning and staff integration process. They are written to provide continuity across ACO public affairs and as memory aides to draw the planners’ attention to the important aspects of PA planning.

Annex 3-A Public Affairs Staff Estimate

PA ESTIMATE

The starting point for PA contributions to staff planning is the Public Affairs Estimate. The PA Estimate consolidates information on the mission audiences, media presence and capabilities, public opinion, PA assets and PA guidance.

This is not a static document created just for the beginning of an operation. It is a living document intended to maintain a record of the current environment in a theatre of operations or mission. It must be continually updated to reflect changes in the operational situation and environment.

The information contained in the estimate will feed the operations orders or plans and subsequent revisions of those products, if kept current and accurate.

Sources of information are not restricted to NATO documents. Any legitimate resource may feed this estimate.

The format and headings should be tailored to the specific operations. For example, stand-alone documents and reports may fit the bill for the information required in the estimate and therefore might be included and tabbed within a PA Estimate binder.

The following is an example of a Public Affairs Estimate modified from the U.S. Army Handbook and Canadian PA planning suggestions. Variation is authorised as long as the estimate provides the data and information to make educated decisions within the planning cycle.

1. **Mission.** Restate the commands mission from the public affairs perspective. This as analysis of the mission continues, this will eventually become the Annex X Paragraph 2.

2. **Situation.**
   a. **Information Environment.** Describe the general characteristics of the operation and the information environment in the area of operations.

   b. **Audience Analysis**. Who are the audiences, both internal and external? What are their information needs? How do they get their information: television, radio, newspapers or word of mouth? Is the media state-run or independent? Does the audience population have telephones, cell phones, fax machines or Internet connections? These devices are frequently found even in developing countries and must be considered during the analysis of information channels.

   c. **Media Presence**. What media representatives and organisations are in the area of operation? Are they radio, television or print? Are they state-run or independent? What is their political slant? Are they pro- or anti-coalition? Are they receptive to coalition information products such as news releases or other print or electronic products? Is the local media interested in live interviews with U.S. commanders and soldiers?

   d. **Media Capabilities.** Assess the media's information collection and communication technology, specifically identifying their level of visual information acquisition and

satellite communication capabilities. It includes an analysis of the logistics support, transportation assets, and host-nation communications infrastructure available to them.

e. **Adversaries' Capabilities.** Assess the adversary's or adversaries' information strategy, information tactics and communication technology. Specifically identify their level of visual information acquisition, methods and means of disseminating information and purpose and intent of communications. It includes an analysis of the logistics support, transportation assets, and network communications infrastructure available to them. IO, PsyOps and J2 should be good sources of information.

f. **Media Content.** Assess the global media's presentation of information and agendas and analyse and prioritise the potential strategic and operational issues confronting the command in the news media. This media content analysis will provide an evaluation of the quantity of coverage and the nature of that coverage.

g. **Public Opinion**. What are the opinions/beliefs of the local populations; of the international community; of the U.S. national population?

h. **Information Channel Availabilities.** Assess the information channels available for communications in and out of the AOR. Identify the means available to the commander for receipt, transmission, and dissemination of voice, data, text, graphics, and digital visual imaging. Describes command, coalition, and local national facilities and equipment available, to include an analysis of available telephone lines for voice and data transmission, the accessibility of audio and video channels, the prevalence of private communications devices such as soldier-owned cellular telephones, facsimile machines, computers, portable radios and televisions, still and video cameras, and the nature and flow of the information possible through these channels.

i. **Information Needs.** Assess the information needs of the previously identified key publics. It analyses key internal and external audiences and assesses their news and information expectations. Identify the types of information made available to these key audiences.

j. **Filters.** Who are the key influencers? What are the key influences? What are the motivations and biases?

k. **Personnel and Resources Available**. What is the available Public Affairs force structure, translators, Combat Camera and/or administrative staff?

l. **PA Guidance**. What guidance has been received from higher levels? Official positions on theater issues are naturally not developed at the tactical level. What is the theater strategic/national command authority position? This is often coordinated and de-conflicted at all levels via conference calls and other communication means.

3. **Analysis of relative strengths, weaknesses, opportunities, threats (SWOT Analysis) of both friendly and enemy forces**.

4. **Analysis of Courses of Action.**
   a. Analyse each course of action based on the public affairs objectives from higher HQ or political HQ.

   b. Indicate problems and deficiencies. At a minimum, subparagraphs should include media facilitation and support, news and information provision, and force training and

support.

c. Analyse each COA from a PA point of view to determine its advantages and disadvantages for conducting PA. The detail in which the analysis is made is determined by the level of command, scope of operations, and of urgency of need.

5. **Comparisons of Courses of Action.**
   a. Compare each course of action.

   b. List advantages and disadvantages of each course of action under consideration.

   c. Include methods of overcoming deficiencies or modification required for each course of action.

6. **Conclusions.**
   a. Indicate whether you can support the command mission (restated in paragraph from the public affairs viewpoint.

   b. Indicate which COAs you can best support.

   c. List major public affairs deficiencies, which commander must consider. Include specific recommendations about methods of eliminating or reducing their effects.

Annex 3-B – Military Planning Model for Public Affairs

Generic Model – Military Planning Cycle

a. Receipt of the mission. The mission might be directed by a commander or it might be an acknowledged need for future action.

- Warning Order #1 (Higher HQ alerts Subordinate HQ of impending mission and alerts to begin parallel planning)

b. Research and Mission Analysis
- Update Staff Estimate
- Analyse Higher Mission / Intent
- Identify Specified / Implied Tasks /Essential Tasks
- Review Task Organisation / Assets
- Determine Restrictions / Constraints
- Assess Risk
- Identify Critical Facts / Assumptions

- Develop intent for PA
- Warning Order #2 (Initiate movement to preposition resources and personnel, guarantee logistics, establish timings, etc.)

c. Course of Action Development
- Generate options
- Develop embed, media engagement or visual information plans
- Identify resource requirements
- Assign responsibilities
- Prepare COAs

d. Course of Action Comparison/War gaming
- Identify resource shortcomings
- Compare COAs against intent and resources available

e. Appropriate Course of Action Selection

f. Plan Approval
- Approval authority accepts plan and authorises resources

- Warning Order #3 or PA Annex/PA paragraph in the base order

g. Plan Implementation

h. Evaluate – take a self-critical look at how your plan was executed and determine what worked and what did not. This feeds into the research for the next event, or can lead you to make a course correction to the current activity, if required.

- Tasks and considerations within the planning step
- Product or Output

Annex 3-C Public Affairs Research and Metrics

The very core objective of public affairs is to inform a select audience. But how does one know if he has achieved this objective? Has the message changed the audience's opinion or behaviour? Has the public affairs effort made a difference?

Key to answering these questions is first figuring out what the audience knows, often referred to as establishing a base-line from which to measure progress. Then, from that baseline, one can measure changes and adapt the plan accordingly.

Measuring progress must be based on facts rather than assumptions or 'best guesses'. To acquire the facts, a public affairs staff must conduct detailed research specific to the operational environment. Western military cultural ideas about communication and credibility will not always apply in other parts of the world and sometimes not even within segments of their own population. Too often, communications strategies are developed on predetermined conceptions, cultural or political biases or general naivety about the particular environment. Western communicators often assume that experiences from their own environment can be overlaid against other cultures. This false assumption often leads to more serious problems and frustration on the parts of both the communicator and the audience. For this reason, it is vital that public affairs research be conducted prior to launching a public affairs campaign.

Research can identify influential audiences and information needs, which will inform decisions such as appropriate messages, preferred delivery methods, and required intensity. The PAO must also evaluate or reassess the communications strategy to be able to refine and tailor the plan. This feedback is processed and applied against measurable standards, or metrics to determine whether the plan is on track, whether it needs adjustments or if new dynamics have altered the situation. Unfortunately, most communications plans are based on a sense of unfounded intuition rather than any type of intellectually derived facts or data.

Research may be conducted to guide strategies for all three of the PA functions but each function will require slightly different approaches and resource allocation. For instance, researching the internal communications needs of an organisation might require a PAO to design and execute a simple, inexpensive research project himself. Researching an external audience, perhaps speaking a different language, might require hiring a professional survey group to conduct opinion and behaviour polls. Conversely, information might already exist through other academic or government research. That information might actually be more accessible than that of a local community or command.

As most public affairs budgets and resources will be very limited, conducting research might be difficult. If this is the case, consider seeking studies which have already been completed or seek other researchers who are willing to collaborate (also known as "piggybacking" on another survey). Often, various IOs, NGOs or national organisations have collected data on particular environments. It is absolutely permissible to use secondary research (that research conducted by someone else) provided that research has been made available for the task at hand and the primary researcher is properly cited.

Based on these concepts, the PAO should ask the following questions before beginning the research plan. The responses to these questions should then begin to frame the research plan:

- What is the communications/public affairs problem or challenge? (this might be left for the PAO to determine or it might be directed by the commander or higher headquarters)
- What information is required?
- What is the priority of each category of information?
- How will you use the results of the research?
- What specific public, audience or environment should be researched?
- What research techniques should you use? (see the following discussion)
- How will the research results be analysed, formatted or applied to the plan?
- How much will it cost?
- How do we sustain the research effort to support the communications plan?

There are generally two categories of communication research – Qualitative, that which deals with descriptions, perceptions and opinions, and Quantitative, that which measures and collects numeric data to support public affairs planning. When used in a complementary manner, these categories can provide the fact-based data that create an inter-subjectivity that helps us to better inform decision making and prove impact. Together, they provide a more complete picture of a PA situation.

Qualitative Research

Qualitative research is a discussion-based format with a small group of individuals designed to gain an in-depth knowledge on a narrow range of topics. More simply, qualitative analysis allows the researcher to understand “why” things are happening the way they are. Since qualitative research is conducted on a smaller, select audience, results should not immediately be assumed to apply to the whole, but can be used to identify concerns, confirm assumptions or provide a reality check before, during or after the execution of a plan. Qualitative research can also provide persuasive and convincing anecdotes for use in the PA plan. Qualitative research is normally done through focus groups or one-on-one interviews.

Focus groups are facilitated discussions conducted to gain reactions and opinions to existing concepts. The issue under review will drive who is recruited for the focus group but they will normally consist of a select ten to twelve people from a key audience who share a common characteristic (gender, jobs). The facilitator may also raise open-ended questions about how to resolve or address problems. If the topic is a community relations issue, perhaps “*How are military convoys affecting*

local business?" you might want to randomly recruit local business owners. To gain sufficient, detailed and usable information, it is important not to mix too many audiences together. In the military convoy example, mixing local business owners with local medical personnel might result in convoluted feedback which would make interpretation of public perceptions difficult.

One-on-one interviews allow a researcher to gain insights from key individuals who, in turn, can help you reach key audiences. The goal of both methods is to develop a clear understanding of those key audience members' positions and what role they might be willing to play in outreach efforts. Equally important is the fact that these key individuals are involved in the research effort and if brought in from the beginning, will often take an active role in helping solve the problem.

Another simple and less scientific method of qualitative research is conducting **planned observations** which can tell the researcher "how" people are doing things. For instance, a researcher might periodically monitor the habits of patrons in a café to determine how they gather their news. Are the patrons watching television news programs or listening to the radio? Which stations do they watch or listen to? Does a particular program or program host then spur conversation or emotional reaction? Although not an exact measurement, these observations can lend insight into audience behavior, thus informing public affairs decisions.

In addition to providing valuable insights into potential communication approaches, this qualitative research will indicate the level of understanding or acceptance for your issue *prior* to your communications effort. At the conclusion of the project, it is important to go back to the same or similar group to determine success (i.e. did they hear or understand your messages, did they change their behavior accordingly?).

Be aware of the limitations of qualitative research. Selection of interviewees and focus group members can easily skew the results of the interviews. Too often, interviewees are chosen because they will give the desired responses rather than provide insight into the real issues. Another drawback is that since qualitative analysis normally involves just a portion of your key audience, the results cannot be extended to the broader population; that is, the results are not "projectable." For example, if you discuss a certain issue with selected community leaders, their opinions might not extend to the entire community; instead, it must be understood that these are merely opinions of a select group of people. Finally, 10 -12 good anecdotes or observations may not be adequate justification for commanders to make decisions. Commanders might wish hard data prior to making or approving a decision. Despite the limitations, however, qualitative research is powerful tool. Used in conjunction with Quantitative research the PAO can gain a better understanding of the environment which will in turn help in making better communications decisions.

Quantitative Research

The other category of public affairs research is quantitative research. This research is typically done through surveys, content analysis and experimentation. The goal of quantitative research is to answer the question of "How many?" With a sufficient, representative number of respondents, one may extend those results across the entire target audience. **Surveys** are typically how one gathers

quantitative data and may be done in a variety of ways, each technique having merits depending on objective, time and budget.

Survey Development

When developing the survey, ask to following questions:

- What type of survey will provide the information that I need?
- What medium is available and will that medium assist in gathering the information in a usable format?
- What are the priorities for each category of information? When developing the survey, list the most important questions first as the respondents will tend to pay less attention and give less detailed answers at the end of the survey.
- Is anyone else conducting research along similar lines, whose data could compliment your research?

Generally there are four methods of conducting surveys; in person, phone, mail, and online. The survey effort does not need to be elaborate or complex. Concerns over traffic rerouting or likely use of a new on-base service could easily be assessed with a simple survey. While surveying does take time up front, it can be time well spent when the PAO needs to make the case for or against an issue.

Strongly consider the use of on-line surveys for data collection. There are a variety of free survey websites, which explain step-by-step how to conduct the survey, generate and write good questions, develop distribution lists, and how to collate and interpret the data. On-line surveys can be a great asset for the PAO with little research experience working on a small budget.

A PAO can conduct a **poll** (a survey with a limited number of questions) to get a quick impression about attitudes on a very specific topic.

Each method has benefits and limitations. For instance, surveys sent through the mail typically have low return rates unless an incentive is included or the recipient is aware that the survey is coming. The entire process for a mailed survey (distribution, return and tabulation) takes longer than other methods because the respondents are driving the schedule, rather than the interviewer.

If the survey is intended to identify the opinions of a specific demographic, it is necessary to include appropriate screening or **profiling questions** at the beginning of the survey.

Quantitative Sampling Methods

The process used to define and select the sample will directly impact the validity of results. Since a sample is a representative group of a broader population, the more closely the sample reflects your population, the more valid the results.

When considering sampling options, the question to consider is how much confidence you need to be able to put in the results. You have two options: **Probability Sampling** or **Non-probability Sampling**.

Probability Sampling or Random Selection. Random refers to the fact that anyone within that target group has an equal chance of being selected. This is important to consider if you want to project your results to a broader population. For example, phone surveys typically select respondents randomly by geographic parameters. In a person to person survey, the researcher might approach every fifth

or sixth person to ask him/her to participate. This ensures that every person in the target population has an equal chance to share their views.

Non-probability Sampling - There are several approaches to non-probability sampling.

Convenience Sampling – This method involves asking questions at a location convenient to the surveyor. An example might be asking questions just of those entering a medical clinic or entering a particular governmental building. If time or type of population limits who you can access, then convenience sampling might be the only option, but because this method limits the range of respondents, the information gained may not be an accurate reflection of the general population.
Quota Sampling may be used if you want to ensure your sample reflects a specific make up of a population – either by income, gender, education, etc. For example, if 43% of the large group is below 35 years old, then 43% of your survey respondents need to be younger than 35.
Snowball Sampling starts with a small group, asks those respondents for recommendations for more contacts, and builds from there. It is often used when not much is known about your population. Clearly, there is bias built into this approach, but if one is interested in responses from within a limited group (e.g., area business owners), then such an approach can be effective.
Volunteer Sampling is when respondents present themselves for participation. Pharmaceutical testing is done by volunteer sampling. Since motivations for participating often exist (usually money), results need to be carefully evaluated. Volunteers tend to have very strong views on topics and want their opinions heard.

Sample Size

Budget and time are the major driving decision when conducting surveys. To get the most representative sample within these two constraints, consideration needs to be given to two factors: Confidence level and confidence interval (margin of error). Most surveys strive for 95% confidence level with a 5 point margin of error.
Confidence Level - If every person within a target group could be interviewed, you would be 100% confident that results reflected that group's opinions. However, both budget and time usually prevent that approach. Instead, you need to settle on an acceptable level of certainty.

Typically surveys have a "95% confidence level" meaning that you have a sufficient number of completed surveys to be 95% confident that your results reflect those of the entire group. As expected, a 99% confidence level will require more surveys but may be needed because of the topic.

Confidence Interval or **Margin of Error** - Another way to reflect potential uncertainty is to suggest that your answers are correct within a specific range. A range allows for predictions that the true answer falls within a high-low scale. The typical confidence interval is plus or minus 5 points (+/-5%).

Both factors considered together will impact on the number of surveys needed. The typical survey (with large population) relies on 95% +/-5 leading to 384 interviews required, however if more reliability is required the survey sample must be larger.

Online resources are available to determine the appropriate sample size. For example http://www.surveysystem.com/sscalc.htm provides a free calculator.

Question Types

The design of the survey questions and how those questions are asked will also affect the quality of the data. For most surveys, questions will fall into one of two categories – close-ended and open-ended.

Close-Ended Questions - In order to determine a sample's preference for a specific list of options, you can offer "close-ended" questions. These questions force respondents to pick specific answers over another. Examples of close-ended questions include:

The military base's traffic patterns delay my arrival at work.

True _____ *False _____*

Within the last 3 months, I have taken my children to the local health clinic for the following reason (Pick one. If more than one applies, pick most current):

Minor illnesses ___ *Checkup ___* *Emergency needs ___* *No visits within 6 months ___*

Please indicate your age range:

Under 25 ___ *25-40 ___* *41-55 ___* *56-70 ___* *71+ ___*

Another type of close-ended question might use the Likert Scale. With this method, the respondent is asked scale his answers on the level of agreement, level of importance, or level of awareness.

NATO remains relevant in today's security environment.

Strongly Agree				*Strongly Disagree*
1 ___	*2 ___*	*3 ___*	*4 ___*	*5 ___*

Open Ended Questions - Open ended questions are those which provide no options for the respondent to choose. The respondent will have to provide his own answers to the questions. The limitations to using open ended questions are that it is difficult to organise the answers and that time, space, and a general unwillingness to write down a lot of information will hinder meaningful responses.

Interpreting and Using the Data

The following steps will help in interpreting and using the data:

- Perform a broad overview of the data. A quick assessment of the responses might point out flaws in the returns. It might also help to develop an understanding of the trends and themes of the returns.
- Validity - Double check your respondents – is this an accurate reflection of the population or did the respondents skew to one side or the other. This is where the profile questions come into play. For example, if you are doing a residents' survey in support of a community relations program, ensure you (or the survey you are reviewing) have a spread of respondents likely to reflect the community. If you know that the community has a fairly even mix of ages but your survey has predominately seniors reflected, then that could have an impact on your analysis.
- Compile the data into categories. Does one thread of opinion dominate? Are the opinions equally dispersed? Common terms for interpretation follow and can assist in making sense of the data:

    - Frequency – How many respondents gave a particular answer? What percentage?
    - Mean or average – Considering all answers given for that sample, what is the average for the sample?
    - Median -- If ranked (high to low or vice versa), what is the response exactly in the middle?
    - Mode – What is the answer appearing most often?

- Use the open ended comments as a 'feeling' for opinions. These comments might provide insight into the issues or good recommendations to deal with them. If, for instance, survey findings suggest that local businesses are frustrated with convoys driving through the business centre, the PAO could use an open ended question to provide the commander with the respondent's words. For example, "One respondent noted that "the convoys ….."
- Clean the data – discard incomplete surveys or surveys in which the respondents were obviously not serious about providing genuine information.
- How do you want to use the data – do you want to focus on only the negative comments? Do you wish to merely measure the overall perception? This seems like a simple and obvious step, but deciding what to do with the data can be a very challenging debate.
- Did the survey achieve your objectives for the research? Did the survey perhaps identify other information requirements? Did your survey results provide the information you need to draw a conclusion?
- Draw conclusions and take action or revise the survey and try again.

Content Analysis

Often, public affairs offices will present clipping services to the command as an assessment of the media environment. These are merely a 'copy and paste' of various headline stories appearing the international or local media. Although making these available to the command group is beneficial in some respects, taking the effort to actually analyse the clippings can significantly guide the public affairs plan and provide the commander a much more valuable assessment. The various tools to analyse the news clippings are called content analysis.

Content Analysis is a quantitative tool to count and measure what the media are saying about the command or organisation. It is a way to measure the impact of messages, count the number of times PA output has appeared in the media, and most importantly, it allows the PAO to examine the tone, prominence, and placement of strategic messages.

There are a variety of methods to conduct content analysis and each has benefits and limitations in different situations. Not each technique will be appropriate for every outreach effort. Additionally, the PAO may not always have to conduct his own content analysis. Online services exist (for varying fees) to perform the analysis.

Below are the categories and brief descriptions, in ascending order of complexity, of the various methods of content analysis.

Clip Counting - Clip counting simply determines how many times your story ran. While a useful measure at the tactical level, such figures offer little insight into the impact of that coverage.

Circulation and Readership Analysis - As part of this step, you would gather information such as circulation and audience profile to answer the questions of "Who?" and "How many?" It is important to keep in mind that not all outlets are created equal. A positive hit in a major international newspaper will often carry more weight than a similar length story in a smaller local paper. Likewise, wire services will carry a wide distribution.

Advertising Value Equivalence - The advertising value equivalence (AVE) approach asks the question "If I had to pay for this space, how much would it cost?" AVE allows for a comparison of media outreach efforts to advertising buys. In doing so, several factors need to be considered such as day of publication, placement (positioning) in the publication and length.
While a helpful technique if advertising is an option for your effort, the AVE approach should be used reluctantly. AVE figures create the impression that advertising and communications outreach are equally effective, which is typically not the case.

Placement Analysis - This approach requires the development of a list of characteristics to "define" an article or story and associate values to those characteristics. Essentially you are looking for ways to visually differentiate one article from another. This does not consider the content; just the physical features. The list of potential factors to consider can be quite long, but examples would include:

- Front page placement?
- Above the fold? Picture?
- Black-white or colour?

For each of these criteria the analyst would establish criteria (e.g. above the fold 10 points front page, below the fold 5 points, article found on page 37 1 point). This data is then compiled and presented as a quantitative measure of how the messaging has been conveyed by the media, how important the issue is, etc.

Prominence Analysis - Prominence Analysis combines the steps of the above Placement Analysis with the Circulation and Readership Analysis. For prominence, the assumption is that "bigger and earlier" is better as suggested by the following list of factors to review:

- Publication or outlet
- The values associated with various publications will be driven by goals of outreach (e.g., a national publication carrying a local story mention might not be as "desirable" as placement in a local publication.)
- Audience demographics; Do those demographics match your key audience?
- Date of run (Recognises that readership/viewership varies by time period. For example, a story in the Sunday paper would get more "points" than one run on Monday).
- Overall size of article; Column inches or broadcast time
- Where in publication/broadcast did story appear?
- Photography used.
- Size of headlines and with/without subhead.

As with other approaches, various factors would be assigned numeric values allowing comparison across a collection of coverage.

Message Analysis – This is the first method for actually analysing the message rather than the placement. Essentially for this approach, the focus is on whether key messages and spokespeople made it into the story, and if so, where. Another factor to consider is how the message was included (implied quote by reporter or as an attributed quote).
As with the Placement Analysis, points are assigned for each message included in the coverage and its placement. Clearly the earlier key messages (or spokespeople) appear, the more valuable the coverage. A message buried at the end of the story is unlikely to reach most of audiences.
Tonality Analysis - This is the first step in which subjective analysis comes into play to assess if the coverage was favorable or unfavorable. Typically articles are scored with a "positive, neutral or negative" slant. Each article should be reviewed independently and then scores can be added together to assess overall impact. Since tonality analysis is a subjective process, it is wise to ensure the analyst is not building personal bias into the review. A way to guard against this is to ask others to assess a collection of articles and discuss if and how each came up with their own assessment. If possible, it would be useful to have someone from outside the PA field review the articles as well.
Overall Quality of Coverage - For this approach the analyst would combine several of the above techniques such as tonality, prominence and message inclusion. The values assigned by each of these techniques factor into creating an overall score for specific coverage. Such coverage can be done for individual placements or can be done over time to track overage of a broader issue.
Competitive Analysis - Since no communication outreach effort occurs in a vacuum, it can often be very beneficial to compare what coverage the "competition" is getting. When promoting one side of a story, what coverage relays the opinion of those supporting the other side?
Often called "Share of Discussion," this analysis reviews coverage from the audiences' perspective: The public picks up the Sunday paper and reads your one

"good" story but also reads three others that do not support your position. Clearly your good news runs the risk of being overcome by the "competition."
An easy place to start this competitive review is by counting clips and reviewing prominence. It might also be beneficial to do message analysis as a way to understand how others are getting out their messages.
Understanding your issue's share of discussion is one of the most critical components of providing communications support at the strategic level. If we limit ourselves to just reviewing our placements, we will miss a major part of the picture of how our key audiences – especially the public – are getting information about our situation. In addition, reviewing the competition's efforts can offer valuable insights into what additional issues to consider for future communications or topics and what questions can be expected.
Such reviews can be done on "hot" short-term issues as well as topics that run for several years.
The factors tracked and scored will vary by topic. For example, the tone of a "feel good" story will be less useful to track than that of a policy-oriented story. Assigned values can be adjusted as well, but you need to ensure the same values are used throughout your review of a specific topic and are in keeping with your communication objectives.

Presenting Coverage
Once the content analysis has been completed, the results must be presented in a way that facilitates decisions. In order to do this, the PAO must draw on the original purpose defining the research. For instance, the purpose might have been *"To provide an indication of media penetration and analysis of the success of the command to asset its position on the NATO Comprehensive Approach."*
The next step would be to develop the analysis criteria. In this example, the PAO might choose:

- List command messages or positions to assess
- Were the spokespeople quoted? What were their quotes?
- What was the journalist's tone when covering the issue?
- What was the prominence of the story within the publication?

From these criteria, the PAO then develops a scoring protocol. For example:
Tone - 1 (not positive) – 5 (very positive)
Placement - 1 (poor placement) – 10 (positive placement)
Messages - 1 (no messages carried) – 10 (all key messages carried)
Outlet - 1 (outlet not critical) – 5 (critical outlet)

Each article on the issue is then scored.

Example Scoring Protocol

Issue: CDR's NATO's Comprehensive Approach news conference 14 May 2010					
Date	Tone	Placement	Messages	Outlet	Total
Story 1	2	1	4	3	10*
Story 2	3	1	6	4	14
Story 3	4	3	6	4	17
Story 4	4	3	8	5	20
Story 5	5	2	8	5	20

Totals:	20+ Green;	12-19 Yellow;	<12 Red
* Story tone and placement scored low with this particular story. PAO will contact editor, discuss reasoning, and seek solution.			

The format for presenting results is central to ensuring areas of attention are recognised and acted upon, if necessary. A quick approach to identifying coverage for discussion is to "color code" total points for each item reviewed. This will allow the PAO to show the content analysis findings and identify the actions to be taken to deal with any problems in news coverage.
Since low scores (red) are likely to generate questions, it would be helpful to include notes at the bottom indicating what is being done in response. Low scores can obviously be the result of many factors, but one positive outcome of a negative article is that its content gives clear insight into potential arguments and messages that could be used by those on the other side of the issue. This in turn allows you to prepare responses and be proactive to prevent the "bleed" of those messages into other outlets.
It is important to look at, not just immediate impact of a particular news event, but also the long term trends of the topic. There are a variety of software programs which can easily assist in presenting this data to inform decisions. Likewise, there are a variety of services which can assist the PAO in developing the research plan. Services such as DVIDS and Google Analytics can provide research data on to those with registered accounts.
Print articles, internet chat rooms, television programs and blogs are all media which can be analysed to understand how the media landscape is developing and can help in assessing the performance of a communications campaign.

Conclusion
To make good public affairs decisions, the PAO must know the environment he is dealing in. To do that, he must conduct research. This annex has provided a very brief overview of the various techniques and methods of conducting research.

Information for this chapter was drawn from:

Dr. Maureen Taylor's presentation to the United States' Defense Information Schools' Joint Senior Public Affairs Course, January 2010 and subsequent collaboration with ACO Public Affairs. Dr. Taylor is the Gaylord Family Chair of Strategic Communication at Gaylord College, University of Oklahoma. She currently teaches public relations at the undergraduate and graduate level as well as introduction to graduate study.
Bell, Ryan J.; How to Interpret and Analyze Survey Data; posted 25 July, 2008; http://www.articlesbase.com/management-articles/how-to-analyze-and-interpret-survey-data-496698.html
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Annex 3-D Public Affairs OPORD Annex X

Guidance on drafting ACO Public Affairs Operation Order/Plan Annexes.

1. The purpose for ACO to prescribe a PA Annex format is twofold. First, by using the approved format, the writer ensures continuity, in that NATO military officers will be familiar with the format and will understand where to find the vital information within that format. Second, this template serves as a checklist to ensure the PA planner has considered the important aspects and issues for public affairs operations.

2. The Public Affairs OPLAN Annex is both a tool for conveying the details of the operation plan to the subordinate headquarters and a legally binding order signed by the commander responsible for the operation. **As such, it should be concise, relevant and directive in nature**. Additionally, the Annex is not a solitary document. The annex cannot be developed in isolation from the base OPLAN – its major points should be included within the base OPLAN whilst also incorporating the major points of the base OPLAN into it.

3. The **five main paragraph headings** and **bold subparagraph headings <u>are mandatory</u>**. Plain text subparagraph headings may be omitted or supplemented as required. The important thing to remember is that the annex must accurately describe the environment, state the mission and provide the details for conducting the public affairs and communication operation in a manner useful to other public affairs practitioners. Deviation from this format is authorised but not recommended.

4. If appropriate, use an appendix to provide the necessary detail required for a particular topic, rather than a paragraph in the base order. Appendices are often useful as standalone products or templates for subordinate HQs use. For instance, master messages or service member media cards can be included as appendices to distribute directly to the intended recipient.

5. Depending on the resources and staffing available to the particular NATO military headquarters drafting the Annex X, higher headquarters assistance or contractor assistance might be sought in order to provide useful, knowledgeable and informed guidance to the subordinate command. Planning should not be conducted “in a vacuum.” Proper planning should be coordinated across military and political lines, up and down the chain of command and with the ultimate goal being unity of effort.

ANNEX X TO
OPLAN X
DATED …..

OPLAN X
(TITLE of OPLAN)

REFERENCES:
A. MC 0457/1 dated 14 September 2007
B. AD 95-1 dated May 2008
C. PO(2009)0141 dated 29 September 2009
D. AD 95-2 dated 19 November 2009
E. ACO Public Affairs Handbook dated March 2010

Time zone used throughout this order: ZULU

1. **SITUATION**. The situation paragraph consists of a brief general description of the communication situation, with emphasis on information particularly affecting PA operations such as the public environment in the theatre of operations i.e., positive to NATO, hostile to NATO. Note: Consider a joint situation annex with the other communications disciplines in order to ensure unity of effort and to eliminate redundancy. Much of the information in the Annex X is of interest to Strategic Communication (StratCom), Information Operations (IO), Psychological Operations (PSYOPS) and other communicators:

   a. **Enemy forces / Opposing or Hostile forces**.

      1) Identify the threats to friendly PA efforts or success of the mission.
      2) Describe the opposing forces' capability/expertise in propaganda or media operations that will require specific counter-actions.
      3) Outline any other threats to friendly communications efforts. The scope of this analysis will increase from tactical to strategic level.

   b. **Friendly Forces.**

      1) Outline the higher HQ's PA and adjacent agencies' communications plans.
      2) Identify any and all other forces or authorities in the Joint Operations Area (JOA) with public affairs capacity and/or capabilities and consider the required coordinative activities.

   c. **Attachments / detachments**. Highlight critical elements of the task organisation that will provide additional PA capacity and/or capability e.g. subordinate NATO Media Information Centres or detachments of specialist staffs such as NATO TV crews or combat camera teams.

   d. **Availability of local infrastructure to support PA activities**. For example, internet infrastructure in place, Government/Joint/Multi-national Media Information Centres, etc.

e. **Media activity, both friendly and hostile**. Identify specific entities as well as trends and state how these will impact fulfilling the PA mission in theatre.

f. **Assumptions**. (If applicable) Planners must make assumptions when faced with a lack of information or uncertainties in order to further the PA plan. Assumptions must be plausible, necessary and realistic and should eventually be confirmed or denied to ensure that the plan remains valid.

g. Any other information relevant to the information environment.

2. **PA MISSION.** A clear and concise statement of the PA mission, addressing the WHO, WHAT, WHEN, WHERE, WHY AND HOW of the PA element. State clearly, in simple terms, how the PA effort will support the commander in achieving his operational objectives. A clear task and purpose must be provided and the mission must be nested to both the owning HQ and the higher HQ StratCom and PA missions.

3. **EXECUTION**.

a. **Commander's PA Intent**. Clearly and concisely explain the commander's vision of how PA activities will be conducted. This paragraph should make clear how much effort will be invested in public affairs activity. Include:

b. **Concept of Operations**. A detailed discussion of the overall PA mission, explaining how PA activities will be conducted in each phase of the operational plan and what the priorities are. (There should exist a specific sub-task and purpose for each phase)

1) **PA Posture.** Very Active, Active, or Reactive as defined in MC 0457/1.
2) **PA Purpose.**
3) **PA Priorities of Effort.**
4) **Desired End-state.**

c. **Key Tasks.**
1) State the **overall key tasks** that must be accomplished.
2) State **tasks and purposes for each subordinate PA entity**. Detail requirements for media operations and internal communications including but not limited to:

a) development of public affairs plans
b) capturing, archiving and disseminating imagery (still and video)
c) web site and social media web site management
d) media monitoring
e) building and maintaining relationships with local/international media, third party advocates and other stakeholders (IO's, NGO's, etc.)
f) producing internal information product for troops in theatre
g) Media training for key leaders or service members.

d. **Coordinating Instructions**.

1) **Master Messages**. Master Messages should be attached as Appendix 2.

2) **Commanders Critical Information Requirements (CCIRs)**. Identify types of public affairs information or events which may have an impact on the conduct of the campaign that the commander should be made aware. PA recommendations should be integrated into the overall list of CCIR's, which the staff presents to the commander for approval. These should not be separate and/or isolated PA CCIRs. Examples might include; inaccurate leader articles in influential media outlets, speeches by senior public figures (ministers and heads of state) of NATO and Troop Contributing Nations and public statements about the conduct of the mission by senior NATO figures or combat video that shows enemy of friendly forces actions which visually reinforce our messages.

3) **Release Authority.** State who will have authority to release information and what coordination is required.

4) **Synchronisation and Timings.** Examples include:

a) Provide details of critical PA timings, synchronisation aspects or key battle rhythm events.

b) Deadlines: indicate any critical deadlines/timings

c) Briefings: state how frequently these will be conducted by whom and any briefing materials that may be required e.g., CDs, briefing cards

d) Routine news conferences/briefings: state how frequently these will be conducted by whom

5) **Sensitive Issues**.

a) **Casualties/Accidents/Incidents:** Describe the procedure to be used to coordinate the release of information on casualties. Be clear about the delineation of responsibility between national elements and NATO public affairs staffs. Address incidents involving CIVCAS (both host nation and international) as well military casualties from more than one nation in a single incident.

b) Host nation (HN) law: Describe any specific considerations that might apply to journalists or media operations activities as a result of HN law. If there is a NATO Status of Forces Agreement state whether its provisions would apply to journalists accompanying NATO military personnel into theatre and include it as a reference to this annex.

c) Cultural/ethnic/religious issues: (where applicable)

d) Caveats: The Annex X should specifically direct that caveats will not be released publically.

e) Limitations on the use of images showing prisoners of war (Geneva Conventions).

6) **Media Facilitation.**
   a) **Media Accreditation Procedures.**

   b) **Embedded Media Policies.** State whether media will be embedded during the operation and if so how it will be accomplished.

7) **Security.** Both physical security and OPSEC. Include at a minimum:

   a) Reception, accreditation and identification of media: describe procedures.

   b) Reporting restrictions: state any restrictions that may be imposed on the media and why.

   c) Security review and how to clear, declassify documents and information for public release and/or use as public affairs products.

8) **Liaison with other actors in the information community**: Explain how the public affairs staff will conduct normal coordination and de-confliction with StratCom, PSYOPS and IO.

9) Escort Officers – what training will escort officers be provided, who will supply them and who will brief them.

10) Specialist support – describe the requirements and arrangements for access to interpreters, translators and cultural advisors.

11) Strategy for coordination with civilian agencies, IOs, and NGOs?

4. **<u>SERVICE SUPPORT</u>**.

   a. **Concept of logistics support** for public affairs.

   b. Transportation. Consider the following:
      1) Transport of photographers and videographers
      2) Drivers, communications, integration into Higher HQ movement control
      3) Concept to move media through theatre and approval process/authorities, etc.
      4) Prioritisation of media on intra- and inter- theatre transportation.

   c. Contracting and purchasing. Consider the following:
      1) NATO Contracting vs. National Contracting
      2) Process and Authority
      3) Local National hiring (Media analysts, translators, cultural advisors)

4) Command Information printing and contracting
5) Photo and video equipment
6) Laptops and software for imagery editing
7) Mobile or satellite phones.

d. Briefing and Press Conference Support considerations. Consider the following:
1) Conference room
2) Maps, display boards, large screen TV monitors, overhead projectors, etc.
3) Interpreters, simultaneous translation equipment , transcription services
4) Microphones, speakers, splitter boxes, etc.
5) Food and beverage costs

e. Other acquisition aspects to consider:
1) Power supplies, voltage, conversion
2) Stationary
3) Petty cash
4) Still and video cameras
5) Printers and photocopiers
6) Individual digital recorders (one per person in Media Ops/escort)
7) Organic transportation (Armoured or not.) and its inherent requirements (Drivers, security, maintenance, etc.)

5. **COMMAND AND SIGNAL**.

a. **Command.**
1) **PA Organisation**. Will be detailed in an Appendix. Include an organisation chart of the relationship between PA and the Command Group/General Staff, J-Staff and other Communications divisions

2) Identify the chain of command and control, locations of the command posts and PA offices, succession of authority.

3) Include requirements for PA staff to liaise with their counterparts throughout the chain of command in order to develop coherent public affairs advice and recommendations.

b. **Signal.** Issues to consider include:
1) PA POC list, which includes name, rank, unit assigned, title/duty position, phone numbers (Secure, non-secure, IVSN, VOIP, mobile, etc.), and email addresses, to include group addresses.
Integrated media use of communication assets. If integrated media are anticipated state clearly whether media may be permitted to file copy using military communications channels.

2) Computer integration, OPSEC, Thumb-drive usage, etc.

3) Details on the use and acquisition of telephone lines (with international dial-out capability to communicate), mobile or satellite telephones, fax machines, telephone answering machines, etc.

4) Internet connectivity and computers with unrestricted access, mission secret computers, etc. Include the requirement for access to the ACO Open Source System for media monitoring (requires broadband internet connection).

5) Details for use and acquisition of satellite TV with international news channels

6) Video transmission systems (DVIDS or similar system compatible with NATO requirements)

7) Commercial/Public radio monitoring facilities

///Signature Blocks///

APPENDICES :

1. **Key Audience Analysis**.
   a. Audience groups may be identified by; geography e.g. citizens of NATO member nations, interest group e.g. international think tanks/IOs/NGOs, ethnicity or some other characteristic.
   b. Audience groups need to be identified when different communications issues need to be considered.
   c. It should be remembered that, in the age of the internet and satellite television, messaging leaks across audience boundaries and must be consistent, relevant and appropriate.

2. **PA Master Messages, Talking Points, Questions and Answers.** These messages should be enduring but may require different emphasis or even amendment by phase of mission. Messages should be related to audiences and often derive from existing, higher level messages or guidance. Talking Points/Media Response Lines/Questions and Answers dealing with specific issues of the operations should be living documents and must be updated as the mission develops. The effective management of TPs, MRL and Q&A is a primary responsibility of the public affairs effort.

3. **PA C2 structure** – include as an appendix if not addressed in Paragraph 5.

4. **Imagery guidelines**. At a minimum include:
   a. Direction and guidance for acquisition of images to support the communications plan
   b. Direction for archiving, Meta-data and cut lines
   c. Direction for transmission procedures and distribution lists (ACO imagery websites, DVIDS, etc.)
   d. Points of contact for assistance

5. **Media Ground Rules, Liability Waivers and PA Guidelines**

6. **Daily and/or Weekly Reporting format**

7. **Service Member Media Cards**. Include quick reference cards for NATO service members highlighting the important themes and messages and acceptable guidelines for dealing with the media.

8. Public Affairs and Communications Battle Rhythm taking into consideration HHQ and NATO HQ battle rhythm

9. Map of AOR with PA assets, transmission facilities, NMICs, etc.

Annex 3-E Public Affairs Plan and Example

In some situations an Annex X is not appropriate to convey the details of a public affairs activity. In these instances, a more narrative-style public affairs plan is the alternative. This type of plan is typically used within multi-agency or multi-national events rather than the OPLAN or OPORD Annex X, used when directing a public affairs plan within a particular command.

The format for an ACO public affairs plan is flexible. It must convey the major points of the plan in a clear, thorough, yet concise document in which the intended public affairs operatives and their supported commanders understand the objectives of the plan, key themes, timelines and expectations/responsibilities.

A narrative-style public affairs plan may be used for tactical and local events as well as large picture strategic events, although the level of detail contained within the plan might vary. Strategic level plans tend to be more broad in nature while tactical and local plans will be much more directive. The situation dictates the level of detail. Regardless, a good narrative-style public affairs plan should cover the following:

- List applicable references.
- Include a background paragraph(s) which will inform the reader of the history of the issue, higher level perspectives, planning assumptions, and how the issue/event fits into the larger picture. Within this paragraph the communications problem should be defined.
- Intended audiences. An analysis of the various audiences is preferred.
- Objectives of the plan. What does the command or multi-agency taskforce intend to accomplish with this plan.
- Activities – list specific activities which will be conducted and describe how each assists in the accomplishment of the goal or objective. Group activities in support of specific objectives and by phase if there is a roll-out schedule over time.
- Other planning considerations – both vertical and horizontal.
- Explicit statements of the PA approach and a narrative concept statement.
- Critical timings and phasing.
- Responsibilities and guidance.
- Themes, Messages, Talking Points and/or Q&A's (as appropriate).
- Measures of success or milestones to achieve.
- Any other key information, useful to the PA operatives or external agencies implementing the plan or coordinating additional actions.

An example Public Affairs Plan follows. This example was the real world public affairs plan for the release of Gen. McChrystal's strategic assessment in October 2009. This PA Plan was socialised among NATO, Afghan and US agencies and highlights the joint and multinational coordination required in alliance operations. It gives a good indication of what a strategic level PA plan might look like.

COMMUNICATION STRATEGY
COMISAF STRATEGIC ASSESSMENT
31 AUGUST 2009

1. REFERENCE

COMISAF Initial Assessment (TBP)

2. BACKGROUND

General Stanley McChrystal, the Commander of NATO's International Security Assistance Force and U.S. Forces Afghanistan will issue his initial assessment to the USA Secretary of Defense and NATO Secretary General prior to the end of August. The assessment, which was directed by USA SECDEF and the NATO SECGEN, will review the existing situation, outline a revised implementation strategy and broadly address required resources. This classified assessment will have consequences for both USA and NATO leadership and will be of keen interest by the people and government of Afghanistan, as well as international and USA audiences.

3. OBJECTIVES

- To key USA and NATO audiences, explain and reinforce the continuing vital national importance of their international efforts in Afghanistan and how the new strategy will lead to enduring progress.
- Manage expectations with regards to GEN McChrystal's assessment.
- Enable accurate and objective media coverage of both GEN McChrystal's assessment and on-going political and military issues surrounding Afghanistan.
- Engage key publics via media and other public fora to:
- Explain the process for dealing with GEN McChrystal's Strategic Assessment. Note that the key budgeting and resource decisions and challenges related to operations in Afghanistan will come after the decision on the assessment/strategy.
- Explain the strategy ISAF/U.S. Forces are employing as a viable way ahead for sustained but ultimately effective counterinsurgency operations in Afghanistan.
- Reinforce and encourage continued commitment among ISAF-contributing nations.
- Provide frank and clear assessments of the situation in Afghanistan – both the challenges and progress made to date.
- Highlight the current status and planned growth of the ANSF.

4. PLANNING CONSIDERATIONS

Although originally directed by USA SECDEF, the additional request by NATO SECGEN requires consideration for how and when the assessment will be presented to NATO. GEN McChrystal will forward his assessment simultaneously to the Commander, USA Central Command, GEN David Petraeus, and Commander, Joint Force Command Brunssum, GEN Egon Ramms, who will endorse and forward through their respective chains of command. It is anticipated that several days will

be needed for internal discussion of the assessment prior to any public discussion. Below is an approximate timeline (Encl 1) for major roll out events.

D-5: ISAF public affairs coordinates roll out plan for the assessment with USCENTCOM public affairs, the USA Office of the Assistant Secretary of Defense for Public Affairs, JFC Brunssum public affairs, Supreme Headquarters Allied Powers Europe public affairs, and the NATO Media Operations Centre.

D Day (Est.: 31 Aug 09): COMISAF forwards assessment to Commander, USCENTCOM and Commander, JFC Brunssum.

D Day: ISAF public affairs release statement (Encl 2).

D Day to D+1: COMISAF conducts key leader engagement with the Government of the Islamic Republic of Afghanistan and United Nations Assistance Mission in Afghanistan (on essential aspects of the Strategic Assessment).

D+2: Commander, USCENTCOM and Commander, JFC Brunssum endorse and forward the assessment to USA SECDEF and NATO SECGEN, via USA Chairman of the Joint Chiefs of Staff, Supreme Allied Commander Europe, and Chairman of the NATO Military Committee.

D+2 to 10: USA SECDEF and NATO SECGEN review and brief their respective leadership. For USA SECDEF, anticipate National Security Council, key Congressional staff and the President of the United States. For NATO SECGEN anticipate the Permanent Members of the North Atlantic Council.

D+10: COMISAF briefs stakeholders on essential aspects of the Strategic Assessment (see Para 5).

5. STAKEHOLDER ENGAGEMENT

It is vital that key stakeholders – the Afghan, USA, and European governments, NATO, ISAF troop contributing nations, the United Nations, the European Union, and others – have a thorough understanding of the strategic assessment. To ensure this we recommend the following series of actions to brief key stakeholders on the essential aspects of the Strategic Assessment:

<u>United Nations and Non-Governmental Organisations</u>
ISAF will reach out to the UN and select NGOs to ensure uniform understanding of assessment content and implications for international forces' efforts in Afghanistan.

<u>Afghan Security and Ministry Spokespersons</u>
ISAF Director of Communication and the ISAF Spokesperson will brief national security spokesman from key Afghan ministries (Ministry of Interior, Ministry of Defence, National Directorate of Security, Independent Directorate for Local Governance, etc) and the Afghan Government Media and Information Centre staff.

<u>ISAF Strategic Executive Group (SEG)</u>

ISAF will add the assessment as an agenda item at an upcoming meeting. Note: This group includes spokesman from the European Union, United Nations, and key Embassy representatives (USA, GBR, NLD, DEU, CAN, etc.).

6. PA APPROACH

Following approval from USA OASD(PA) and NATO MOC, the public affairs posture is active using approved talking points from this plan (see Para 8).

7. QUESTIONS AND ANSWERS

Q1. What is COMISAF's assessment of the current situation?
A1. The situation in Afghanistan is serious, but success is achievable and demands a radically revised implementation strategy, commitment and resolve, and increased unity of effort.

Q2. What is COMISAF's revised implementation strategy?
A2. It is a renewed implementation of NATO's comprehensive approach and ISAF's mission to reduce the capability and will of the insurgents, support the growth in capacity and development of the Afghan National Security Forces, and to facilitate improvements in governance and socio-economic development.

Q3. Does the assessment include a request for additional resources?
A3. The assessment does not include specific recommendations or requests for additional forces - recent reporting on this topic is premature speculation. Any future force and resource requests will be considered separately and subsequent to this assessment and its approach.

Q4. When will COMISAF provide his detailed request for resources?
A4. During the assessment, COMISAF considered the current resources and troops he has available to task. COMISAF will state his resource requirements privately up his chains of command.

Q5. Will COMISAF request additional forces?
A5. It is premature to speculate on any additional requests for forces as COMISAF still must consider the impact of the operations of forces that are still arriving.

Q6. Will COMISAF's assessment be released to the public?
A6. The assessment, while classified, can be discussed in general terms; however, there is no plan to release it to the public.

Q7. Has the Government of the Islamic Republic of Afghanistan seen COMISAF's assessment?
A7. COMISAF personally discussed the essential elements of his assessment with various Afghan political and military leaders.

Q8. Was the Government of Afghanistan involved in the development of COMISAF's assessment?
A8. COMISAF did meet with and seek the expert advice and counsel of our Afghan political and military hosts to determine how best ISAF can partner with and grow

Afghan capabilities because ultimate success in Afghanistan will require an Afghan solution.

Q9. Does COMISAF's strategy differ from current strategies?
A9. To a degree. The fundamental strategy to support the Afghan people remains unchanged; however the revised implementation strategy reflects a properly-resourced civilian-military campaign with a greater emphasis on counter-insurgency and a renewed implementation of NATO's comprehensive approach.

Q10. Is success achievable?
A10. Success is achievable, but demands a radically revised implementation strategy, commitment and resolve, and increased unity of effort.

8. GEN MCCHRYSTAL'S STRATEGIC ASSESSMENT TALKING POINTS

The situation in Afghanistan is serious, but success is achievable and demands a radically revised implementation strategy, commitment and resolve, and increased unity of effort.

The new strategy seeks to implement NATO's comprehensive approach and ISAF's mission to reduce the capability and will of the insurgents, support the growth in capacity and development of the ANSF, and to facilitate improvements in governance and socio-economic development.

The assessment does not include specific recommendations or requests for additional forces - recent reporting on this topic is premature speculation. Any future force and resource requests will be considered separately and subsequent to this assessment and its approach.

The Afghan people are the focus of this new approach.

Generally, the assessment outlines ISAF's revised implementation strategy, which reflects an integrated and properly-resourced civilian-military campaign with a greater emphasis on counter-insurgency and a renewed implementation of NATO's comprehensive approach.

Specifically, the assessment emphasises reforms to get the basics right and a revised implementation strategy with a renewed focus on the people of Afghanistan as the centre of gravity. The essential reforms are:

- A primary emphasis in the operational culture to connect with the people.
- An expansion of and increased partnering with, and capacity of the ANSF.
- A prioritisation of responsive and accountable governance to improve understanding with the people of Afghanistan, relationships with regional partners, and partnerships with ISAF and the international community.
- An improved unity of effort and command.
- A geographical prioritisation of resources to where the Afghan population is threatened.

- Gaining the initiative and then evolving the operation in stages by strategically consolidating those initial gains as Afghan force capabilities grow, until sustained security occurs to where the achieved gains are durable.

As fundamental concepts of counterinsurgency, none of these reforms are necessarily new. However, as imperatives adapted to Afghanistan they will be radical to how we do business.

The reforms and approach require us to make an operational culture shift and not only change how we operate, but also change how we think.

9. POINTS OF CONTACT

Drafting Officer: (names and contact information)
Approving Officer: (name and contact information)

Enclosures
Recommended Action Timeline for Communication Strategy for COMISAF Strategic Assessment, dated 31 Aug 09.
Proposed Public Statement by ISAF upon COMISAF's Forward of the Assessment, dated 31 Aug 09.

Annex 3-F Public Affairs Guidance Template

	Letter Head for Responsible HQ	

Subject:	This is “chapter” heading, such as Afghanistan, KFOR, Partnership for Peace, etc. This is used for filing the individual MRL within a larger book.
Issue:	This is the actual topic to be discussed. For example elections, support to local government, manning issues, etc. This is not meant to be unduly restrictive; use as many as needed to ensure that the issues are dealt with appropriately. The major difference between the main information sheet and a sub-issue is totally discretionary. With use, this will become more easily defined.
PA Approach	Include a brief concept for the scheme of release and posture (Very Active, Active, or Reactive) here. At times a phased approach might be appropriate.
Date originated:	Date of the original document
Date/Time of last update	Date and time become critical in an evolving issue.
Expiry date:	Latest date this MRL should be used without revision. If the MRL is to be revised annotate with the comment: Revise by (date). This should ensure that the info is timely and not overtaken by events.
To be used by:	This is where you define those allowed to use this information in responding to media. It should aim to be more permissive than restrictive. However, if the situation warrants communication by a single source, clearly annotate here.
Issue overview	This is the context needed to understand the issue at hand, and the overall aim of any communications on the subject or issue. If the overview becomes lengthy or is better explained in a separate document, annotate and attach an annex.
Messages:	List the three main messages you wish to present to the audience. These messages should usually be nested to a higher level communications plan or commander’s intent.
Talking Points	This is where you can become more prescriptive in the communications about the issue. They should be concise, make a point, and be sufficiently complete to provide the spokesman with a script for the media engagement.
Questions and Answers	Q&As are useful for preparing for an interview and must reflect potential journalists’ questions. They are not meant to replace basic research on a topic; they are meant to trigger quick responses to obvious or dangerous questions. At a minimum, five positive and five negative questions should be prepared to reflect realistic media queries. Format the Q&As as such: Q1. A1. Q2. A2. etc.
Fact & Figures	Clearly state the PA posture for facts and figures. Some might be useful

	for an open audience, others might only be useful only if pushed or with a more knowledgeable audience.
Background and other Information	This is the detail needed to understand the broader subject and why this has become a newsworthy issue. Include as much detail as needed for a spokesperson to understand and explain this issue. Consider adding old backgrounders as well if they help better understand the evolution of the issue. Use annexes if necessary. Website and hyper-links might be appropriate.
Officer of Primary Importance	As the issue can rapidly evolve, provide names, phone numbers and e-mail addresses for the points of contact (POCs) for subject matter experts who can update the spokesman or validate that the data is relevant and current.
Author:	Drafter of the MRL with phone and e-mail contact. This person should effectively be the most knowledgeable PIO on this issue.
Coordinated with:	List POCs who provided input, validated or coordinated for release of the information.
Releasing authority:	Name, phone number and e-mail address of the releasing authority. This should be the CPAO or higher.

Annex 3-G Visual Information and Imagery Planning

Reference MC 457/1, Paragraph 39 (Imagery)

The demand for imagery, to include still, video, surveillance and gun camera video, has increased in recent years as social media, imagery repositories, websites, and other technological advancements have proliferated. PAOs cannot expect to request photos in a reactive manner or to employ photographers with minimal guidance and expect to receive images of the right quantity, quality or, most importantly, content. Likewise, merely sending a photographer to an event or operation does not provide him the guidance to address deadlines, transmission requirements or release authority of the images.

To address these requirements, PAOs must develop imagery collection and dissemination plans and ensure they are included in operations plans. On the macro level, these plans are addressed in organisational SOPs and appendices to the PA annex. On the micro level, they are stated by detailed task and purpose by the photography team's supervisor.

Regardless of the level, the PAO must state the task, purpose, requirements and expectations, while ensuring realistic means to transmit and disseminate the images are in place and coordinated vertically and horizontally. Without expressed direction and resource planning the subordinate commands, staff officers and photographers will not know the command's expectations.

Consider the following factors and comments when developing an Imagery Plan:

HQ Objectives	What are the HQ's objectives and how can imagery support these objectives? If the HQ's objectives are heavily reliant on public perception of information outputs, did the HQ weight the public affairs and imagery collecting effort with the appropriate resources? Is the command's emphasis on imagery and its declassification and/or release known and understood by the rest of the command? Do they understand their role in supporting the imagery plan (J-3, J-2, J-6, J-4, Air transportation planners, etc)? Are the above mentioned considerations included in any official order, SOP or policy letter to empower the PAO to leverage assistance?
Audience	Who are the intended audiences and how do they receive their information? Which medium(s) is the most appropriate for addressing these audiences?

	Are there agreements, restrictions, cultural taboos, ground rules or ethical issues which should be considered when developing the imagery plan or which should be addressed as instructions to photographers? In what format will the audience view the imagery (PAL, NTSC, jpeg, etc.)? Include this information to ensure the photographers and staff officers/NCOs understand the format requirements.
Intent for Imagery	Are there specified tasks within the OPLAN or OPORD for imagery? Whether specified or not, what are the implied tasks which will require imagery support? How will the imagery be presented or published? In what format should imagery be submitted?
Timing	Is the imagery to be disseminated immediately, archived for later use or released as part of a phased operation? Are the images time-sensitive. Is the photographer required to transmit images from the field and, if so, does he have the capability? Who is responsible for receiving, embargoing and safeguarding the images if they are to be used in a phased operation?
Resource Network	What agencies or equipment are available to co opt support from (national, alliance, embassies, ministries, regional commands, higher HQ, host nation, IGOs, NGOs, etc.?) Who can assist and what is their contact information? Examples include: The NATO Military Audio Video Working Group (http://www.navwg.org/) or (https://sites.google.com/a/navwg.org/navwg/home) or NATO Media Library (http://www.nato.int/multi/photos.html) Defense Imagery (http://www.defenseimagery.mil/index.html) If there are gaps in resources, develop solutions and recommendations to overcome the deficiencies. Provide

	the recommendations to the appropriate HQ or action officer. Where are the nearest DVIDS facilities and who are the POCs? (http://www.dvidshub.net/)
Reception Plan	Who is the responsible party on the ground to receive the photos/video? How will they process or edit the images? What is the intent for the images after reception?
Propriety	What are the considerations for images of detainees, persons under arrest or prisoners of war? This could vary by nation according to its interpretation of the International Laws of Armed Conflict. What are the considerations for images of casualties, friendly, enemy, civilian? Are there copyright issues? Some nations restrict the release of photos. Generally, higher headquarters can assist with this if informed of the problem.
Classification and Declassification	Who will initially assign a classification to the images? Who can authorise the declassification of the images? What is the process for declassification? What is the means of identifying then declassifying UAV footage of Weapon Systems Video (WSV)? What is the process for identifying the UAV or WSV footage as useable? Will the PAO have the authority or will this be a commander's call? Note: Some nations have very specific photo restrictions on equipment and especially on photographing SOF personnel so the national considerations have to be observed.
Transmission Plan	What are the methods available for transmitting imagery (DVIDS, .ftp, Internet, photo repository website, etc.)? Who are the POCs for each method? Are there bandwidth issues which must be addressed prior

	to the operation? What are the passwords or access codes for using each of these resources? Note: DVIDS is the primary repository of imagery to be available to the media. Other internet based photo and video repositories are authorised but will be used secondarily to DVIDS. ACO commands will maintain active credentials to use the DVIDS functions. Liberal use of NATO TV is also a highly recommended.
Release Authority	What is the scheme of authority for release of the imagery? With which agencies will coordination be required prior to release of images (Higher HQ, subordinate HQ, multi-national, joint, host nation, NGO, etc.)
Define mission complete End State	How does the PAO define “mission complete” to the photographer. Does the photographer understand that the mission does not end, for instance, until the photos are edited, captioned, VIRIN numbers assigned, uploaded/archived and/or transmitted? Without expressing these expectations the photographer may not comprehend the PAO’s expectations. Confusion in these matters could jeopardise achieving the command’s intent.

Annex 3-H *Communications Strategy Template*

This is an example of an annual communications strategy template. It is intended only to introduce a concept of laying out a series of media engagelments, matching objectives and themes across a year long period of time. ACO is not prescribing this particular template, but presents it as 'food for thought." This time of matrix can be easily created in Word, Excel or Powerpoint.

2010 Communications Plan – (Subject)

Quarter:		1			2			3			4		
Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Major Events	Political												
	Military												
	Social												
Desired Effects	1.												
	2.												
	3.												
Engagements													
Themes and Messages													

Annex 3-I Resource Acquisition in NATO

The NATO CRO Capability Delivery Process. For NATO, new equipment and capabilities are either provided through national means or are submitted for approval through the Crisis Response Operations Capability Delivery Process. This process is executed to ensure that NATO money is spent prudently, efficiently and effectively. The process allows for headquarters at any level to identify a capability then, through staffing up the headquarters chains, ensures that the capability can be integrated into other systems, does not cause unnecessary redundancy and is appropriately prioritised for funding.
Once a capability is identified it must be documented and submitted through the respective headquarters (i.e. if the tactical/operational headquarters PAO shop identifies the requirement, it must be submitted through that headquarters). From that point, it will proceed through the following series of boards and committees to develop the scope of the project, align the capability within existing capabilities and resources, and identify the funding methods:

- Operational Requirements Review Board – Tactical Operational HQ
- Crisis Requirements Coordination Board – Permanent Operational HQ
- Crisis Management Requirements Board – SHAPE/ACO
- NATO Office of Resources – NATO HQ
- Infrastructure Committee (IC) – NATO HQ
- Contracting – Host Nation or Appropriate HQ
- Implementation – Host Nation or Appropriate HQ
- Capability Delivery

Note that this is a revolving and very time consuming process to make sure that NATO is not wasting money on systems that cannot 'talk' to each other, negate effects of other equipment through frequency conflicts and fit into the larger, longer term plans. The flow of the process will start at the level which identifies the requirement, flows through the ACO headquarters, to NATO HQ, and then back down the military chain for the actual contracting of the equipment or services. This process encompasses the entire J-Staff in addition to the advocates of the requirement at all levels of the chain of command.
Decisions on Common Funding, Host Nation sponsorship and other financial matters are considered at the NATO and SHAPE levels. These decisions are out of the purview of the operational PAO. The operational level PAO's main responsibility is to focus on writing a clearly defined requirement with a valid justification and coordinating with the higher headquarters so they can push the request through the process.

CUR Checklist

Once the capability is identified take the following actions. Recommendations are also included to ensure that the requirement is properly and effectively staffed:

- Submit the requirement via the Crisis Urgent Requirement (CUR) and the Requirement Summary Sheet (RSS) formats. Examples of these forms are included in this annex.

- Request a capability rather than a piece of equipment. Example – request a system or data base to accredit media with the ability to categorise journalists' personal information, photo, etc. rather than requesting a laptop, computer, and passport photo camera. This will allow more flexibility when contracting.

- The CUR should be written as a stand-alone defence of the requirements. This is the argument which will compete with all other requirements for money and time. Reference doctrine or direction when possible.

- The CUR should be written clearly, concisely, and precisely. It should be simple enough for non-native speakers to understand yet still be powerful enough to explain the requirement when under scrutiny.

- Coordinate with your counterparts at the higher headquarters. Establish contacts with the project officers at the higher headquarters levels, as they will be the champions of the request through the staffing process.

- Submit the draft CUR and RSS to your SHAPE and JFC counterpart. These officers offer a good perspective, provide continuity and have experienced the process. They are a useful sounding board and can provide great insight into developing the resource requirement.

- Submit the CUR and RSS to the Operational Requirements Board at your HQ and be prepared to defend the requirement throughout the process.

- Follow-up frequently with the ORB Secretary. Just as turbulence affects the PAO staff, the personnel responsible for the ORRB, CRCB and CRMB change frequently as well. Frequent follow-ups will ensure that they are aware of your priorities. Do not be afraid to ask for their help. They are the experts on the process.

- Ensure that you have a method to pass the request to follow-on colleagues. Most service members are assigned to ISAF for a short duration and may not see the CUR come to completion. Be sure that replacements are briefed on the individual requirement, justification, status and process. Continuity is vital.

Example - CRISIS RESPONSE OPERATION URGENT REQUIREMENT (CUR)

Date: **16 December 2008**

To: **Secretary CRCB**

Subject: **Portable Simultaneous Translation Equipment for ISAF HQ PAO.**

References:

A. HQ ISAF PAO ISAF/PAO/1204 – Background CONOPS

B. FRAGO 376-2008 (Security at regular GMIC Press Conferences)

C. SG(2006) 0160-REV1 Revised Funding Arrangements for ISAF

SECTION 1: REQUIREMENT IDENTIFICATION

1. Originator Number: 220/ISAF/OPS

a. Requirement Definition Owner: ISAF HQ PAO – Deputy Chief Media Operations

2. Action/ Authorising Officers:

HQ/COM	Responsible Division	Action Officer	Authorised By	Authorised On
ISAF HQ	PAO	Lt CDR J. Gater, ISAF HQ PAO Deputy CHIEF Media Ops	Capt. Mark Windsor GBR, N, Ch PAO	16 Dec 08
JFCBS	PAO	Valentin Poponete, SO Media Relations ISAF	Capt. Meiert (DEU Navy), Ch PAO	05 Jan 09
SHAPE	PAO	Lt. Col. Wright, W (USA-A), SO PAO	Col. Derek Crotts (USA A), Ch PAO	

SECTION 2: REQUIREMENT DEFINITION

3. Details of the requirement

(1) Urgent Requirement Definition: Purchase of an integrated 'simultaneous translation kit' to enable the simultaneous translation of COMISAF media engagements.

b. Location of Works: PAO Building, ISAF HQ, Kabul (but capable of being transported to various locations such as Embassies and the Government Media Center).

c. The scope of work includes: The procurement of 1 x portable audio system allowing COMISAF to be translated, simultaneously as he speaks, into up to five different languages to an audience of up to 50 personnel, listening with wireless headsets. System must:

(1) Allow COMISAF to communicate through up to five interpreters simultaneously translating into five different languages to a maximum of 50 members of the audience.

(2) be portable (must fit into the back no more than two SUVs to be transported to the various press conference sites - GMIC, MOI, MOD, COMISAF office, etc.)

(3) be wireless to avoid bulk, avoid excessive set up time and mitigate tripping hazards

(4) Be easy to set up, operate and maintain - personnel fluctuation at ISAF mandates ease of training and operation.

(5) Run on 230V power - must run at ISAF HQ and the Government Information Centre.

(6) Will be used to transmit information to an open source audience.

d. User of the Capability: ISAF HQ PAO in support of COM-ISAF

e. Military Justification:

(1) Justification: Simultaneous translation equipment is needed to facilitate COMISAF media and key leader engagements held in up to five differing languages (Dari, Pashtu, Farsi, etc.).

(a) System will replace existing use of 'one-after-the-other' translation which halves the available media contact time. Current system is very slow, tedious and does not use COMISAF's time effectively or efficiently.

(b) ISAF PAO holds mission essential COMISAF, General Officer, Ministry and Regional Command press conferences and round table discussions eight times per month in a variety of locations to include ISAF HQ, Government Media Center, various embassies, etc.

(c) The system must be portable in order to be moved in the organic PAO up-armored SUVs.

(d) Renting is not a cost effective or reliable option. Rental systems costs 1100 euro for six hours. Used at least 8 times a month, the system covers the costs in less than one year. Renting the system is not flexible enough for the very fluid events occurring in theater. COMISAF has been called upon to conduct very short notice emergency press conferences regarding important events or incidents, making it impossible to find one for rent at short notice.

(e) This capability has been specifically endorsed/approved by COMISAF.

(2) Impact of Failure: Currently, press conferences, round-tables and other media engagements can only be conducted with consecutive translation across multiple languages, thus doubling meeting times and severely reducing the effectiveness of such meetings. For example, in a recent COMISAF round-table with Afghan journalists, only 45 minutes was available in the commander's programme; due to the need for translation and the number of attendees, there was only time for each media outlet to ask one question. This is a waste of COMISAFs valuable time and has a negative impact on our mission

4. Technical Considerations for the Requirement: The portable wireless audio system to facilitate simultaneous translation is an 'out-of-the-box' kit that will operate with local Afghan supplied power. This stand-alone capability will not interface with any other ISAF HQ equipment now or in future.

5. Duration of the Requirement: Duration of ISAF mission.

6. Standards and Interoperability: System must be stand-alone, requiring only external 230v power.

7. Other Special Requirements: Nil

(1) **Constraints:** System must be portable, wireless, easy to set up, operate and maintain and run on 230V power.

8. **Precedence considerations:** Extremely Urgent. COMISAF endorses this new capability which is vital to the ongoing success of the mission as soon as possible.

SECTION 3: LINES OF DEVELOPMENT

9. **Lines of Development:**

a. **Doctrine:** No Change

b. **Training:** Nil required.

c. **Personnel:** Nil required.

d. **Equipment (CIS and Non CIS):**

(1) **CIS –** Nil.

(2) **Non CIS -** one (1) portable Simultaneous Translation Equipment set is now required

e. **Organisation:** No Change

f. **Infrastructure (Real Estate and Civil Works / Electronic):**

(1) **Real Estate and Civil Works:** Nil.

(2) **Electronic:** Nil

g. **Information and Interoperability:** Nil

h. **Logistics:** O&M costs are not expected to exceed 2000 EUR for re-charging, battery and spare part replacement.

i. **Security:** For the translation/transmission of UNCLASSIFIED material.

SECTION 4: IMPLEMENTATION AND TIMELINES

10. **Implementation:**

a. **Host Nation (HN) Recommendation:** SHAPE

b. **Responsibility for Design:** Nil.

c. **Responsibility for Implementation:** SHAPE delegated to JFCB or further delegated to HQ ISAF P&C office. Deviation authority requested to authorise the delegated Financial Controller the authority to approve the appropriate procurement deviations necessary to award the contract in a timely manner.

11. **Staffing and Implementation Timelines:**

Template Time line	Action	Estimated Time	Actual Time	Remarks
Requirement Definition *(5 Weeks)	Endorsed by ORRB	16 Dec 08		E-day
	Endorsed by CRCB	15 Jan 09		Aim E+2 Weeks
	Endorsed by CMRB			Aim E+4 Weeks (+1 week for CG)
	Request for APF			If necessary
Cost Estimate *(4-12 Weeks)	TBCE Submitted to NOR			Estimated date must be verified by the Host Nation / NOR.
Authorisation* (2 Weeks)	IC Authorisation			
	Contract Award	70 days after IC approval (timeline can be much shorter if Deviation is approved; 11c above)		Estimated date must be verified by the Host Nation.
	IOC	30 days after contract award		Estimated date must be verified by the Host Nation.
	FOC			Estimated date must be verified by the Host Nation.

SECTION 5: COST ESTIMATE AND FUNDING VALIDATION

12. **Cost Estimate:** one (1) portable Simultaneous Translation Equipment set is estimated at less than 50000 Euro.

13. **Requirement Initiation and Funding Validation:**

    a. **Has this requirement been initiated or have any funds been committed for this requirement?** No

    b. **Any request for special consideration for early initiation and/or committing of any funds?** No, but very high priority for ISAF HQ and has been endorsed by COMISAF.

    c. **Is this requirement a part of any Development Plan (Infrastructure/CIS):** This is a companion directive to the initiative detailed in Ref B.

Eligibility and/or Rationale for NATO Funding: The cost of this MMR cannot be attributed to any single nation, being in support of ISAF HQ and its' Crisis Establishment. Simultaneous Translation Equipment sets for CE personnel and equipments for HQ elements are eligible for common funding in accordance with Ref C. This equipment will be employed by a multinational PA office in order to better provide information to a multinational media audience.

Example - Requirement Summary Sheet (RSS) for CMRB

SHAPE, 23/02/2009, 399	**CMRB Meeting Number:**
1. CUR Number: 220-ISAF-OPS	**2. Subject:** Simultaneous Translation Equipment for ISAF
3. Originated by: LTC WRIGHT, W (PAO)	**4. SHAPE Lead Division and Project Officer:** PAO, LTC WRIGHT
5. Date introduced to CMRB: 15 FEB 09	**6. Date assigned to Lead Division and staffing time in SHAPE:** 15 JAN 09

7. Definition of the Requirement:

- ISAF requires a simultaneous translation system that will allow COMISAF to communicate through up to five interpreters simultaneously translating the speaker's words into five different languages to a maximum of 50 members of the audience.
- Equipment must be portable (must fit into the back an SUV to be transported to the various press conference sites - GMIC, MOI, MOD, COMISAF office, etc.)
- System should be wireless to avoid bulk, avoid excessive set up time and mitigate tripping hazards
- System should be easy to set up, operate and maintain - personnel fluctuation at ISAF mandates ease of training and operation.
- System should run on 230V power.
- System will be used to transmit information to an open source audience.

8. Does this Project represent only the MMR (reference)? Yes (SG(2007)0464 – Action Plan on NATO's Strategic Communications (5 Jul 07)

9. Military Justification: COMISAF requires this equipment to effectively communicate the ISAF objectives and actions to the local, regional and international media in Afghanistan in support of:

- Comprehensive Strategic Political Military Plan to Guide NATO's Engagement in Afghanistan (3 Apr 08)
- SG(2007)0464 – Action Plan on NATO's Strategic Communications (5 Jul 07)
- MC Dir. 457-1 – NATO Military Policy on Public Affairs
- ACO strategic Communications Directive 95-2 (5 Mar 08)
- NAC ISAF Strategic Vision (3 Apr 08)
- ISAF Theatre Communications Strategy.

10. Cost Estimate : (when required) Under 50K EUR

11. Associated O&M costs: (when required) replacement batteries and spare parts; Under 2000 EUR per year

12. Is this project eligible for Common Funding (reference)? SG(2006) 0160 REV-1

13. Proposed HN: SHAPE

14. ACO Staffing Timelines	**Total weeks after ORRB:** 8

Date released by ORRB: 23 DEC 08

Date released by CRCB: 15 JAN 09

Date received at SHAPE: 15 JAN 09

15. Planned Implementation Milestones (from HN):	**Forecast (and amended)**	**Actual**

a. TBCE Submitted to NOR:		
b. IC Authorisation:		
c. Contract Award:		
d. IOC		
e. FOC		

16. Key points for Discussion:

17. Lines of Development Coordination:

a. Training (ACT LO Team): Nil required

b. Equipment:
(1) CIS (J6): Nil
(2) Non CIS (J4): One (1) portable Simultaneous Translation Equipment set is now required

c. Personnel (J1): Nil required

d. Infrastructure
(1) Real Estate and Civil Works (J4) Nil
(2) Electronic (J6): Nil

e. Doctrine (ACT LO Team): Nil

f. Organisation (J3):

g. Information and Interoperability (J3): Nil

h. Logistics (J4): O&M costs are not expected to exceed 2000 EUR for re-charging, battery and spare part replacement

i. Security (J2): For the translation/transmission of UNCLASSIFIED material

18. Is the requirement included in (ISAF, KAF, or C4I) Development Plans (Reference):
This is a companion directive to the initiative detailed in FRAGO 376-2008 (Security at regular GMIC Press Conferences)

19. Potential ACT Targeted Support (to include Mid to Long Term plans) (ACT LO Team):

20. CMD Position : To endorse the requirement

21. Recommendation:

22. Options/Risks:

Prepared by: LTC Wright, SHAPE PAO	**23. CMRB Decision:**
Reviewed by:	
Approved by: Col. Derek Crotts (USA A), Ch PAO	

Annex 3-J Issue and Crisis Management

Working definition of a crisis: An event that creates or threatens to create harshly negative media coverage that could permanently damage the reputation or future viability of an organisation.
Working definition of an issue: An external or internal factor – usually lasting over a mid- to long-range time frame – that could represent a serious obstacle to achieving an organisation's objectives and cause damage to its reputation if not managed well.

1. Issue and crisis management is a significant part of the PA planning process. Every issue or event could potentially escalate into a crisis. Issues and crisis management is a process of identifying a potential issue or crisis and co-ordinating an organisation's response.

2. Issues and crises will always occur - the key to mitigating the negative impact is, first, to solve the underlying problem and second, to communicate the organisation's actions effectively. Managing the underlying issue is the commander's responsibility with the PAO acting in a supporting role to communicate to the public. Without effective management of the central issue, Public Affairs cannot be effective and the organisation will eventually lose credibility.

3. When dealing with an issue, an organisation must proactively keep the public informed of its actions in a timely and accurate manner. Poorly managed communications chip away at an organisation's credibility, undermine public confidence and contribute to the emergence of crises. Properly managed communications strategies entail co-ordinated responses emphasising identification and reporting actual or potential issues and problems, taking action to address and resolve issues quickly and effectively, and keeping audiences informed of what is being done to address the issues.

4. Specific issues should be monitored to assess the potential impact on the organisation; determine any changes in public opinion on major issues; and provide Commanders with regular assessments of public opinion relating to such issues. Media analysis and opinion polls are examples of means to track issues. Because public opinion is an imprecise prediction of behaviour, issues-tracking must be a dynamic process carried out over time.

5. When faced with an issue or crisis, ensure that the requirement to inform the public is not delayed by the search for solutions. Instead, acknowledge the problem and inform the public immediately of the corrective actions being considered. Keep the public informed of developments as they occur. A general rule of thumb: Inform the media; tell them what you know; tell them what you don't know; and tell the media when you think you will have more answers. In most cases, an organisation has less than an hour to respond to public and media queries before it loses credibility. A response stating, "We're looking into it and will get back to you shortly," is better than saying nothing at all.

6. Operational security must be assured at all times. When dealing with an issue or a crisis, PA activities must never undermine the safety of military personnel engaged in a military operation, or the success of a military operation or activity.

7. JFCs/JCs/CCs and deployed HQs should have an issues/crisis management team, of which the PAO is an integral part. The time to decide who needs to be part of this team is not in the middle of a crisis. Included in this annex are checklists for issues and crisis management and an example of a crisis management SOP.

8. Guidelines for Crisis Management. There are certain basic considerations common to all crises. The following guidelines form the basis for dealing with the aspects of crisis management:

a. **Be informed**. Keep an eye on the current issues in the media that could lead to your issues making the news and becoming a crisis. Try to identify potential issues before they begin to smoulder and ignite. Track the public environment.

b. **Do advance work**. Plan and anticipate what may go wrong. Pull together a crisis management team. Build relationships of trust with key stakeholders and the local community. This trust will pay dividends.

Some examples of potential events to anticipate include:

Aircraft Accident	Hostage Situation	Senior Leader KIA
Destructive Fire at HQ	Investigations	Logistics attacks
Labour Dispute	Mass Casualties	Poisoning/Food Contamination
Environmental Damage	Civilian Casualties	Service Member Misconduct
Natural Disaster	Historical Site Damage	Political Announcements
Cyber Attacks	Assassination	
Personnel Missing/Captured	Harmful High profile statements	
Security Leak	Loss of Sensitive Equipment	

c. **Get the facts**. Determine the situation and then assess the PA implications. At this formative stage, make sure that the ACO PA TechNet and appropriate command authorities know about the situation. Establish what information is approved for public release, and whether or not someone has prepared messages/talking points.

d. **Prepare messages/talking points** that you will want to use when you receive media queries. Engage with the responsible office. Draft news releases, Questions and Answers, and Media Lines to use when the crisis occurs. Ask tough questions, and prepare appropriate answers.

e. **Know who has the lead**. It may not be you. It could be NATO HQ PDD, national authorities, the host nation, ACO headquarters at SHAPE, or the theatre command. Respect that lead and stay in your lane.

f. **Designate a spokesperson**. The spokesperson must be well-informed and comfortable with the issue, since the credibility of the spokesperson is of paramount importance. The spokesperson should also be pre-selected and have received media and on-camera interview techniques training. You may also need a technical or subject-matter expert if the issue is highly technical or complex. This person should also receive media and on-camera interview techniques training.

g. **Designate an 'anticipator'**. The anticipator is a member of the crisis management team whose role is to assess how the crisis will evolve and provide advice and proposed solutions to manage that evolution with the aim of seizing the initiative. This person cannot be engaged in the minute-by-minute management of the crisis because the function requires that the individual has a 'bird's eye view' of the process to better predict future direction.

h. **Maintain regular communications between PA and command staff**. There is nothing worse in crisis situations than not knowing what is going on. Provide regular updates to the senior headquarters, and make sure they pass you regular instructions and situation reports. Keep your people informed.

i. **Check standard operating procedures**. Although not all possible crisis situations may be covered, there is no point wasting time reinventing the wheel. For example, most military installations have standard operating procedures that govern actions that must be taken in the event of a fuel spill, for example.

j. **Get relevant, accurate information to the public as soon as possible**. Truthful, accurate and timely is the appropriate posture in times of crisis. It is better to tell bad news sooner rather than later. Once you have received clearance to make public statements, you should do so quickly and thoroughly. Update public information regularly as new material becomes available. The rule of thumb of truthful, accurate and timely information applies however accuracy should never be sacrificed for speed.

k. **Be accessible**. The media will be interested in the reactions and comments of military authorities, even if developments are slow. Remember that news updates, especially radio and television reports, must appear immediately to be newsworthy. For the media, it is far better to attribute a no-change report to a NATO spokesperson than to report no further word is available from the same sources. Accessibility also implies openness and progress, two important image builders during times of crisis.

l. **Be thorough**. Make every effort to pass the same information to all media agencies. During crisis situations, the media and the public often depend entirely on PAOs for information updates. If you do not pass new information to all agencies as events unfold, you can damage future relationships. Log all media queries. See Annexes 4-B and C for a template.

m. **Be considerate**. Take care not to violate privacy regulations. Respect the rules for releasing casualty information before the next of kin is notified.

n. **Be professional**. Crises bring out the best and the worst in individuals and organisations. Maintain a cool, balanced approach, and avoid being drawn into activities that are not directly related to managing public communications.

o. **Adhere to information/document management archival practices** in accordance with applicable NATO directives. Information management is critical when working in a stressful situation within a group dynamic.

p. **Be honest in preparing the post-crisis assessment**. An after-action report can be of tremendous value if prepared objectively, paying equal attention to successes and failures. You can only find future solutions by analysing past failures.

9. Other Considerations for Crisis Management

- Appearance and tone *do* matter. Choose words appropriate to the situation and be cognizant of underpinning context.

- Mind the emotions/intellect pendulum as a crisis unfolds. There is a time for "cold, scientific facts" and there are circumstances where facts will not be heard as emotions take control. Generally, issues can be discussed between groups of professionals. But in public hearings, or in demonstrations, facts often give way to emotions. If you can address a crisis early, as it begins to develop, you'll have a greater opportunity to win with intellectual arguments – and a greater number of alternatives for action.

- Command the information. Stay ahead of the story by maintaining follow-on press releases, statements, making responders or support network officials available for escorted media interviews.

- Be perceived as having nothing to hide without speculating on causes or specifics that may be part of an administrative, criminal or safety investigation.

- Stay tight organisationally, but stay loose tactically. Flexibility is essential and options should be continuously re-examined.

- Constantly evaluate your messages and feedback. Watch the situation on an hourly or daily basis. Use clippings, surveys, personal and public meetings, or focus groups to gauge their information needs and perceptions.

- Keep the communications lines open after the crisis. Maintain contact with your allies and other audiences. Good communications never really ends. Internally, review what the crisis has taught you about the effectiveness of your crisis communications plan. Externally, you may have to replenish your goodwill "bank account". Opinion research can tell you how well you've weathered a crisis and point the way for your communications between the crises.

- A tactic that has worked, particularly in Afghanistan civilian casualty allegations, is to deploy public affairs assets with a larger Crisis Action Team. This PA contingent of the CAT would deploy to the incident site to document

evidence and mitigation efforts. The mission, resources and priority will dictate the size and composition of such a team. Irrespective of those factors, the team must be competent, prepared to deploy within the specified time and must be fully trained and knowledgeable as to the mission and requirements. Product return and release is critical to success.

- Manage the expectations of the public. Some issues cannot be fixed in days, weeks or even months. Some are only resolvable through much higher levels of diplomacy, policy or funding. Make sure, early on, that solutions could take time, money and effort.

Crisis Communications Checklist

Managing crises is similar in procedure to managing issues. The only real difference is the speed at which events unfold and the degree to which the organisation becomes overwhelmed. When a crisis erupts, the following activities should take place immediately. In parentheses is the person in the organisation responsible for the action.

- ☐ Find out what happened. (Cmd. Grp., Ops Team, issues management team)
- ☐ Assemble the issues management team. (Cmdr.)
- ☐ Define the issue and the organisation's position. (Cmdr. or SME as appropriate)
- ☐ Determine whether or not there are any legal implications. (Legal Advisor)
- ☐ Identify the SME. (Cmdr.)
- ☐ Identify the spokesperson(s); should be the SME. (Cmdr. with PAO advice)
- ☐ Continue to gather information. (Issues management team)
- ☐ Deploy assets as required and feasible. Ensure assets are briefed on their requirements, are properly resources and have a clear understanding of their purpose. Planning for rapid product return and release is critical.
- ☐ Log everything that happens. (Issues management team member but PAOs should keep their own records as well)
- ☐ Lateral coordination up the chain of command. (Cmdr or MA/EA as appropriate)
- ☐ Lateral coordination along the PA Tech Net. (PAO)
- ☐ Develop initial statement. (PAO with SME and Legal Advisor [as required])
- ☐ Develop any other required PA products such as talking points, news release, backgrounder, etc. (PAO with SME and Legal Advisor [as required])
- ☐ Alert website manager to post PA products as required. (PAO)
- ☐ Hold news conference if appropriate. (PAO should confer with higher HQ PA)
- ☐ Conduct regular briefings to the media. (Spokesperson with PAO support)
- ☐ Call in other resources if the existing team becomes overwhelmed or activate crisis PA plan. (SME with PAO input)
- ☐ Assign someone as the anticipator to forecast crisis evolution and begin preparations. (Cmdr. or issues management team leader)
- ☐ Monitor/Analyse media coverage and take corrective action as required. (PAO)
- ☐ Conduct comprehensive After Action Review – Implement lessons learned (All)

SAMPLE HEADQUARTERS CRISIS COMMUNICATIONS SOP

SUBJECT: (Insert Unit) Crisis Communications SOP

1. **Purpose.** To establish a Crisis Communications SOP for (Insert Unit) that provides an initial communication, IAW designated communication priorities, within one hour of plan implementation.

2. **Applicability.** Personnel performing crisis communications duties for the Public Affairs Office, (Insert Unit).

3. **Coordination and Responsibilities.**

   a. PAO. As the crisis communications manager, the PAO is responsible for formulating communications policy and objectives relating to the particular crisis; provides expertise and assistance required to carry out command communications policy; determines if it is necessary to formally notify the Higher Headquarters according to applicable NATO guidance and policy; ensures timely preparation, coordination, review and implementation of crises annexes; marshals Crisis Communication team/resources; coordinates for SJA support; ensures coordination and timely release and dissemination of crisis communications to the affected communities and media; coordinates crisis communication functions with senior staff at the scene of the incident, when and if required. Implements the Crisis Communication Team alert roster. The PAO coordinates this plan with the Commander.

   b. Deputy PAO. As deputy crisis communications manager assumes duties assigned by PAO; reviews crisis communication plan annexes; mans emergency Operations Centre, when implemented, to coordinate crisis communication functions.

   c. NCOIC. Performs duties as deputy PAO; assumes duties as assigned by PAO or Deputy PAO; analyses installation mission, location and infrastructure to identify likely crises; coordinates and prepares crisis communication plan annexes; plans and establishes MOC, when and if implemented, to coordinate crisis communication functions; prepares Crisis Communication Team alert roster with shift rotations to ensure site manning as required.

   d. Staff Judge Advocate. SJA staffer provides legal guidance and reviews statements prior to release.

4. **Procedures.**

   a. This crisis communications plan will be implemented upon notification by the Commander or other authorised person that a crisis exists.

      1) The commander is the designated Crisis Team Manager (CTM) for crises occurring within the facility.

      2) Exceptions: The commander may designate a commander or commandant of a subordinate unit as CTM for a localised crisis pertaining

solely to breaches of order, discipline or regulation by their assigned personnel (staff, faculty or student body). The commander has designated the Deputy Commander and DCOS OPs to manage environmental crises occurring on the facility.

b. The point-of-contact list at (Annex A) contains names and phone numbers of:

1) Commander and senior staff (J-staff, special staff, directors, tenant unit commanders and commandants;

2) Local and regional broadcast and print media, wire services news desks; stance on military should be included

3) Mayors and public safety officials of adjacent communities;

4) Senior headquarters' and senior HQ PAOs will be maintained as an appendix to this plan. The roster will be reviewed and updated semi-annually.

c. Refer to the appropriate annex for crisis-specific guidance. Crisis communications management fact/information sheets designed to provide guidance for each type of situation identified as a smouldering crisis are at annexes plan. (Note – Each potential crisis situation should be identified and addressed in separate annexes or 'playbooks'.)

d. Only the PAO or PAO's designee(s) may authorise release of information.

e. Members of the Crisis Communications Team will log their activities to facilitate after action review for evaluation of crisis communications procedures.

5. **Files.** (UNCLAS) Electronic files will be used for coordination. Paper files will be maintained in the current files area of the PAO.

6. R**eferences.**

(Note: Attach as applicable)

Annex 3-K Public Affairs Weekly Situation Report

----------Organisational Header----------

Public Affairs SITREP		**Date:**	
Last Week	**Media Engagements**		
	Releases or Advisories		
	Summary of Media Queries		
	Imagery/Social Media Postings		
	Other Actions		
Next Week	**Planned Media Engagements**		
	Planned Releases or Advisories		
	Planned PA Missions or coverage		
	Other Actions		
Top 3 Issues/Concerns (Media Topics, Manning, Resources, etc.)			
Chief PAO's Assessment and Recommendations			
Completed by:		**Contact**	
Approved by:		**Contact**	

Annex 3-L Public Affairs Outputs

The following products, while not an exhaustive list, are some of the more common releasable Public Affairs products:

- Audio Messages / Streaming Audio
- Briefing Packages / Presentations
- B-roll Packages
- Electronic Newsletters – either intra- or inter- net
- Fact Sheets
- Imagery, Still and/or Video
- Internet Site (public website)
- Direct Mail
- Display/Notice Boards/Screens (for important messages and updates for staff)
- DVD Video Products
- Email or All Users Messages
- Exhibitions and Displays
- Hometowners (photo and story of soldiers sent to their hometown newspapers)
- Leaflets / Brochures / Tri-folds / Pamphlets
- Letters to Newspaper Editors
- Media Advisories
- Media Clippings
- Media Response Lines (MRLs) also known as Talking Points or Lines to Take
- Media Engagements
    - Background Discussions
    - Media Roundtables
    - News Conferences
    - Question and Answer Session
- News Releases
- Pocket Cards (Internal Communications - Command Information)
- Podcasts (also known as on-demand streaming video)
- Press Kits
- Publications, either internal or external
- Statements – (News Conference, video, news release formats)
- Town Hall Meetings (for staff or with the local community)
- Visual E-mail (video)

Chapter 4

Media Relations/Operations (PA Core Function)

"One consequence of eight years of war, eight years of embedded relations, eight years of growing and fighting right alongside journalists, journalists who accept the same risks, the same dangers, who lose their lives and their limbs right alongside our soldiers, has actually brought our tribes into a different arrangement, one where there is greater shared respect, a greater shared understanding."

- ***Maj. Gen. Kevin Bergner, U.S. Army Chief of Public Affairs***

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4.1 Introduction

a. Media Relations is the doctrinally acceptable term set forth in MC 457/1 and AD 95-1 to describe the first of three basic NATO military PA functions. This handbook acknowledges this terminology but also recognises that mere connections or associations and separate and isolated activities will no longer suffice at the tactical, operational, and strategic levels. It acknowledges an extremely complex environment at each of those levels that requires an increased level of coordination across the communication landscape. Therefore, this handbook more appropriately refers to the function as media operations to reflect the current realities at those levels. Both terms are used interchangeably and are equally acceptable.

b. The media, in its traditional (print, radio, television) and newer (bloggers, citizen journalists, etc.) forms, is a conduit for ACO to tell and show, in words and images, the NATO story to local, national, and international audiences. Relationships with the media must therefore be forged and strengthened on a proactive and continual basis, particularly before crises emerge. Maintaining such relationships provides the media with opportunities to constantly learn and receive updates about our NATO organisation's and to better understand how we operate in order to provide appropriate context when reporting.

c. Whereas the commander is the official spokesperson and Chief Public Affairs Officer is traditionally delegated spokespersons for their respective commands, all public affairs practitioners, particularly those working in media operations, should be empowered to interact with the media to deliver the agreed and appropriate Alliance messages and support communications objectives. Media interactions must be transparent and off-the-record interactions should be the exception, not the norm. The ACO Public Affairs position is that everyone within the public affairs community should be leveraged and empowered to engage the media in an official capacity, on the record and fully attributed, provided those personnel are trained, knowledgeable and acting within their lanes and responsibilities.

4.2 Guidelines to PAO - Working with Media. The following are guidelines ACO PAOs will follow when dealing with the media:

- Develop a relationship with local reporters and maintain regular contact. Once a firm relationship is established, journalists will continue to contact that PAO.
- Establish a specific system of contact with journalists (email, fax, mobile). Maintain a master media contact list and update it regularly.
- Know and understand your local media. Understand the requirements, capabilities, limitations, deadlines, political affiliation, biases, and other motivations of the local media representatives. This understanding will better prepare your staff to meet their needs and will assist with projecting your message to them.
- Always return media calls or emails as soon as possible. Even if the answer is "I don't know", a speedy reply and an honest answer will assist in building relations and credibility.
- Be courteous and fair in dealing with various media agencies.

- Help media representatives obtain the releasable information they need. Do not be obstructive. Bad news does not get better with age.
- Be accurate. Check and confirm all factual information. Even if you are not quoted extensively, your knowledge and attitude may have a considerable impact on the journalist as far as the slant and tone of the report are concerned.
- Do not compromise accuracy for timeliness. Release what information you can verify as accurate before the reporter's deadline with a promise to provide additional information as it is available.
- Always use accurate security classifications. If an item of information is classified, by all means say so but do not pretend it is classified simply to avoid answering sensitive questions.
- Have reasonable expectations. Competition for space and broadcast time is fierce and editors and news directors to decide which items to use.
- Never make "off the record" comments. All comments you make can be used and attributed to you.
- NATO supports freedom of the press. It is not appropriate for a PAO to pressure a journalist to use or not use an item of information for publication or broadcast.

4.3. Requests for Information. Often, journalists will contact the Media Operations Section with particular requests for information. The following are recommended consideration points for addressing these requests:

- Return media calls or emails as soon as possible.
- Develop a system to record and log all media contacts.
  - Establish the exact nature of the enquiry (information to be used in TV/Radio broadcast, live or recorded, for print, etc.)
  - Determine specific questions and the reporter's deadline.
  - Determine the reporter's level of knowledge of the subject matter. Do not assume a reporter is either well-informed or ill-informed. You may need to provide additional information.
  - Ascertain what specific areas are intended to be covered
  - Recommendations are provided at Annexes 4-B and 4-C
- Determine who will need to provide the information (SME) and pass the request to that SME to compile response.
- Collect, review and edit responses provided by subject matter experts. Be sure to get appropriate clearances before releasing information to the media.
- Get approval from Chain of Command (CPAO, COS, DCOM, COM, ACO headquarters, NATO PDD) and/or Legal Advisor and/or Political Advisor as appropriate.
- Provide information to the reporter. Additionally, include copies of relevant material such as fact sheets, news releases, backgrounders as appropriate.
- Arrange for collecting copy of news article or broadcast.
- Analyse and evaluate final product: was information reported accurately? Were command's master messages incorporated into the story? Was the article positive toward NATO, your command, the operation?
- Immediately correct any substantial factual errors, either during interviews or after publication. Errors left uncorrected stand as fact.

- Provide feedback to leadership and chain of command.

4.4. Requests for Interviews. Consider the following recommendations when receiving requests for interviews:

- Timely responses aid in fostering the PAO/media relationship.
- Establish the exact nature of the enquiry
  - Will the information be used in TV/Radio broadcast, live or recorded, for print, etc?
  - Determine specific questions or subject areas to be covered during the interview.
  - Determine the reporter's level of knowledge of the subject matter.
  - When does the reporter want to conduct the interview?
  - Who does the reporter want to interview? Assess if that is the best person to be interviewed based on the subject areas to be covered. Determine appropriate interviewee and concurrence from chain of command. (CPAO, J-Head, COS, DCOM or COM)
  - Use the Interview Planning Guide provided as Annex 4-N.
- Confirm availability of interviewee and interpreter if required.
- Confirm details of interview with the journalist (Date, time, place).
- Prepare the interviewee.
  - Coordinate with the relevant subject matter expert (SME) to provide briefing material and/or talking points.
  - Conduct practice interview session, if time allows. Include time to practice communicating through an interpreter.
  - Use the SME Interview Preparation Worksheet included as Annex 4-O.
- Coordinate interview (access for reporter, PAO escort, location free of background noise)
- Record interview for official record-keeping purposes.
- Arrange for collecting copies of news article or broadcast.
- Analyse and evaluate final product: was information reported accurately? Were command's master messages incorporated into the story? Was the article positive toward NATO, your command, the operation?
- Immediately correct any substantial factual errors, either during interviews or after publication. Errors left uncorrected stand as fact.
- Provide feedback to leadership and chain of command.

4.5. Releasable Products. The following are suggestions for releasable products. This list is by no means exhaustive.

a. News Releases. A well-written news release is a necessary ingredient of most, if not all PA plans. The news release serves not only as a source of information, but also provides notice to editors and news directors of policy developments, operations, events, and activities they may wish to cover in greater depth using their own resources. For this reason, news releases must also be sent to radio and television stations, and posted on the organisation's Intranet and the Internet. It is standard practice to send out the same news release to all media agencies that you deal with at the same time. A checklist and example for writing news releases can be found as Annexes 4-J and 4-K.

All ACO news releases must be approved by the appropriate level authority and comply with NATO Visual Identification Standards. Potentially contentious or significant releases should be coordinated with higher headquarters *before release*.

Ideally, the contents of a news release should be distributed by the chain of command (not necessarily the PAO) to the internal military/civilian audience before the media receives it - particularly if it is very negative or tragic information.

The news release is just one way of achieving a specific communications objective or effect. Bear in mind, however, that not all activities warrant the issuing of a news release.

b. Media Advisories. Media advisories serve to alert media to upcoming events or products which have been made available to the public, by means other than news releases. Examples include advising of upcoming media events, news conferences, or postings of documents or images on social media sites. An example of the recommended format can be found at Annex 4-L.

c. Declassified Documents. Documents may, at the discretion of the commander and with the appropriate staff coordination, be declassified or redacted in order to release to the public. Release of these products will not be a unilateral decision of the PAO. They will require proper staff and command group consultation and will require notification to the higher headquarters public affairs channels.

d. Facts Sheets. Prepared fact sheets with basic information about your command or operation are always very useful background material for media. The PAO should maintain and update these products as required. Quite often pre-approved fact sheets serve as responses when responding to media queries.

e. Social Media Postings. Media, third party advocates and citizens around the world monitor social media sites of all varieties. PAOs should strive to make use of these resources. Guidance for ACO social media usage is governed by ACO Dir. 95-3.

4.6. News Conferences

a. News conferences are generally a good way to reach a large number of media with the same message at the same time. They follow a set procedure and can be excellent communications tools as long as they are well organised, taking the needs of the media into account. There is always an opening statement by a spokesperson then a Q&A session with media for a pre-determined time period.

b. News conferences should always be moderated by a PAO. The moderator is the event manager who sets the ground rules and time limits, introduces news conference spokespersons/participants, manages the Q&A session after the initial statement, and wraps up the event. The moderator also takes notes during the event in case follow-up action is required.

c. A news conference aide memoire, news conference procedure, room layout and sample moderator's opening remarks are at Annex 4-I.

d. At the conclusion of the news conference, a transcript of the event, audio file or summary of topics (with specific relevant quotes) should be posted to further highlight the event. Once posted, consider publishing an additional media advisory directing interested parties to the website link or social media outlet.

4.7. Background Interviews. Background interviews, also called 'backgrounders', are a good way to maintain contact and develop your relationships with local media. Backgrounders are typically information that is provided to a reporter that can be used without specific attribution. A background interview can be used to inform or educate a reporter about your organisation, operation or specific topic or issue. It can also be used to provide context and depth to complicated issues. Note that there is also a PA product called a 'backgrounder' (fact sheet) so use the term 'background interview' to ensure clarity. Background interviews and briefs are not "off the record".

4.8. Operational Security. The need for operational security (OPSEC), versus the media demands for access to information, is a historic challenge that military commanders must meet. Commanders must keep in mind that the principles of democracy dictate that their forces must maintain the support and confidence of their populations. This necessitates an open and honest flow of information. Access to this information may conflict with the need for security in military operations. If this is the case, it is acceptable to tell a journalist that certain information cannot be released for that reason. PAOs should consult with other staff agencies for advice when deciding release criteria for information.

4.9. Media Embargoes

a. 'Embargoed' Information. At times it may be necessary to 'embargo' information given to the media. An embargo is an agreement with one or more media representatives not to publish defined information before a specific date and time (expressed in GMT). The importance of a media embargo cannot be overstated because of the impact on operations and on soldiers' lives. It should be used sparingly, in cases where it is important that information is released but is protected in terms of time sensitivity or operational security. Embargo time should be kept to the absolute minimum necessary for operational security.

b. Violation of a Media Embargo. Should a journalist violate the rules of an established embargo, the rules violation will be immediately reported back to the Theatre CPAO and the media representative's parent organisation or bureau chief. Punitive actions should be considered to include withdrawal of NATO support to the journalist or agency. The Chief PAO within the command will decide the course of action to be taken in such circumstances, upon consulting with the command group and higher headquarters.

4.10. Media Registration.

a. All media requesting support or access to units to cover NATO operations must be registered. This includes traditional media working for established news agencies, freelance journalist, and the various military media representatives who are not supporting units on the battlefield.

b. Registration versus Accreditation.

(1) Accreditation is the verification and validation that a person represents a legitimate commercial news organisation. This means that accrediting governments or military organisations will physically verify the affiliation of an applicant with a specific news organisation.

(2) Registration, however, is merely an accounting tool, which provides PAOs the ability to know what media are represented in the theatre, where they are located, and their movement around the theatre. This information is helpful in planning and conducting media logistical support and transportation, and in preparing subordinate commands for media encounters. It is also helpful to commanders who might want to provide newsworthy events to the media. Registration also identifies which news media have asked for military assistance and access, and have agreed to the command's media ground rules.

c. The command should develop a registration policy and procedures for allowing media access facilities, conduct interviews or cover planned events, exercises or operations. Measures should be taken to streamline theatre and national requirements in a single policy to avoid confusion.

d. The following are the general expectations for an accreditation program:

- The PAO will be responsible for journalist screening, collection of biographical/agency information and providing accreditation badges for the media representative. Journalists' information will be updated periodically.
- The PAO will frequently co-ordinate with the access-control authority to ensure the PAO staff is informed of current policies and procedures for allowing access to non-NATO personnel.
- The PAO will act as the advocate for media in all planning and policy development with respects to force protection and base security measures.
- Media will provide accurate personal and biographical information, news bureau and employment information, medical information, current passport information and subscribe to other mandated measures (i.e. photographic and biometric data base, etc.).
- The media personnel will be required to provide valid media credentials in order to access NATO military compounds.
- Journalists who refuse to agree to the military ground rules and who are not registered will receive only the support and information assistance as provided to the general public.
- Journalists should be informed that registration and acceptance of media ground rules will entitle them to better access to units and subject matter experts, and provision of military ground and air transportation when possible.

e. The registration process is conducted in five basic steps:
- Verify the identity of the media representative (including checking for valid passport/visa, professional media organisation membership card, media ID card, other military press credentials, etc.).
- Have them sign an agreement to abide by the established media ground rules for the operation in exchange for granting support, access to units, information and other privileges. If required, revoke credentials for those who violate the ground rules. (Enforcement of this requirement is essential.)
- Have NMR agree to and sign a liability waiver that frees the military of responsibility if the NMR is killed or injured as a result of covering the operation. (An example of a waiver of liability is at Annex 4-R).
- Give NMRs proof of registration (memorandum, press badge or other identification).
- Maintain a roster of registered NMRs and monitor their movements during the time they are receiving military support.

4.11 Media Escorts. Commands are required to address media escort requirements and, as with the accreditation policy, streamlining of national policies should be attempted. The following are the ACO Public Affairs expectations for media escort duties.

a. Media must be accredited prior to access to NATO operations.

b. Media should be escorted at all times.

c. Preferably, media escorts should be trained PAO staff members. However, history shows that there are not enough PAO personnel to accommodate the high number of media which cover NATO operations, particularly at the tactical level. In this case, designated personnel, trained and empowered to fulfil the duties can be authorised by the local command to perform the tasks of media escort.

d. Duties of Escort
- Brief media on expectations and re-iterate and enforce ground rules
- Facilitate media through security and within military facilities
- Ensure compliance with timelines and military procedures
- Put military terms and concepts into context
- Explain and enforce OPSEC
- Assist media with filing products through military communication systems as required
- Conduct an after action review and assessments at completion of the escort

4.12 Media Training. Commanders, designated spokespersons or subject matter experts commonly called upon to make media statements or be interviewed should undergo formal media training. Chapter 7 of this handbook covers the various aspects of public affairs training.

4.13. Working with Interpreters. In the NATO environment, it is often necessary to work with interpreters. It is important to work with accredited and trusted interpreters when conducting interviews. Interpreters are often local civilian hires and can be a good source of cultural information. A comprehensive list of planning factors for working with interpreters is included as Annex I at the back of the handbook.

Annex 4-A Establishing a NATO Media Operations Centre

NATO Media Operations Centres (NMOC) fulfil the requirement for a focal point for the news media during military operations. In essence, it is a command post for media support efforts. It serves as both the primary information source and as a logistical support and coordination base for commercial news organisations covering the operation.

NMOCs are organised when large numbers of news media representatives are anticipated to cover military activities and may be formed for all types of operations or for any stage within an operation.

The military committee policy states that “all NATO-led military operations or other activities involving a major deployment of forces will establish a facility in theatre, which will normally take the form of a NATO Media Operation Centre (NMOC) in a location and facility as accessible to the news media as security conditions allow. NMOCs should also be established for major training events.”

NMOCs support the commander and are subordinate to the command's PAO. They provide the commander a professional, immediately available, fully trained organisation designed to respond to host nation, regional and international civilian media interest in NATO military operations.

In addition, the NMOC provides the following functions:

- Provide a single point of contact and information for media within the theatre.
- Plan and integrate PA, media and messaging into NATO operations.
- Provide oversight and enforcement of media guidelines and ground rules.
- Acts as the primary information release authority for the command.
- Coordination of news media coverage, visits, and embeds.
- Coordination with all participating alliance national PA entities.
- Preparation and conduct of press briefings and news conferences.
- Registration and accreditation of news media personnel.
- Facilitate the declassification and release of operational imagery and weapons system video.
- Collect, archive and disseminate imagery.

Based on manpower and resources, the NMOC might:

- Manage the operational website
- Conduct media monitoring and analysis

Organisation and personnel staffing of media operations centres are determined by the responsible command in coordination with the PAO and his staff. The NMOC staff should be a proportionate representation of the forces, with representation from all nations involved in the operation. Regardless of the echelon establishing a media operations centre, the organisational model is functionally designed and remains relatively the same.

ACO recommends that NATO Media Operations Centres be organised so that they provide the following capabilities:

- Command and Administration
- Planning and analysis
- Media Operations
- New Media – Imagery and Internet
- Production and Internal Information

A recommended Crisis Establishment structure for a NATO Media Operations Centre is included at the end of this annex.

NMOC section's responsibilities are as follows:

Command and Administration Section is responsible for the overall command and control of all NMOC functions and the operation of the NMOC. It should be staffed and equipped to carry out the following tasks:

- Assume supervisory responsibility for all NMOC actions.
- Coordinate and liaise with the mission Command Group, keeping Command Group appraised of all NMOC activities.
- Provide administrative support to NMOC personnel.
- Ensure that PA guidance from higher headquarters is understood and applied by NMOC personnel.
- Establish internal procedures for staffing, assignment of duties, and prioritisation of tasks.
- Obtain and maintain NMOC supplies and equipment.
- Obtain and maintain imagery transmission capability and internet connection, so that time sensitive imagery can be disseminated quickly.
- Provide clerical support.
- Register news media, and assist them with administrative arrangements.
- Co-ordinate transportation, logistics and local contracting support.
- Co-ordinate linguistic services.
- Manage facilities e.g. conference room bookings.

Planning and Analysis Section is responsible for forecasting, planning and coordinating PA requirements and operations with the remainder of the mission Command Group and the PA staffs of higher, lower and adjacent headquarters. It is also responsible for media monitoring and analysis. The section should be staffed and equipped to carry out the following tasks:

- Co-ordinate with internal, higher, lower and adjacent HQs and MOCs.
- Prepare and co-ordinate PA annexes, plans, and guidance.
- Remain abreast of current and future operations/events of the mission.
- Monitor media coverage (print, TV, radio, web) and flag any issues requiring clarification/correction.
- Provide media monitoring reports to Command and Admin Section for dissemination to the Command Group and PA TechNet as appropriate.

Media Operations Section is responsible for direct contact with the news media, operating a media desk, responding to queries and media escort duties. Media ops

staff should work closely with those in Plans and New Media. The section should be staffed and equipped to carry out the following tasks:

- Identify media opportunities.
- Respond to, and maintain a log of media queries.
- Arrange and co-ordinate media interviews, tours and visits.
- Provide, or arrange for, media escorts.
- Draft News Releases and Media Response Lines/Lines to Take/Talking Points/Qs and As.
- Maintain up-to-date information on the operation.
- Facilitate the declassification and release of operational imagery and weapons system video with other HQ staff elements.
- Brief media representatives on the mission/operation, supplemented by SMEs as appropriate.
- Provide oversight and monitoring of status of embeds.
- Identify and bring to the attention of the CPAO any issues with ground rules.

New Media Section is responsible for gathering, cataloguing and disseminating imagery about the operation and establishing and maintaining the operation/mission website. The section should be staffed and equipped to carry out the following tasks:

- Make imagery available to the news media via approved ACO Imagery sites.
- Develop and maintain the operation website or, where the website is maintained at higher headquarters, provide updated content on a regular basis, but not less than weekly.

Production/Internal Information Section is responsible for producing or assisting with the production of all PA products required by the NMOC. This section must work closely with all of the NMOC sections for imagery content and production. The section should be staffed and equipped to carry out the following tasks:

- Assist Media Operations and New Media with the production and development of imagery releases, video releases, fact sheets, backgrounders, or other releasable products.
- Produce an internal information vehicle for the operations such as newspapers, newsletters, video updates and Intranet products.

The physical facilities of the NMOC should be adequate to accomplish the mission and project a professional image to internal and external visitors. Daily operations necessitate that the NMOC staff work space, including equipment areas, meeting rooms and security control points, are separate from any media work space that may be made available to media in the NMOC. Security conditions for a particular operation may preclude allowing media into the PAO workspace, and media may have their own working arrangements, including being accommodated with national contingents, thereby reducing the demand for work space in the NMOC.

A separate area outside the security zone needs to be available to conduct news conferences and briefings. Included in this requirement is adequate lighting, excess noise levels reduced, sound system available, simultaneous translation equipment, electrical power access available, splitter box, stage or raised platform for both the

participants and for television/still photographers, seating arrangements which can accommodate the anticipated number of media, and support requirements for interpreters.

NATO Media Operation Centres should support and be responsible to the senior commander of the operation on a 24-hour basis.

During the first 24 hours after arrival in a new theatre of operation, a media centre can provide limited media support services. But within this first operational day, the MOC must:

- Establish a "hasty media centre" as the initial focal point for the news media until additional media support forces arrive.
- Establish communication with the higher HQ JFC PA, SHAPE PA and NATO HQ Press Service and with units operating within the theatre.
- Gain a situational awareness of the media in theatre under alliance national invitations.
- Establish command structure, lines of authority and release authority within the theatre.
- Coordinate with appropriate authority for leasing and purchasing contracts.
- Begin to register news media personnel in the area
- Provide basic media support (coordination of media access to subordinate units and media escort as resources permit).
- Assist or conduct command news briefings and conferences.
- Coordinate Subject Matter Expert (SME) interviews.
- Be capable of assisting in the transmission of media products.

Recommended CE for NATO Crisis Response Operations Media Operations Centre

Command and Administration

	Position	Recommended Rank	Supervisor
1	CPAO	OF-5	Commander
2	Executive Officer	OF-3	CPAO
3	SGM	OR-9	CPAO
4	Technician	OR-6	SGM
5	Technician	OR-5	SGM
6	Admin NCO	OR-7	SGM
7	Admin Assistant	OR-4	Admin NCO
8	Driver	OR-4	Admin NCO

Planning and Analysis

1	Chief, PA Plans and Analysis	OF-4	CPAO
2	Chief, PA Plans	OF-3	Chief, PA Plans/Analysis
3	Staff Officer, PA Plans	OF-2	Chief, PA Plans
4	Staff Officer, Visual Information Plans	OF-2	Chief, PA Plans
5	NCO, PA Plans	OR-7	Chief, PA Plans
6	Chief, Media Analysis	OF-3	Chief, PA Plans/Analysis
7	Staff Officer, Media Analysis - Day	OF-2	Chief, Media Analysis
8	Staff Officer, Media Analysis - Night	OF-2	Chief, Media Analysis
9	NCOIC, Media Analysis	OR-7	Chief, Media Analysis
10	NCO Media Analysis	OR-5	Chief, Media Analysis

Media Operation and Current Operations

1	Chief, Media Operations/Deputy CPAO	OF-4	CPAO
2	Deputy, Media Operations	OF-3	Chief, Media Operations
3	NCOIC, Media Operations	OR-8	Chief, Media Operations
4	Staff Officer, Media Operations	OF-2	Chief, Media Operations
5	Staff Officer, Media Operations	OF-2	Chief, Media Operations
7	NCO, Media Operations	OR-6	Chief, Media Operations
8	NCO, Media Operations	OR-6	Chief, Media Operations

New Media and Internet Communications

1	Chief, New Media	OF-3	CPAO
2	Deputy Chief New Media	OF-2	Chief, New Media
3	Staff Officer, New Media	OF-2	Chief, New Media
4	NCOIC, New Media	OR-7	Chief, New Media

Production and Internal Information

1	Chief, Production	OF-3	CPAO
2	NCOIC, Production	OR-7	Chief, Production
3	Editor	OR-6	Chief, Production
4	Editor	OR-6	Chief, Production
5	NCOIC, Combat Camera	OR-8	Chief, Production
6	Combat Camera Photographer	OR-5	NCOIC, Combat Camera
7	Combat Camera Photographer	OR-4	NCOIC, Combat Camera
8	Combat Camera Photographer	OR-4	NCOIC, Combat Camera
9	Combat Camera Videographer	OR-5	NCOIC, Combat Camera
10	Combat Camera Videographer	OR-4	NCOIC, Combat Camera
11	Combat Camera Videographer	OR-4	NCOIC, Combat Camera

Total – 41

Annex 4-B – Response to Query Form

Response to Query Record Form

SUPREME HEADQUARTERS ALLIED POWERS EUROPE

PUBLIC AFFAIRS OFFICE

B-7010 SHAPE, Belgium

Control Number:			
Issue:			
Date:		**RTQ Taken by:**	
Reporter's Name:		**Reporter's Agency and Bureau:**	
Phone Number		**Fax Number:**	
E-mail			
Specific Questions:			
Actions Taken (Include coordination / information sources)			
Follow-up Actions:			
Reviewed and Closed out by:		**Close out Date:**	

Naming Convention
Control #: YYYYMMDD-(Sequence #)
Save as (File Name) on DHS: (Control Number), Issue, Agency, Reporter

Annex 4-C – Response to Query Log

RTQ TRACKER

Supreme Headquarters Allied Powers Europe
PUBLIC AFFAIRS OFFICE
B-7010 SHAPE, Belgium

Control Number	Date/Time Received	Date/Time Responded	Reporter's Name	Medium	Reporter's Agency/Bureau	Issue	Action Officer	Action Taken	Hyperlink to RTQ

Annex 4-D – Media Registration and Reception Log

Media Reception Log

Name	Badge Type and #	Agency	DTG In	DTG Out

Annex 4- E *Example Theatre Media Tracking Report*

ACO recommends the following matrix as an example to track media embeds. Such a product allows the Media Operations Section to maintain situational awareness of embeds, current status of embed requests, and provides a convenient briefing reference to inform the command and higher HQ Public Affairs. This example is created in Word for inclusion in the handbook, but obviously an Excel spreadsheet would be of more utility to the user.

Embedded	Approved	Completed	Pending	Cancelled	Disapproved	Military

Journalist's Name	News Organisation	Badge #	Start	End	Region/ Location	Unit	Intent	Request Received	Sent to Region	Region Accepts	Ground Rules	Remarks
Current Embeds												
Smith, James	CNN	0458	14 Mar	24 Mar	HQ	HQ	Day in the life of COM	15Feb	16Feb	20Feb	Y 14Feb	
Johnson, Barry	BBC	9231	4 Mar	19 Mar	MR-S	TF32	Cover offensive in MR-S	4Feb	6Feb	8Feb	Y 3Feb	
McDonald, Don	BFBS	N/A	28 Feb	8 Mar	MR-S	4/31	Command info	22Feb	22Feb	25Feb	Y 14Feb	
Bond, James	ITV	5400	28 Feb	6Mar	MR-W	WelGrd	to cover combat ops	15Jan	17Jan	19Jan	Y 10Feb	
Holmes, Gary	CanPress	3045	26 Feb	24Mar	MR-E	BlkWtch	To cover combat ops	12Feb	15Feb	17Feb	Y 7Feb	
Approved – Awaiting Embed Start												
Mamie, Joseph	Xuhan Radio	0023	25 Mar	25 Apr	MR-N	3rdBN	Economic projects	1Mar	3Mar		Y 22Aug	
Jackson, Chris	NATO TV	0210	26 Mar	23Apr	MR-N	FRA BG	R&D	5Mar	7Mar		Y 8Sep	Journo cancelled due to logistics issues.
Keen, Jon	Foreign Affairs	6783	8 Apr	22Apr	MR-E	BlkWtch	COIN Strategy at tactical level	15Mar			Y 27Aug	
Norris, Charles	Techno Talk	8374	13 Apr	2May	MR-W	WelGrd	UK Force Pro Eqpt.	15Mar			Y 25May	
Pending Approval												
Kasporov, Joey	Rus TV	9284			MR-W	TF 2-2		11Mar			Pending	
Johnson, Martin	Eyewitness TV	3547			MR-N	3rdBN	PRT Activities	12Mar			Pending	
Embed Complete												
Wight, Jonathan	Western News	5771	2Aug	19Aug	MR-W	TF 2-2	To cover combat ops	10Jul	12Jul	14Jul	Y 10Jun	Story ran in WN on 3 Dec 09
Labelle, Paul	Czech Times	3339	23Sep	29Sep	MR-S	4/31	To cover combat ops	15Aug	17Aug	19Aug	Y 14Jul	Story ran in CT 3 Oct
Bardot, Ricky	AFP	6582	8Oct	5Apr	MR-N	3rdBN	To cover combat ops	15Sep	17Sep	19Sep	Y 18Aug	Carried throughout wire service

Annex 4-F Media Kit Guidelines

1. Media Kits are an effective tool to properly inform media representatives about the command, operation, or standard issues prior to the event. They ensure that information is accurate from the command's perspective.

2. Consider inclusion of the following information when developing a press kit
   a. Schedule of events – do not forget contingency arrangements.
   b. Strip maps, key routes, sites.
   c. Fact sheets – equipment, organisations.
   d. Biographies – key personalities or keynote speakers.
   e. Advance copies of key note speeches.
   f. Press releases, media advisories, special events calendar.
   g. Photos and cutlines.
   h. Video releases.
   i. Related news articles.
   j. Frequently Asked Questions (FAQs)
   k. General or baseline information (i.e. command and organisational structure, rank structure, etc.)
   l. Acronyms
   m. Local lodging and restaurants
   n. Documentation referenced by subject matter experts or spokespersons
   o. NATO or North Atlantic Counsel directives, mandates, charters
   p. Other information directed by the command

3. Consider the following when preparing press kits:
   a. Provide a point of contact (coordinate through Media Operations) and phone number on each item in the press kit.
   b. Make it professional and attractive. A simple folder with inside pockets is sufficient.
   c. Get approval. Submit kit ideas to the PAO and appropriate approval authority for review and approval.
   d. Maintain OPSEC. Use open source information when possible.
   e. Review press kits frequently to ensure the information is current and relevant to the specific event.
   f. Provide e-mail addresses and links to social media sites. Invite the media to join those sites.

Annex 4-G Recommended for Media Packing List

	FINANCIAL	COMMENTS
	Cash	Dining and mess facilities may only accept cash or checks
	Chequebook	
	Credit Card	For incidental expenses

QTY	CLOTHING & EQUIPMENT	(Minimum requirements)
1	Backpack (day and a half pack)	
1	Luggage tag	
1	Large garbage bag	line backpack to keep clothing dry
4	Underwear	Appropriate for season and region
4	Socks	wool blends best to keep feet dry
4	Under shirts	
2	Long sleeve shirts, cotton, button	protect skin from sun and insects
2	Cotton trousers (jeans or fatigue-type)	
1 pr	Hiking boots	
1 pr	Athletic shoes (cross trainers)	all terrain running shoes
1	Baseball cap/hat	sun/rain protection
1 pr	Sunglasses	Wrap-around, poly-carb for eye protection
1 pr	Dust goggles	
1 pr	Extra pair of prescription glasses	
1	Hooded raincoat, Gore-tex material	
1 pr	Gloves	Protective / seasonal dependant
1	Fleece jacket liner	Appropriate for season and region
1	Sleeping bag	Appropriate for season and region
1	Sleeping mat or pad	
1	Mini-flashlight with batteries and red lens	
	Extra batteries	
1	Camelbak-type water container	
1	Face scarf	For dusty conditions
1	Kevlar helmet	
1	Flak vest (with protective armour plates)	
1	Alarm clock, battery powered	
1	Electrical surge suppressor	
1	Electrical power converter	Appropriate to Host Nation voltage and format
	Journalism equipment and supplies	

QTY	HYGIENE ITEMS	
1	Razor	(as required)
1	Toothbrush	
1	Toothpaste	
1	Deodorant	
1	Sun screen	
1	Shampoo (sample size)	
1	Bar soap	
2	Bath towel, medium size	
2	Wash cloth	
1	Roll of toilet paper (Ziploc bag)	
	Over the counter or prescription medicines	optional - 30 days worth
3	Laundry soap (individual portions)	
1	Foot powder	optional
1 pr	Shower shoes	

Journalists may bring sufficient equipment to cover operations. However, it is the journalist's responsibility to carry his own gear.

Transmitters are authorised but blackouts may be imposed as per tactical and OPSEC requirements.

All equipment and clothing should be neutral, subdued colours for tactical considerations.

Please refer questions to Public Affairs – Media Operations (Insert contact information).

Annex 4–H Media at Entry Control Points

The following is recommended verbiage for Entry Control Point (ECP) Media Guidance.

1. Units will ensure that base security elements are provided current approved media rosters. Rosters will be disseminated through command FRAGOs.

2. ECP elements will be directed and rehearsed on the following tasks when approached by media attempting to gain access to the base or attempting to document base entry points:

   a. Check media representative credentials. Only media listed on the current media rosters will be allowed access to the base unless accompanied by PAO personnel. Media not listed on the approved media roster will be professionally informed that they must contact the PAO for proper credentialing and denied access to the base. Base security personnel will attempt to gain the names of the media representatives and forward them to the PAO for tracking.

   b. If credentialed media is unaccompanied by PAO personnel, the security detachment will hold the media at the gate and notify PAO office.

   c. Media attempting to take photographs of entry control points (ECP) procedures or force protection measures will be asked to delete the photographs, explaining that release of force protection measures could release sensitive information to the enemy which could result in coalition forces being injured or killed and that as stipulated in the media ground rules, the reporter has an obligation to comply with these instructions or have his credentials revoked. Observe and verify that the media has deleted or erased the images. Report the situation to the PAO immediately. Forward the reporter's name, agency and credential numbers to the PAO.

   d. Individuals documenting ECP procedures who do not possess any form of credentials will be detained and treated IAW the current policy.

   e. At no time will the media representative be allowed into a JOC or sensitive area without first making positive hand-off to a PAO representative.

Annex 4-I Preparing for a News Conference

Use the following points as an aide memoire for organising and conducting the news conference:

- **Obtain appropriate approvals.** Your news conference should not come as a surprise to the chain of command.

- **Consider national and international linkages and issues.** Local issues may have something in common with regional, national, and international issues.

- **Is a news conference is the appropriate way to deliver the message?** Is this announcement or occurrence of important news value?

- **Select the proper spokesperson.** The principal spokesperson should be the most senior and knowledgeable person available. You should thoroughly brief the principal spokesperson using background material and relevant Qs & As then conduct a rehearsal. Likewise prepare appropriate SMEs.

- **Select the proper venue.** Choose a location large enough to accommodate the numbers of journalists likely to attend. Confirm adequate electrical power is available to accommodate television lights. Make sure the location is easily accessible, and that media do not have to carry heavy equipment long distances. Be sure the room is well-ventilated in summer, and well-heated in winter.

- **Send out invitations.** Send out a media advisory usually about four or five days before the news conference, unless a news conference is called at short notice following breaking news. Follow up the day before with a telephone call to media, editors, or news directors. The day of the news conference, set up a media register to record which agencies attended. If time permits after the event, check back with those who did not show to find out why and to offer them a copy of the media package you prepared for the event. This demonstrates interest on your part, and it may help you get a better turnout at future news conferences.

- **Prepare information kits and handouts carefully.** Information kits are valuable aids because they allow the officer who is conducting the news conference to refer to the kit for technical questions or statistical details. The person giving the news conference must be completely familiar with the contents of the kit, since credibility can suffer if that person mistakenly refers to information not included in the kits. Distribute the information kits and copies of prepared remarks before the news conference starts.

- **Have a moderator.** As the PAO on site, you will often serve as moderator. The moderator introduces the person giving the news conference, summarises the contents of the information kit, and indicates who is next in line to ask questions. Basically, the moderator is a low-key master of ceremonies. As the moderator, you should state the ground rules for the news conference and indicate the scope of material to be covered. If there is a time limit, let the media know from the

beginning. The moderator also has the important job of bringing the news conference to a smooth conclusion, such as "I see we're nearly out of time. I'll take one last question, please."

- **Select visual aids carefully.** Make sure the media know from the outset which visual aids will be available. For example, television reporters will expect copies of videotapes, and print journalists will want copies of photographs, charts, and overheads. If copies are not immediately available, you should say so, but be prepared to provide them later on.

- **Accommodate all media.** Television reporters are the most challenging to accommodate, although photographers pose special challenges as well. The table or lectern for the spokesperson giving the news conference should be the focus of the proceedings, at the front of the room, ideally on a slightly raised platform. You should prepare a large central aisle to permit camera operators to shoot straight on. If you provide a centre aisle, make sure there are also wide side aisles to give camera operators the freedom to move during the news conference and to allow for unobtrusive access for late arrivals. Alternatively, you should provide camera risers at the back of the room to permit filming over the heads of other participants. In an outdoor setting, you can mark off a semicircle facing the spokesperson, to allow the news conference participants and the media to arrange themselves according to their requirements. Television reporters usually want to maintain eye contact with their camera operators, and radio reporters generally prefer to sit near the front of the room so they can adjust sound levels. Generally speaking, print journalists can sit anywhere. From a technical point of view, you should make sure that appropriate audio-feed facilities are available for all journalists who want to record the news conference. You usually set up these pool boxes or patch boards off to one side or in the middle in front of the cameras. These boxes or boards negate the need for every journalist to place a microphone in front of the spokesperson giving the news conference.

- **Be prepared for frequent movement during the news conference.** Movement is a feature of news conferences which is often unexpected by those taking part for the first time. Radio reporters move about to change adjust levels, television-camera operators wander around looking for interesting angles, and photographers move back and forth to obtain a variety of pictures. Be prepared for movement, and brief the person giving the news conference accordingly.

- **Time the news conference well.** Ideally, news conferences should take place between 10:00 and 11:30 a.m. This allows assignment chiefs time to locate and assign reporters and gives media enough time to prepare for the event. A late-morning news conference also ensures that night-shift personnel are off duty, and day-shift people are well into their workday. This timing permits editors and news directors to feature the material from the news conference on noon newscasts and in afternoon and early-evening editions. News conferences in the afternoon run the risk of being overtaken by fast-breaking stories. Also, media are sometimes late. The later a news conference is scheduled, the more likely the chances that the reporters assigned to cover it will be delayed or reassigned. In scheduling the date and time for the news conference, consider the competition from other scheduled events in the area.

Procedure for Conducting ACO News Conferences

News conferences follow a set procedure to ensure that the process is fair for both the organisation holding the news conference and the media. Within ACO, the following procedure for conducting news conferences shall be followed:

- Moderator and spokesperson meet before the news conference starts to discuss any final points. The moderator tells the spokesperson which media are in attendance.
- Main three points to be made at the news conference are re-stated
- At the five minute point before the appointed start time of the news conference, the moderator introduces him/herself and outlines the procedure for the news conference and the ground rules. Media are usually given one question then a supplementary.
- Moderator gives a one-minute warning. Reminds media to silence mobile phones, and pagers.
- Moderator introduces the spokesperson.
- Spokesperson gives the prepared statement.
- Moderator begins the Q&A session and reminds media of the ground rules.
- Questions and Answers.
- Moderator announces “Last Question.”
- Last question or time limit is met.
- Spokesman ends with final statement, reiterating top three points.
- Moderator ends news conference.
- Spokesman exits briefing room by the most direct route.
- Conduct follow-on interviews if appropriate.
- Debrief spokesperson.
- Evaluate news conference.

Briefing Set-up Checklist

Briefing Subject	Briefing Date	Briefing Time

Speaker	Briefing Location

	Personnel Prep
	Speaker provided talking points an d 5 good / 5 bad questions
	Speaker murder board conducted
	Facilitator selected and briefed
	Escorts selected and briefed
	Interpreters selected and briefed
	Rehearsal conducted

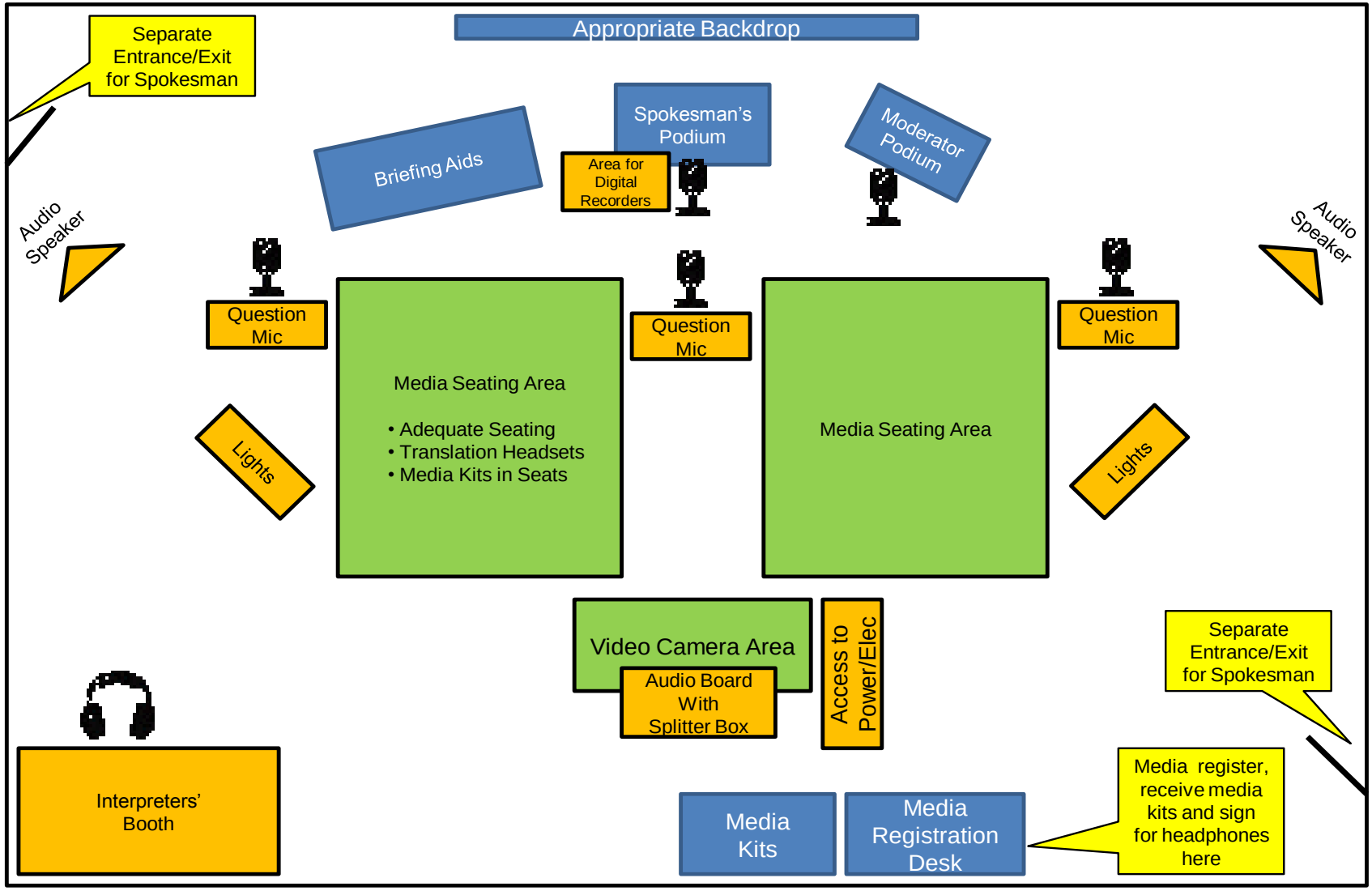
	Site Prep
	Briefing area secure and separated from the BCT operations and TOC
	Briefing area separated from generators or other noise
	Briefing area large enough to accommodate anticipated audience with seating
	Adequate electrical power and outlets for video equipment
	Sufficient lighting and has it been checked/tested
	Suitable backdrop
	Are the following items on hand (as appropriate):

	Podium			Pointer
	Public address system			Computer w/ CD/DVD
	Projector screen			Proxima
	VHS player/recorder			Television monitor
	Lighting system			Visual aids
	Maps of area of operation			News releases / press packets

	Video camera or digital voice recorder to record briefing
	Event catered or refreshments provided (as per funding regulations)

	Sequence Plan
	Plan to secure media reception area
	Plan to search media as they pass through security
	Plan to escort media into briefing area
	Ground rules established by facilitator
	SMEs introduced
	Questions monitored and ground rules enforced
	Plan to escort media to reception area when briefing complete
	AAR completed and forwarded to BCT PAO

General Layout for a Press Conference



Annex 4-J News Release Checklist

The following checklist highlights the considerations for preparing a news release:

Decision Criteria

- ☐ Is the information newsworthy?
- ☐ Is it more appropriate to have a news conference to get this information out?
- ☐ For example:
  - Is the issue too complex for a news release?
  - In crisis situations, it is important to show that ACO has control of the situation and who is in charge.
  - Will a news release give the perception that the organisation is hiding something?
- ☐ Are we the appropriate organisation to be putting out this information? We do not speak for NGOs, our allies, other governments or civilians.
- ☐ Use news releases judiciously. Constantly posting releases with nothing substantive become ‘white noise’ and are soon ignored.

Production

- ☐ Does the release answer the five Ws and two Hs? Are there any other details that should be included?
- ☐ Information arranged in descending order of importance (inverted pyramid)?
- ☐ Does the release simply state the facts and events - no adjectives or adverbs?
- ☐ Is the news release brief enough?
- ☐ Does the news release conform to the ACO style considerations?
- ☐ Is the news release on proper letterhead with the name of a contact person?
- ☐ Is the news release properly dated?
- ☐ Is the news release for general, immediate, or delayed release?
- ☐ Are the words "-END TEXT-" positioned at the end of the news release?
- ☐ Are ‘Notes to the Editor’ positioned after the "-END TEXT-"?
- ☐ Make sure that you “accept all changes” in the document and resave it to remove traces of earlier edits AND the DRAFT watermark.
- ☐ Have you checked that the contact phone number works what happens out of working hours? Is there a duty officer number?
- ☐ Has the news release been translated (if required and after approval)?

Approval

- ☐ Have proper clearances by the chain of command been obtained?
- ☐ Is the PA Tech Net aware?

Release

- ☐ To whom will you send the news release? Have you given copies of the news release to all of the appropriate agencies?
- ☐ How will you issue the news release?
- ☐ When exactly will you release it?
- ☐ Have you prepared a web version of the news release?
- ☐ Will the release be posted on the social media sites?

Post Release

- ☐ Is the original hard copy news release with original approval signatures on file?
- ☐ Is the final, approved electronic version of the news release filed in the office electronic archive?

Annex 4-K News Release Example

Head Quarters

International Security Assistance Force – Afghanistan

23 Aug 2007
NR*# 2007-606

ISAF soldiers transport 11 kilometres of pipeline

POL-E KHOMRI, Afghanistan – Soldiers from Provincial Reconstruction Team Pol-e Khomri in Baghlan province, in collaboration with Regional Command North soldiers, transported 11 kilometres of pipelines to Dahana-e Ghori district to help bring clean drinking water.

"ISAF provided the helicopters to transport the pipes because there was a lack of roads," said Major Levnete Tabi, Hungarian Civil-Military Cooperation team.

Helicopters airlifted the pipes. Three German air crews flew in from neighbouring Uzbekistan to prepare the cargo. The PRT Pol-e Khomri soldiers prepared and secured the site with help from Afghan National Security Forces.

"This project has both a civilian and military side. It was funded with money from the Government of the Islamic Republic of Afghanistan," Major Tabi said. Afghans will lay the pipes with contractors from local non-governmental organisations."

Residents in seven villages have no access to clean drinking water and have to walk up to half a day to the nearest well, according to Lieutenant Robert Smidroczki, PRT Pol-e Khomri Public Information Office.

The pipeline should be finished in about three months.

- END TEXT –

Contact Information ISAF Public Affairs Office
Tel: +93 (0)79 51 1151 - Mobile: 0093 (0) 799 55 8291

Email: pressoffice@hq.isaf.nato.int - www.nato.int/isaf/

NOTE: This annex is an actual release sent out by ISAF 23 Aug 2007 with terminology updated to reflect current NATO PA practice.

Annex 4-L Media Advisory Example

Head Quarters

International Security Assistance Force – Afghanistan

17 Jul 2007

MA# 2007-MA70

ISAF News* Conference scheduled for Wednesday

KABUL, Afghanistan – News media representatives are invited to an ISAF news conference with Lt. Col. Claudia Foss, ISAF spokesperson, at Headquarters, ISAF Wednesday, July 18, at 11 a.m.

Please arrive at the HQ ISAF main gate as early as 9:45 a.m. but no later than 10:15 a.m. for a security check prior to being escorted to the conference location. Late arrivals will not be admitted.

Those arriving with cell phones and laptop computers will be asked to check them in with security for the duration of the visit to HQ ISAF.

All personnel entering the ISAF compound are subject to X-ray inspection. This procedure is safe for men and women. Those with concerns about this procedure can notify the escort public information officer.

Equipment and bags will also be passed through a scanner or searched by trained dogs. The scanner is safe for people and items such as medication, food and film.

All news media representatives attending the press conference must hold a valid ISAF press pass. Registration is held each Monday, Thursday and Saturday from 10 to 11 a.m. Registration requirements are located on the top right-side of the ISAF Web site.

For further information, please contact the ISAF Public Affairs* Office.

- END TEXT -

Contact Information ISAF Public Affairs* Office
Tel: +93 (0)79 51 1155 - Mobile: 0093 (0) 799 55 8291 pressoffice@hq.isaf.nato.int - www.nato.int/isaf/

*NOTE: This annex is an actual media advisory sent out by ISAF 17 Jul 2007 with terminology updated to reflect current NATO PA practice.

Annex 4-M Fact Sheet Example

NATO's OPERATIONAL MENTOR AND LIAISON TEAMS (OMLTs)
Current as of October 2009

The Operational Mentor and Liaison Team (OMLT) programme is an important part of NATO-ISAF's contribution towards the development of the Afghan National Army (ANA).

OMLTs provide training and mentoring to the ANA. They also serve as a liaison capability between ANA and ISAF forces, co-ordinating the planning of operations and ensuring that the ANA units receive necessary enabling support (including close air support, casualty evacuation and medical evacuation).

OMLTs are composed of 13-30 personnel (depending on the type and function of the ANA unit with which it is partnered) from one or several countries. Each OMLT is normally deployed with an Afghan unit for a minimum period of six months.

There are currently 59 OMLTs operating in all five regions of Afghanistan. The current requirement to fully support the ANA is 68 OMLTs, some of which are expected in the coming months.

The NATO-ISAF OMLT programme works in complementarily with the US-led Embedded Training Teams (ETT) which perform similar duties.

Under OMLT mentorship, the ANA's capabilities are increasing steadily. Today, 28 Kandaks (Battalions) and 11 HQs (2xCorps & 9xBrigades) have reached the highest standard - Capability Milestone 1 (CM1) - assessed to be fully capable of conducting independent operations at battalion level.

In September 2008, the Joint Coordination Monitoring Board (JCMB) decided to authorise the expansion of the ANA from 80,000 to 122,000 force level (+ 12,000 training pool and transient personnel). Thanks to the accelerated fielding plan, this expansion should be completed by October 2010. This will increase OMLT requirements to 103 by December 2010.

Twenty-seven nations have contributed or have pledged to contribute to the OMLT Programme.

- END TEXT -

Contact Information NATO HQ Brussels Public Affairs* Office
Tel. +32-2-707-1010/1002 mailbox.moc@hq.nato.int

NOTE: This annex is a fact sheet sent out by NATO October 2009 with terminology updated to reflect current NATO PA practice.

Annex 4-N Interview Planning Guide

Journalist's Name			
Agency		**Type of Medium**	
Office phone		**Mobile phone**	
Email			

What is the issue?	
Which aspect is the focus?	
What is the story or angle?	
Who else is being interviewed?	
How much is already known?	
Does journalist need background information?	
When will the story run?	
What is the journalist's deadline?	
How will the interview be conducted?	
Where will the interview take place?	
Will it be live or edited for broadcast?	

Summarise agenda and boundaries	
Arrange a time when you will call the journalist	
Determine who is the right person to be interviewed	
Obtain authorisation if required	
Prepare yourself	

Annex 4-O SME Interview Preparation Worksheet

Interview Subject	*To be defined through negotiation process with journalist*	
Your Goal	*What you wish to accomplish from the interview*	
What's Your Position?	*Opening statement that outlines your organisation's view point*	
Theme	*Choose a central theme that will appeal to your audience*	
Who are the messages aimed at?	1. 2. 3. Internal audience (your co-workers)	
Main Messages (include for each: Sound Bites, Examples, Analogies)	*These are the main points to be addressed* ***Message, Example, Evidence*** 1. 2. 3.	
DEVELOP AND PRACTICE QUESTIONS AND ANSWERS	*5 Good*	*5 Bad*
	1. *2.* *3.* *4.* *5.*	*1.* *2.* *3.* *4.* *5.*

Annex 4-P Media Embedding Guidance to PAOs

Intent. Consistent with Article 2 of NATO's founding treaty, ACO encourages transparency and media access to operations and exercises. Accommodating media through allowing access to operations - what is traditionally known as embedding with a unit - provides an opportunity for journalists to get a better understanding of the issues faced by our forces and gives context to their reporting. Providing multi-national media with access is important as it broadens the scope of their reporting and provides audiences with a better understanding of the collaborative nature of allied operations.

Policy. NATO does not have an agreed media embed policy and some nations are apprehensive about a directive embedded media policy for a variety of concerns such as the legal and medical ramifications, service member privacy, etc. For this reason, the ACO policy is that media embedding is predominantly a national program carried out under the respective national policies and procedures. PAOs working for NATO will always defer to those national policies.

Throughout MC 457/1, the terms integrated, embedded and hosted media are used. For simplicity, ACO will use the term 'embedded' to refer to a unit hosting a media representative for the purpose of reporting operations for more than a 24 hour period. For nations without established media embedding policies or ill-defined policies, this handbook will provide recommendations and suggestions of best practices and a view as to what is acceptable to ACO.

Embed Requests

PAOs who are approached by media to facilitate embedding should generally seek to do so at the lowest level possible either through the PA TechNet, through the chain of command in theatre or if necessary via the operational HQ/SHAPE. The decision to accommodate a journalist will be a command decision influenced by PAO recommendation.

Guidelines

Specific guidelines for the conduct of media embeds with deployed ACO units are as follows:

The goal of ACO is to provide the international community with as much accurate information as possible about NATO efforts and requests will be prioritised using the following criterion:

a. Priority 1 – International media and wire services.

b. Priority 2 – National media relevant to the units in the AOR; and

c. Priority 3 – Freelance media. Freelance media, photographers and documentary filmmakers will not be embedded unless they are under contract to a media outlet that will publish/broadcast their material.

Embed durations will be agreed to prior to the journalist embedding with the unit. The commander approving the placement is the authority to grant or deny extensions. It should be made clear at the outset that extensions are not automatic and will be considered on a case by case basis.

Ground Rule Agreements

Ground rule agreements will be signed by the embedding journalist and the ACO unit accommodating them. Deployed ACO units accommodating media should use either the national process and agreements for embedded media or the examples annexed to this chapter. Ground rule agreements are 'gentlemen's agreements.' Punitive repercussions other than discontinuing the embed and restricting future access, transportation and assistance are rare.

It should be noted that although media may sign an indemnification agreement and liability waiver, such waivers may have limited utility. National laws concerning liability waivers differ. Consult a legal advisor familiar with the specific situation.

Accreditation and Registration

Embedding journalists must be accredited by a media agency or organisation. Freelance journalists may embed but must have a letter from the agency or organisation that has hired them. All journalists will need a current, valid media ID card in order to be registered with an ACO theatre of operation. Journalists should have appropriate life and medical coverage to mitigate legal issues against the hosting nation.

Accommodation Authority and Agreement

Nations may be willing to embed media proposed through an ACO PA office. The commander of the hosting unit should seek any national approvals required. In the event that this cannot be resolved locally and the NATO PA office feels that the request is valid it should be referred to the next higher HQ for action.

As part of the embed agreement the media outlet and journalist must complete and sign the following documents:

a. ACO Ground Rules for Embedded Media on NATO Operations (Annex 4-Q);

b. Indemnification Agreement and Liability Waiver (Annex 4-R);

c. Personal Biographical, Medical and Preference Statement (Annex 4-S);

Copies of these documents must be kept by the embedding journalist, theatre/operational PA office and the unit with which the journalist is embedding.

Terminating Accommodation

The accommodating unit's Public Affairs Officer, with acknowledgement from his immediate commander and higher headquarters CPAO may terminate the agreement early if an embedded journalist breaks the ground rules or if the operational situation changes and the arrangement is no longer workable. However, early termination of an arrangement without good reason may result in adverse publicity. The commander approving the placement must be made aware of the media ground rules when the initial request is made.

Embedded journalists will only be supported while they remain with the ACO unit or command. If a journalist leaves the formation or unit, even temporarily, to cover non-ACO related news, that journalist will temporarily lose his embedded status. The individual and his media outlet will be responsible for their own safety in these circumstances. The operational commander will be kept advised of any significant change to the status of embedded media through the theatre CPAO.

ACO reserves the right to deny, postpone or cancel any embed request and will not be liable for any expenses incurred by the journalist or media outlet in preparation for the embed program, including the cost of airline tickets, vaccinations, passports, visas, etc.

Ground Rules

The aim of media ground rules during embedded media operations is to protect operational security and ensure that embedded journalists have clear guidance regarding what they can expect from the host unit. The media ground rules recognise the journalist's right to report and are not intended to prevent the release of derogatory, embarrassing, negative or non-complementary information. There is no specific review process for media products within the ACO process; however, some nations may require factual review of media reports. With respects to OPSEC, PA staff has the authority to review any reporting of potentially sensitive operational issues to ensure there are no breaches of security prior to release to the media and to the general public. The PAO's objective should be to work with the journalist to remove the sensitive material in an amicable, professional manner. Content will not otherwise be restricted.

Should a journalist obtain photographs or video of operationally sensitive information or casualties the PAO should review the images, determine the risk to OPSEC and either embargo the photos until release would no longer threaten NATO lives or missions or request that the journalist delete or record over the images. At no time with the PAO, escort or NATO personnel confiscate accredited, registered media's camera or equipment.

Embedded journalists must understand the ground rules and agree to follow them. Ground rules will be agreed to in advance and signed by the embedding journalist and by an appropriate supervisor/representative of his media outlet prior to the embed. Violations of these rules may result in termination of embed status and removal from the ACO controlled area. A standard set of ground rules are at Annex 4-Q to this chapter. Journalists should be encouraged to carry a signed copy of the ground rules with them at all times while embedded.

Disputes

Disputes on ground rules should be settled as soon as possible at the lowest possible level by negotiation without recourse to any outside jurisdiction or third party. If the issue cannot be resolved locally, it will be forwarded through the chain of command to the operational commander through the operational PAO for final decision.

Administrative Requirements, Medical and Physical Fitness

Journalists must meet the following conditions prior to authorisation of an embed:

a. Journalists should be medically certified that they are physically fit for travel, can withstand the climate, and can cope with the physical demands of the operation before arriving in theatre. Journalists are responsible for bringing any allergy kits and personal medication, and to advise the operational PAO and the specific formation or unit of any special medical requirements before agreeing finalising the embed. The journalist must complete the Personal Biographical, Medical and Preference Statement at Annex 4-S;

b. Journalists selected for embed are responsible for ensuring that they receive the proper immunisations specific to the AOR and be prepared to provide documentation;

c. Journalists should be physically fit and prepared to withstand the rigorous conditions required for the particular environment in which the NATO formation or unit will be operating;

d. Journalists are responsible for obtaining their own passports and visas and any additional life, medical and air evacuation insurances. Journalists or their employers will be responsible for costs incurred while in a civilian medical facility; and

e. Embedded journalists will provide necessary personal information for records purposes. This information will be accorded a protected category and will only be used for the purpose for which it was collected.

Logistics

Out-of-Theatre Transportation. In most instances, the journalist will be responsible for his travel to and from the AOR and will pay for his own food and accommodations while staying in a commercial facility. Journalists will not be allowed to use their own vehicles while operating with military units.

In-Theatre Transportation. NATO forces will only provide transport to media while covering ACO operations, events and activities. Journalists who choose dis-embed to cover non-ACO stories are responsible for their own transportation.

Rations and Billeting. Rations and billeting must be agreed upon with the host unit. The general principle is that the media should get the same treatment as a service

member, with no special care or appeasement in order to give that journalist the best view of what service members are experiencing.

Level of Access. Level of access (escorted at all times, escorted part-time or unescorted) must be determined with the host unit and agreed upon by the PAO. It is the PAO's job to explain this to the journalist and a dual responsibility between the host unit and PAO to enforce the agreement.

Media Injuries and Casualties

NATO forces will provide emergency first aid treatment to any media representative who has been injured while embedded with a NATO formation or unit in accordance with NATO or national regulations. Injured media who are also contaminated by nuclear, biological or chemical agents (NBC) may not be repatriated until the situation is resolved. Repatriation of journalists who have been killed or injured is the responsibility of the media organisation employing the journalist. Media outlets employing freelance journalists must pay particular attention to this responsibility.

Embedded journalists and the media organisation they represent are responsible for ensuring they have adequate indemnity and insurance coverage.

If an embedded journalist is seriously injured or killed in the course of military operations the following procedures will be followed:

a. The unit to which the journalist was embedded must immediately notify the chain of command and the PA office that facilitated the embed. The death of a journalist while embedded with NATO troops would be a significant news story, therefore, the information must be passed informally up the PA chain, through PA duty staff, concurrently with chain of command notification.

b. The PA office that organised the embed will confirm the facts with J3 and then notify the journalist's registered contact immediately.

c. The theatre headquarters PAO will act as the in theatre point of contact for the journalist's parent organisation or nominated POC. In some instances it may be possible for national air assets to evacuate or repatriate journalists injured or killed while embedded with NATO troops but the primary responsibility lies with the journalist's parent organisation or next of kin.

Equipment, Clothing and Services

Journalists are responsible for providing an appropriate carrying bag or rucksack for their own personal equipment, clothing, sleeping bag, personal protective equipment, and hygiene items. They should also provide their own environmental protection items (e.g. insect repellent, sunscreen), water bottle, flashlight, and eating utensils. All clothing and equipment must be subdued in colour and appearance.

While stationed at established bases of operation, ACO will provide rations, workspace and basic accommodation commensurate with that of the service member. Media may have access to morale facilities, mess, and postal services

where they exist according to local policy. Embedded journalists should be aware that conditions of forward outposts may be more austere than those found at established operational bases. The basic needs (security, food and water) of the journalist will be met to the greatest extent possible during forward deployed operations; however, it should be understood that comfort, story filing/transmission and workspace limitations may exist.

Communications Equipment

Embedded journalists must provide their own communications equipment. However, if these are unusable, the operational commander may authorise and is encouraged to permit the use of unclassified military communications equipment for transmitting media products depending on operational tempo and availability of the equipment. The NATO aim in facilitating media access is to enable the journalist to report on the operation, therefore necessitating the ability to file products. Restricting access to communications must not be used as a deliberate means of censorship. Specific guidance should be included in respective Annex X to the OPLAN Paragraph 5 (Command and Signal), and should be coordinated with the J-6.

No communications equipment used by media (e.g. mobile phone, satellite phone, wireless internet computer) will be specifically prohibited. However, the operational commander may impose temporary restrictions on those devices or embargoes on the information in order to safeguard classified information or for other security or operational reasons. Unless specifically authorised by the operational commander or a designated representative, media will seek approval to use electronic devices while on patrol or tactical missions to prevent the risk of electronic interference or detonation of signal initiated weapons.

Protection of Media and Equipment

Journalists who have been granted embed status with ACO will be accorded protection of their person and equipment as allowed within authorised Rules of Engagement. It should be recognised that ACO in pursuing its mission cannot guarantee the personal safety of embedded media or their equipment.

Journalists who leave the protection of an ACO facility or patrol to meet their organisations ‘fixers’ or support personnel do so at their own risk. ACO will not render any assistance to media when they leave ACO facilities, therefore these occasions should be kept to a minimum. If media wish to cover news outside of ACO facilities on a regular basis, they should officially withdraw from embedded status so that other journalists may have the opportunity to cover ACO operations.

Media Access

The aim of embedding media is to provide them access to allow them to report what is happening and to add context to that reporting. To that end, every effort must be made to allow embedded journalists to see a full range of activities undertaken in support of the mission, view mission preparations and debriefings and to speak to people who can explain NATO’s position. Some of these discussions will be on

background and others on the record. Staff should always be aware that even if a discussion is on background classified information is not for sharing with journalists.

An ACO liaison officer may be assigned to large groups of media from the same agency. This person will be responsible for ensuring that the journalists are assisted while with the formation/unit and that they receive the appropriate. The liaison personnel will also be responsible for assisting the media in observing operational activities once authorised by the operational commander.

Training and Briefings

Journalists may be required to attend security/safety briefings when deploying into theatre and may be given additional briefings depending on the type of operation they will cover. Journalists will not participate in weapons training.

Embedded Media Reporting on Casualties and Missing Personnel

ACO PAOs will release as much information as possible to the public commensurate with operational security and next-of-kin (NOK) notification. Operational security, patient welfare, patient privacy, and NOK/family considerations are the governing concerns related to media coverage of wounded, injured, and ill personnel located in medical facilities or other casualty collection and treatment centres. Permission to interview or photograph a patient, including those inside operating rooms during operating procedures, will be granted only with the consent of the attending physician or facility commander and with the patient's informed consent, witnessed by the person responsible for escorting the journalist. "Informed consent" means the patient understands his or her picture and comments are being collected for news media purposes and they may appear in any news media reports. The attending physician will confirm that the individual is medically capable of giving informed consent.

Media visits to medical facilities will be in accordance with applicable regulations, standard operating procedures, operations orders and instructions by national policies and attending physicians. If media visit a medical facility, ACO or medical personnel must provide an escort. Visits must not interfere with medical treatment.

The issue of missing persons is particularly important since it may be necessary to withhold information due to the security classification of the information (i.e. in anticipation of a rescue mission or the need to safeguard the information from an adversary in the event the person is trying to evade capture). A restriction on the access or an embargo on the release of information related to a missing person may be established in such cases.

Release of Information

The operational commander has the right to have any reporting of potentially operationally sensitive issues reviewed to ensure there are no breaches of security prior to release by the media. Content will not otherwise be restricted. Technical

information may be reviewed by a subject matter expert but will not involve editorial changes.

In the event that personal information is provided to media during a briefing and the media are told that its release would result in a violation of national privacy legislation pertaining to that individual, ACO may choose to take legal action against a journalist who proceeds to release the information thus exposing ACO to potential liability. Media should also be informed that violations of directions regarding force protection and the release of sensitive information might result in loss of accommodated status.

Final Operational Authority

The ACO theatre commander is the final authority, through the chain of command, for the provision of support to embedded media and may add supplementary instructions or rules for accommodating embedded media.

Lessons Learned

Media outlets and journalists should be encouraged to provide feedback on the accommodating program to ACO through ACO PA offices.

Annex 4-Q Recommended Media Accommodation Guidelines

ALLIED COMMAND OPERATIONS

GROUND RULES FOR EMBEDDED MEDIA ON NATO OPERATIONS

Introduction

In the spirit of transparency and the democratic ideals of open reporting, NATO's Allied Command Operations encourages media coverage of its operations. In this context ACO has prepared these guidelines for use where national policies have not been established.

The following ground rules set out the terms upon which journalists are embedded within NATO operations and exercises (Embedded Media). If followed, they will help to ensure that embedded media activity does not adversely impact on operational security and service member privacy. Likewise, they address certain practical matters with respect to the journalist's health and notification procedures. They are not intended to prevent the release of negative coverage or embarrassing information. However, the rules necessarily restrict the release of certain categories of information which could provide information useful to an enemy and put military and civilian lives at risk.

Violations of any of the following rules may result, at the sole discretion of the first line commander in termination of a person's embedded status:

Administrative Issues

a. Passports, Visas and Travel. Unless supported through national programs, Embedded Media are responsible for obtaining the required passports and visas for their entry into, and exit from, the area of operations.

b. Immunisation. Embedded Media are strongly advised to be immunised in accordance with World Health Organisation recommendations for the region or country prior to deployment with NATO units.

c. Identification. Embedded Media must wear their NATO media credentials in a clearly visible place on their person at all times while in the AOR.

d. Personal Equipment. Embedded Media are responsible for procuring and using personal protective equipment to include, as minimum, military-grade helmet and body armour. Clothing and equipment will be subdued in colour and appearance, but non-military in appearance. Embedded Media are responsible for supplying, caring for, the security and carriage of, their own personal and professional equipment.

e. Media representatives, support staff, producers or personal protection teams will not carry firearms while embedded.

f. Dispute Settlement Procedures. Any disputes raised by Embedded Media personnel should be raised with the local NATO PAO point of contact. The NATO PAO community will endeavour to resolve the work as the honest broker but the ultimate decision to accommodate media is held by the commander.

Movement Rules

g. Embedded Media will not enter any classified areas e.g. Tactical operations centres or Intelligence cells without a military escort.

h. Embedded Media will follow instructions regarding their activities and movements.

i. Embedded Media working with national units under NATO command will be required to comply with relevant national military codes of conduct and rules for embedded media.

Interview Rules

j. All interviews with NATO personnel will be on the record. Security of information will be the responsibility of the NATO personnel being interviewed. Prior to any interview taking place, Embedded Media must inform the NATO member that he or she is being interviewed on the record. NATO personnel always have the right to decline to be interviewed.

k. Interviews with NATO personnel are authorised upon completion of missions and patrols; however, release of information remains subject to compliance with these rules.

Release of Information and Embargoes

l. Embedded Media will take care when datelining products to avoid releasing location information which may jeopardise Operational Security. If in doubt advice should be sought from the PAO.

m. Embargoes may be imposed to protect operational security. Embargoes will be lifted as soon as the operational security issue has passed.

n. Embedded Media are to be self sufficient with respect to filing product. On occasion, Embedded Media may, subject to national regulations and availability limitations, be allowed to file products via military communications systems. Embedded Media may not be allowed to connect privately-owned computers or USB thumb drives to military communications systems. Therefore, they should have the capability to burn to CD/DVD. Bandwidth limitations may restrict the ability to file video and large files.

o. The following categories of information **are** releasable, subject to the restrictions set out in Paragraph P (below):

1) Arrival of NATO units in the AO when officially announced;
2) Approximate friendly force strength figures;

3) Non-sensitive, unclassified information regarding air and ground operations, past and present;
4) The size, composition and capabilities of a force participating in an ongoing action or operation may be sensitive and Embedded Media should take care to avoid breaching Operational Security when reporting on those aspects of the operation. If in doubt advice should be sought from the PAO
5) Generic description of origin of air operations, such as “land-based”;
6) Date, time, location and results of completed military operations and actions;
7) Types of ordnance expended in general terms;
8) Number of aerial combat or reconnaissance missions or sorties flown in the Area of Operations; and
9) Casualty Reporting (subject always to the further instructions set out in these Rules).

p. The following categories of information are **not** releasable:

1) Force numbers and equipment. Specific information on troop strength and capabilities, equipment or critical supplies (e.g. artillery, radars, trucks, water, etc.);
2) Aircraft numbers and origin. Specific number of aircraft in units below wing level, or identification of mission aircraft points of origin, other than land or carrier based. Number and type of aircraft may be described in very general terms such as “large flight”, “small flight”, “many”, “few”, “fighters”, “fixed wing”;
3) Individual Identification. Embedded Media will not report the identity of NATO personnel who kill or injure opposing forces without the prior approval of the theatre level CPAO
4) Operational Information. Information regarding planned, postponed or cancelled operations – unless authorised by the CPAO. Extra precaution in reporting will be required at the start of an operation to maximise operational surprise. Therefore, broadcasts from airfields by Embedded Media are prohibited until authorised by the unit commander. During an operation, specific information on friendly force troop movements, tactical deployments, and dispositions that would jeopardise operational security or lives. Information about on-going engagements will not be released unless authorised by the on-scene commander. Any other information that, due to operational requirements, may be restricted from time to time when notified by the CPAO or first line commander.
5) Imagery that would show security precautions at military installations or camps, especially aerial and satellite imagery which would reveal the name or specific location of military units or installations;
6) Rules of Engagement. Details of the rules of engagement (ROE), escalation of force or force protection measures to include, but not limited to, those at military installations or camps, unless explicitly intended to be visible to non combatants (such as warning signs);
7) Intelligence Collection. Information on intelligence collection activities including targets, methodology and results. Information on friendly forces electronic warfare equipment or procedures or friendly forces counter-IED activities;
8) Search and Rescue Operations. Information on missing personnel or sensitive equipment or downed aircraft while search and rescue and recovery

operations are being planned and executed unless expressly authorised by the CPAO;

9) Special Operations Forces. Information on NATO Special Operations Forces in the Area of Operations. Embedded Media will not interview, photograph, film or report on NATO Special Operations Forces or operations they conduct or participate in, without prior approval of the NATO Special Operations Forces Commander;
10) Enemy Forces Information. Information on effectiveness of enemy camouflage, deception, targeting, direct and indirect fire, intelligence collection, electronic warfare or security measures; and
11) Detainees. All imagery of detainees or any transport of detainees will respect the detainee's rights, and protect the detainee from public curiosity in accordance with the principles of Article 13 of the Third Geneva Convention. No visual media showing a detainee's recognisable face, nametag or other identifying feature or item may be taken.

Operational Security Issues

q. Light Sources. Visible light sources and infra-red devices, including flash or television lights, will not be used when operating with NATO personnel at night unless specifically approved, prior to the commencement of the operation, by the on-scene Commander.

r. Noise Discipline. Embedded Media will follow instructions to comply with tactical movement and noise discipline requirements while covering operations.

s. Although the use of communications equipment (such as cell phones) is not generically prohibited, unit commanders may impose temporary restrictions on their use for operational security reasons. Embedded Media will comply with such temporary restrictions.

t. If, in the opinion of the unit commander, Embedded Media do not meet the requirements to operate within a particular environment, or in doing so would put the safety of their or other personnel at risk, the unit commander may limit or prevent the Embedded Media's participation in an event or operation.

u. Visual Recording Exclusions. The following will not be visually recorded without the explicit approval of the local Chief Public Affairs Officer (CPAO) and the local NATO Commander:

1) Restricted military areas, facilities or installations, such as operations centres and perimeter security measures;
2) Images of maps, navigation devices, communications equipment or Counter Improvised Explosive Devise/Electronic Warfare equipment. Care should be taken in tactical vehicles to ensure these categories of sensitive equipment are not documented;
3) Classified systems, equipment or demonstrations of capabilities;
4) Any flight line (being any runway, storage area, control tower or related facility or equipment) in the Area of Operations and military aircraft operating on or near it. Embedded Media will adhere to specific rules relating to coverage of ramp ceremonies for deceased personnel. Such rules will be briefed prior to each ceremony.

Medical Treatment and Fatalities

v. Injury or Death of Embedded Media. NATO forces will provide immediate emergency medical treatment and evacuation to an appropriate medical facility. If Embedded Media are injured or killed in the course of military operations, NATO will notify the injured or deceased's nominated emergency point of contact in accordance with instructions provided on the accommodation application. That point of contact will be responsible for further notification of next of kin. Repatriation of Embedded Media who have been killed or injured is the responsibility of the media outlet employing the journalist. Media outlets employing freelance journalists must pay particular attention to this responsibility.

w. Casualty Reporting. Unless otherwise advised by the host unit CPAO or commander, the following procedures and policies apply to coverage of dead, wounded, injured, and ill NATO personnel (NATO Casualties).

1) Embedded Media will follow national policies for release of names and identity of NATO casualties. National policies differ from nation to nation, the detail of which are beyond the scope of these rules. However, Embedded Media who witness the deaths and injuries of NATO personnel will not disclose, through any medium, the identities of the NATO casualty until the relevant nation has notified next of kin. Because of the particular sensitivities involved in releasing information about NATO casualties, Embedded Media should contact the CPAO for release advice.

2) Embedded Media will not be prohibited from reporting on casualties provided the following conditions are met:

a) Names, video, identifiable written/oral descriptions or identifiable photographs of NATO Casualties will not be released without the casualty's prior written consent. If the casualty dies, next-of-kin reporting rules then apply.
b) National policy dictates the policy on release of names of the death of NATO personnel in the Area of Operations. In respect for family members, names or images identifying NATO personnel who die in the theatre of operations will not be released prior to national notification of next of kin. The names of NATO personnel who die in the theatre of operations may be released after the national announcement has been made. Embedded Media should contact the CPAO for release advice.

3) Media visits to medical facilities are authorised and will be conducted in accordance with applicable national regulations, standard operating procedures, operations orders and instructions by attending physicians. If approved, service or medical facility personnel must escort media at all times.

4) Patient welfare, privacy, and next of kin/family considerations are the governing concerns about news media coverage of the wounded, injured, and sick in medical treatment facilities or other casualty collection and treatment locations.

5) Permission to interview or photograph a patient will be granted only with the consent of the attending physician or facility commander and with the patient's expressed, informed consent, which must be, witnessed by the escort. "Informed consent" means the patient understands his or her picture and comments are being collected for news media purposes and that they may appear in news media reports.

Conclusion

x. In the event of any doubt as to the requirements placed upon Embedded Media by these ground rules clarification should be sought through the Public Affairs Office which facilitated the placement.

I, (print) _____, confirm that the following information is accurate:

a. "I am not aware of any existing physical or health conditions which would adversely affect my participating in strenuous activities."_____ (Initial) (Medical certificate is enclosed)

b. "I have read the media ground rules provided to me by Allied Command Operations Public Affairs staff and agree, with my signature, to abide by them. I also understand that any violation of these ground rules is cause for the revocation of my accommodated media status with Allied Command Operations."_____ (Initial)

Journalist's Signature		Date
Media Organisation	Bureau Address	Phone Number
Media Outlet Supervisor Signature		Date

ACO Witness Signature		Date
ACO Witness Printed Name	Rank	Organisation

Annex 4-R Recommended Liability Waiver

Indemnification Agreement and Liability Waiver

1. I, _____ (PRINT NAME), on behalf of myself, my heirs, my executors and administrators, in consideration of being permitted to become registered as an embedded journalist with NATO's Allied Command Operations from on or about _____ (insert start time and date) to on or about _____ (insert end time and date) at _____ (insert location) and the surrounding area.

2. Acknowledge and agree that covering combat and other military operations is inherently hazardous and may result in death, personal injury, whether physical or otherwise, or damage to property, and wishing in any event to participate in covering combat and other military operations, voluntarily consent to participate and assume any risks that may be associated with said participation.

3. Acknowledge, agree and declare that I have been advised of the nature of covering combat and other military operations, that I have been advised of the procedures and safety measures in effect and that I agree to abide by them.

4. Acknowledge, agree and declare that I have been advised that NATO's Allied Command Operations, in pursuing the successful accomplishment of its mission, cannot guarantee my personal safety or the safety of my equipment.

5. Waive all claims of any nature or kind, including, but not limited to claims for personal injury or damage to property, against NATO, Allied Command Operations, Supreme Headquarters Allied Powers Europe, and its military personnel and civilian employees, in any manner arising out of, based upon, occasioned by, attributable to or connected with my participation in covering combat and other military operations while being an accommodated media:

   a. Agree that I will not commence or maintain against any person, any action or proceeding which will give rise to a claim against NATO, Allied Command Operations, Supreme Headquarters Allied Powers Europe, and its military personnel and civilian employees for contribution or indemnity;

b. Acknowledge, agree and declare that my signing this agreement is a condition to being registered to cover NATO's Allied Command Operations missions and receiving assistance for that coverage; and

c. Acknowledge having read this liability waiver in its entirety and, understanding that this waiver is intended to be broad and all inclusive so as to preclude any claims, I voluntarily indicate my acceptance of this document by my signature.

Dated: (DD/MM/YYY)

Media Member:	ACO Member – Witness:
(Print Name)	(Print Name)
(Address)	(Rank, Unit/Organisation)
(Tel)	(Tel)
(Mobile)	(Mobile)
(Email)	(Email)

_____ _____

Signature of Media Outlet Supervisor Date
(Assignment Editor, News Director)

(Print Name)_____

Annex 4-S Example Journalist's Biographic, Medical and Preference Statement

Affix Photo Here

Media Personal Information Sheet

Journalist Information

Full name (print):			
Address:			
E-mail Address			
Phone (Mobile)		**Phone (Land)**	
Organisation		**Date of Birth and Age**	
Height		**Date of Birth**	
Weight		**Blood Type**	
Nationality		**Passport Number**	
Place of Issue		**Date of Expiry**	

Employer Information

Name of Organisation			
Address			
Supervisor			
Supervisor's Location			
E-mail Address			
Phone (Mobile)		**Phone (Land)**	

Personal Emergency Notification - Emergency notification is the responsibility of the media outlet. Who at your media outlet do you suggest to perform this function?

Primary Agent Full name (print):				
Address:				
E-mail Address				
Phone (Mobile)		**Phone (Land)**		
Organisation				
Relationship		I authorise the PAO to contact this person in case of an emergency	YES	NO

Secondary Agent Full name (print):				
Address:				
E-mail Address				
Phone (Mobile)		**Phone (Land)**		
Organisation		I authorise the PAO to contact this person in case of an emergency	YES	NO

I declare that the above statements are, to the best of my knowledge, correct.

Signed_____ Date _____

Witnessed _____ Rank _____
(ACO member)

Medical History Questionnaire –
Civilian Media Accommodated with Allied Command Operations

Name_____ **Age** _____
Gender: Female Male
Smoker: Yes No
Current Medications: (Name / Dose / Frequency)

Medication Allergies:

Environmental Allergies:

Past Medical History:

Condition	Yes / No	Date
Angina		
Heart Attack		
Cardiac Arrhythmias		
Asthma		
Chronic Bronchitis		
Emphysema		
Asthma		
High Blood Pressure		
Kidney Stones		
Hypothyroid		
Hyperthyroid		
Depression		
Diabetes		
Hypoglycemia		
Other Psychiatric Illnesses		
Surgeries (List)		

Physician's Comments:

I certify that _____ **is in good general health, and has no medical ailments that would impede their ability to accompany NATO's Allied Command Operations units on deployed operations in their theatres of operations.**

_____
Name (please print)

_____
Signature

_____
Date

Annex 4-T Media Escort After-Action Report

This After-Action Report serves as the official record of the media contact / escort mission. The report will assist the PAO Staff track and analyse the operation environments and enable improvement of media operations. Complete the AAR format as completely and with as much detailed information as possible. Forward completed AAR Form to the through your chain of command to the PAO.

Unit Reporting	Date Submitted	PAO Control #

Individual Completing Report	Phone Number	E-mail Contact

Who	Media Reps' Names	Media Reps' Agencies
1. 2. 3. 4. 5.		

What (Event Name)	
When	
Where	
Why	

Media's Story Angle	Story Publication Date

Comments on Reporter(s)

Additional Comments / Lessons Learned

Overall Assessment of Impact on Operations

Chapter 5

Internal Communications / Command Information (Core Function)

"Internal Communications facilitate communication with and among NATO military personnel, civilians working for those organisations, and their families. Its purpose is to inform about the command or HQ, its people and its activities, and is distinct from administrative information or direction from the chain of command that is normally found in administrative or routine orders. Effective programs to keep internal audiences informed about significant developments that affect them and the work of their HQ creates an awareness of the organisation's goals and activities, increases work quality, and makes command personnel more effective representatives of the organisation."

(MC 0457/1 dated 14 September 2007)

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5.1 Introduction. Perhaps more than any other function, internal communications is both a chain-of-command and a collective responsibility that cuts across all levels of ACO. However, investment in effective internal communications is essential; staffs that feel well informed and consulted are more effective in supporting the organisations objectives and can be empowered as ambassadors for the organisation. Well informed personnel carry considerable credibility with external audiences.

5.2 Components. There are two components of internal communications: organisational communications, which is direction that must be given by the chain of command; and internal information which is co-ordinated by public affairs staff. Both are integral to a co-ordinated and effective internal communications plan.

5.3 Organisational Communications. Leaders at all levels of ACO must strive to pass information quickly through the chain of command to their subordinates. Surveys conducted by various organisations have shown that individuals generally trust the information they receive from their immediate supervisor; efforts must be made to maximise this method of information passage. Face to face is always the best and most effective form of internal communications. Other organisational communications vehicles include orders groups, conferences, routine guidance, internal publications and other directives. Consistent and continuous effort must be made at all levels within ACO to keep members informed of issues that affect them.

5.4 Internal Information. The second component, coordinated by PA, supplements information passed by the chain of command and reinforces leadership's messages. When people are informed, they feel a sense of ownership over issues that affect them.

5.5 Integration. The ability to communicate effectively within an organisation is as important as the ability to reach the external public. Large organisations like NATO are involved in numerous operations, and employ thousands of people. Rules, regulations, guidelines, operating procedures, formal orders, as well as corporate objectives, messages, and news, must all be passed on to ACO units and individuals. Therefore, internal communications must be integrated into our chains of command, fully integrating PA into the decision-making process for policy development, service delivery, and military operations.

5.6 PAO's Role. ACO and ACT PAOs have a key role in supporting internal communications in all of its facets:

a. Effective internal communications must be aligned with the overall communications strategy for the organisation. It is not a standalone function and must be aligned with all other communications functions so that the internal audience can be informed before members of the media/public. This avoids personnel being informed of changes/events on the television or in the local newspaper;

b. Incorporating internal communications into PA plans. This could be as simple as the commander walking around the HQ and informally talking to staff, holding regular 'town hall' meetings so the commander can update staff on organisational priorities and operations followed by a Q&A session, or posting a story with photos on the organisation's WISE 'homepage';

c. Allocating adequate resources to internal communications to achieve planned objectives;

d. Including internal communications when implementing PA programs;

e. Supporting NATO-wide 'corporate' internal communications programs, as required; and

f. Two-way internal communications must not be neglected. It is important that personnel feel that they have a medium to ‘feed’ ideas/information up the chain.

5.7 Internal Communications Tools Hierarchy.

a. The most effective method of internal communications is one-on-one, because of the close interaction between the sender of the message and the receiver of the message. With this method, the receiver can immediately ask clarifying questions of the sender to ensure the message is understood.

b. The least effective method of internal communications is through the mass media because there is no opportunity for the receiver to ask questions or the sender to ensure the message was understood. A PAO therefore needs a variety of tools to reach ACO’s internal audiences: NATO military members and NATO civilians.

c. The Hierarchy of Internal Communications Tools © is listed in descending order of effectiveness:

1) Face to face (one-on-one) – interviews/walking the talk
2) Personal phone call
3) Face to face (group) – road shows/clear lower decks/ mass briefings
4) Voice mail
5) Display/notice boards/screens (for messages and staff updates)
6) Audio messages
7) Internal communications DVDs
8) Visual email (video)
9) Email – mass distribution emails
10) Mail
11) Intranet / e-newsletter
12) Internet
13) Targeted paper newsletter
14) General audience newsletters
15) Mass media

5.8 Writing Standards. When writing internal communications products such as newsletters, or content for the Intranet, apply the basic journalism standards. See Annex G, Basic Journalism and ACO Style Guide.

5.9 Conclusion. ACO’s personnel are ACO’s ambassadors in their local communities. By keeping our personnel informed of operations, events, and policies, they can help pass NATO’s message to their neighbours thereby extending the audience reach. Obviously, the rules governing release of information and information security apply when communicating outside of ACO and NATO.

The range of methods used to deliver internal information will ultimately depend on the commander’s preferences, the financial resources available, and the PAO’s initiative.

Annex 5-A Feature Story Example

26 Jul 2007

KFOR aids Kosovo fire fighting operations

NATO military forces work side-by-side with civilian fire-fighters to contain wildfires burning out of control and threatening families across Kosovo.

There has been an incredible heat wave across Kosovo for weeks; however, it is a Kosovo tradition that farmers - after harvesting their fields - burn the remaining straw. This tradition, plus extremely dry and hot weather conditions, means spontaneous wildfires have erupted all over Kosovo.

For that reason civilian institutions have requested emergency support from NATO Kosovo Forces or KFOR in fire fighting operations all over Kosovo. Where ever possible, KFOR has made its assets available. KFOR has assisted not only with helicopters, but also with trained fire fighting personnel on the ground. These men and women are helping battle several different fires.

When conditions allow, KFOR's helicopters operate from sunrise to sunset, seven days a week. However, it is not possible for helicopter's to drop the water at night, and only certain types of helicopters are equipped for fire fighting operations.

KFOR has provided Bell UH 1 and AS 332 Super Puma helicopters to drop water over burning lands. Because of existing landmines, it is extremely dangerous for pilots to drop tons of water from a low altitude; therefore, assistance is sometimes limited.

KFOR's determination to serve in this region for the benefit of all residents of Kosovo is not limited to military means.

- END TEXT –

Chapter 6

Community Relations (Core Function)

"Community Relations programs are associated with the interaction between NATO military installations in NATO member states and their surrounding or nearby civilian communities. These programs can take the form of addressing issues of interest to and fostering relations with the general public, business, academia, military-related associations, and other non-news media entities." MC 0457/1

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6.1 Why Community Relations. Active community relations (COMREL) programs enable commanders to enhance morale, public trust, and support. Military personnel involved in the communities where they live become front-line ambassadors for NATO. Through active programs, NATO demonstrates it is a community partner and a responsible steward of resources.

In order to effectively manage misunderstandings and disagreements that may arise from time to time between NATO military installations and their surrounding communities, it is important to foster and maintain personal relationships between both groups.

The most amicable relationships, established at the commander-mayor level can be seriously damaged overnight by the thoughtless or insensitive actions of a small group, or even one individual. Having no relationship at all with your local community can be disastrous during a crisis. The case study at Annex 6-A demonstrates the value of a strong community relations program. To that end all ACO units shall develop a community relations program with their local community.

Outreach, both garrison and deployed locations can be as simple as small groups of people on the installation independently providing support to organisations or

families in the surrounding communities. This form of community interaction often happens with and without PAO knowledge. It is best that PAO work to track these activities to capitalise on them in future references with the media and also to be aware in case friction arises between the two entities or others.

6.2 COMREL while deployed – Key Leader Engagements. In a deployed environment, COMREL may take the form of Key Leader Engagements (KLE) or outreach programs. Consult with the S/C/J-9, Civil/Military Cooperation (CIMIC), Information Operations and Legal Advisors to ensure that you stay within the PAO lane when getting involved in non-traditional community relations activities.

A KLE typically involves gathering local community leadership together to discuss issues impacting the battlespace environment. Examples of KLE in operations include:

a. The senior NATO Commander might meet with high level political and military officials to share future plans for military deployments or withdrawal of troops in order to coordinate governmental support of smooth transition between international and indigenous forces.

b. Regional Commander might meet with the local provincial police chief to ensure that respective standards of conduct are understood.

c. A local Provincial Reconstruction Team in Afghanistan may request a shura, or meeting of the village elders, to highlight construction progress throughout the province with the objective of encouraging self policing in high-threat areas thus enhancing the PRTs ability to provide infrastructure in those areas as well.

d. A Task Force level commander might meet with a local religious leader to foster a sense of cooperation and to assess how the local population perceives the task force presence.

PAO needs to maintain awareness of the other players, both Non Governmental Organisations (NGOs) and Governmental Organisations, and stay abreast of the issues and areas of responsibility that can cause friction if crossed. Many NGOs have highly developed skills and understandings of the local areas and might know how to interact with the culture better than a recently deployed military force. However, keep in mind that most NGOs do not want to be perceived as interacting with the military because it gives the appearance of collusion, thus making them a target for insurgents or tarnishing their reputation as independent entities. Approached with sensitivity, they may be prepared to develop constructive relationships and share some information, but will probably be very keen to avoid any publicity.

When deployed, military members, families and home station civic organisations often enjoy collecting clothes, toiletries and toys to give away at locations where they are needed most, such as refugee camps and orphanages. This may be a rewarding experience for the military members and done with the best of intentions to help people that need these items, but it can cause repercussions for the local governments, tribes, refugee community and organisations that oversee these

issues (such as the United Nations High Commission for Refugees). Likewise, actions like these occasionally present logistics issues that the PAO cannot solve without significant assistance from outside of his immediate control.

6.3 Planning Considerations. COMREL can be very effective when done correctly. Prior to engaging in a COMREL event, consider the following:

Know Your Organisation

Before conducting community relations, it is critical to understand the history, purpose and objectives of your military organisation (NATO military installation). Make sure you know what past issues have shaped the current relationship that exists with the community. Identify the military units that comprise your organisation and the principal decision makers.

Know Your Community

It is equally critical to know your local community; specifically, what it knows and thinks about your organisation. To this end, a community-survey file can help you structure some of the information you need to gather to better understand your community. A community-survey file template can be found at Annex 6-B.

Building Better Relationships

To help you foster and maintain the relationship between your military organisation and your local community, the following five elements should be included in your community relations program:

a. Networking: building an extensive network of contacts within the community is the first step towards developing a strong relationship. Find opportunities within the community to go out and meet community stakeholders.

b. Presentations: presentations allow one-on-one contact between the community and military leaders. Identify opportunities to make or organise presentations to the community that inform them about the issues that most concern them. During these presentations, continue to build on your network of community contacts by inviting your stakeholders to bring along a guest.

c. Community Events: being seen in the community is important to building and maintaining a strong relationship. To that end, with the help of your community stakeholders, identify community events in which members of the NATO military installation can participate.

d. Special Events: invite the community onto the base or ship to provide them with an opportunity to meet military personnel in an environment that is both new and interesting. An example Op Order for an installation open house is at Annex 6-E.

e. Local Media: the local media can have a strong influence on the community, and may represent an excellent way of communicating with it. You will likely meet local media at community events. Over time, your relationship with the local

media will provide you with a greater understanding of the community, and will allow you to communicate more effectively with the community.

Community Relations Event Sponsors

At times it may be appropriate to co-host a community relations activity or have an event sponsored by a local group. In these circumstances, ACO directives and regulations on contracting and partnering must be observed. Prior to involvement with these activities, a PAO should ensure:

a. The event does not appear to endorse, selectively benefit or favour, any private individual, special interest group, business, religious, ideological movement, commercial venture, political candidate, or organisation;

b. The event does not solicit votes in a political election; and

c. Does not endorse commercially sponsored events intended to increase sales and business traffic (such as a business, mall grand opening, motion picture promotion, etc.).

Confer with the legal advisor prior to committing to support to such events

Community Relations / Base Tour General Guidelines

Tours tell a portion of the NATO story to visitors and should be tailored to coincide with the interests of different age groups. Often referred to as civic leader tours, the audience is composed of key community leaders connected to a local issue or where general civic education can be justified.

Include participants from a cross-section of community or business leadership (consider age, gender, race, ethnic and occupational backgrounds). Theme-based tours, such as environmental, small business, personnel, education, to name a few, can be excellent ways to focus in on key community leaders and their issues without diluting the message by doing a broad-based tour. Community and opinion leaders who can influence public opinion for the theme/objective selected for the tour, or inform and educate their communities and peers, should be considered.

For all tours, specific communication objectives should be developed. Limit time spent in briefings and increase contact with people and operations.

Orientations, demonstrations and briefings should be scheduled during normal duty hours as much as possible so the impact on your personnel’s off duty hours limited. PAOs working with SMEs shall ensure that all briefings, demonstrations, and orientations are security cleared for presentation to the general public.

A planning checklist for base tours is at Annex 6-F.

Annex 6-A Case Study:

Community Relations - an Essential Part of Public Affairs
by LT Cappy Surette, U.S. Navy (1999)

Let me offer one word that demonstrates how vital a solid community relations (ComRel) plan is — Vieques. In a Nov. 4, 1999, press briefing, Secretary of Defense William Cohen told reporters that the Navy was at least partly at fault for the crisis.

"The Navy has not really done a very good job in their relations with the people of Vieques and Puerto Rico," said Cohen. "We hope to do better in that regard."

What happened in Puerto Rico could just as easily happen elsewhere should we not learn from it.

The necessity of a good program was driven home to me as the firestorm of public outrage erupted Feb. 3, 1998, after a Marine EA-6B Prowler severed a cable car line near the Italian ski resort of Cavalese killing 20.

As U.S./Italian bilateral relations deteriorated as a result of this accident and the highly publicised trials that followed, it became abundantly clear just how necessary it was to have good relations with our local communities before something like this happens.

The importance of interacting with the local Italian community to promote trust had never been greater. The Cavalese cable car incident presented us with the challenge of mending fences and strengthening bonds here in Sicily.

Prior to the disaster, I would classify our ComRel program as merely adequate. While I didn’t find it to be the most exciting aspect of the base PAO job, we did run the occasional base tour, hosted parties for orphans and threw the gates open for the locals every summer for an annual Fourth of July blowout.

Following the Cavalese incident, we sat down, re-evaluated our programs and saw the need to turn up the heat. After going back to the drawing board, we created a new battle plan.

The difficulty with ComRel in general is that it’s a vague term and success is difficult to measure. To attempt to counter this, we articulated a goal — bolster the image of deployed American service members and their families.

We surmised that by engaging in comprehensive and proactive ComRel, we would attempt to dispel speculations and suspicion of U.S. activities behind the gates of Naval Air Station Sigonella (NASSIG). Involvement with all facets of the general population would promote a better understanding of the U.S. military, its members and our reason for having a presence in their community.

To do this, we targeted four principal audiences to provide a variety of ages and social classes — a wide cross-section of Sicilian society — to promote a better

understanding of U.S. presence in Italy. The following groups have been the focus of the effort since the program kicked off in March 1998:

1) Business and Civic Leaders: Base tours were offered and given to business organizations such as the Lion's Club and Rotary Clubs of several cities to educate business leaders on the role of the U.S. military in Europe. Targeting business and social leaders ensures positive reaction to U.S. involvement in Sicily is filtered to upper income groups.

2) Municipalities: Social functions and joint training were coordinated with municipalities such as local law enforcement, disaster preparation teams and fire fighters to provide for better cooperation when the need arises.

3) Schools: School and base visit programs expose students to Sailors and American school children with the goal of creating a long-standing relationship of understanding and teamwork between Italy and the United States early on.

4) Religious organisations: With Italy being more than 95 percent Catholic, interacting with local religious leaders and sponsoring more than 20 local orphanages enabled NASSIG representatives to demonstrate we are good neighbours.

Between educating the local populace about the mission of the base and promoting cooperation, we hoped to show the U.S. military presence abroad in a positive light to reduce misperceptions.

The final part of the plan was to strengthen relations with small Sicilian media outlets. We hosted a few media days and worked closely with Commander, Naval Air Forces Mediterranean (COMFAIRMED), AFSOUTH [now JFC Naples] and the U.S. Embassy in Rome to generate a large media embark of the small Sicilian press agencies (TV, radio and print) that visited Sigonella for a NATO Maritime Patrol Exercise in late February 1999.

The timing of that visit was pure luck as NATO air strikes in the former Yugoslavia began a week later. Establishing a relationship with the smaller markets as well as maintaining a good one with the larger markets paid dividends as 80 percent of the reporters who were part of the embark returned for official comment on the campaign. The stories that saw print were not only glowingly positive, but they seemed to actually cheer NATO on. The lesson we learned here was, "don't forget the small press."

We were able to measure our overall progress of strengthening relations two weeks later when we received word that a protest against NATO aggression in Yugoslavia would occur outside our gates the following day. We braced for an ugly crowd but only about 60 protesters actually showed up. We later learned 40 had been bussed in from Naples. Interesting, considering that our neighbouring city of Catania has a population of more than 380,000.

A strong ComRel plan is worth its weight in gold, and although essential, it doesn't need to be overly complicated. Simple face-to-face contact between our Sailors and

a wide range of people can establish a trust that will support us in accomplishing our mission as well as help us weather the occasional storm.

Lieutenant, now Commander, Surette was the public affairs officer at NAS Sigonella, Italy, at the time of the incident. This case study is reprinted with his permission.

Annex 6-B Sample Outline for a Community-Survey File

The Area

- Geographical description
  - Size of area
  - Population and demographics
  - Climate, topography, annual and seasonal temperatures, rainfall, etc.
- Historical data
- Economic data
  - Types of industry
  - Unemployment rate
  - Cost-of-living index
  - Direct benefits of base

Recreation and Entertainment

- Cultural attractions
- Commercial facilities
- Parks
- Spectator sports
- Amateur sports

Civic Government

- Key personnel in local and regional governments
- Offices of federal and provincial elected officials

Organisations

- Civic
- Fraternal
- Women's groups
- Youth groups
- Business groups
- Labour groups
- Veterans' groups
- Interest groups

Housing

- Housing units available
- Housing regulations and zoning laws
- Cost and adequacy

Other Community Facilities and Services

- Utilities
- Transportation
    - Highways
    - Buses
    - Taxi services
    - Rail
    - Air
- Education
    - Public
    - Private
    - Higher
- Health care
- Fire protection
- Police protection
- Churches
- Sanitation services
- Hotels and motels
- Convention centres

Communications Media

- Newspapers, magazines, and newsletters
    - Writers and contacts on military issues
    - Key personnel
    - Deadlines
    - Policy considerations
    - Wire services
    - Type of ownership
- Broadcast media
    - Radio
        - Type of format
        - Key personnel
        - Deadlines
    - Television
        - Network affiliation
        - Key personnel
        - Deadlines
        - Policy considerations
        - Tape format

Public Relations and Lobbyists

- Contacts and services, listed by company Community Leaders

- List those in the community, and the types of issues they influence

Annex 6–C Special Events, Exhibitions and Displays

6.C.1. Introduction. Special events can be used as strategic PA activities in support of a larger PA strategy or campaign, part of a community relations program (particularly if they are done in conjunction with the host community), or they can be stand-alone events. They can include exhibits and displays, imagery, print material, and give-aways.

6.C.2 Planning Considerations for Special Events. Special events may consist of equipment displays, parades, VIP visits, etc. hosted by a formation, a base, or even an individual unit. These events may involve many hundreds of military personnel, a few dozen or even just a few individuals. Special events may serve a PA function that focuses on an external audience, or they may be conducted primarily to entertain or to educate an internal audience. Audiences could range from the local community to high-ranking officers within NATO.

a. In terms of complexity, special events may range from a single unit 'open house' to one involving an entire formation with equipment displays from units garrisoned in different locations, or even a visit to an ACO establishment by a small group of high-ranking military or civilian VIPs from a member nation. VIP visits may be high or low profile and in all cases, the PAO must know what the chain of command's expectations are with respect to PA support.

b. Regardless of their size, complexity and purpose, special events, like any other military activity, must be carefully planned. Special events require a significant amount of logistics support (e.g. parking, security, food, medical assistance) that must be coordinated with other staff – not just staff PAOs. Bear in mind that special events almost always involve host nation or visiting VIPs, and they require a significant amount of coordination and attention to a broad range of detail. Consult Protocol for advice.

c. It is important to note that, although special events may have a PA purpose, a PAO should not be the overall coordinator of such an event. Special event planning is usually quite complex and will involve much time as well as significant staff and equipment resources. PAOs should be careful about what they volunteer for and if necessary, consult the PA Tech Net before agreeing to something because their actions may have an impact on ACO PAOs in other locations. The PAO's involvement should be limited to the PA aspects of the event, not the overall execution of the event. The PAO will be far more effective developing and implementing a PA plan to support the event and then marketing the event.

d. Special Events can incorporate such things as a Change of Command ceremony, an event featuring the arrival of a new ship to a fleet or an air show featuring a nation's air demonstration team. Change of command parades should have PA and imagery support and should be closely coordinated with the staff organising the parade itself. The commander is the face of the organisation in the local community, and building his/her profile can help with your community relations program. Set up an exhibit and invite the local community.

e. Often times, NATO operations are held in countries far away from the Troop Contributing Nations. Special events, exhibits and displays are often the only real mechanisms (outside of media coverage) that serve to inform the public of the personnel and equipment resources that NATO has at its disposal to support NATO mandated operations.

f. Many NATO member nations hold special events, open houses or military equipment displays and capability demonstrations at their bases, wings and unit levels. These activities are often an important component of community relations programs, and also fall into the category of special events, exhibits or displays and give members of the public an opportunity to acquaint themselves with the myriad tasks NATO nations perform each day.

g. Special events invariably involve media operations and media coverage. A supporting media plan must be included in the overall PA plan for the event and must include media requirements, *before, during* and *after* the event.

h. In addition to a visual display or show, special events usually also include other more static exhibit components such as exhibits or displays.

6.C.3. Exhibits and displays are a highly effective mechanism to attract public attention and interest in order to deliver selected messages using a low-tech format.

a. Exhibits and displays are organised at all levels within NATO and, in most instances, they are intended for the general public. Exhibits and displays can support a special event or may be a stand-alone attraction. Many NATO nations already use exhibits and displays in support of nations recruiting activities but they are also an integral part of ACO's PA activities at the operational and tactical level.

b. ACO headquarters PAO at SHAPE co-ordinates exhibitions and displays that are primarily targeted at the strategic level. These exhibits and displays are designed to target the public and generate or enhance specific NATO public affairs objectives at the strategic level. Previous examples include displays at the NATO summits and various ministerial level meetings.

d. When planning an exhibit, consider its purpose and ask some basic PA planning questions before you begin:

- Who is your audience?
- What is your message?
- How are you going to tell them?
- When are you going to tell them?
- Are there security, privacy or other limiting factors?

e. It is a good idea to plan for and develop promotional material that you know will be effective for the audience you are trying to target to enhance your ability to deliver your key messages. Supporting material can include posters, information brochures, and give-'away' promotional items such as lapel pins, pens, etc. On the more elaborate side, DVD/videos can be produced which inform your audiences of

your specific unit activities. Be aware that these are more costly and require much more planning time but can be very effective products.

f. While JFC/JC/CC exhibits displays do not need to be elaborate or expensive there is almost always some cost associated with these capabilities. More importantly, the exhibit equipment elements require time to develop, design, and produce. Some of the very best features of an effective exhibit are the very equipment that nations' soldier, sailors and air force personnel use. Even serving up military rations to the general public goes a long way to educating the public (or even guest military visitors) about NATO nation's missions and roles. Visitors will want to touch the items on display (climb into and to clearly understand their uses and capabilities. Displays can consist of nothing more than a piece of equipment, a weapon, a vehicle, or an aircraft.

6.C.4. Exhibit Staff. It is absolutely critical to have knowledgeable staff (both military and civilian) working at your exhibits and displays. These personnel are the public face of ACO and ACT, so they should be personnel who enjoy their work and are capable of passing along information in plain, simple terms. The staff needs to be able to effectively engage the public. The staff needs to be provided with the appropriate and most current NATO messages and, where possible, formal training to exhibit staff personnel would be ideal.

a. PAOs should never be the automatic default exhibit staff. The public and the media want to talk to operators, military personnel who have been on operations and who can explain how to use any military equipment that is on display. If an exhibit is part of a larger special event with media in attendance, the PAO will be far too busy with the media to be able to staff the exhibit.

b. All ACO and ACT exhibit and display material (display walls, promotional material to accompany the exhibit) shall conform to the NATO Visual Identity Guidelines.

6.C.5. Professional Exhibit Design and Production. Many commercial companies offer services to assist you in the development, design and production of exhibit components – exhibit walls, racks to display information brochures, even light shows that are very effective in attracting visitors to the exhibit. To contract these types of commercial services, proper NATO contracting rules and regulations must be followed.

6.C.6. Budget. As mentioned, Special Events, Exhibits and Displays do not have to cost a lot of money, but taking the time to plan out a budget will go a long way to ensuring adequate financial resources are available when it comes time to execute the PA plan with the special event, exhibit or display.

Annex 6-D Special-Events Checklist / Aide-Memoire

Regardless of the type of event you select to showcase, there are certain fundamentals which apply to staging or coordinating all special events. PAOs must consider certain basics to ensure the event succeeds.

Although there is a great deal of difference between an air show and a change-of-command parade, both events are similar from a planning point of view.

The following checklist includes some of the major factors which PAOs responsible for organising or coordinating special events must consider. Note that the non-PA tasks must be assigned to someone in the command group/organising committee:

The Event Objective or Aim

- Identify the objective or aim for holding your special event.
    - Is it purely for public relations?
    - Is it to inform, educate, or entertain?
- Identify the audience to whom you are communicating.
    - Is your audience military community, local opinion leaders, or the general public?
- How often do you want to hold this type of event?
    - Is it an annual event? Or is it a one-time-only activity?

Co-ordination

- Obtain from the commander a clear statement of responsibilities for event-related activities. In most situations, PAOs do not have tasking authority and will require the support of the Headquarters Support Group or J-3.
- Prepare a schedule of critical deadlines and activities leading up to the event.
- Arrange for imagery support.
- Plan progress review meetings for agencies to report status and problems.
- Keep the commander informed of progress.

Location

- Select an appropriate, accessible location or locations.
- Select an alternate location in case of inclement weather.
- Make sure the required facilities, such as power, water, and washrooms, are available at the chosen locations.

Promotion

- Provide internal audiences with event information through such media as base newspapers, routine orders, flyers, and posters.
- Provide external audiences with information through the local media by using news releases, public service announcements, and appearances on local radio and television programs.
- Invite local media representatives to preview the event 24 hours before it takes place or, in the case of parades, to attend dress rehearsals.

- Designate spokespersons and media contacts.

Communications

- Find out whether you will need a public address system.
- Arrange for mobile phones or hand-held radios for staff to communicate.
- Make arrangements for media needs, such as remote or live-broadcast.

Administration and Logistics

- Issue VIP invitations in coordination with Protocol (if applicable).
- Prepare print material early to allow time for translation, film work, or printing.
- Establish parking areas and arrange pass system (if necessary).
- Arrange for VIP and media areas in coordination with Protocol.

Special Arrangements

- Prepare accident/incident contingency plans.
- Arrange for emergency medical facilities.

Follow-Up

- Prepare a thorough and objective after-action report.
- Establish solid recommendations on how to improve future special events.

Annex 6-E Example Operations Order for an Installation Open House

TO: SEE DISTRIBUTION

SUBJECT: OPORD – Heritage Days/Journees Du Patrimoine, 8-9 Sep 07 and Fun Fest Bus Tour 1 Sep.

1. **SITUATION:** The Belgian "Journées du Patrimoine – Heritage Days" will take place in the Walloon Region of Belgium on 8 and 9 Sep 2007. The theme of the Heritage Days this year is military architectural heritage. SHAPE has agreed to open its doors on these two days, between 1300-1700 hours. Visitors from all over Belgium may take advantage of this unique opportunity to visit SHAPE HQ. In addition, the Fun Fest, 1 Sep, will be used to allow families to visit SHAPE as a tour rehearsal for the Heritage Days. An additional day of tours for VIPs and media will be held 7 Sep.

2. **MISSION:** SHAPE will conduct a series of "Open House" tours as a function of the "Journées du Patrimoine – Heritage Days" consisting of a bus tour and a visit of the SHAPE Command Centre. Total time of the proposed tour: 90 minutes.

3. EXECUTION:

a. Concept of Operations:

1). SHAPE personnel will conduct visitor tours on the following four days:

a). Morning 1 Sep (11:30) as a dry run for the guides (1 bus);
b). Afternoon 1Sep (13:00) for families at Fun Fest (5 or 6 buses);
c). VIP and media visits 7 Sep (1 bus) will be an additional rehearsal at 10:00 for the Media and 13:30 for the VIP's.
d). Heritage Days 8 and 9 Sep (5 or 6 buses)

2). Visits during the Fun Fest will begin and end by the GB parking lot.

3). Heritage Days visitors: All visitors will be directed to the Visitors' Centre in the SHAPE Events Centre. It will contain a visitors' control desk in the entrance of the building, a concession stand for snacks/ drinks and souvenir sales in the Doom room, with a small area for the SHAPE Band and two PIO* information-briefing rooms. Visitors will leave their cars in the designated car park(s) (cordoned off) next to the SHAPE Events Centre and if overload to the library parking lot. They will be directed to the Welcome Desk in the Visitors' Centre.

4). Two SHAPE buses will leave every half hour. There will be a guide for each bus and a sufficient ability to cater to French, Dutch and English. The SHAPE Command Centre (Bunker) visit is planned at the end of the circuit and will last approx 30 minutes. Mr. (NAME, phone) is the POC for this part of the visit. He will ensure the bunker is properly prepared and staffed for the visit.

5). Rehearsals will start 1 Sep at 11:30 (SHAPE Fun Fest). The Media/VIP day will be an additional rehearsal and is scheduled for 7 Sep. See schedule for rehearsals under Para C, Coordinating Instructions.

6). Specific itineraries and tour scripts will be published prior to the event.

b. Responsibilities:

1). DOS and SO NMR Echelon are requested to task divisions/NMRs to provide escorts/guides and support personnel as per the attached excel sheet.

2). Commander NCSA Sector Mons is requested to provide:

a). Sound support for the Visitors' Centre (SHAPE Events Centre). The sound systems and the Public Announcement system must be in place and tested before the VIP/Media Day on 7 Sep. A sufficient number of speakers should be available to permit all attendees to hear the announcements in all the rooms that are to be used; and
b). Sound support personnel 7, 8 & 9 Sep, 30 minutes before the event.

3). PIO has overall responsibility for all events, and will:
a). Provide public information/media relations;
b). Provide coordinating staff throughout the weekend and rehearsals;
c). Produce information leaflets for handout to visitors;
d). Provide articles to SHAPE Community Life before and after the event;
e). Provide photographic support;
f). Coordinate artwork for all required signage.

4). HSG is to:
a). Provide and set up a tent with a table and 2 chairs for the Fun Fest visit.
b). Block use of SHAPE Events Centre for 7-8-9 Sep;
c). Publish appropriate articles in the SHAPE Community Life prior to and after the Heritage Days. Co-ordinate with PIO;
d). Prepare SHAPE Events Centre for Media/VIP Day and Heritage Days NLT 1000, 7 Sep;
e). Provide small musical ensembles of the SHAPE band during visiting hours
f). Ensure snack food, coffee and other appropriate beverages are available for sale, as well as tables and chairs;
g). Provide souvenir items for sale (Arts and Crafts); and
h). Produce signage as required.

5). HSG S4 Engineering and Logistics is to:
a). Ensure the lobby and exterior areas of the SHAPE Events
b). Centre are thoroughly cleaned prior to the Heritage Days;
c). Ensure that a member of S4 reports to the HSG Project Officer on 07 Sep 2007 to inspect the area;
d). Provide and arrange NATO and PfP flags and stands in co-ordination with HSG Action Officer;
e). Schedule latrine cleaning personnel and extra toilet paper;

f). Ensure the fire station is aware of the visit and ready to intervene. If desired, the Fire Service may wish to place one of their trucks in the parking lot by the SHAPE Events Centre as an attraction and fire safety awareness demo for visitors as they wait for their tours.

g). Provide:

1. one bus for 11:30 dry run on 1 Sep for rehearsal on Fun Fest day;
2. four buses from 1300 to 1630 on 1 Sep;
3. one bus on 7 Sep for Media day at 09:50, and for VIP's at 13:20,
4. up to 6 buses between 1230 and 1830 hours on 8 & 9 Sep;
5. Provide one mini-van on standby on 8 & 9 Sep for any emergency local trips outside of the SHAPE Events Centre;

6). HSG Provost Marshal's Office is to:

a). Issue separate police OPORD, delineating necessary traffic control, a car-parking plan, security at entrance of the Visitors' Centre and Bunker;

b). Co-ordinate with the SHAPE Federal Police (SFP) on the impact on traffic safety on Rue Grande/Chaussee de Bruxelles caused by increased traffic arriving for the Heritage Days;

c). Co-ordinate with PIO and HSG as to proper control of visitors;

d). Seal off SHAPE Events Centre car park for the Heritage Days.

e). Manage visitor parking on both days;

f). Close roads as appropriate or required to avoid having visitors wandering in the SHAPE compound, while not interfering with Shapians' movement;

g). Co-ordinate security sweeps of SHAPE Events Centre as required.

7). HSG HNLO is responsible to coordinate with the Host Nation in order to provide an ambulance for emergency medical coverage during the event.

8). SHAPE Protocol will coordinate all aspects of the VIP visit 7 Sep.

c. Co-ordinating Instructions:

1). The last coordination meeting will take place in the PIO briefing room (Bldg 102 room 248) 31 Aug at 13:30.

2). Dress for both rehearsals (1 and 7 Sep) and Heritage days: National Service dress (preferable combat clothing).

3). Rehearsal Schedule:

a). A dry run will be held at 11:30 on 1 Sep for all guides and the two buses to be used that day. Between 1300 hours and 1630 hours, the visit will be run using four buses. A bus tour for SHAPE families will be organised along the same lines as planned for the Heritage Days.

b). There will be an additional rehearsal on 7 Sep when local media and local VIPs will be invited. Timings are for Media at 10:00 and for VIP's at 13:30.

d. The PIO Coordinator is (RANK, NAME), ext. 1234; the HSG Project Officer is (RANK, NAME), ext. 5678.

(NAME)
Colonel, DNK AF
DDOS

DISTRIBUTION:

COS
DCOS Support
DOS
Commander, NCSA Sect Mons
SO NMR Echelon
SHAPE Protocol
Commander, SHAPE Healthcare Facility
SCC

Internal –
Action:
Chief, Public Information Office
HSG Commander
S3 Operations
HNLO
PMO
S4 Engr Log
S1
MWB
HSG SO Admin
HSG Admin Supervisor
Bandmaster, SHAPE International Band

*NOTE: This annex is an actual event Op Order released by SHAPE in August 2007. While NATO has adopted the term “Public Affairs Office’, this example retains the original terminology in use at time of release.

Annex 6-F Base Tour Checklist

Briefers and Speakers

- ☐ Have they been requested and confirmed?
- ☐ Have they been given background information on the group?
- ☐ Who will introduce them?
- ☐ Will they be invited to eat with the group? Who will pay?
- ☐ Have they been informed what uniform to wear?
- ☐ Is background information on the speakers required?
- ☐ Have briefings, presentations, and speeches been tailored to the group?
- ☐ Who will prepare them?
- ☐ Will copies be distributed?
- ☐ Do speeches have to be cleared with higher headquarters?
- ☐ Have briefing rooms been scheduled?
- ☐ Is audiovisual support arranged (equipment, spare bulbs, operators)?
- ☐ Do speakers desire a podium, microphone, or other public address system?
- ☐ Water?
- ☐ Will the speakers be tape recorded or videotaped? Have they been notified?
- ☐ Is a dry run required for any presentation?
- ☐ Should seats be reserved for speakers waiting their turns to speak, staying to hear other speakers, or requiring staff members to listen?
- ☐ Will questions be allowed?
- ☐ Are speakers prepared to answer questions likely to come from the particular group (i.e., noise complaints, base construction, and civilian employment)?
- ☐ Is there a plan for keeping speakers within their scheduled times if the itinerary is rigid? Do the speakers know?

Escorts

- ☐ How many will be required? Are backup escorts necessary?
- ☐ Have they been briefed on their responsibilities?
- ☐ Have they been given background information on the group?
- ☐ Have meals, other accommodations, been arranged for escorts? Who will pay?
- ☐ Have they been told what uniform to wear?
- ☐ Do they know locations of all tour stops and activities? Can they answer questions about other arrangements made for the group?
- ☐ Do they know locations of restrooms, water fountains, off-base capable telephones, etc., along the tour route?
- ☐ Is a dry run required?
- ☐ Where will the escorts assemble?
- ☐ Do they have appropriate names and phone numbers to contact if problems or delays occur?

Itinerary and Agenda

- ☐ Is there a backup plan for events that are tentative or might be affected by adverse weather?
- ☐ Has appropriate participation by the commander been coordinated?
- ☐ Are other activities or exercises scheduled for the same dates? Will the activity serve as a detriment to desired tour support or could the tour be enhanced by including the activity in the itinerary?
- ☐ Have all restricted areas been identified and provided for?
- ☐ Will guests be allowed to bring personal cameras? What safekeeping measures will be taken if they cannot take cameras into certain areas?
- ☐ Are restroom breaks included?
- ☐ Will all affected areas be clean and spruced up for the visit?
- ☐ Will group make any presentations to base officials? Will base officials make any presentations to group? Have recipients been advised?
- ☐ Is a base photographer required?
- ☐ Can refreshments be provided?
- ☐ Are telephone facilities available?
- ☐ Is there an appropriate mix of standing, sitting, and walking stops on the tour, for the comfort of the group?
- ☐ Do all supporting personnel have a copy of the itinerary?
- ☐ Will one person be available in the Public Affairs Office to coordinate last-minute changes?

Arrival

- ☐ Will escorts be early in case group is early?
- ☐ Has security forces been briefed on arrival time and location?
- ☐ Have information packets been prepared (agenda, fact sheets, and biographies)? Will they be distributed upon arrival or placed in rooms?

Media

- ☐ Is there local media interest?
- ☐ Should tour be covered by base newspaper representative?
- ☐ Have ground rules been discussed with them? Have commander and others who might be affected been advised?

Follow-Up

- ☐ Are letters of appreciation appropriate?
- ☐ Will photos be sent to group?
- ☐ Are after-action reports required?
- ☐ Is there a way to get feedback from the group for use in fine-tuning future tours?

Chapter 7

Public Affairs Training

"The value of an education ... is not learning of many facts but the training of the mind to think something that cannot be learned from textbooks." – Albert Einstein

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7.1. Introduction

a. As with all military activities, to be confident, proficient and effective, PAOs, PA staff members and spokesmen require training at various levels and across a wide spectrum of topics. Unfortunately, in the heat of conducting real-world Public Affairs operations, training often becomes a secondary priority forcing the PA staff to learn by "on the job training." Obviously, being expected to perform at a high state of effectiveness in this manner is not the optimal solution. But with the limited time available, high real-world operational tempo, differing skill levels, skill sets and languages of an ACO PAO staff, how can the PAO meld his team into an efficient organisation? This chapter will provide a primer for the PAO to develop training concepts for his particular situation.

b. This chapter briefly introduces:
   - Ideas, recommendations and techniques for the PAO to formulate a collective training program for his PA section. These ideas will help maximise those individual skills taught through national and ACT programs

to apply them to a collective team environment in preparation for real world missions.

- Ideas to prepare spokesmen, non PA service members and family members for media engagements.
- Assessment tools for the PAO to tailor to his own training needs.

7.2 Developing a Training Plan.

a. Analysis. Developing a training plan begins with an analysis of the mission, commander's guidance and HHQs specified and implied tasks. This analysis should not be limited to the purely PAO tasks but should also take into consideration the mission and tasks for the unit that the PAO section supports.

b. Critical Task Development. From this analysis, the PAO then determines four or five critical tasks required for accomplishing that mission and fulfilling the stated guidance. These critical tasks will normally be larger scale collective (team) tasks as opposed to individual service member tasks. For example, a PAO preparing to deploy his PAO section might assess his critical tasks to be:

Critical Task 1.	Establish and run a media operations centre
Critical Task 2.	Coordinate information strategies with (Comms Directorate / Joint Effect Management Board / StratCom)
Critical Task 3.	Prepare the Commander/Spokesman/SME for media interviews
Critical Task 4.	Develop and execute an imagery strategy

Once establishing these as his critical tasks, they become the cornerstone for allocating time and resources towards developing his section's proficiency.

c. Sub-task Development. After critical tasks are chosen, sub-tasks can be developed. The subtasks begin to identify lower-level collective and individual tasks which are required to be proficient at the critical task. In other words, the subtasks are the "bite-sized chunks" that can be trained daily. The multiple sub-tasks should complement each other, building the various skill sets of the section towards accomplishing the critical tasks. Taking our example forward, the PAO may decide to focus on the imagery requirements of his mission. He would develop the sub-tasks which support the critical task as follows:

Critical Task 4.	Develop and execute an imagery strategy	
	Sub-task a.	Develop photography skills
	Sub-task b.	Develop video skills
	Sub-task c.	Determine imagery needs
	Sub-task d.	Identify imagery opportunities
	Sub-task e.	Format imagery for internet release
	Sub-task f.	Assess imagery for OPSEC or policy compliance
	Sub-task g.	Archive and retrieve imagery
	Sub-task h.	Deploy and operate DVIDS / BGAN
	Sub-task i.	Plan and execute logistics support for the imagery

	strategy

d. Training Management. The PAO, operating in a time constrained environment must first prioritise his training focus and resources. Some recommendations, based on our imagery critical task example, follow:
   1) Assess existing skills. Assess what the section is already good at and what skills they truly need to develop. For instance, if the imagery section is proficient in photography composition and editing, perhaps the training should jump to policy or logistics. The PAO has to make this decision based on his assessment of current proficiency.
   2) Prioritise. Decide what the key, most important skills are and focus training on those skills. For example, if your photographers lack sufficient camera function and composition skills, this should be the first priority for training. All of the DVIDS work, logistics planning and archiving will not matter if the photographic skill sets are lacking.
   3) Focus on sub-tasks initially. Once a base proficiency level has been reached with sub-tasks, the critical tasks begin to take shape. A foundation of multiple sub-tasks will cascade toward proficiency at critical tasks.
   4) Utilise NCO talents. NCOS are the technical experts. Use their skills and experience to your advantage.
   5) Co-opt. Seek other agencies or assets requiring or providing the required training. For instance, local newspaper photographers might be willing to establish a training partnership in return for embed opportunities.
   6) Protect training time. In real-world public affairs it is very easy to get caught in daily operations, overlooking training time. Daily staff requirements will invariably encroach on training. In this case, the PAO must make clear that training is a priority and must protect the PAO section from outside interference. This might require standing up to the chain of command, but it is vital to ensure that the section is prepared to accomplish its mission.

e. Battle Drills. In real world operations, certain tasks must happen automatically. The team must recognise the trigger of the event, and then begin to accomplish specified tasks in accordance with standing operating procedures. When an incident occurs, the unit must know, almost instinctively, how to react as a team. In combat arms branches these are call “battle drills”. Smooth execution of battle drills are a result of repetitive training and rehearsal of that task. When applied to public affairs, this could mean reacting to a casualty situation. The trigger in this case might be the notification by the PA liaison in the operations centre to the media operations section of the casualty report. The media operations section would then work through the liaison and J-3 to gather facts on the incident, draft a press release, coordinate with higher headquarters, and review the release for factual correctness and policy compliance. The final tasks would involve gaining approval from the CPAO and command group and completing the drill by releasing the news release within a specified number of minutes. Other battle drills might include: identifying and releasing weapons sight video to rebut enemy propaganda statements; preparing commanders and SMEs for

impromptu, opportunity media engagements; or setting up the DVIDS satellite equipment.

Do not limit training battle drills to purely PA functions. PA should strive to integrate into operational battle drills as well. Examples for this include PA photographers and PA staff establishing an immediate media operations centre and documentation of an incident site.

f. Performance Measures. Once the training tasks and objectives are identified, the PAO must identify how he will evaluate the training – typically this is done by comparing the training against performance standards. Performance standards form the basis of the lesson plans and evaluation. They should identify the specific skills and tasks required to perform a sub task well. This handbook provides policy recommendations, templates and examples of PA products that the PAO may use to develop performance standards. Continuing with our imagery example, the PAO can use Chapter 9 – Imagery to evaluate a photographer's captioning skills. In addition to the handbook, many national PA schools maintain very specific performance standards for a variety of tasks.

g. Training Appraisal and Feedback. A critical part of training is providing good, honest and critical feedback in a positive manner for growth and improvement. There are a variety of ways to provide feedback, most of which are beyond the scope of this text. It is important, however feedback is done, to ensure that the subordinate knows the standard and understands whether his performance met the standard or where and how it did not meet the standard.

h. Training Cycle. Training is an on-going process. The training process is never complete. The PAO must continually re-assess the competence level of his staff, modifying and tailoring the training plan, particularly during times of personnel transition, changes of mission or changes in equipment. Likewise, as a general proficiency is developed across the spectrum of tasks, the PAO should seek to increase proficiency to a higher standard.

i. Include Regional and Cultural Training. For public affairs to deploy and operate in a foreign environment, the PA staff must maintain a decent perspective on the host nation's language, infrastructure, and cultural nuisances. Such aspects should also be included in the PA training plan. A resourceful PAO might bring in SMEs to talk about the culture and media environment, arrange language training of develop a reading and viewing list of appropriate books, movies and documentaries to culturally sensitise the section.

j. Basic Soldier Skills. Do not overlook the basic soldier and military skills required to survive in a hostile environment. This is important for two reasons: first and foremost, your PA service members must be able to operate within a military formation, defending themselves when necessary; secondly, they must always be seen as service members first and PA practitioners second to maintain the credibility of the career field.

7.3. Non-PA Service Member Training. Public affairs training should not be limited to training PA soldiers. PAOs also have a responsibility to train commanders, spokesmen, non-PA service members and family members in military/media relations. Organic PA elements must develop training programs for their supported units. These can take the form of classes as well as pre-deployment briefings for units and family members.

a. Training for Commanders and Subject Matter Experts. Unit commanders and individual subject matter experts must be prepared to be interviewed. It is a PA responsibility to ensure they are familiar with the ground rules and understand to restrict statements and comments to their respective area of expertise. Preparation recommendations, interview techniques and assessment resources are provided as Annex 7-A, B, C, and D.

   Commanders must also be trained on national and Alliance public affairs policies and potential issues which he might face regarding command philosophy, service members' relations with the media, and social media policies, for example. The PAO, working with other key staff functions, must inform, advise and train the commander so he may make reasonable decisions in these matters.

b. Training non-PA Service Members. Individual service members must be advised of the inevitability of media presence during operations. Units PA training should be part of NCO training time and consist of training the respective nation's media policies what they should and should not talk about when meeting the press. ACO encourages service members to address the media in a professional, informed manner, provided the service member's remarks fall within his lane of responsibility and within his respective nation's media policy.

c. Training Unit Public Affairs Representatives. As stated in Chapter 2, Role of the PAO, public affairs responsibilities might have to be delegated to a non-PA trained representative. PAOs should advise the commander on selecting a competent, well-spoken and operationally informed UPAR to support his communications objectives. Once selected, it is the PAO's responsibility to train the UPAR and prove him the tools and support to succeed. Annexes 7-G, H, and I provide examples of SOPs, checklist and training plans which can be tailored to fit the command's needs.

d. Training for Family Members. PA training for family members consists of educating them on their rights and responsibilities when interacting with the media. Family members often know more about specific operations than should be revealed to the media. They must be advised not to discuss information, which may be used by the enemy against their spouse's unit, such as details about troop movements, destinations, missions etc. They must also be advised that they have the right to refuse to talk to the media. Family member briefings should be a standard element of pre-deployment activities. A sample training outline is provided as Annex 7-J.

7.4. PAO Professional Development. PAO professional development is often neglected due to time constraints and high operational tempo. The PAO should make efforts to seek out training and professional development opportunities. Professional forums, recommended reading lists, PA TechNet collaboration and active pursuit of mentorship are all means to satisfy the need for professional development and growth. Additionally, ACT and several alliance nations open enrolment of senior public affairs courses to Alliance PAOs. There are great opportunities to, not only learn the PA craft, but also to develop multi-national contacts and insight.

7.5. Indigenous/Partner Forces Training. Contemporary operations show that Alliance public affairs officers will be called upon to train, mentor and assist indigenous and partner forces with developing and increasing their public affairs and communications capabilities. The recommendations and examples within this handbook proved a good starting place to begin developing training programs. Higher headquarters, Ministries of Foreign Affairs and Embassies might also be a good source of information, material and guidance when pursuing partner force training.

7.6. Training Products. The following annexes are provided as examples to develop training resources for your unit's public affairs training. These are generic in nature and do not necessarily comply with each nation's public affairs or media policies. They should be tailored to your particular national policy, mission and commander's intent.

Annex 7-A Prepare a Spokesperson to Address the Media

Part of the PA mission is to provide media interaction training. Successful training ensures a spokesperson is prepared to address the media in a positive, correct and effective manner and can respond to questions while stating the command's position, knowing and understanding PA policy and release guidelines. When prepping a spokesperson, PA should:

- Determine if the spokesperson will address the media in a one-on-one interview dealing with one subject or in an open forum where reporters can ask about anything. Develop a draft script and prepare answers to anticipated questions for the briefer.
- If the topic of the interview involves an extremely complicated or highly technical subject, call on a subject matter expert to help you put the information in understandable terms. In most cases it is better to have the SME as the briefer. If that is not possible, ensure he is at the briefing and at the training session.
- Try to find out who the reporters are and how they handled previous military briefings.
- Establish enforceable procedures/ground rules on what will be covered and how much time will be allowed for questions.
- Determine uniform and protocol requirements.
- Prepare a draft script to familiarise the briefer with the format of a media briefing and the kinds of questions he will be asked based on the presentation and the current situation.
- Setup: Provide all the materials and equipment at the briefing site. Provide handouts/fact sheets to the media prior to delivering the opening statement.
- Visual aids: prepare handouts/fact sheets for the briefing. Add cues to the briefing text for visual aids. Ensure you have the proper equipment (video playback, projectors, chalkboards, flip charts, maps, etc.).

Develop Opening Statement (Gives the “5 W’s” and command messages)
- Introduction (greeting, purpose and procedures)
- Presentation of facts (summary lead, body)
- Conclusion (reinforce theme or message)
- Emphasise competence and caring in the event of tragedy

Develop Questions and Answers
- Anticipate likely questions:
    - 5 “Good” questions – what you want the public to know
    - 5 “Tough” questions – problem areas, issues for which you don’t have answers
- Prepare answers to anticipated questions not already covered in the opening statement of your script. Question the position. How will people understand the position?
- Submit answers for review by an approval authority (SME, higher headquarters, etc).
- Know the key points to be made and highlight them on the spokesperson’s notes/script.

Preparing a Command Spokesperson / SME Checklist

1) PRE-INTERVIEW

A. Spokesman / SME

- ☐ Explain PAO role in process
- ☐ Background on reporter, news organisation
- ☐ Obtain and review PAG
- ☐ Review command messages, talking points
- ☐ What image/themes do you want and NOT want to portray...what do you want the audience to take away from the interview?
- ☐ Develop sound bite synopsis
- ☐ Who is the target audience for your message?
- ☐ Attribution rules
- ☐ Ground rules
- ☐ Policy restrictions
- ☐ Time limit
- ☐ Physical setting of the interview
- ☐ SME appearance
- ☐ SME concerns (nervous, distrust media, etc)
- ☐ Give information on stance and style of reporter

B. Reporter

- ☐ Introduce self and explain role
- ☐ Inquire about special needs, requests
- ☐ Attribution category
- ☐ Ground rules
- ☐ Policy review
- ☐ Time limit
- ☐ Provide materials
- ☐ Begin command messages

2. INTERVIEW

- ☐ Introduce reporter and SME
- ☐ Restate ground rules, SAPP, time limit
- ☐ Establish comfortable, professional climate
- ☐ Get the interview started smoothly
- ☐ Clarify any misunderstandings during interview
- ☐ Repeat the question in your answer, plus add your message
- ☐ Do not repeat negative words or phrases
- ☐ Interrupt tactfully (gross violations policy or ground rules only)
- ☐ Take notes or record interview to develop interview skills of SME and to document the actual statements of the SME. This can be confused in translation or through political agendas
- ☐ Watch body language of both SME and reporter. This will clue to angle of story and comfort levels

3. POST INTERVIEW

A. Reporter

- ☐ Clarify any information needed by reporter
- ☐ Clarify any misinformation given by SME
- ☐ Confirm any of reporter's additional requirements
- ☐ Confirm publication/broadcast DTG
- ☐ Offer further assistance
- ☐ Re-emphasize command's position
- ☐ Identify who to contact – follow-up

B. SME

- ☐ Provide feedback on SME performance (good/bad)
- ☐ Forecast story/coverage based on interview
- ☐ Provide publishing or broadcast time and date

C. Provide higher command

- ☐ Initial impressions report
- ☐ Success in presenting command messages
- ☐ Main theme of interview
- ☐ Expected outcome

Annex 7-B Interview Techniques

1. **Blocking**
   - Deftly avoiding the question
   - Never say “No comment” or refuse to answer with hostility
   - Block only when there is good reason for doing so
   - Try to explain briefly why you cannot answer, usually OPSEC
   - Bridge to your message
   - Stay in your lane!
   - Only talk about things in your area of expertise and things of which you have direct knowledge
   - “There’s a lot you can talk about without talking about what you can’t talk about!”

2. **Bridging allows you to:**
   - Turn the discussion to your agenda
   - “Asked about a problem? Talk about a solution.”
   - Present your message and support it

   When bridging: block or answer the question briefly, then use a transitional phrase as a bridge to your message. Common bridging phrases are “what I can tell you”, “what you should consider”, “what’s important to realise”, etc.

   Blocking and Bridging Sample:
   Q. “Do you think NATO should attack Iraq?
   A: “That’s a question for our nations’ leaders; what I will tell you is that soldiers at my base are trained and ready to perform any mission they are called on to do.”

3. **Interview “DO’S”**
   - Be polite but firm
   - Discuss how you would like to be addressed
   - Ask the reporters their names and try to break the ice
   - Use the reporter’s first name instead of “Sir” or “Ma’am”
   - Respond to hard questions with “bad news” as willingly as you do good news to establish credibility and a good relationship
   - Take your time: formulate the answer in your mind before speaking
   - Be brief & concise – 10-20 second responses are the rule of thumb
   - Try to avoid using large words, military words, jargon, and acronyms – the audience for your interview is the general public
   - Ignore the camera and talk to the interviewer
   - Remain in control of the interview
   - Reasoned responses will help you stay in control even if the questions are silly or aggressive.
   - Always think OPSEC.
   - Stay in YOUR LANE – only talk about matters within your responsibility or personal knowledge.
   - If you don’t know, say so.
   - Don’t make anything up or speculate.

- If you can't talk about something, tell the media why
- Be careful of statements of absolute nature

4. Interview "DON'TS"

- Participate in an interview that will interfere with your mission
- Do not attempt to cover negative events with a cloak of security or secrecy.
- Refer requests for details about serious incidents to higher HQs
- Don't offer "off the record" information
- Never lie – you represent NATO and your unit
- Do not discuss exact numbers or troop strength (Use descriptions like "Light," "Heavy" or "Moderate")
- Do not discuss political or foreign policy matters – you don't speak for the politicians
- Don't give the enemy propaganda.
- Resist grumbling or thoughtlessly complaining.
- Don't forget the enemy watches CNN.
- Don't get trapped.
- If a reporter claims they have information from a higher HQ, refer them back to that HQ for clarification.
- Don't try to answer something OUTSIDE your lane!

4. Interview Presence (Physical Presentation)

<u>Demonstrate Confidence</u>

- Sound confident
- Be conversational and informal
- Vary your pace and be well-modulated
- Exhibit confidence; don't be nervous
- Speak clear and strong
- Look at the interviewer
- Be open and relaxed
- Be lively, but remember the emotion of the day
- Be interesting
- Be friendly

<u>Focus</u>

- Control your eyes: Look at the reporter in one-on-one. Look at the person talking in a group. Look at the camera in a remote.
- Use appropriate nonverbal reactions and facial expressions.
- Listen carefully and attentively.
- Take off sunglasses and headgear.

<u>Clarity</u>

- Keep it simple but don't talk down.
- Assume your audience knows little about NATO. Explain necessary points and make analogies.
- Avoid jargon, acronyms and bureaucratic/pretentious language.

- You're not briefing your boss; you're talking to the folks at home. Explain it like you would to "grandma"!
- No profanity!

Be mindful of your presentation

- Open – or closed off?
- Relaxed – or tense?
- Confident – or nervous?
- Lively – or stodgy?
- Interesting – or boring?
- Friendly – or hostile?
- Are you in the correct uniform (by national standards and by situation?

Annex 7-C NATO Military Spokesperson Training Debriefing Form

Date: Candidate:

NC		Radio		TV Studio		TV Stand up		DE	
Performance :									
Non-verbal communication:									
Confident		In control		Prepared		Body language		Posture	
Attitude:									
Respectful		Courteous		Focused		Not intimidated		Response to unexpected	
Delivery:									
Voice		Eye contact		Gestures		Facial expressions		Mannerisms / Tics	
Content:									
Messaging:									
Early mention		Clear		Complete		Repetition		Bridging	
Language:									
Appropriate		Articulate		Sound bites		Jargon		Clear and concise	
Constraints:									
Operational Security		Privacy Act		Official Secrets Act		Next of Kin Notification		Propriety	

Remarks:

Signature of Debriefer

Annex 7-D A Leader's Guide for Succeeding with the Media

1. Commanders, regardless of size or type of unit, have Public Affairs responsibilities. Commanders must ensure that they meet the information needs of the higher HQ and other critical national audiences and that the unit is prepared to operate in a media environment.

2. To operate successfully, commanders needs to understand the following PA principles:

a. Feed Internal Audiences. Identifying, understanding and fulfilling information of internal audiences enhances morale, confidence and unit discipline and effectiveness.

b. Inform External Audiences. Facilitating the efforts of the media fosters the confidence of national and allied publics and deters enemies and potential adversaries by communicating capability, readiness and resolve.

c. Every service person is a spokesperson. Good commanders recognise the benefits of personnel-media interaction. They seek opportunities to train their personnel how to interact with the media and find opportunities to encourage this interaction.

d. Journalists are not the enemy. The media is an important information channel to the Alliance public, and most journalists strive to publish accurate, truthful, balanced stories. Commanders need to understand that the media's goal is not to undermine, interfere or misrepresent, although some stories will be negative, and misunderstanding, errors and criticism will occur. By proactively assisting reporters in obtaining information and access to personnel, units help educate the public and foster confidence in our organisation. Remaining silent or uncooperative, leads to antagonistic, counterproductive results and incomplete, inaccurate and imbalanced stories. Remember, if we don't tell our story, someone else will tell it for us.

e. "Maximum disclosure with minimum delay." The Alliance has an obligation to keep the public informed. Therefore, information will be made readily available, within the bounds of OPSEC. Information should not be withheld solely to protect the mission from criticism or embarrassment. When speaking with a reporter be honest, accurate and candid. However, understand your commander's information strategies and your role in supporting his objectives.

3. In dealing with the media, commanders and their personnelt eust remember the following:

a. Know to whom you are talking. When a reporter comes to your unit, verify their credentials.

1) If the reporter is properly accredited, assist them in gathering information for their story.

2) If the reporter is not accredited, inform them that they must be accredited through military channels and assist them in getting accredited. If they are uncooperative, do not detain, threaten, or try to apprehend them.
3) Report the incident through you chain of command and to the PAO.

b. **Know your rights.** It is your choice whether or not to speak to reporters. If you decide to speak with a reporter, you may talk without fear of repercussion or punishment. Keep your answers brief, simple and to the point. Avoid rambling explanations full of acronyms and jargon. Always be professional and courteous. If necessary, ask the reporter to repeat, clarify or rephrase their questions. Remember that it is okay to say you don't know, you may refuse to answer any question you feel is inappropriate, and you can end the interview or conversation any time you desire. If you chose to end an interview or conversation or chose not to speak with a reporter, know how to do it without causing animosity, anger or frustration.

c. **Know your limits.** Stick to subjects within your own area of responsibility and personal knowledge. Stay in your lane.

d. **Remain Truthful.** If you don't know something, say so. Don't speculate! Don't repeat rumours! Be honest, accurate and candid. Do not respond to hypothetical questions, comment on remarks or statements you have not seen or heard. Do not discuss situations, issues, or subject matters which are outside the expertise of your command.

e. **View media visits as opportunities.** Provide escorts and support to accredited media whenever possible. Emphasise the positive aspects of your unit and mission, but don't try to hide problems. Introduce the reporters to your soldiers. Show them your equipment and training. Let them understand your motivation pride and morale. Their inside look at your unit can result in favourable coverage for your people, their accomplishments, the operation and NATO.

f. **Maintain "Security at the Source".** Don't violate OPSEC or aid adversaries. Actual and potential adversaries have access to the information published by the media. The most effective way to protect classified or sensitive information that might jeopardise your personnel, unit or mission, or be used as propaganda against our nation and force is to practice security at the source. If information is inadvertently provided, remain professional, seek the reporters' assistance and cooperation or obtain assistance through the chain of command. Do not attempt to forcibly confiscate the reporter's film, notes or equipment, or detain, threaten or apprehend the reporter.

g. **Maintain professionalism and composure.** When interacting with media, you must always maintain a professional attitude. Never lose your composure or temper or give sarcastic responses to questions you feel are inappropriate. Never try to mislead, equivocate or rationalise. Never threaten, or attempt to physically interfere with, detain, or apprehend a reporter. Never try to confiscate a reporter's equipment. Your ROE and SOPs should include policies in dealing with the media.

h. Prepare your Personnel. Prior to meeting with the media, personnel should be; made aware of public affairs guidance, informed of the NATO perspective, themes and messages, and briefed to ensure their information is accurate and up to date. They should not be told what they can and cannot say but should understand the significance of their actions.

i. Incorporate media contact into your SOPs, training scenarios, and rehearsals.

1) Just as you task organise you unit for CASEVAC and POW search, so should you designate and train media contact teams. Train these teams to understand how to deal with the media just as in any other battle drill.
2) Interject media scenarios into your training. Periodically include PA classroom training and media role-players into field training. Conduct media training for SGT's time training.
3) Rehearse actions on media contact as part of your preparation for combat and troop leading procedures.

j. Report Media contact. Report all media interaction to your command and the PAO. Use the PAO AAR format when possible. This allows the PAO to track media trends and effectively address the media requirements. Also, good feedback assists the command in developing realistic training scenarios.

4. Understand the resources available to assist you with your Public Affairs program.

a. Seek Public Affairs Guidance. Your chain of command or UPAR should be able to provide appropriate talking points, themes and messages for anticipated media contact.

b. Seek assistance from the PA Staff. The PAO is trained and resourced to advise and assist you in developing and executing your media training program.

PAO Contact Information – (insert e-mail, phone and mobile numbers)

Annex 7–E Interact with Media (Non-PA Service Member Training)

Service Member's Name and Rank			
Unit		**Date**	

Requirement: Train non-PA service members to interact with the news media in a field or garrison environment.

Guidance: Train non-PA service members to perform the following functions:

- Determine whether he/she may participate in a media interview.
- Follow prior guidance put out by the chain of command.
- Soldiers have a right to express their personal opinion.
- Soldiers do not have to receive prior authorisation to conduct a media interview *if they are acting in an unofficial capacity and not in uniform* – the public must not perceive them as "national military or Alliance spokespersons."

Performance Measures. Service member successfully:

- ☐ **Identified legitimate media.** Checked ID and press credentials. If the journalist produces identification and press credentials, continue with the interview. If not, refer the journalist to the chain of command or public affairs representative.

- ☐ **Recognised rights**. Service member recognised the right to speak or not to speak to the media; understood he/she did not have to answer all the questions; controlled the length of the interview.

- ☐ **Recognised obligations.**
  - ☐ Maintained OPSEC;
  - ☐ Exercised good judgment and professionalism at all times;
  - ☐ Made no negative comments toward a race, religion or culture.
  - ☐ Respected host nation sensitivities.
  - ☐ Informed the chain of command of media's presence, departure, the general nature of the interview and any violation of operational security or ground rules.

- ☐ **Implemented these guidelines when speaking with the media:**
  - ☐ Gave thoughtful, informed answers.
  - ☐ Did not lie or intentionally mislead the media.
  - ☐ Spoke at appropriate level; discussed only things they had direct responsibility for or had personal knowledge about.
  - ☐ Did not speculate or answer speculative (what if) questions.

- Avoided jargon, acronyms, slang and technical terms.
- Kept remarks brief and concise.
- Used "I" not "we" when stating an opinion.
- Explained not being able to answer a question (e.g. OPSEC, personal privacy, etc.),
- Avoided using "no comment."

Annex 7-F Service Member's Pocket Media Card.

ACO provides this verbiage to configure and print double sided pocket media cards.

Do's of Interviewing

- Do be prepared.
- Do tell the truth.
- Do keep your answer short.
- Do use plain English.
- Do use single, clear sentences to make your point.
- Do pause before answering.
- Do answer the question.
- Do communicate your messages.
- Do state your message clearly and powerfully.
- Do address your points to the public (reporters are not your ultimate audience).
- Do repeat your points.
- Do be friendly, honest and yourself.
- Do keep calm.
- Do use body language effectively.
- Do maintain eye contact.
- Do smile.

General Tips

- Reporters generally feel overworked, underpaid and on deadline. Know this. Respect this.
- You have more power and control than you think. Information is power and you have the ability to use that power in a positive way as a source of information.
- To conduct a successful interview, answer questions in a manner that supports your messages. You may be asked questions that don't get to the points you wish to make. Bridge to your messages at every opportunity.
- The physical appearance of a speaker should never overshadow what he or she has to say. It can, however, make the message more convincing. Keep this in mind as you prepare for a public appearance. Viewers will decide within eight seconds if you appear credible.

(YOUR HQ CREST HERE)

POCKET GUIDE
Media Interviews

"An interview is a seemingly casual but directed conversation that clicks open locked doors, organises scattered memories, and penetrates privacy chambers."

Two-time Pulitzer Prize-winning investigative reporter Eric Nalder

(YOUR HQ TITLE HERE)
Public Affairs Office

Don'ts of Interviewing

- Do not speculate or guess.
- Do not discuss hypothetical situations or unfamiliar matters.
- Do not offer personal opinions.
- Do not lie or bluff.
- Do not use jargon or long explanations.
- Do not lose your temper.
- Do not continue talking after you make your point.
- Do not fill awkward, silent pauses.
- Do not go "off the record" unless you have good reason to trust the reporter.
- Do not fidget.
- Do not use sympathetic nodding, which could be interpreted as agreement.
- Do not wear sunglasses or a hat.
- Do not wear distracting clothing, as it gets in the way of your message.

Professional Interview Techniques

Preparations

The media is a vehicle for conveying your organisation's messages to the public. If you don't have a clear sense of what you want to convey, how the headline should read, and what you want people to know about your issue, then the chance is slim that you will be satisfied with the result of the interview. Be prepared:

- Ask yourself "What is my goal with this interview?"
- Know the key points you want to make (main messages).
- Have back-up data to support your points.
- Get to know the media outlet: the type of publication or program, the interview format - live, taped, solo or multi-guest, length?

Professional Interview Techniques

General rules

REMAIN CALM. Calm always wins the day. Defensive and angry are signs of a person in a weak position. If you are easily excited or angered, take a breath and pause before speaking.

KNOW YOUR FACTS. Support your messages with anecdotes, statistics and sound bites.

STAY ON MESSAGE. Use "off-message" questions to bridge back to your message. Use phrases such as "That's a good question. Before I address it, I'd like to go back my earlier point..."

COMPLETE ANSWERS. Don't hop around in an interview just because the interviewer is jumpy. If interrupted or barraged with rapid-fire questions, remain calm, finish your sentence, wait until the interviewer takes a breath and then pick one question to answer.

TO THE POINT. Be concise - keep your answers to between 10 and 20 seconds.

Specific Guidelines for TV Interviews

- Realise your interview will be substantially edited to fit into a short time frame.
- You are always on the air. Say what you have to say, and then be quiet. Don't fill "dead air." This is an old journalist trick to get you to say something you really don't want to say.
- If standing, put one foot slightly in front of the other to avoid swaying. Avoid sudden body movements (standing up, leaning back in the chair) that may take you out of camera range. Hand movements should be small. Find a place to rest your hands and keep them there.
- Make eye contact with the reporter. Don't stare at the camera.
- Don't be distracted by activity near you.
- Dress appropriately (conservatively). Men - button coats if standing, unbutton if sitting.

Specific Guidelines for Radio/Telephone Interviews

- Use your voice to create variety and interest.
- Use descriptive language to illustrate your points to help the audience visualise what you're talking about.
- Raise your voice slightly for key points and emphasis.
- Feel free to have notes of key points, facts, etc.
- Avoid ums, ahs and "verbal nodding" - it sounds silly on radio.
- Make sure you can hear questions clearly. If you are even slightly uncomfortable with the volume or connection, say so.
- For in-studio radio interviews, sit 6 to 8 inches from the microphone.
- Ask the reporter for feedback to ensure he or she understands you. With no eye contact or body language, this can prevent misunderstanding.

Annex 7-G UPAR Media Facilitation Training

UPARs in recent operations have often been the primary POC for media embedded with their units. Therefore, PA should provide UPARs specific training in media facilitation. The following section should serve as a starting point.

Objective: Support news media efforts by providing accurate, timely, balanced, credible coverage of the force and operation while minimising the possibility that media will disrupt the operation.

UPAR Media Escort Responsibilities and Checklist

- You are NOT responsible for the physical safety of the media. Assist them as you would any other Alliance civilian in a combat environment. Instruct them and assist them in making combat-smart decisions.
- Ensure media does not violate standing force protection measures, such as noise and light discipline.
- Let leaders and service members do the talking.
- Trust service members to tell the unit story and the Alliance public to listen.
- Service members have the right not to talk – but not talking can send the message that the unit has something to hide – especially if the leaders avoid talking to the media.
- Remember that media are influential members of the public.
- Media are not the enemy – they are just out for a story. Make sure to tell your story.
- Secure classified or sensitive information and/or equipment.
- If you accidentally say or show something classified, remain calm, explain the situation and ask the media for their cooperation. Report the incident immediately.
- Never detain or confiscate any material or equipment from bona fide media – it will make matters worse.
- Do not refuse to speak to the media just because they are unescorted.
- Be courteous
- MISSION FIRST

UPARs and Media Escort in Crisis Situations

- PA staffing, remote locations and logistics limitations can sometimes prohibit PA from being there during every crisis situation. Media escorts and UPARS should be able to provide the following services for the media:
- Coordinate with PA/Command on messages and releasable OPSEC details.
- Brief the media - The escorts must know the general situation or should have access to those who do. Arrange for briefing to the media to ensure accurate information is passed.
- Brief the media on the risks of the situation. - Do not needlessly put the media in harm's way. Media members, especially photographers, will often go to great lengths for a story, ignoring the risk which might put your fellow service members at risk.
- Protect classified material.
- Issue and collect identification - Provide badges for escorts and media.

- Coordinate with MPs or base defence for site access (if applicable).
- Confirm and log entry and exit of media - maintain a record of entries and exits.
- Know how to navigate to/from the crisis site.
- Have the tools you need to get the public affairs job done (communications, messages, PAG, background materials, camera, etc.).
- Don’t speculate on causes – “An investigation is underway” is a good enough answer in the early stages of any crisis.

Annex 7-H UPAR Interview Checklist

1. Plan

- ☐ Determine Commander and PA intent for the interview.
- ☐ Ask PA what types of media to expect.
- ☐ Determine “news issues” in your area.
- ☐ Wargame possible questions and develop appropriate responses.
- ☐ Identify media support requirements (background/backdrop, lighting, sound, power, etc.)
- ☐ Develop itinerary with interview opportunities to support reporters’ intent.
- ☐ Review interview techniques with interview subject.

2. Greet media

- ☐ Be friendly and time conscious.
- ☐ Coordinate itinerary with reporter.
- ☐ Explain ground rules, military requirements, and safety and security concerns.

3. Conduct the Interview

- ☐ Monitor the interviews for time limits, OPSEC violations, confusion and inaccuracies.
- ☐ Position interview to avoid OPSEC violation.

4. Report results

- ☐ Lines of questions
- ☐ Attitudes of reporter
- ☐ OPSEC violations
- ☐ Slant of the story
- ☐ Overall impression to PA and higher HQ.
- ☐ Time and date of publication/airing
- ☐ Share info with other units.

Annex 7-I Basic Photography Guidance for UPARs

1. **Rule of Thirds** The rule of thirds uses two horizontal and two vertical lines to divide the photograph into nine equal parts (imagine a Tic Tac Toe grid). The subject's eyes should be placed at or near one of the four intersections, and his hands at another (if the hands are featured). Leave space within the photo for the subject to move or look into.

2. **Move around for a variety of shots:**
   - □ **Long shot:** It is normally shot 10 to 20 feet from the subject. Called an "establishing shot," it shows the subject in his environment.
   - □ **Medium shot:** Normally taken from seven to nine feet, it identifies the subject and the action taking place.
   - □ **Close-up:** Like the medium shot, it is used to identify the subject and action taking place, only from a closer position, about three to six feet.
   - □ **Extreme close-up:** Shows important aspects of the subject's job in detail. Shoot as close as possible to the subject.
   - □ **High and low angles:** The key to a successful picture page is varying the shooting angle. The difference of angles creates interest and can lend power and strength to the subject if a low angle is used, or can indicate subject inferiority if a high angle is used.
   - □ **Horizontal and vertical formats:** The different formats are essential when designing a layout; it adds variety.

3. **Take more photographs than needed.** Sometimes lucky shots are the best. Subject movement and technical miscalculation may ruin a planned shot.

4. **Record cutline information**. For every person in the picture, get the first and last name, rank, unit, location, date and what they are doing in the picture. The cutline info can be embedded in the "File Info" if you are using Photoshop, otherwise attach it in a word document or the email sending the photos.

5. **ACO Policy on Editing and Alteration –** Alteration of digital imagery, beyond what can normally be done in a darkroom is prohibited. Do not digitally alter photographs that are being submitted to PAO in any way.

6. **Work with your local PAO to determine resolution and image size requirements.** Generally, a high quality or raw .jpg file (1-2 MB overall size) will work. Photos should be small enough to email.

Annex 7-J Family Members and Media Interviews

Military families often become the centre of news media attention. Because of this, family members should know these concepts when dealing with the press.

Service members and their families sometimes don't realise they can be the best (sometimes the only) sources of information for news stories. Their individual stories are often the best way to tell the military's story, good or bad. Family members should keep the following guidelines in mind when interacting with media:

- You have the right to say NO to an interview request. Some reporters have coerced family members into submitting to an interview by emphasising the public's "right to know" and "freedom of the press," but your right to privacy always takes precedence.

- It is NOT harassment if a journalist calls your home or stops you at the supermarket to ask for an interview. It IS harassment to infringe on your privacy or persist after being told "no. "

- Your home is your property. No one, reporter or otherwise, has a "right" to enter your home or property unless you grant them that privilege.

- If you decide to talk with the media, establish ground rules before the interview. Prior understandings are for your protection, and responsible, professional reporters will respect these.

- Know with whom you are talking. Before answering questions, get the reporter's name, organisation and phone number - especially if you are going to decline the request. Your caution will discourage the reporter from persisting.

- When you agree to an interview, remember that you give away some of your privacy. Always keep in mind the family's best interest when dealing with the news media.

- If you consent to an interview, you may not want your full name to be used. You should always ensure that your address is not used. Television pictures of your house are not a good idea. Explain to reporters that your wish to maintain privacy at your home will help protect your family from harassment by a wide range of people who could learn through press coverage where the family lives.

- Appearing on television or being written about in the newspaper could identify you as a target for unscrupulous salesmen, crank calls, or crime. Be especially cautious if your phone listing includes your spouse's rank and your address.

- Know who will hear you. Family members often have information that would be useful to an enemy. Make sure they understand adversaries also watch television and read newspapers for intelligence purposes.

- Know your limits. Talk only about what you know firsthand. It's okay to answer with "I don't know." Never make comments or answer questions that talk about what might happen or could have happened.

- Know what to keep to yourself. If your spouse calls or writes with news about casualties, unit locations, or deployment timelines, keep such information to yourself. Deployments spawn rumours, and some of what you might hear could be wrong, sensitive, or subject to change.

- If you desire, contact your PAO for assistance. PAOs have a working relationship with the media and can provide advice that will help protect your privacy, yet allow the news media to report the story.

Annex 7–K NATO Affiliated PA Training Opportunities

The following are Public Affairs training opportunities run by NATO's ACT or as partnership programs with other nations. Updates to this course list and detailed information may be found on the ACT website http://www.act.nato.int/content.asp?pageid=1255.

Canada's Defence Public Affairs Learning Centre (DPALC)

Canada runs a NATO version of its Defence Public Affairs. This two-week course is recommended for NATO military and civilian students who are designated for, or serving in, PA positions and require basic media and communications skills. In addition, Canada accepts up to four NATO or PfP students for attendance on its Basic PA Course which runs a bit over six months.

Germany's Bundeswehr Academy for Information and Communication (AIK)

Germany offers a two-week international PA course in English at the academy once a year, and has accepted many foreign students. They offer intensive communication training, including presentation and media skills.

Hungary's Basic NATO PA Course

Hungary offers an annual two-week basic public affairs course in English (typically around May), available for NATO and PfP students. This course has been validated against NATO standards. It is recommended for military and civilian students designated for, or serving in, PA positions who require basic media and communication skills.

United Kingdom's Defence Media Operations Centre (DMOC)

The UK's five day Foundation Media Course is typically held 11 times per year and accepts two non-UK students per serial with more on a case-by-case basis. A combination of both the Foundation and Advanced courses is recommended for NATO students who require basic media and communications skills, particularly junior officers designated for NATO operations. In 2010, the Defence Media Operations Centre will be based at RAF Halton. (http://www.defencemediaops.co.uk/Home.html) All scheduled courses, primarily the Foundation Media Course and the Advanced Media Course will be run from RAF Halton from January 2010, starting with FMC 01/10 and AMC 01/10.

United States' Defense Information School (DINFOS)

The United States offers its Public Affairs Qualification Course (PAQC) entry-level PA training for selected foreign nations. The course lasts 43 training days and includes a distance learning package. It is recommended for NATO military officers who are designated for or serving in PA positions and require comprehensive media and communications skills. (http://www.dinfos.dma.mil/index.asp).

Swiss PfP Communications Course

The Swiss PfP Communications Course Basic Level is held annually in March and typically accepts 20 –22 students from many nations, including NATO, PfP, Mediterranean Dialogue (MD), Istanbul Cooperation Initiative (ICI) countries. It lasts seven training days, and is recommended for NATO military and civilian students who are designated for, or serving in, PA positions and require basic media and communications skills. The Swiss have designated five seats for ACT nominees.

Chapter 8

Public Affairs in Exercises

"Train as we fight!"

Exercises are an important tool through which the Alliance tests and validates its concepts, procedures, systems, and tactics. Exercises also build interoperability and contribute to defence reform.

- NATO Website

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8.1 General.

a. NATO conducts more than a hundred exercises and training events of varying sizes every year. These exercises provide opportunities to train personnel at all levels in how to respond to media and ensure that NATO's missions are presented fairly. They also provide excellent opportunities to showcase NATO's capabilities and objectives. There are two distinct areas of PA activity relating to exercises: the real world requirement and the exercise requirement.

b. This chapter should be read in conjunction with Bi-SC Exercise Directive (ED) 75-3, and serve as an in-depth ACO PA reference on PA role in exercises.

8.2. Public Affairs Approach – Real World

a. The real world PA approach chosen for an exercise must be selected in accordance with the guidance provided in the Alliance's current military PA policy, MC 0457/1, and must be consistent with the policies of the Host Nation, participating nations, operational security and the privacy of the personnel involved. This might vary from Reactive to Very Active depending on an assessment of the factors listed below. The appropriate level of real life PA activity and any exercise specific PA objectives will be determined by the Office Scheduling the Exercise (OSE) during drafting of the Exercise Specification (EXSPEC). Primary responsibility for real world PA activity rests with the PAO of the Office Conducting the Exercise (OCE).

b. Working with the Host nation, exercise related real life PA goals and objectives must also ensure that:

- Timely and accurate information is made available so that the public understand the facts and issues associated with the exercise; and

- Community Relations activities sensitise the local population in the exercise area to the temporary increase in activity during the exercise and seek to minimise any negative impact that might arise as a result.

c. Each exercise should be assessed by a PA practitioner in the OSE against standard PA criteria and the following additional factors:

- The Vienna Document, brokered under the auspices of the Organisation for Security and Cooperation in Europe, requires signatories to provide advance notification of some types of live exercises. As most NATO nations are signatories, there are implications for exercise planning. If there is a notification requirement, the PA syndicate must avoid pre-empting the formal notification process with a NATO media release.

- The level of PA effort should be measured against the return on investment. Is the desire to keep the public informed of the important role of the exercise commensurate with the anticipated public/media interest?

- Political and public sensitivities; (chemical, biological, radiological, nuclear [CBRN] weapons, Counter Terrorism, Civil-Military Co-operation [CIMIC] etc);

- Security requirements;

- The visibility of the exercise. Is the public or media likely to become aware of the exercise even if a Reactive Approach is adopted?

d. If real media interest is anticipated, a decision regarding execution and resourcing of the real world PA plan should be taken at the MPC by the PA syndicate. Where the training audience (TA) is not able to meet the real world requirement the OCE HQ PA staff are to take the lead. Any augmentation requirements should be determined at the Main Planning Conference and augmentation requests initiated.

e. Even if a real world Reactive PA approach is adopted, the PA Annex to the EXPLAN (Annex L) must include responses to potential questions and agreed media lines.

8.3 Public Affairs Activity in Exercises. PA exercise activities must be developed in the context of the wider exercise scenario. In general, PA activity should be a consequence of activities and storylines developed to drive events in the exercise situation. Media injects should not be used to drive the scenario or inform the TA about events in a way that encourages them to believe that media reports are necessarily accurate or a basis for military decision making.

8.4 Exercise Planning.

a. In order to add value to the exercise planning process, NATO Military PAOs must understand the exercise planning terms and the system for programming/planning exercises described in MC 0458/1 and ED 75-3. Both provide the strategic direction for the entire process of exercise planning from concept through to execution and analysis.

b. NATO Military PA offices should maintain a planning calendar that includes all planned exercises with PA timelines and milestones.

c. A PA Syndicate must be established at all Planning Conferences. The syndicate should, if possible, comprise representatives from PA elements of all major headquarters participating in the exercise (NATO, national, and ACO military), the chief of the exercise NATO Media Information Centre (NMIC) and the Host Nation. The syndicate is also responsible for ensuring that the overall exercise PA objectives are integrated into overall exercise planning from the outset of the planning process to exercise execution.

d. Public Affairs planning for an exercise should normally start at the early stages of exercise planning and should cover the following subjects:

- During the Concept and Specification Development Stage the PA approach and objectives are developed. They are included in the EXSPEC to facilitate the conduct of future PA events in terms of manning and funding;

- During the Planning and Product Development Stage, the PA syndicate must ensure that the EXSPEC contains appropriate objective(s) in the list of primary exercise objectives. This is important to ensure that the PA function is exercised;

- The PA syndicate will produce the EXPLAN PA Annex (Annex L). The Annex L (template at Annex 8-A) follows the STANAG 2014 standard five paragraph format. Possible PA Outputs are listed at Annex 3-L. While not exhaustive, the list gives exercise planners some ideas to incorporate into their PA plan.

- To add further realism to the exercise play Simulated Press may be

provided by JWC or other organisations within the NATO command structure, depending on their capabilities (e.g. NATO HQ PDD for CXMs). The PA syndicate is to determine the Simulated Press requirements in terms of strength, composition and supported HQs; if applicable.

- If an Initial Exercise News Release (IENR) is required it shall be submitted to the OSE for approval. Supporting information may be required especially where the exercise is thought likely to attract media attention or be controversial.

- Depending on the nature of the exercise PA planners might be involved in MEL/MIL development and during the execution they could be asked to assume an EXCON role such as HICON (simulating SHAPE or NATO HQ) or Observer Trainers.

8.5. Live Exercise Considerations.

a. Live exercises (LIVEX), with their inherent troop deployments/ movements, are the most visible exercises, usually with high public and media interest. In most cases this will necessitate a Very Active PA approach to be applied.

b. Exercises with sensitive environmental issues or in sensitive environmental areas (maritime and amphibious exercises in particular), will require careful planning and considerable thought and research must be put into developing Q&A regarding the likely issues.

c. Land exercises, by their very nature, frequently require public announcements sooner than naval or air exercises. The necessity for concentration of major formations in advance of the exercise, movements of forces by rail or road, warnings to local populations, and the possible negotiations for use of land, makes it evident that an exercise is to be held. Since there is no particular security advantage in withholding this information, such exercises require advance community relations activity.

d. Air exercise PA planning should be determined primarily by the nature of the individual exercise. Increased takeoffs and landings, disruption of civilian flights and low-level flying will generate public interest and other concerns. PA arrangements should include coordination prior to the exercise with the appropriate national and international PA authorities, and should include engagement with communities likely to be affected.

8.6. Command Post Exercises. By their nature, CPXs have a low visibility. Therefore an Active or Reactive PA approach is likely to be more appropriate, unless events such as involvement of civilian authorities/agencies/non-governmental organisations (NGOs etc), use of civil or new military infrastructure, deployment of command post and signal units, are involved.

8.7 Other Planning Considerations. The following planning considerations should be taken into account:

a. Countering Weapons of Mass Destruction (WMD):

- When chemical, biological, radiological, nuclear (CBRN) or theatre missile defence (TMD) capabilities are being exercised a clear distinction should be made between whether the exercise is a LIVEX or CPX;

- It is almost impossible to hide CBRN defensive training. It should be presented as a normal exercise activity;

- Should these exercises include simulation of enemy explosions or chemical attacks, photographic coverage may be permitted. It should be stressed that the devices used are intended for simulation only;

- CPX incorporating CBRN events are ideal for training PA personnel from the training audience in handling this very sensitive topic. As a general rule, the exercise news release should abide by the sensitivity of the subject and, more specifically, only address hostile WMD use after coordination and with the authorisation of the “victim” nation; and

- Planners should ensure that guidance is sought on all likely areas of media interest to ensure the NMIC staff is fully briefed on Alliance PA and Host Nation policy concerning WMD, TMD and CBRN issues.

b. CIMIC Activities:

- A clear distinction should be made between LIVEX and CPX;

- Exercising CIMIC is an excellent vehicle to demonstrate defence preparedness, co-operation and Host-Nation support. Specific PA objectives and plans should be devised and coordinated to emphasise this aspect of an exercise; and

- It is worth remembering that some aspects of CIMIC are less palatable (evacuation, requisition, mass burials). The possible negative implications of those aspects should be carefully considered by exercise planners and coordinated with the Host Nation.

8.8. Release of Information Concerning NATO Exercises.

a. The OCE PA staff, in consultation with the Host Nation, should make a recommendation on the requirement for an Initial Exercise News Release (IENR) in line with the set PA approach. Factors including the exercise intent, size, scale, scope, geographic location, nations participating and political and cultural sensitivities as well as former experiences should all be taken into account. If there is a question of considerations or sensitivities listed above, then the OSE should seek guidance from higher HQs. If NATO Military Committee (MC) approval is likely to be required for an IENR, then it must be staffed through the chain of command and the PA technical network. The proposed IENR must be therefore submitted to SHAPE PAO at least six weeks before the intended publishing date to allow sufficient time for staffing through to the IMS PAA and the MC. All supporting PA products

contained in Annex L to the EXPLAN (e.g. media lines/responses to query, fact sheets/backgrounders, etc) shall be forwarded through the OSE PAO (or higher HQ PAO) for review and to support IENR approval.

b. The OCE PAO retains responsibility for real world PA support to the exercise throughout and is encouraged to issue news releases and communiqués describing the progress of an exercise in accordance with the OSE approved PA approach. If the scope of the exercise is limited, it may be considered desirable to make a summary release after the exercise, or to issue the IENR only. Information copies of all news releases and communiqués issued during the exercise are to be forwarded promptly to the higher HQ PAO responsible for monitoring exercise PA activity. Copies of all news releases and communiqués should be included in the exercise public affairs assessment which will be used to inform the Final Exercise Report.

c. PA planners are to ensure that the NMOC has an emergency response plan available for dealing with accidents and casualties. The release of casualty information policy outlined in Annex B, ACO Policy for the Release of Information also applies for NATO exercises and should be addressed in the Annex L.

8.9 Security. Each exercise requires a deliberate public affairs assessment to identify specific information to be released. PA planners must practice appropriate operational security, ensuring exercise related information that might be detrimental to the security interests of any member nation, participating nation or the Alliance as a whole, will not be disclosed to the media. PA activities must be conducted IAW NATO and national security policies and the privacy of forces and personnel involved.

8.10. NATO Media Operation Centres - Real World Support to an Exercise.

a. As long as the PA approach and the type of exercise require it, the OCE is responsible for establishing the NMOC in co-ordination with the Host Nation. It should be located as near to the centre of exercise activity as practicable, must be easily accessible to media representatives and at a location from where media will be able to file their stories in a timely manner. The NMOC is to provide the media with timely, truthful and accurate information on exercise issues, events and activities and to provide other support, advice and assistance as necessary.

b. The NMOC tasks and functions are described in Annex 4-A.

c. NMOCs will not normally be collocated with visitor or protocol centres, nor should NMOC staff members be assigned protocol or other duties involving visitors other than media. The NMOC, will, however, need to maintain close liaison with the Visitors and Observers Bureau (VOB) since distinguished visitors to the exercise may generate media attention.

d. Visit programs for observers and VIPs should not interfere or intersect with visit plans for media and vice versa. There should be no interference with the plans for observers, but plans for the latter should be coordinated with plans for media representatives.

8.11 Invitations to Media - Real World PA Support to an Exercise.

a. The OCE or Host Nation must plan for and provide facilities for media.

b. If the decision is made to invite media to NATO exercises, invitations must be accompanied by sufficient information about the exercise to stimulate interest.

c. Where it is necessary to issue invitations to media in advance of the IENR, this informal invitation should also stipulate that details of the exercise, except as already announced in annual calendars, are embargoed until the publication of the IENR.

8.12. Registration/Accreditation of Media Representatives - Real World PA Support to an Exercise.

a. The NMOC Chief, will register media by maintaining a list of visiting correspondents and their affiliations. Formal registration shall be done in order to facilitate control within, or access to, certain exercise areas, or to obtain information required to arrange transport/ accommodations for correspondents. ACO Form 19, Media Registration Form shall be used.

b. Formally registered media representatives will be issued an ACO Media Identification Card, ACO Form 43.

Annex 8-A *Annex L to EXPLAN - Format*

ANNEX L TO
EXPLAN ……
DATED …..

PUBLIC AFFAIRS

References:

A. MC 0457/1 “NATO Military Policy on Public Affairs” dated 18 September 2007

B. MC 458/1 “NATO Education, training, Exercises and Evaluation Policy” dated 27 March 2006

C. ACO 95-1 “ACO Public Affairs Directive” dated March 2008

D. ACO Handbook 2008 dated May 2008 Rev 1

REAL WORLD

1. SITUATION

   a. General

   b. Media Trends

   c. Assumptions

2. MISSION

3. EXECUTION

   a. PA Approach

   b. Concept of Operations

   c. PA Objectives

      (1) External
      (2) Internal

   d. PA Organisation (see Appendix 1)

   e. Audiences

      (1) External Audiences

      (2) Internal Audiences (NATO wide)

   f. Initial Exercise News Release (IENR) (see Appendix 2)

g. Master Messages/Responses to Query (see Appendix 3)

h. Other PA Products (e.g. Fact Sheets/Backgrounders)(see Appendix 4)

i. Planned Media Activities

j. Tasks

k. Coordinating Instructions

(1) (List any requirements from key organisations)

(2) Release of Information

(3) Media Registration

(4) Imagery Support

(5) Procedures for Reporting of Casualties/Accidents/Incidents

4. SERVICE SUPPORT

a. Facilities

b. Equipment

5. COMMAND AND SIGNAL

a. Points of Contact

b. Signals

APPENDICES

(List as appropriate)

Appendix 1 – PA Organisation for real world and exercise play

Appendix 2 – Initial Exercise News Release

Appendix 3 – Master Messages/Responses to Query

Appendix 4 – Other PA Products (examples include fact sheets, backgrounders, imagery)

Appendix 5 – Templates (Media badges, PA SITREP form)

Annex 8-B Public Affairs Fact Sheet for Exercises - Format

APPENDIX 4 TO

ANNEX L TO
…… EXPLAN PART 1
DATED ……..

PUBLIC AFFAIRS FACT SHEET
for
EXERCISE …….
(template)

A. EXERCISE BASIC DATA

NICKNAME:

FORM/TYPE: E.G. CPX, LIVEX, SYNEX, CAX etc

EXECUTION DATES:

LOCATION: (Geographical)

PARTICIPATING HQs, NATIONS:

TROOPS NUMBERS, MAJOR ASSETS: (provide details by nation)

B. CONCEPT AND SCALE OF THE EXERCISE

Provide a brief overview of the exercise scenario (not more than two paragraphs). When did planning begin? When and where did the IPC, MPC and FPC take place? When was the location agreed? Was the exercise open to PfP, ICI, Med Dialogue, etc? Is it linked to other exercises?

C. OTHER PLANNING CONSIDERATIONS

1 Live Firing Exercises (time, location, weapon/ammunition used).
2 Involvement of civilian authorities/agencies/non-governmental organisations (NGOs etc).
3 Use of civil or new military infrastructure.
4 Deployment of command post and signal units.
5 Weapons of Mass Destruction (WMD); Chemical, Biological, Radiological, Nuclear (CBRN) or Theatre Missile Defence (TMD) capabilities involvement or exercises.
6 If there are political sensitivities, what are they?

D. CONTACT DETAILS:

OSE OPR and PAO (phone and email)

OCE OPR and PAO (phone and email)

CHAPTER 9

Imagery

. . . modern wars are won on television screens and Internet websites. These are the battlefields that really matter, the arenas that frame the war and the scoreboards that determine the losers and the winners.

Gabriel Weimann
Author, "Hezbollah Dot Com"

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9.1 Introduction. Photo and video imagery are vital tools to enable NATO to tell its story effectively. Striking images and video can be transmitted to news media, used on NATO websites, member nation websites, and in exhibits, print publications, social media sites and in DVD productions. Therefore all PA plans and activities shall include imagery as one of the key deliverables.

9.2 Use of Social Media Sites. The creation of photostreams on other web sites (e.g. Flickr, Smugmug, Facebook, etc.) is permitted but content should be managed as part of the overall PA effort. Despite the increased use of social networking sites and online imagery sites mainstream media still provides the most effective channel to reach a mass audience and as such making imagery available via mainstream media should be given priority. This chapter should be read in conjunction with Chapter 10: Social Media and Internet-based Communications as imagery is integral to good Command websites.

9.3 ACO Imagery use by Conventional Media. Media organisations will generally want to use images generated by their own or independent sources however they will use military photographers' material when images are unique or compelling. Where an image or series of images support a media release they should be offered

to the media before being used on other channels. Such images should be offered via the primary ACO distribution channel which is the Digital Video and Imagery Distribution System (DVIDS). Based on operational intent, it may be appropriate to delay uploading of the same images to social media sites by 48 hours to allow mainstream media a period of exclusivity.

9.4. DVIDS. DVIDS is a 24/7 operation that provides a timely, accurate and reliable connection between the media around the world and the military. The service is provided free to NATO through a contract maintained by the U.S. Army. Due to the existing relationship between this contractor and U.S. Public Affairs, this capability has been adopted by ACO as the primary tool to provide imagery to both the media and the public.

DVIDS operates a distribution hub in Atlanta, Georgia making available, to the media, real-time broadcast-quality video, still images and print products as well as immediate interview opportunities with service members, commanders and subject matter experts.

An ACO structure has been established in DVIDS with sites for SHAPE and the JFC HQ's. Larger missions may also have sub sites created. Each site must have a designated administrator, nominated through SHAPE Internet Communications office. CPAO's should ensure that their staff and PAO offices from their subordinate units/supported missions register as contributors on the most appropriate site and upload press releases, photo stories and good quality "b" roll. Further advice is available from SHAPE PAO.

DVIDS provides that following benefits to deployed PAOs:

- Facilitates remote interviews with commanders and subject matter experts engaged in fast-breaking news.
- Promotes products posted on its site to hundreds of media outlets.
- Links media to deployed military units.
- Enables embedded journalists to transmit broadcast quality video from the field.
- Provides reporting features allowing units and contributors to identify when and by whom their material has been used.
- Fulfils requests for products quickly via satellite, fibre and the Internet.
- Submits daily bulletins detailing archive additions and email alerts about breaking news.
- Coordinates holiday greetings, "shout-outs" and special events programming involving soldiers, sailors, airmen and Marines deployed to Operations Iraqi and Enduring Freedom.
- Maintains a searchable archive of video, photo and print products.

A brief primer and basic contact information for DVIDS can be found at Annex 9-E.

9.5 Imagery Standards. Annexes 9-A, 9-B and 9-C respectively describe the standards to be applied to still photos and some helpful tips on taking good photographs, writing photo captions and cutlines . Annexes 9-D and 9-E describe

the standards for video products and use of the DVIDS capability. Finally, Annex 9-F covers the use and production of 'hometowners'.

9.6 Technical Requirements. ACO imagery/photo technicians participating in deployed operations must have access to a transmission capability (internet connection, satellite modem, mobile phone or PDA) in order to transmit time sensitive imagery.

9.7 Imagery and Privacy.

a. In general, photographing or filming an event should not present any problems. However, recent court cases in some member nations may have created precedents about photographs being published in newspapers without the consent of the people depicted in these pictures. In developing countries, people may ask to be paid for having their picture taken. As a rule of thumb, ask permission before publishing pictures.

b. NATO personnel performing their regular tasks should reasonably expect that NATO PA/imagery staff will take their picture, i.e. people on parade, unless the circumstances support that an expectation of privacy is present e.g. in a hospital or at a private event such as a funeral or wedding. If possible and if safe to do so, explain in advance what you are doing and have the subject sign a photo release form.

9.8 Image Editing and Alteration. In order to uphold the credibility of Allied Command Operations, ACO Public Affairs imagery must accurately depict real life situations. Alteration of content or misrepresentation of events alters that accuracy and will inevitably lead to an erosion of trust in and credibility of the organisation.

Technology offers the ability and temptation to alter photographs with relative ease. Some alteration (i.e. touching up the photo, colour balancing, etc.) is certainly authorised, but altering the content or editing the photo to change the meaning is most certainly not. The following are the ACO general guidelines and limits for imagery editing.

- Ethics and guidelines used for creating and working with standard photography will be the same for digital imagery. Enhancing the *technical* quality of a photograph is acceptable, but changing the *meaning* is not.
- The changing, altering or manipulating the content of a photo (e.g. changing the positions and appearance of people and objects) or alteration that misleads or misrepresents its accuracy is not authorised for public release.
- Copyrighted materials cannot be altered without written permission of the copyright holder (generally the creator or source of the original photo).

Authorised

- Electronic equivalents of established practices for traditional darkroom printing methods (e.g. dodging, burning, toning, and cropping) as long as the content and meaning aren't changed.
- Colour and tonal correction to ensure accurate reproduction of the original image.
- Technical touch–up of images for the purpose of colour–balancing or removal of flaws (such as dust spots, scratches, digital noise, artefacts, etc.) to achieve better reproduction. Such changes will be considered to be insubstantial.
- The use of cropping, editing, or enlargement to selectively isolate, link, or display a portion of a photographic or video image is not considered alteration. However, cropping, editing, or image enlargement that has the effect of misrepresenting the facts or circumstances of the event or object as originally recorded constitutes a prohibited alteration.
- Conversion of a colour image to black and white.
- The obvious masking of portions of a photographic image in support of specific security and criminal investigation requirements is authorised.

Not authorised for public release

- Altering the content of an image (e.g. moving, adding, deleting, combining, stretching, flipping, shrinking, etc.)
- Misrepresenting a staged or manufactured scene as an actual event.

Photo Illustrations

Photo illustrations differ from news photos in content, creation, and purpose. They are staged or produced, and are manufactured situations. When an existing photograph is altered for artistic purposes, such as by adding or deleting content, it also is considered a photo illustration.

- When publishing a photo illustration, it should be made clear to readers that the image does not represent a real situation. In all cases, photo illustrations should be labelled as such. Any permitted alteration changing the original content of an image must be labelled as a "photo illustration." The credit line should read: "Photo illustration; original photo by XXX." Artistic use of images, as in a collage, is permitted.

9.9 Imagery Terms.

Abbreviations and / or Acronyms

ACOIS	Allied Command Operations Imagery Section
CODEC	A codec is a device or program capable of performing encoding and decoding on a digital data stream or signal. Codecs encode a video stream or signal for transmission, storage or encryption and decode it for viewing or editing.

COMCAM	Combat Camera
FFT	Fast File Transfer
FTP	File Transfer Protocol
IPTC	International Press Telecommunications Council
JPEG	Joint Photographic Experts Group
MOPIC	Motion Picture
MPEG	Moving Pictures Expert Group
SFTP	Secure File Transfer Protocol
TIFF	Tagged Image File Format
VI	Visual Information
VIRIN	Visual Information Record Identification Number
CU	Close Up
ES	Establishing Shot
ECU	Extreme Close Up
LS	Long Shot
MS	Medium Shot

ACO COMCAM Imagery - COMCAM imagery recorded in the NATO multi-national environment.

Allied Command Operations Imagery Section (ACOIS) - The central reception and distribution point for NATO ACO Imagery. Operated and maintained by the Public Affairs Office, Supreme Headquarters Allied Powers Europe.

Caption Data - Short explanatory or descriptive data accompanying imagery. Caption data records include shot sheets/lists, camera operator's notes in either paper or machine-readable form, and, in digital still images, embedded International Press Telecommunications Council (IPTC) header captions.

Combat Camera (COMCAM) Imagery - Still and motion imagery of military operations acquired by COMCAM forces, regardless of the medium in which the images are acquired, transmitted, or displayed.

Cover Story - A story accompanying imagery which describes the event, operation, action, or activity that the imagery depicts and puts the imagery in a context that the viewer can understand.

Imagery - A visual representation of a person, place, or thing recorded and stored in any format on a physical medium.

IPTC Headers - Caption data that is embedded into a digital still image as part of the image file, and conforms to the standard developed by the International Press Telecommunications Council.

Scene - All the shots that record a unit of continuous related action(s) but which may include changes in camera angles, camera field of view, pans, or zooms. There is a change of scene when there is a jump to either an unrelated subject or series of action(s) or events, or a change in the geographic location of the subject(s). Thus, imagery of visiting dignitaries that showed them descending from the aircraft,

meeting with the commanding officer in his office, and reviewing troops on the parade ground would all constitute separate scenes.

Sequence - A series of shots that record a unit of continuous related action(s) in which there is no change in subject matter or geographical location of the subject(s). A sequence can contain shots in which the camera operator changes camera angle, camera field of view, or there is a constant change preceded and succeeded by a shot or sequence of shots that are discontinuous (as in a pan, zoom out, or zoom in).

Shot - A single segment of motion media that typically can be identified as a close up (CU), medium shot (MS), long shot (LS), or establishing shot (ES), etc. A shot is a single element which when combined with additional shots makes up a sequence.

Still Images - Visual representations or images that are recorded or rendered on a two-dimensional surface or screen by chemical, electronic, or artistic means. Still images fall into three categories:

Still Photographs - Chemically based images recorded in a camera as either photographic negatives or colour transparencies.

- **Still Digital Images** - Electronically based images that are recorded (either as camera originals in a digital camera or as copies from an analogue photographic or image medium) and stored as machine-readable digital files. They include digital still videos, digital images, digital scans of photographs, and digital frame-grabs of motion video or television broadcasts.

- **Graphic Art** - Relating to the design, creation, and preparation of two and three-dimensional visual aid products. Includes charts, graphs, posters, and visual materials for brochures, covers, television, motion pictures, printed publications, displays, presentations, and exhibits prepared manually, by machine, or by computer.

VI Material - Any still and motion film, videotape, disk, or other media that contains visual information. This includes the original, intermediate, master, and any duplicate, print, reference, or dub copy.

VI Media - Any films, videotapes, discs, or other physical objects that contain or are capable of containing visual information.

VIRIN - Visual Information Record Identification Number. An alphanumeric designator assigned to a VI record other than a VI production. The life cycle number under which VI records are managed. For the format of the VIRIN, see Enclosure 1.

Visual Information (VI) - Information in the form of visual or pictorial representations of person(s), place(s), and/or thing(s), either with or without sound. VI includes still photographs, digital still images, motion pictures, analogue and digital video recordings, and hand- or computer-generated graphic arts and animations that depict real or imaginary person(s), place(s), and/or thing(s), and related captions, overlays, and intellectual control data.

Annex 9-A ACO Still Photo Guidelines

Preparing Still Imagery for Submission

Using the established procedures for your particular camera make and model, prior to shooting ensure the camera is set to the highest resolution available preferably a camera raw format (RAW, NEF, CRW) or Adobe DNG**,** and that the date, time and time zone are correctly set. Once imagery has been recorded, download and save the digital files to a local computer.
Regardless whether filming in JPG or a raw format, rename the pictures according to the guidelines below and fill in the IPTC content.
If using a raw format, open the files in Photoshop and edit the photographs (colour, cropping, etc.) and save as JPG with the following settings:

- File Format - JPEG
- Quality - Level 12
- Format Options - Baseline ("Standard")
- Filename - Use a VIRIN for the file name. Make sure the VIRIN used for the filename matches the VIRIN used in the file. See the instructions below for how to create a VIRIN.

If recorded as a JPG: Do not perform any colour corrections. Do not change the file size, the image size, or the resolution. Do not crop the images.

Filling Out IPTC Content

The **International Press Telecommunications Council** is a consortium of the world's major news agencies and news industry vendors. It develops and maintains technical standards for improved news exchange that are used by virtually every major news organisation in the world.

Since the late 1970s IPTC's activities have primarily focused on developing and publishing industry standards for the exchange of news data. In particular, the IPTC defined a set of standards necessary to link the text information describing an image and embedding that information into the digital image file itself.

NATO Imagery Staff are required to add IPTC metadata to all of their image files. This ensures that all NATO imagery can be used accurately by the media and internally within NATO organisations. Images are to be ‘captioned’ using a standard template that ensures industry compliance across this diverse network and allows quick retrieval and identification, regardless of the system they are stored on.

Users can use any software for captioning their images but software such as Adobe Photoshop and Photo Mechanic support the metadata template and are recommended for use.

Alternative examples of commercially available IPTC compliant software are MediaGrid, iView Media Pro, Fotostation and Extensis Portfolio. If imagery staff

chooses an alternative software program they are to ensure that compliance with the IPTC template is still maintained.

Creating a VIRIN

VIRINs uniquely identify every image shot by military photographers by using four pieces of information:

- The date the image was shot;
- The nationality and service of the photographer;
- Identification of the photographer;
- A sequence number;

Here is an example: 071106-GBRA-8540B-001.

The components of the VIRIN are:

- 071106 - Date the image was shot (in YYMMDD format)
- GBRA - Photographer's nationality (using standard NATO three letter nationality abbreviations) and branch of service (Use A-Army, F-Air Force, M-Marine, N-Navy, G-Coast Guard)
- 8540 - Last four digits of the photographer's military ID number or Social Security Number
- B - First letter of the photographer's last (family) name
- 001 - Sequence number for that day (sequence numbers start at 001 each day, not each shoot)

The same VIRIN should be used both in the IPTC header (captioning/metadata area of the image) and as the name of the file.

Caption Content

The caption block should contain only two items: the caption and the credit line.

When constructing a caption:

- Include the full name, rank, and title of the person or persons featured in the photo. Include the full name and model number of all featured equipment, vehicles, aircraft, or ships.

  Note: Some nations do not permit the release of personal details where this is the case this detail will have to be omitted – substitute generic information e.g. “a soldier from the XXX army”.

- Clearly identify the activity being documented. Include the date and place the image was shot.

- Briefly explain the purpose of the event, exercise or operation. Why the documented action is happening and/or why it is significant

- Use acronyms sparingly. Do not use an acronym for a term appearing only one time within the caption. Be certain to define the acronym the first time it is used. This includes military units. For example, do not use "1 PARA"; use "1st Battalion, The Parachute Regiment".

- Before you cut and paste text from word processing programs into either Photoshop or PhotoMechanic, turn off the "smart quote" function within the word processing program. This will prevent the appearance of odd characters in the text when a Web browser presents the caption.

When constructing a credit line:

- Include the rank, full name of the photographer, nationality (using NATO standard 3 letter country abbreviations) and service as well as the release status of the image.

Releasing Images

Images that are not released should not be transmitted or stored in a (public) archive. However If there is a need to include release data or a line “Not (yet) Released”, this is a function of the Instructions IPTC header. A line ‘Not Released’ or a line saying ‘Released by:’ (followed by name, rank, unit and contact information) could be included in the *instructions* but release information if applicable should be included in the property release header. Since the property release header is not a standard function however and not accessible through either Photoshop or Photo Mechanic release information should only be included in unique situations where the photo is distributed without being released. If released by NATO, SHAPE or another nation, there is no need to include release data beyond the source and credit information. If it is cleared for internal use only this could be included in the instructions header but such imagery should not be distributed on a public network. IPTC data is a function primarily used by professionals only, and ANY information distributed through it, including release and copyright information will probably not be picked up by the average user.

Examples of properly constructed captions and credit lines:

U.S. Navy Air Traffic Controller 2nd Class Esther R. Hines plots ship coordinates in the amphibious air traffic control centre aboard USS Iwo Jima (LHD 7) May 2, 2006. Iwo Jima is conducting an expeditionary strike group exercise in preparation for an upcoming deployment.

Credit: U.S. Navy photo by Photographer's Mate Airman Joshua T. Rodriguez

(Released)

Or

Iraqi army soldiers salute as they graduate from basic training during a ceremony at the regional training centre on Camp Habbaniyah, Iraq, April 30, 2006. The soldiers are part of the first all-Sunni class to graduate.

Photographer: Gunnery Sergeant Sean D. McCullough USA M

(Released)

Keywords and Keywording

Keywords are key ideas/concepts expressed as words.

Keywording is the practice of selecting the most appropriate keywords to describe an object, image, or work.

The Function of Keywords

When researchers submit research papers for publication in a journal, the paper's abstract is typically preceded by a set of keywords. Generating these keywords is fairly simple as the work is usually focused and has a point of view (generally to prove or disprove a hypothesis).

When writing keywords, keep in mind the following:

- In larger online systems, the captions are fully searchable as well, so don't create keywords for every word in the caption, stick to what's important.
- Use plural spelling only, unless the spelling is different than just adding an *'s'.* For example, just using '*cats'* is sufficient, but if you use *'babies'* also include *'baby'.*
- Use gerunds not verbs. For example, use *'running'*, not *'run'.*
- Do not capitalise unless it's the name of a place or a proper noun (most search functions/search engines are NOT case sensitive, but this makes for easier reading).
- List alternative spellings for international audiences (colour / colour, gray / grey, etc.).
- In order to copy and paste into the keyword field in Photoshop CS, use a comma and then a space between each term. For example: xxxx, xxx xxxx, xxxxx, term, word phrase, two word phrase, etc. You can also separate terms using a semi-colon or even a hard carriage return.

- Limit keywords to those that express or describe the visual content of the image. Do keyword thoroughly, but be judicious. Keywords for minor details, such as those out of focus or in the distance, should not be included.

- Apply keywords consistently. If *'windsurfing'* should alternatively be keyworded as *'wind surfing'*, then ALL of your windsurfing / wind surfing images should contain both versions of the word.

- Do not apply human attributes and emotions to images of animals. For example, *'love'*, *'smiling'* and *'happy'* are fine if they are used with images of humans, but *'smiling dog'* is likely to confuse a researcher.

NAA/IPTC Header Codes

1. Descriptive Metadata

- **Headline**: A brief summary of the contents of the image. The headline term should not be confused with the image title.

- **Description/Caption**: Prose to comprehensively describe the who, what, when, where and why of the image.

- **Keywords**: Keywords to express the subject of the content in free text. Keywords should include no new information but be used to find the images in a general search. They should include alternative spellings, genre, predominant colour, emotive keywords, etc.

- **Subject News Codes/IPTC Subject Code**: This field can be used to specify and categorise the content of a photograph by using one or more subjects as listed in the IPTC 'Subject News Code' taxonomy (available at http://www.newscodes.org/). Each subject is represented as an 8-digit numerical string in an unordered list. Only subjects from a controlled vocabulary should be used in this field; free-choice text should be entered into the Keyword field. When using the fields genre, scene, subject code and subject qualifier only use News Codes or controlled vocabulary. For the News Codes see the link above.

- **Genre:** see Subject News codes above

- **Scene: :** see Subject News codes above

- **Subject Qualifier:** see Subject News codes above

- **Category:** The category field lists codes that aid in a more detailed search. (*See below)*

- **Supplemental Categories:** The Supplemental Categories field lists codes that aid in a more detailed search for an object.

2. Administrative Metadata

- **Title**: A shorthand reference for the image or photo – primarily for identification and less formal than the unique ID. The title of an image may take several forms; for photographers, this might be the filename of their original scan or digital camera file. *Do not confuse with the title field in Photo Mechanic; this refers to the creator/author title field.*

- **Date**: Records the date (and optionally the time) when the image was taken, not the date when scanned, imported, archived or edited.

- **City**: Where the image was originally taken. Do not use the transmission point city.

- **Country**: Lists the three-letter country code where the image was originally taken.

- **State**: Lists the state/province where the image was originally taken. For the United States, use official US state abbreviations.

- **Job ID**: Identifier for the purpose of improved workflow handling. This ID should have no significance for archiving.

- **Instructions**: Any of a number of instructions from the provider or creator to the receiver of the image not covered by other explicit fields. May cover embargoes, instructions for reproduction, etc.

- **Description/Caption Writer**: Name of the person(s) involved in writing, editing or correcting the caption or other metadata of the image.

IPTC Contact Field

The IPTC contact field is an option you can use to include the data potential users might need to contact you. You should include contact details for the PA office producing the images.

Creator
This field should contain your name, or the name of the person who created the photograph. If it is not appropriate to add the name of the photographer (for example, if the identity of the photographer needs to be protected) the name of a company or organisation can also be used. Once saved, this field should not be changed by anyone. This field does not support the use of commas or semi-colons as separators.

Note: This field is 'shared' with the 'Author' field in the Description Panel of the Adobe Photoshop File Info field.

Creator's Job Title
This field should contain the job title of the photographer. Examples might include titles such as Staff Photographer, Freelance Photographer, or Independent

Commercial Photographer. Since this is a qualifier for the Creator field, the Creator field must also be filled out.

Note: This field is 'shared' with the 'Author Title' field in the Description Panel of the Adobe Photoshop File Info field (only appears in versions of Adobe products later than CS).

Address (Contact Info)
The address field is a multi-line field. Enter your organisation name and all required information to locate the building or postbox to which mail should be sent.

City (Contact Info)
Enter the name of the city in which your organisation is located.

State/Province (Contact Info)
Enter the name of the State or Province in which your organisation is located. Since the abbreviation for a State or Province may be unknown to those viewing your metadata internationally, consider using the full spelling of the name.

Postal Code (Contact Info)
Enter the local postal code (such as ZIP code) in which your organisation is located.

Country (Contact Info)
Enter the name of the country in which your organisation is located.

Phone(s) (Contact Info)
Enter your business or work telephone number here. Multiple numbers can be given; separate them with a comma. Be sure to include the complete international format of a phone number which is:
+{country code} ({regional code}) {phone number} - {extension if required} e.g. +1 (212) 1234578

Email(s) (Contact Info)
Enter your organisation or work email address. Multiple email addresses can be given; separate them with a comma.

Website(s) (Contact Info)
Enter the URL or web address for your organisation. Multiple addresses can be given; separate them with a comma.

3. Rights Metadata

- **Creator/Photographer**: This should preferably be the person who created the image. If this is not appropriate then the name of an organisation or company should be used here.

- **Creator Job Title**: The job title of the photographer, such as *'Staff Photographer'*, *'Freelance Photographer'* or *'Independent Commercial Photographer'*. *See below.*

- **Credit Line**: One or more parties to be credited for the image, shown in a single line adjacent to an image. Essentially free text, this line may follow formatting and style guides as required by law or organisation policy. Can be creator and service or service; i.e. ACO Photographic, NATO, Sgt Francois De Verre FRA A.

- **Copyright Notice**: These images are copyright NATO and may be used freely within the limitations described in the usage rights provided NATO is credited.

- **Property Release**: *See above.*

- **Usage Rights**: The usage rights field should include text instructions on how the image can be legally used. ACO standard terms are:

    - Images may not be reproduced for profit, used in advertising or in parodies or products that defame NATO nations.

- **Provider/Source**: Who provided the image to the receiver? This doesn't have to be the owner/creator

- **Urgency**: Lists urgency name or code such as Low, Medium, High, Flash (only when official Flash clearance has been given and proper protocols for transmission and receiving are used), or a numeric code 1-8 where 1 is highest (Flash) 5 is normal and 8 is lowest. Numeric code 9 is user defined.

Imagery Categories

The following imagery categories will be used for IPTC metadata:

- News/Actuality
- Culture & Entertainment
- Anniversary
- Feature
- History (only scanned historic material)
- Interview (including Hometown stories)
- News Release
- Protocol
- Sports
- Background (background and stock imagery)

Byline/Creator Titles

- **STF:** photographs by staff photographers
- **FRL:** photographs made by freelance photographers
- **MAG:** photographs provided by magazines
- **POOL:** photographs made by pool photographers
- **HO:** handout photographs

Supplemental Categories

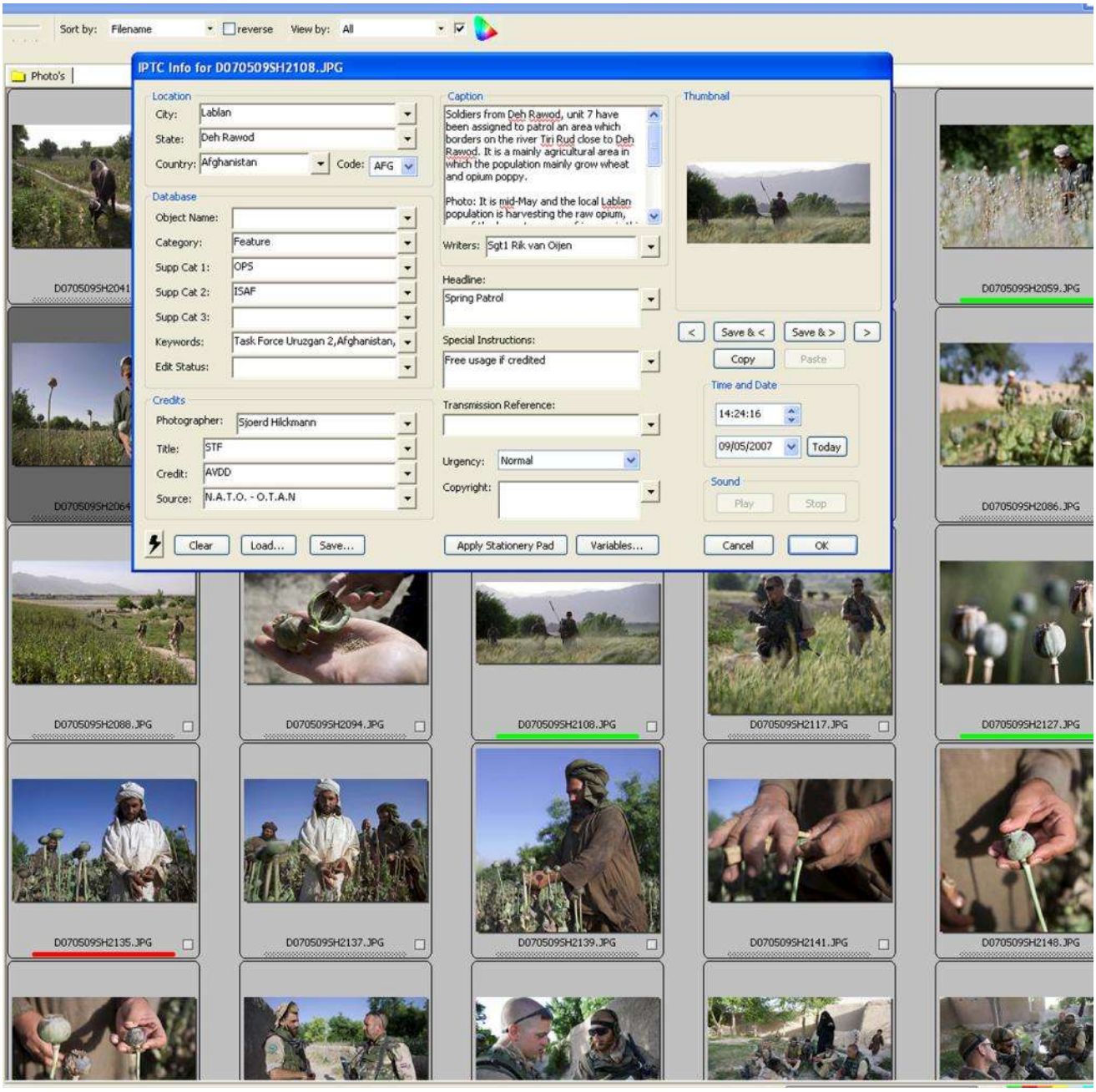
General			
CMY	Ceremonial	GRP	Groups
ENT	Entertainment	HFR	Hold for release (embargoed photos same day release)
EQP	Equipment (tanks, planes, etc)	MAP	Map or graphic
ETH	Ethnic and local portraits/ groups	OPS	Operations
EXC	Exercises	POR	Portraits
FEA	Non-news feature pictures	SPCL	Specials
FILE	File or stock photo		
Sports			
AFB	American Football	GYM	Gymnastics
BBI	(International) Baseball	IHK	Ice Hockey
BKI	(International) Basketball	OLY	Olympics
BOW	Bowling	RAC	Racing (animals)
BOX	Boxing	RUN	Track and Field
CAR	Racing (car, boat, bike)	SKI	Skiing
DRT	Darts	SOC	Soccer/Football
EQN	Equestrian Sports	SWM	Swimming
FHK	Field Hockey	TEN	Tennis and Racket Sports
GLF	Golf	VLB	Volleyball

Field Limits

IPTC Field	Max Length (# characters)
Caption	2000
Keywords	64 per keyword
Credit	32
Copyright	128
Object Name	64
Created Date	16
City	32
Province or State	32
Country	64
Special Instructions	256
Byline	64
Category	None
Supplemental Category	None
Headline	256
Source	32
Priority	None

Example IPTC Template

A typical example of required IPTC data for a still image can be found below. The IPTC data was completed in PhotoMechanic software. Although not identical in IPTC data field appearance, all data fields will be available in any IPTC compliant software.


Sort by: Filename
reverse
View by: All
Photo's
IPTC Info for D070509SH2108.JPG
Location
City: Lablan
State: Deh Rawod
Country: Afghanistan
Code: AFG
Database
Object Name:
Category: Feature
Supp Cat 1: OPS
Supp Cat 2: ISAF
Supp Cat 3:
Keywords: Task Force Uruzgan 2,Afghanistan,
Edit Status:
Credits
Photographer: Sjoerd Hilckmann
Title: STF
Credit: AVDD
Source: N.A.T.O. - O.T.A.N
Caption
Soldiers from Deh Rawod, unit 7 have been assigned to patrol an area which borders on the river Tiri Rud close to Deh Rawod. It is a mainly agricultural area in which the population mainly grow wheat and opium poppy.
Photo: It is mid-May and the local Lablan population is harvesting the raw opium,
Writers: Sgt1 Rik van Oijen
Headline:
Spring Patrol
Special Instructions:
Free usage if credited
Transmission Reference:
Urgency: Normal
Copyright:
Thumbnail
Save & <
Save & >
Copy
Paste
Time and Date
14:24:16
09/05/2007
Today
Sound
Play
Stop
Clear
Load...
Save...
Apply Stationery Pad
Variables...
Cancel
OK
D070509SH2059.JPG
D070509SH2086.JPG
D070509SH2088.JPG
D070509SH2094.JPG
D070509SH2108.JPG
D070509SH2117.JPG
D070509SH2127.JPG
D070509SH2135.JPG
D070509SH2137.JPG
D070509SH2139.JPG
D070509SH2141.JPG
D070509SH2148.JPG

Annex 9-B Tips for Taking Good Photos

A photographer should seek out the opportunities that will enhance the image of NATO using experience and creativity to find innovative solutions for their work. The adage a ‘picture paints a thousand words’ is certainly true. Remember it is the picture that will sell the story.

Composition makes the difference between a boring photo and an interesting one.

You want the viewer to feel what the serviceperson is feeling and experiencing. If you’re shooting winter warfare, replenishments at sea or flying operations reflect the weather in your images. If the service people are cold and uncomfortable you want to make your viewers feel cold and uncomfortable, or hot and sweaty and tired, happy or sad. Show the tears, the pain, and the emotion. Show people working on the equipment they use rather than just showing the equipment. Try to explain the story in your image.

You’re a fly on the wall. While you do not want to be part of the action, get in your subject’s face. Get as close as possible to the action with your lens. Zooms don’t always work. Zooms from far away don’t always get you the up close feel. Zoom in on a soldier’s tears from a respectful distance, but move in close while shooting soldiers crawling through the bush. If they are on the ground, get on the ground. The lens should be at the same level as the action. If it’s not, give an angle that is totally different. Shoot from overhead or from under the action if possible and safe to do so. A standard shot is the primary image and must be taken first as this may be the only shot to be taken given time constraints. Creative images should only be taken once a standard safety shot is in the bag. Be creative—having all your photos at eye-level, standing up is boring!

Remember to incorporate a relevant background to the image i.e. a ship/aircraft/tank/flag in the background. Flags are good props if nothing else is available but you must ensure that the flag is correct for the subject and it is recognisable as a flag.

When taking photographs you must remember to communicate with the subject to achieve a good expression and to avoid images where the eyes look like rabbits caught in the headlights or are closed.

Images should be downloaded and archived as soon as possible with the correct file information embedded within the image (see Annex A to this chapter: ACO Still Photo Guidelines).

Practice using your camera’s motor drive. Take lots of photos. Film (memory) is cheap. You will have a better selection from which to choose. Avoid taking only one photo of your subject to avoid having that “great” shot with the subject’s eyes closed. Same goes when taking group shots.

Always take photos at the highest resolution you can, preferably 300 dpi (dots per inch) and using a RGB colour profile. A high resolution photo can be reduced to low

resolution for a website, but a 72 dpi photo cannot be increased to be of suitable quality for publication or to be shown in a slide-video presentation on a large plasma screen.

Use natural light as much as possible, for interior shots as well as exterior shots. The use of a flash will be very useful in both areas for killing shadows. Use your flash to fill the subject not flood the subject with artificial light.

Action/Reaction. Capture the action and capture the reaction to the action. Photograph the soldiers on parade. And then photograph the baby waving to his father on parade.

When you take a photo, decide:

- What to include
- When to press the shutter release button.

Decide where you want the horizon to appear. The most used position for the horizon is a third of the way down a photo. For a more dramatic look or to set a mood, go higher or lower.

Take verticals and horizontals. Shoot faces. The rule of thumb is that faces should be at least as big as a 0.50 Euro coin.

A busy or overwhelming background can ruin a photo, while a background that complements the subject creates a stronger photo. When considering the background, watch for these three distractions:

- Objects – lampposts, branches or anything else blocking or appearing to protrude from the subject
- Competitive backgrounds – a general confusion or jumble
- Intrusive light or colour

To reduce or remove these distractions:

- Change your camera angle
- Change your position
- Change your subject’s position
- Eliminate some of the background by tightening up on your subject
- Use a neutral background

Constructive use of the foreground is an important composition tool. It balances, emphasises and tells more about the subject. The proper use of the foreground gives an impression of depth and scale to the photo. The foreground can also be used to frame the subject.

Sometimes the foreground will dominate the photo. Three ways to correct this include:

- Change the camera position
- Use a longer focal lens
- Reduce the depth of field

Decide where you want the subject to be. To produce a balanced composition, use the rule of thirds. Imagine that the scene is divided into horizontal and vertical thirds. The intersections of the lines produce four ideal points to position your subject.

If you want your subject centred, position the most import part of your subject just above the centre of the image.

A well-exposed photograph produces a superior quality picture. So if you are comfortable with the basics, experiment with exposure. The results are sometimes surprising and help create a mood or underline something you want to show.

A good photograph always needs a description of what the image is: the people or equipment in the photograph. These descriptions are called photo cutlines and photo captions.

A cutline is usually a stand-alone statement that accompanies a photo when it is released to the media on its own without an accompanying article. It contains the five Ws (Who, What, When, Where and Why) and sometimes the two Hs (How and How Much (cost)).

There are a few basic guidelines on how to write photo cutlines:

- Always write in the present tense.
- Identify the action. Say what is happening in the picture.
- Name people who can be identified in the picture, usually from left to right.
- Identify the location.

A caption is the written material that goes with photographic material used to support news stories or feature articles. Depending on the photos you select, captions can simply identify the equipment, people, or specific actions being depicted. Sometimes they are only short quotations from the text of the story. Photo captions can be brief, since the bulk of the information the reader needs to understand the picture should appear in the text of the story.

If you are using Adobe Photoshop™ use the ‘File Info’ function to insert your photo caption. That way you’ll always have your photo caption if you can’t find the article that went with the photo.

In this package are examples of good photos in a variety of situations to be used to guide you when taking images. Some of these photos have been cropped* to show you how a tight photo draws the eye into the picture.

Taking good photos can be a lot of work until you are comfortable with your equipment and what it can do for you. So practice when you can. And don’t forget to have fun—because taking good photos can also be a lot fun!

*’Cropping’ is the photo industry term for removing extra space around the subject in a photo to focus the viewer’s eye on the subject. The space is removed using digital editing software. Note that there is no alteration or manipulation of the image itself. If

you are unfamiliar with cropping photos, the ACO Imagery Section at SHAPE can help you with this.

These examples depicting people at work demonstrate interesting composition, relevant backgrounds and images that tell a story. These are the kinds of images that ACO imagery sections should be producing, including in news or photo story release, posting on their own Internet and Intranet sites, using in their publications and other PA products.

Annex 9-C Example - Photo with Caption

Members of the Force Protection Company interact with Afghan children during a dismounted patrol in Kandahar City.

The Kandahar Provincial Reconstruction Team (KPRT) consists of Canadian Forces members, a civilian police contingent led by the Royal Canadian Mounted Police, Correctional Services Canada, representatives of the Department of Foreign Affairs and International Trade and the Canadian International Development Agency. The KPRT conducts coordinated interdepartmental operations to promote good governance, assists the Government of Afghanistan in extending its authority in the province of Kandahar, and facilitates the development of a stable, secure and self-sustaining environment for the people of Afghanistan.

Joint Task Force (Afghanistan), Rotation 4, is comprised of 2,500 Canadian Forces personnel drawn mainly from elements of the 5th Canadian Mechanised Brigade-Group in Valcartier, Quebec. The Force, lead by Brigadier-General Guy Laroche, is serving in the Province of Kandahar, Afghanistan, as part of the International Security Assistance Force (ISAF). Canadian soldiers play a key role in the NATO-led mission whose goal is to improve the security situation in Afghanistan and assist in rebuilding the country.

Canada is in Afghanistan at the request of the United Nations on behalf of the democratically elected Afghan government, alongside with 36 other nations. This UN-sanctioned mission mandated the NATO to help building a stable, democratic, and self-sufficient society in Afghanistan.

(Canadian Forces photo by Corporal Dan Pop) (Released)
Kandahar Provincial Reconstruction Team Image Technician

Annex 9-D ACO Video Guidelines

Video Formats

We appreciate that NATO member nations capture their video imagery using various broadcast and camera formats. Broadcast formats may include PAL or NTSC using 16:9 widescreen or 4:3 pixel aspect ratio formats. Camera formats vary greatly and are further complicated by the many new High Definition (HD) formats that have been released.

It is *preferred* that any one of the following tape formats listed below be used:

- Mini DV
- DV Cam
- Betacam SP
- HDV
- Footage can be shot in either PAL or NTSC
- 16:9 widescreen pixel aspect ratio is preferred but standard 4:3 ratio is acceptable.

All video imagery submitted DVIDS must include:

Video Slate

All video sequences should include a slate at the front of the sequence that contains at a minimum the following:

- VIRIN
- Videographer Name and Rank
- Videographer Contact Information (e-mail and/or phone)

The placement of a slate on the video sequence does not replace the requirement to send a caption sheet with the video.

Creating a VIRIN

All imagery must include a VIRIN. VIRINs uniquely identify every piece of video shot by military videographers by using four pieces of information: the date the imagery was shot, the country (using NATO standard three-letter abbreviation), service of the videographer, identification of the videographer, and a sequence number.

Here is an example: 060515-GBRA-8540B-001.

The components of the VIRIN are:

- 060515 - Date the image was shot (in YYMMDD format)
- GBRA - Videographer's Country and branch of service (Use A-Army, F-Air Force, M-Marine Corps, N-Navy, G-Coast Guard)

- 8540 - Last four digits of the videographer's Social Security or military ID Number
- B - First letter of the videographer's last name
- 001 - Sequence number for that day (Sequence numbers restart at 001 each day, not each shoot)
- 001 - A sub-sequence number (Used only if a sequence needs to be split into smaller pieces for transmission)

The VIRIN of the video sequence should be used as the filename of the electronic version(s) of the sequence and as the filename of the corresponding shot sheet. Naming each file with the VIRIN ensures shot sheets and sequences remain together when arriving at the ACO Imagery Section.

Captioning

All video needs to be correctly captioned on a separate document and transmitted along with the video file. Include a detailed '*Sequence Caption'* describing the footage followed by *'Shot Captions'* of the video sequence (include information that is pertinent only to the section of time code).

Sequence Caption

The following detailed Sequence Caption information should be included:

- VIRIN
- Classification of the video
- Videographers name, nationality, unit and contact details (both telephone and email)
- Description of the video sequence, including the full name, rank, and title of the person or people featured. Include the full name and model number of all featured equipment, vehicles, aircraft, or ships. If not featured in the entire video sequence, place information about people, equipment, vehicles, aircraft and ships in the shot captions
- Clearly identify the activity being documented. Include the date and place the video was shot.
- Briefly explain the purpose of the event, exercise or operation. Why is the documented action happening and/or why is it significant?
- Use acronyms sparingly. Do not use an acronym for a term appearing only one time within the caption. Be certain to define the acronym the first time it is used. This includes military units. For example, do not use '1/14 Infantry'; use '1st Battalion, 14th Infantry Regiment.'

Sequence Caption examples:

060515-GBRA-8540B-001
Cleared for Public Release
Corporal David Brown, GBRA, ACO/SHAPE PAO, +32 1234 567891
david.brown@shape.nato.int

U.S. Navy Air Traffic Controller 2nd Class Esther R. Hines plots ship coordinates in the amphibious air traffic control centre aboard USS Iwo Jima (LHD 7) May 2, 2006. Iwo Jima is conducting an expeditionary strike group exercise in preparation for an upcoming deployment.

060515-GBRA-8540B-001
Cleared for Public Release
Corporal David Brown, GBRA, ACO/SHAPE PAO, +32 1234 567891
david.brown@shape.nato.int

Afghan National Army soldiers graduate from basic training during a ceremony at the regional training centre at Camp Whatever, Afghanistan, April 30, 2006. The soldiers are part of the first class to graduate before being assigned to the newly formed 250th Corps.

Shot Captions

A shot-by-shot caption should include information that is pertinent only to the section of time code. If applicable to the entire sequence, place the information in the Sequence Caption. Place time code in Hour:Minute:Second:Frame format.

Shot Caption Examples:

Time code	Description
00:02:01:14	MS - Col. John Smith presents diploma to Pvt. Joe Dean
00:02:08:05	MS - Col. John Smith presents diploma to Pvt. Frank Bazooka
00:02:15:22	LS - Graduates march in review

Annex 9-E Digital Video and Imagery Distribution System

The ACO DVIDS structure comprises a top level page for ACO which is supplied with content from the pages which are managed by SHAPE and the JFC's/major operational commands.

When issuing a press release including a link to the appropriate page will allow media outlets to access the image and associated captions etc. See example below:

DVIDS Website: http://www.dvidshub.net

The DVIDS website has various links to both handbooks and instructional videos. To be able to use most of these instructions, the operator must register with DVIDS. Registration for all PAOs is highly recommended.

Useful links within the user, password protected site are:

For uploading New Items:
http://www.dvidshub.net/training/upload_news_photos.pdf

For uploading Audio:
http://www.dvidshub.net/training/upload_audio.pdf

For uploading Publications:
http://www.dvidshub.net/training/upload_publications.pdf

For uploading Photos:
http://www.dvidshub.net/training/upload_photos.pdf

For using DVIDS Delivery:
http://www.dvidshub.net/training/DVIDSDeliverySOPV2.doc

For uploading using FTP:
http://www.dvidshub.net/training/DVIDSDeliveryFTPClientSOP.doc

A host of instructional videos can be found at:
http://www.dvidshub.net/?script=admin/admin_training.php&view=tools

DVIDS “Smartbook” Website:
http://www.dvidshub.net/training/dvids_smartbook.pdf?bcsi_scan_175338BB3A9A8BC0=0&bcsi_scan_filename=dvids_smartbook.pdf

Annex 9-F The Hometowner / Home Town Stories

The hometowner is a form of applied journalism peculiar to military PA. It is a cutline, usually accompanied by a photograph, depicting a military member of NATO or a NATO civilian employee at work. These are usually sent to community newspapers in the hometown of the person featured in a news release.

Hometowners are an excellent way to reach the public with messages about NATO, since they feature people whom the local readers know. There is then a local angle and local interest in an event that might otherwise not have been covered by the hometown daily or community newspapers.

Hometowners are most effective when they originate from operational deployments, field exercises, special events, or foreign locations. This gives them enough newsworthiness for editors to use them without compromising their journalistic principles. The standard hometowner should not be more than 150 words. Since it is actually a more detailed photo cutline, the cutline rules apply. A typical hometowner might read as follows:

"Private John Hampton, 23, of 'C' Company, 1st Battalion, Princess Patricia's Canadian Light Infantry, checks his gear before boarding a CC-130 Hercules transport aircraft for a night parachute jump over Canadian Forces Base Wainwright, Alberta. Hampton is one of 5,000 Canadian and British soldiers taking part in Exercise Prairie Oyster, part of the annual NATO land forces joint training program."

Hometowners use first names and ages. They also blend personal information with information about operations, policies, and activities. In this case, the public receives information about the exercise, while the subject of the hometowner receives recognition for his efforts. It is good practice to provide the subject with a complimentary copy of the photograph. It is also important to obtain permission from the individual for the production of a hometowner.

Chapter 10

Social Media and Internet-based Communications

…decide what our message is and thinking about how to communicate it in new and innovative ways. I'll give you examples: Facebook. Twitter. Linked-in. I'm on all those social networking mechanisms…. I think that it's extremely beneficial to use these new methods of moving information.

- ***Admiral James Stavridis – Supreme Allied Commander Europe***

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10.1 Introduction.

a. The Internet is a powerful tool allowing commanders to communicate directly with audiences and without filters. It therefore must be factored into public affairs activities using the same basic thinking process applied to other communications channels and products. Before developing an internet site, whether it is a conventional web site or social media site, a clear understanding should be established as to who the target audience is and what public affairs objectives it will support.

b. ACO Directive 95-3, attached as Annex A.6, sets social media policy. This document should be consulted before engaging in social media activities and local SOPs and policies should be consistent with it.

10.2 Planning Considerations. The following questions aid in determining the best use of a website:

a. What do we want to achieve with our site?

b. Which objectives can we meet using the Internet?

c. Is there a strategic advantage to using the Internet for the objectives?

d. Are there any disadvantages to using the Internet?

e. Who are the target audiences we are trying to reach?

f. What are the communications needs?

g. Where do the needs of the audience coincide with our objectives?

h. Do key audiences have access to the Internet? Which ones do not have access to the Internet? Are they Internet users? Do third-party messengers have access to the Internet?

10.3. Responsibilities and Risks.

Prior to the initial stand-up of an ACO web site, careful planning must occur to ensure the site can be properly supported and is adequately protected. Sites may be hosted on NATO infrastructure, through NCSA, or on a suitable commercial hosting site. Security advice should be sought from appropriate authorities regarding risks but should not proscribe a particular solution as the same risks are faced wherever the site is hosted; the key issue is how they are managed or mitigated and the risk/benefit assessment. Ultimately the acceptable level of risk is a command decision but that decision should be properly informed. The main issues which need to be considered are:

a. Denial of service attack (risk to reputation and availability of the site).

b. Hacking and defacement or infection (risk to reputation and operability).

c. Inadvertent uploading of classified material.

d. Potential for embedded metadata to be aggregated thereby revealing information about the source system.

e. Inappropriate discussions or content introduction (risk to reputation)

10.4. Appearance and Content

a. ACO PAOs are responsible for content management and the appearance of their respective Internet websites. Posting information on the Internet for public access is the same as releasing information through any other means. Clear approval procedures must be established for the release of information.

b. ACO websites need to be current, easily navigable, visually appealing, interactive, and consistent with the NATO Visual Identity Guidelines. A good general guideline for websites development is “the three click rule”. If a user has to click more than three times to find the desired content, he will lose patience and look elsewhere.

c. ACO web sites should not duplicate content from other NATO websites but may use extracts to attract attention to an issue and then link to the original.

d. Images posted to ACO websites should be carefully selected to support a narrative and should be compliant with the ACO Visual Identity Guidelines as specified in Annex C.

e. PAOs must work closely with the technical staff at the JFC/JC/CC/mission that is responsible for technical requirements and maintenance of their respective web sites. It is the PAO, however, acting on behalf of the commander that determines JFC/JC/CC/mission website content.

f. All personnel working in ACO are encouraged to submit content for posting on ACO websites however content must be approved for release by the JFC/JC/CC/mission CPAO.

g. The information on ACO websites is there for the public, including national institutions, journalists or researchers on ACO activities. Therefore, within OPSEC and privacy sensitivities, ACO web sites should contain as a minimum the information listed below:

- PA Contact Information (phone number, fax number and e-mail address);
- News Releases, Fact Sheets and Backgrounders;
- Biographies of key personnel assigned to each JFC/JC/CC/mission;
- Selected transcripts of speeches and interviews with key personnel;
- Information about current operations;
- Information about current exercises;
- Information about the HQ (facilities, community life, etc.);
- Photo galleries with high and low resolution images for media publication;
- Links to other sites (i.e. NATO HQs, MODs of NATO countries, International Organisations, Military Institutions, etc); and
- Archived information.

10.5. Blogs and Other Internet Communications.

a. Internet home pages, message boards, Web Logs (blogs), Web-based Video Diaries (VLogs) and other Internet video products, standard email, text messaging and other evolving forms of electronic media have become increasingly popular as a convenient means for military members to communicate in real and near-real time with families, friends and the general public – nationally and internationally.

b. The most prolific form of such media currently is the “blog”, which is a frequently updated web site highlighted by personal commentary, editorial comments, and regular links to supporting web sites. Often a personal journal, blog consists of dated entries in chronological order, and invites and/or permits comments from readers, thereby fostering two way communication.

c. Blogs and other emerging forms of communication are proliferating on the Internet, though generally created for personal use; they are often used by advocacy groups or people with recognised or self-proclaimed expertise in a particular subject. Consequently, they have become significant sources of information for the traditional news media as well as the public at large.

10.6. ACO Blog. Provision has been made within the ACO web site, managed by SHAPE PAO, for ACO units to maintain a blog if they so wish. The site allows units to maintain their own blog page, accepting and responding to comments but also rolls up recent posts to an ACO blog page to provide an alternative view of what's going on in ACO. In order to build and maintain an audience this site needs regular and diverse contributions therefore any ACO unit wishing to contribute is encouraged to do so, links on HQ web sites should be established pointing to the ACO blog or the units sub page if established.

a. The objectives of the blog are;

- To communicate the Commanders intent and philosophy
- To foster a sense of empowerment among staff and promote innovation and interaction.
- To broaden and deepen understanding of ACO
- To engage with audiences so we can explain our mission, generate support and temper opposing views
- To solicit ideas that may help us develop our thinking and nurture third party advocates

b. Bloggers are news reporters and value their audience share every bit as much as traditional media, so it is important to let them know why the ACO headquarters (SHAPE) website is a useful resource to provide to their readers. Bloggers are invited to visit www.aco.nato.int, use any materials they find there, and subscribe to electronic publications and notifications.

c. The blog will also aid ACO's existing online efforts by establishing links from popular blogs to the command's existing official website that contains news releases, photos, audio, video and statements by key leaders.

10.7. Personal Blogs and Operational Security.

a. MC 0457/1 gives broad policy guidance on personal Internet websites ('blogs'), and the uploading of personal video and still imagery to commercial web sites. The approval authorities and guidelines respecting public electronic communications are no different than those for other forms of external communication.

b. Military and civilian personnel, especially when deployed or in situations where normal civilian communication channels are limited, often use blogs to communicate with family and friends. But blogs and other personal diaries, including video products, are open to review by anyone with World Wide Web access. Uninformed users often think of these mediums as tools for conversation amongst peers, but, because of the public nature of blogs, they are open to unlimited view and dissemination.

c. With the increased speed and capability of these digitised and wireless communications comes increased personal and military unit responsibility. As easily as personnel can text message, email, or post information to a blog,

VLog or other evolving forms of electronic media or video invention, NATO's adversaries can retrieve and monitor these sources. Information harvested here has the potential to make our adversaries much more lethal.

d. All ACO personnel must understand that whether classified or unclassified, the information to which they have access, including their very life style, is valuable to our adversaries.

e. Operational security is paramount. It is incumbent upon all ACO personnel to consider the potential for creating risk to themselves, their families, their peers and the mission by publishing information to the Internet. Such information or imagery may, either individually or in conjunction with other information, provide expert analysts insight into ACO current operations, equipment, capabilities, tactics, and intentions, or may provide information that puts personnel in specialist roles or their families at risk.

f. All personnel assigned to ACO shall consult with their chain of command before publishing NATO-related information and imagery to the Internet. Both PAOs and intelligence staffs will review the information and imagery prior to release to ensure that it does not jeopardise NATO operations and personnel.

10.8. Blog Guidance

a. NATO provided information and communication systems are for official use and authorised purposes only. Authorised purposes may include limited personal use when permitted by commanders/commanding officers and supervisors for morale and welfare purposes, but, whether accessed at home or at work, OPSEC training and education apply to internet communications in exactly the same manner as to personal conversations, correspondence, telephone conversation, and interaction with the public and the media. ACO policies on communicating with unauthorised personnel apply just as strictly to electronic communication such as blogs. Always assume the entire world, adversaries included, is reading or intercepting your material – email, blog or personal web page, text message, or video transmission.

b. Personal websites and blogs produced in a personal capacity and not in connection with official duties or with NATO supplied equipment restricted from such use require no advance clearance. However, it is the personal responsibility of ACO personnel to ensure that any such electronic communication does not contain un-releasable information as defined in NATO OPSEC training and guidance.

c. Personnel should also consider adding a disclaimer to personal websites to preclude readers from assuming unofficial sites represent an official NATO/ACO position. Also be aware that any limitations on free speech imposed by national military authorities (for example, no political commentary while in uniform) remain extant when serving in NATO.

d. Personal websites should not contain product endorsements or inflammatory comments.

e. Preparation activities, as explained earlier, are not to be done during normal duty hours or with the use of ACO facilities, property, or personnel unless authorised to do so by their chain of command. The author is prohibited from using official ACO information generally not available to the public and which would not be released under NATO and ACO security policies.

f. The following is a summary of some of the types of information that must not be displayed on any public accessible web site including personal blogs or other electronic media operated by ACO personnel or contract employees:

- Pre-decisional information, proprietary information, business sensitive information, information designated as For Official Use Only;
- Information that is not based on personal experience or not in the scope of personal duties;
- Information --- other than authorised news releases --- about casualties prior to official confirmation that next of kin have been notified and some competent authority authorises publication of specific casualty information. Commanders are reminded that casualty information is to be tightly controlled and heavily scrutinised;
- Information --- other than authorised news releases --- regarding events or incidents currently under investigation;
- Information that is under copyright or trademark, without permission of the holder;
- Unit or other personnel lists/rosters, charts or directories, or the names, addresses and telephone numbers of unit members; and
- Any image, still or motion, of any military operation or activity unless that image is personal and has been cleared for release by the proper authority.

ANNEX A.1 NATO STRATCOM Policy PO(2009)0141

NATO OTAN
INTERNATIONAL STAFF
PRIVATE OFFICE OF THE SECRETARY GENERAL
SECRÉTARIAT INTERNATIONAL
CABINET DU SECRÉTAIRE GÉNÉRAL

NATO UNCLASSIFIED

29 September 2009 PO(2009)0141

To: Permanent Representatives (Council)

From: Deputy Secretary General

NATO STRATEGIC COMMUNICATIONS POLICY

1. I attach at Annex an agreed paper by the Senior Political Committee on a NATO Strategic Communications Policy. As you will recall, on 16 September 2009, the Council tasked the Senior Political Committee (SPC) and the Military Committee (MC) to send their recommendations on the draft Strategic Communications Policy paper (SG(2009)0794) to the Council within the following 2 weeks.

2. The SPC approved the Policy at Annex under silence on 28 September 2009. In addition, you will have seen MCM-0164-2009 in which the Military Committee endorses the Policy.

3. I intend to place this paper on the Agenda of the Council meeting scheduled for 30 September 2009 for your approval.

(Signed) Claudio Bisogniero

1 Annex

NATO UNCLASSIFIED
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IMS Control Nr: I09005429

ANNEX to
PO (2009)0141

NATO STRATEGIC COMMUNICATIONS POLICY

1. Introduction

1.1 The Strasbourg / Kehl Summit declaration states that "it is increasingly important that the Alliance communicates in an appropriate, timely, accurate and responsive manner on its evolving roles, objectives and missions. Strategic Communications are an integral part of our efforts to achieve the Alliance's political and military objectives". Dealing with today's information environment is part of the larger Public Diplomacy effort to engage with public opinions and their target groups in order to foster the support for, and understanding of, the Alliance in the medium and long term. NATO must use all relevant channels, including the traditional media, internet-based media and public engagement, to build awareness, understanding, and support for its decisions and operations. This requires a coherent institutional approach, a continuing coordination of effort with NATO nations and between all relevant actors, and consistency with agreed NATO policies, procedures and principles.

1.2 NATO Strategic Communications should be modern in technique and technology in order to match the information cycle; proactive; engaged with, and responsive to, public opinion at all levels, as appropriate; demonstrate consistency of messaging and the maximum possible transparency, in order to promote understanding and trust; and fully integrated in the development and execution of NATO's policies, operations and missions.

1.3 NATO's new Strategic Communications policy will enable the Organisation to:

a. enhance coherence of its communications mechanisms, both civilian and military;
b. communicate better with target audiences, as well as with other international actors and organisations;
c. make best use of its resources.

It will be fully integrated in the development and execution of NATO's policies, operations and missions.

2. Aim

NATO Strategic Communications aim, as appropriate to circumstances and theatres, to:

a. contribute to general public awareness, understanding and support of NATO as part of a broader, ongoing public diplomacy effort;
b. help build public awareness, understanding, and support for specific NATO policies, operations, and other activities in all relevant audiences. This will be done in close and lasting coordination with NATO member states, which

have their own national Strategic Communications responsibilities and programs with regard to NATO; and

c. contribute positively and directly in achieving the successful implementation of NATO operations, missions, and activities by incorporating Strategic Communications planning into all operational and policy planning.

3. Key principles

NATO Strategic Communications should adhere to the following principles[1]:

a. Accuracy, clarity and timeliness;
b. consistency and coherence of message across all levels of command;
c. active engagement in the information environment, including public electronic communications, with an emphasis on speed and responsiveness;
d. ensuring credibility of NATO's communications by fostering relationships of mutual trust with media representatives;
e. effectiveness that is, as far as possible, clearly defined, measured and reviewed;
f. multiplicity of efforts and maximum reach, engaging all of NATO communications capabilities and all available communications platforms to strengthen the dissemination of consistent messages;
g. soliciting public views and adapting efforts as necessary.

4. Definitions

4.1 NATO Strategic Communications: the coordinated and appropriate use of NATO communications activities and capabilities – Public Diplomacy, Public Affairs (PA), Military Public Affairs, Information Operations (InfoOps) and Psychological Operations (PSYOPS), as appropriate – in support of Alliance policies, operations and activities, and in order to advance NATO's aims.

4.2 Public Diplomacy: NATO civilian communications and outreach efforts and tools responsible for promoting awareness of and building understanding and support for NATO's policies, operations and activities, in the short, medium and long term, in complement to the national efforts of Allies.

4.3 Public Affairs (civilian): NATO civilian engagement through the media to inform the public of NATO policies, operations and activities in a timely, accurate, responsive, and proactive manner.

4.4 Military Public Affairs: is the function responsible for promoting NATO's military aims and objectives to audiences in order to enhance awareness and understanding of military aspects of the Alliance. This includes planning and conducting media relations,

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[1] Operational circumstances covered by MC 422/3 Information Operations and MC 402/1 PSYOPS remain valid.

internal communications, and community relations. Military Public Affairs at each level of command directly supports the commander and may therefore not be further delegated or subordinated to other staff functions.

4.5 Information Operations: a military function to provide advice and co-ordination of military information activities in order to create desired effects on the will, understanding, and capabilities of adversaries, potential adversaries and other parties approved by the NAC in support of Alliance operations, missions and objectives.

4.6 PSYOPS: Planned psychological activities using methods of communications and other means directed to approved audiences in order to influence perceptions, attitudes and behaviour, affecting the achievement of political and military objectives.

4.7 Public Affairs and Information Operations are separate but related functions. There shall be no personnel overlaps during operations of staff designated for Information Operations on the one hand, and Public Affairs officers on the other.

5. Roles and Authorities

5.1 **North Atlantic Council (NAC)**: The North Atlantic Council provides overall guidance and direction to NATO Strategic Communications efforts, as well as mission-specific strategic and political guidance for NATO information activities. It keeps the implementation of the Strategic Communications policy under active review.

5.2 **Secretary General (SG)**: The Secretary General provides specific direction and guidance on Strategic Communications to all NATO civilian and military bodies and commands on Alliance policy. The Secretary General is the principal spokesperson for the Alliance.

5.3 **Military Committee (MC)**: The Military Committee provides overall policy for NATO military PA, InfoOps and PSYOPS, in accordance with political direction and decisions, and consensus military advice to the NAC on Strategic Communications issues.

5.4 **Chairman of the Military Committee (CMC)**: The Chairman of the Military Committee is the principal military spokesperson for the Alliance on all military issues.

5.5 **Supreme Allied Commander Europe (SACEUR)**: SACEUR provides direction and guidance on Strategic Communications within ACO, which includes military PA, InfoOps and PSYOPS, in accordance with the overall Strategic Communications direction from the NATO HQ[2]. SACEUR is the principal military spokesperson for current Alliance operations.

5.6 **Supreme Allied Commander Transformation (SACT)**: SACT provides direction and guidance on Strategic Communications within ACT, provides Strategic Communications concept and capability development, in accordance with the overall

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[2] The term "NATO HQ" indicates the authority of the NAC, the SG and the MC.

Strategic Communications direction from the NATO HQ, and in close coordination with ACO. SACT is the principal military spokesperson on NATO transformation.

5.7 **Assistant Secretary General for Public Diplomacy (ASG PDD)**: The Assistant Secretary General for the Public Diplomacy Division oversees the coordination of all Strategic Communications activities across all NATO civilian and military bodies and commands, and also directs all public diplomacy activities (except press and media, which are directed by the NATO Spokesperson on behalf of the SG).

5.8 **NATO Spokesperson**: The NATO Spokesperson, on behalf of the SG, provides day-to-day direction of all Headquarters media activities, including messaging, and offers guidance to military PA to ensure that all NATO messages and communications are consistent with political direction and decisions.

5.9 **International Military Staff (IMS) Public Affairs Advisor (PAA)**: IMS PAA provides spokesmanship for the MC, supports the MC, its Chairman, and the Director IMS on Strategic Communications issues. He facilitates interaction and coordination between the two Strategic Commands, the MC, and the Public Diplomacy Division (PDD) on military PA and Strategic Communications issues.

5.10 **IMS Information Operations (InfoOps)**: the IMS Operation Division is responsible for MC policy on Information Operations and PSYOPS, and facilitates cooperation between NATO's two Strategic Commands and the MC on Information Operations and PSYOPS issues.

5.11 **Supreme Headquarters Allied Powers Europe (SHAPE) Chief Strategic Communications (CSC)**: SHAPE CSC is responsible to SACEUR for the development and integration of Strategic Communications plans in support of NATO current operations and ACO activities, in accordance with the overall Strategic Communications direction from NATO HQ; for the coordination of military PA, InfoOps and PSYOPS outputs in support of those plans and outputs; for overseeing the execution of the plans, in coordination with NATO HQ and subordinate ACO HQs.

5.12 **SHAPE Chief Public Affairs Officer (PAO)**: under SACEUR's direction, SHAPE Chief PAO directs, plans, and executes strategic level military PA in support of NATO current operations and ACO activities, in accordance with the overall Strategic Communications direction from NATO HQ.

5.13 **SACT Chief Public Affairs Officer (PAO)**: under SACT's direction, SACT Chief PAO directs, plans and executes strategic level military PA in support of ACT activities, in accordance with the overall Strategic Communications direction from NATO HQ.

6 Relationships

6.1 The following relationships will guide all levels of command to ensure compliance and coherence with the overall direction of Strategic Communications set by NATO HQ:

a. The NAC and SG direct all NATO Strategic Communications, civilian and military.
b. ASG PDD is responsible for overall coordination of NATO Strategic Communications, civilian and military, within the overall direction set by the NAC and the Secretary General. Within NATO HQ, ASG PDD ensures coherence with, and maximum effectiveness of, NATO's Strategic Communications efforts. The ASG PDD is responsible for establishing and chairing a standing body that brings together the relevant elements of the information community, including SHAPE, SACT and the IMS, as well as representatives from other NATO divisions responsible for operations, planning, and partnerships. On behalf of the NAC, ASG PDD will provide guidance to, and oversee coordination of MC/IMS, SHAPE and SACT Strategic Communications.
c. SHAPE Strategic Communications and SACT Chief Public Information Officer (PIO) will ensure coherence with the overall NATO Strategic Communications effort in their area of responsibility.
d. NATO Strategic Communications aim, principles and considerations must be integrated in the work of both the IS and IMS, guided by policy and planning decisions, in order to provide timely and effective input to the planning and conduct of operations and activities.
e. Under leadership of ACT, Strategic Communications capability development, including training, must be closely coordinated with NATO HQ and ACO.

6.2 MC policies relevant to information disciplines (MC 457/1 Public Affairs, MC 422/3 Information Operations, MC 402/1 PsyOps) remain extant. The implementation of the Strategic Communications process will not affect command and control arrangements of these disciplines.

7. Public Electronic Communications

New means of public electronic communications offer NATO additional means of communicating its message in order to meet its objectives. However, the use of such communications presents some challenges. The authorities and guidelines governing public electronic communications are no different than those for other forms of external communications. In their use of such communications, the NATO civilian and military staffs must adhere to the provisions of security and propriety.

8. Resources

The NATO budgetary authorities will measure the resources -- human, technical and financial, as appropriate -- devoted to realising effective Strategic Communications and their development (including training resources). Resources for NATO communications will be contained within the approved budgets. An evaluation of the effectiveness of the communications and of the resources allocated to them will have to be provided regularly. This will enable performance to be measured, further progress identified and, if needed, resources to be re-allocated.

ANNEX A.2 NATO Military Committee PA Policy MC 457/1

NATO UNCLASSIFIED

MC 0457/1

NATO MILITARY POLICY

ON

PUBLIC AFFAIRS

NATO UNCLASSIFIED

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Annex
A. Lexicon of Terms

NATO MILITARY POLICY ON PUBLIC AFFAIRS

GENERAL

1. The post-Cold War, post-9-11 era has been marked by NATO military operations of unprecedented scale, scope and complexity in locations far from the traditional Euro-Atlantic geographic area. In 1989, the Alliance counted 16 nations as members and none as partners; less than 20 years later, the number of member/partners had quadrupled to include almost one-third of the world's nations, with further expectations of growth. In that same period, we have been witness to a burgeoning market for news in an increasingly competitive media environment combined with new information technologies including the Internet. The result of these developments is that almost any aspect of NATO operations and issues can or will be reported to global audiences in near-real time. NATO adversaries also have similar access to all these technologies and use them to impart their own information and messages to try and sway publics and influence Alliance policy.

2. National and international security issues now figure prominently on the domestic political and media scenes in most NATO countries. Developments respecting military operations or military forces undergoing transformation often feature in coverage and can even define or shape the national and international political discourse. Public expectations for more open and transparent organisations including greater financial accountability and propriety of government spending, plus competition in the labour market with the private sector for the same skilled, fit, intelligent recruits are relatively new phenomena. There is also recognition and acknowledgement that informing our own internal audiences makes for a more productive workforce and empowers our most important outreach resource. All of these various factors regularly test the depth, breadth and flexibility of the military public affairs function in NATO HQs and member nations.

3. In a few short years, the political dynamic has evolved, the operational environment has changed, and the media industry has transformed. Effective public affairs support to field and permanent HQ commanders in the face of these developments requires that the function be resourced and fully integrated into the decision-making process for military operations, policy development, program design and service delivery. As such, a capacity to manage and deliver public affairs programming is expected at all NATO military HQs.

AIM AND APPLICABILITY

4. This policy establishes direction respecting NATO military Public Affairs (PA) for all personnel working under NATO command. It also serves as guidance for all those in the NATO force structure or working in support of NATO military authorities.

MISSION

5. The mission of NATO military PA is to support commanders by communicating accurate information in a timely manner to audiences to improve public awareness and understanding of the military aspects of the Alliance's role, aims, operations, missions, activities and issues, thereby enhancing organisational credibility. Audiences can be allied, international, regional, local or internal, depending on the issue or activity.

DEFINITION, FUNCTIONS AND PRINCIPLES

6. Definition. NATO military PA is the function responsible to promote NATO's military aims and objectives to audiences in order to enhance awareness and understanding of military aspects of the Alliance. This includes planning and conducting media relations, internal communications, and community relations.

7. Functions. The three basic functions of NATO military Public Affairs are:

a. **Media Relations** activities are designed to provide information through all mass communication means to NATO audiences. Commanders and staffs, through their PAOs, should be prepared to, for example: respond to media inquiries; issue statements; conduct briefings and interviews; arrange for access to permanent and operational units; and distribute information including imagery, all as a means to develop relations with the purveyors and the consumers of news.

b. **Internal Communications** efforts facilitate communication with and among NATO military personnel, civilians working for those organisations, and their families. Its purpose is to inform about the command or HQ, its people and its activities, and is distinct from administrative information or direction from the chain of command that is normally found in administrative or routine orders. Effective programs to keep internal audiences informed about significant developments that affect them and the work of their HQ creates an awareness of the organisation's goals and activities, increases work quality, and makes command personnel more effective representatives of the organisation.

c. **Community Relations** programs are associated with the interaction between NATO military installations in NATO member states and their surrounding or nearby civilian communities. These programs can take the form of addressing issues of interest to and fostering relations with the general public, business, academia, military-related associations, and other non-news media entities.

8. Principles. The principles of NATO military PA are:

a. ***Tell and show the NATO story***. Military PA efforts support commanders and staff in the execution of their mission and are conducted in accordance with higher NATO political and military direction. Practitioners are "Alliance" NATO military PA staff first and foremost.

b. ***Provide accurate information in a timely manner***. This is critical to functional and organisational credibility with publics, internal audiences, and media, and helps deter adversary propaganda in a 24/7 media environment. The public affairs impact of the activity is often directly proportional to the timeliness of the PA effort or response: the same information delivered quickly by NATO representatives can have a qualitatively different effect than the same information delivered a day later or even an hour later. Protecting NATO against criticism or embarrassment is not a reason to classify or withhold information.

c. ***Ensure that information provided is consistent, complementary, and coordinated***. One effect of the global information environment is that publics can receive information about military operations from all levels of command, including reports from theatre from multiple sources. Commanders should ensure that their PA operations put forth a consistent message through NATO's many voices, and that military information activities are well coordinated with PA.

d. ***Practise appropriate operational security***. The provisions of operational security and propriety will be considered and adhered to before releasing information.

e. ***Conduct work mindful of multinational sensitivities, and respectful of the local and regional cultural environment***. NATO operations can be adversely affected by culturally inappropriate references or communications activities. Conversely, the effect and impact of communications is made stronger when it is informed by an understanding and appreciation of local custom, tradition and culture.

RESPONSIBILITIES

9. NATO military PA is a command responsibility at all levels. Practitioners are directly responsible to their respective commanders for the conduct of PA activities, and responsive to guidance from the PA function at higher HQs.

10. Public affairs must be well coordinated within the Alliance's military arm vertically through all levels of command and horizontally with national armed forces and other organisations working in parallel with NATO. Effective PA support to commanders including organisational spokesmanship requires that military PA be fully integrated into the operational planning process at all NATO HQs.

11. Political Level. The North Atlantic Council provides overall guidance and direction for NATO public diplomacy efforts, as well as mission-specific strategic and political guidance for NATO military information activities. The Secretary-General, through the NATO Spokesperson, also provides further detailed day-to-day media relations guidance to NATO military PA through the chain of command, either to SHAPE for operational matters or to ACT for transformation issues.

12. NATO Military Committee. The Military Committee establishes overall policy for NATO military PA. The Chairman of the Military Committee is the principal military spokesperson for the Alliance. The International Military Staff's Public Affairs Advisor (IMS PAA) supports that organization's PA requirements, is the MC's spokesman, and facilitates interaction and coordination between the two Strategic Commands, the Military Committee and the Public Diplomacy Division on military PA matters.

13. Strategic Commands. The Strategic Commanders provide overall guidance and direction on military PA within their respective areas of responsibility. Supreme Allied Commander Europe is the principal military spokesperson for NATO operations. Supreme Allied Commander Transformation is the principal military spokesperson for NATO transformation.

14. The Chief Public Affairs Officer (CPAO) for ACO directs, plans, and executes strategic level military PA in support of NATO operations or other activities under SACEUR's direction and responsibility. The CPAO for ACT directs, plans and executes strategic level military public affairs in support of NATO transformation activities under SACT's direction and responsibility. The ACT CPAO is also responsible for NATO-related training and doctrinal aspects of NATO military PA.

15. Subordinate Commands. Chief PAOs for operational and tactical-level Commands and organisations subordinate to ACO and ACT are responsible to their respective commanders for all public affairs programming and activities of their HQ.

16. Elements of the Force Structure and Subordinate Agencies, Bodies, and Committees. The NATO Force Structure consists of forces placed at the Alliance's disposal by the member nations, temporarily or permanently, including the associated command and control elements. These can be part of NATO's multinational forces or be additional national contributions to NATO. Both NATO and elements of the Force Structure benefit from being publicly affiliated with each other. As such, when an issue or activity could become public and affect each other's reputation, liaison between PA offices should occur ahead of time.

17. Other organisations, committees and sub-committees that are the responsibility of the Military Committee (such as the NATO Defence College), SACEUR (such as the high readiness land and maritime forces) and SACT (such as the Training Centres and the NATO Undersea Research Centre) are responsible for delivering their own PA programming. They will seek functional PA guidance from the IMS PAA, ACO CPAO, or ACT CPAO respectively.

18. Nations. Member nations have primary responsibility to inform public opinion within their own country about decisions taken in the framework of their Alliance membership, including participation in Alliance operation and activities. Nations provide

trained and qualified PAOs for national requirements and to fill positions in NATO's permanent headquarters, operations and other activities.

19. NATO Military PA. NATO military PA works on behalf of all member nations to promote public awareness of the Alliance, as well as to inform internal NATO audiences. NATO also promotes joint PA education and training, and develops joint PA doctrine and lessons learned.

20. Operating successfully in today's complex operational and media environment requires that uniformed personnel be trained and skilled in all aspects of public affairs work at the strategic, operational, and tactical levels. A national military public affairs function should recruit, educate, train, employ and promote within the profession in order to build experienced capability in this specialised discipline.

PLANNING AND EXECUTING PUBLIC AFFAIRS

ORGANISATION

21. Reporting Relationships. All NATO military headquarters and command elements will establish a PA capability within the Command Group. Public Affairs at each level of command directly supports the commander and may therefore not be further delegated or subordinated to other staff functions. The Chief PAO, as the principal advisor on PA matters and official spokesperson for that HQ, reports directly to the commander. All supporting PA activities should be organized under the PAO.

22. Resourcing. All NATO HQs are required to have a PA function, but personnel and financial requirements will vary. The PA function needs to be sufficiently staffed with PA-trained personnel and resourced to meet the operational and policy issue tempo of the headquarters and its activities. The minimum capability requirement includes PA plans and policies, media operations, media monitoring and analysis, and production (writing, imagery, and web services).

23. PA Relationship to Information Operations. PA and Info Ops are separate, but related functions. They directly support military objectives, counter adversary disinformation and deter adversary actions. They both require planning, message development and media analysis, though the efforts differ with respect to audience, scope and intent. All military information activities must be closely coordinated with PA in order to ensure consistency in the messages to external audiences and to promote overall effectiveness and credibility of the campaign. Info Ops is a military function to provide advice and coordination of military information activities in order to create desired effects on the will, understanding and capability of adversaries, potential adversaries and other NAC approved parties in support of Alliance mission objectives. PA is not an Info Ops discipline. While coordination is essential, the lines of authority will remain separate, the PA reporting relationship being direct to the commander. This is to maintain credibility of PA and to avoid creating a media or public perception that PA activities are coordinated by, or are directed by Info Ops. Beyond coordination of efforts, messages and being informed of these activities, PA will have no role in planning or executing Info Ops, Psy Ops, or deception operations.

METHODOLOGIES

24. PA Approaches. NATO policy is to release accurate information with the minimum of delay that is consistent with operational security and propriety. The public affairs approach for each activity or situation needs to be assessed on a case-by-case basis, being attentive to the public and external/internal audience interest, and is informed by PA considerations of good issue management and security.

25. A PA approach provides a guide respecting the level of ambition or expectations of the desired profile for an activity, event or issue. Given that everything NATO does or does not do is subject to public scrutiny, this characterization of "intent of effort" helps prioritise work and assign resources. Remaining flexible in the face of changing circumstances is important, as the facts that informed the original assessment can change in very short order and may necessitate a different approach than first thought. The choice, therefore, will indicate initial intent but will always be subject to review and direction from higher HQ. The PA approach with respect to external and internal audiences is not necessarily identical for the same issue. Guided by its PA principles, NATO defines three military PA approaches:

a. Very Active. Significant and deliberate effort will be invested to promote awareness, visibility and to "push out" information. This approach is called for where real public interest is anticipated or desired and may be supported by a wide range of PA products and activities.

b. Active. Routine effort will be invested to promote public awareness; the range and scope of information products or support activities are generally limited. This approach may be used when the activity is expected to have some audience interest, or where the public affairs return on investment given the time and resources expended is expected to be modest.

c. Reactive. Efforts are not made to promote wide awareness, but a public affairs plan and media lines may be developed in anticipation of media or public queries. As such, being reactive still means being responsive to queries: not answering the phone or saying "no comment" are not options. A reactive approach could be used when little to no public interest is anticipated; where operational security, policy, privacy, propriety, or higher guidance indicates that an active or proactive approach is not appropriate; or when full disclosure is not yet possible.

26. Spokespersons. Any uniformed member of NATO regardless of rank who responds to media or speaks publicly about an issue will be perceived as "a NATO spokesperson," regardless of whether that is technically the case or not. This reality calls for a clear understanding ahead of time as to who is authorized to speak to media or the general public on behalf of the organisation and its commander, and a basic level of media awareness training for all NATO personnel.

27. Identifying spokespersons is a command responsibility and all NATO military HQs will identify someone, be it an individual or through appointment, as the public face of the organisation. Military spokespersons will "stay in their lane", limiting their comments

to matters respecting the military operation or function within their area of responsibility. There are two categories of military spokespersons:

a. Official. Official spokespersons are those persons who by virtue of their position or appointment are expected to speak to the media, the public, or internally about NATO military affairs. This includes the Chairman of the Military Committee, Strategic Commanders, Force and Operational Commanders, and the Chief PAOs of all those organisations.

b. Designated. Refers to those persons who by virtue of their job description or responsibility are expected to communicate externally or internally about NATO military affairs. This includes NATO Media Information Centre spokespersons, and subject matter experts who have been tasked to communicate externally or internally about a specific issue or topic. Where possible and practical, they should be prepared ahead of time for the activity by a PAO.

28. Information provided by NATO military spokespersons should normally be directly attributable to them by name. Being "on the record" serves several purposes: it provides an identifiable source for the information and thus adds to the organisational credibility of the information, it identifies when official NATO military spokespersons have addressed an issue, and it promotes transparency both of the media and the organisation. In the circumstances where the person providing the information cannot be identified by name for operational or personal security reasons, this should be specified and agreed ahead of time between the PAO and the journalist.

29. "Not for attribution" or "on background" is supporting information given to media representatives to facilitate greater understanding of an issue. It will be stated at the time whether that information may be used, and if it is, it should appear to come from the journalist's own knowledge, and not directly attributed to the NATO military spokesperson(s).

30. Organisations that belong to the NATO Force Structure are not in the NATO Command Structure. Unless involved in a NATO operation, personnel belonging to the NATO Force Structure should not be identified as NATO spokespersons. Rather, they speak only for their own organisation, although they are welcome to explain the nature of the affiliation with NATO.

PROCESS AND MECHANICS

31. PA Guidance. CPAOs may develop and promulgate Public Affairs Guidance (PAG) to address issues not described or forecast in existing operational plans or strategies. Usually, PAGs will summarize the issue, identify the lead organisation(s), identify spokespersons, list messages and provide coordinating instructions.

32. PA Strategies and Plans. Before elaborating a strategy, the PAO should conduct a serious analysis of the PA environment, from the perspective of both internal and external communication. Master messages developed by higher NATO political and military authorities will be included and used in subordinate PA strategies and plans. Furthermore, public affairs activities should be regularly evaluated, reported to the

higher echelon, and taken into account for future actions or possibly to adapt future plans and strategies.

33. Public Speaking and Writing. Explaining NATO to interested audiences by members of the organisation is to be encouraged. Any person working for or on behalf of NATO military forces who speaks in an organised setting or fora to external audiences or intends on publishing his/her writing about a NATO-related topic in the public domain needs to seek advice from that organisation's PA staff, who will advise on whether prior approval from the member's chain of command should be sought. Academic works are exempted: these need to include a disclaimer on the cover page stating that, "the views expressed herein are those of the author and do not necessarily reflect the official views of NATO."

34. Public and Media Queries. Any and all media queries will be directed to a PAO within that HQ or unit so that interest in the activity or issue can be tracked, assessed and dealt with in an appropriate fashion. Queries from non-media members should be handled with common sense and discretion: a simple request received by telephone for general, generic information that is a matter of public record and/or within that person's specific knowledge, should normally be provided on a background/not-for-attribution basis. Personnel should not speculate or inadvertently participate in an interview – any call received from the news media or the public, including interest groups, may be recorded by the caller. A good rule of thumb is, "if you aren't prepared to see it on the front page with your name attached to it, then don't say/write it".

35. Media Interviews. All interviews between external media outlets and personnel assigned to permanent and deployed NATO HQs requires that the organization's PAO be made aware beforehand, and may require approval of the chain of command including the Commander if the subject is of a sensitive nature.

36. Media requests for interviews with personnel deployed in NATO-led operations and under NATO command should be coordinated with the responsible national or NATO PAO, as appropriate, who will evaluate the request and recommend a course of action.

37. Ground rules for all media interviews regardless of the setting will be agreed and explained in advance to the news media by the PAO, and unless otherwise agreed by a CPAO, all interviews will be on the record. Persons should speak only about those matters within their professional knowledge and responsibilities. They should avoid speculation about events, incidents, issues or future policy decisions; should not comment on political matters; and must "stay in their lane", avoiding comments on issues and activities that they or their unit are not involved in. Where, for good reason prior approval for an interview was not possible (for instance, a member is involved in an incident and a journalist comes on scene and obtains a quote from the member), the organization's PAO must be informed as soon as possible.

38. PA Products. There are many and varied PA products in different forms and formats to tell and show the NATO story, whether they be in anticipation or in reaction to an issue, or to promote a NATO event or activity. Appended to this policy is a lexicon of terms for products that form the core of NATO military PA efforts. NATO military PA

products will adhere to the NATO Visual Identity Guidelines, as determined and issued by the Public Diplomacy Division.

39. Imagery. The increasing dominance of visual media, particularly in light of new technologies, means that NATO cannot effectively tell its story without making imagery available to external and internal audiences. This can take the form of NATO providing imagery itself, or by facilitating media access to NATO people and activities. All PA activities should therefore consider ways and means to collect, properly identify and distribute imagery (still and video, plus sound). Nations that do not already have a deployable military imagery gathering capability are encouraged to develop one. In addition to supporting national PA objectives, proactively sharing imagery with higher NATO headquarters will help leverage its overall impact with regional and international audiences, an effect that may be difficult for any one nation to obtain. The NATO Military Audiovisual Working Group offers an expert forum in which to discuss imagery collection and sharing.

40. Internet. The Internet is arguably the most powerful public affairs and information tool available to NATO military PA, and all HQs shall budget accordingly to remain competitive as quality information providers. Internet sites inform a wide range of audiences and therefore need to be current, easily navigable, visually appealing, interactive, and in accordance with NATO visual guidelines. PAOs are responsible for content management and the appearance of their respective NATO Internet websites. Local directives respecting PA involvement in Command/HQ Intranet sites may be issued.

41. Blogs and other Internet Communications. Those who post information, news, views or opinions to the Internet using a personal site (a "blog") can be as competitive and influential as the most established and recognized media organisations, or even more so. Often, media organisations encourage their own staff to create and maintain blogs as a means to enhance and connect with their readership. "Citizen journalists" may not be accredited media, but they are engaged in the security debate, be they well informed or otherwise. They can exert influence over public perception and understanding of NATO operations and activities and should be considered and factored into PA plans.

42. The widespread availability and access to Internet even by personnel deployed in the most austere of locations results in considerable information describing experiences included on personal websites, blogs, e-mails, and uploaded still and video imagery. This material is posted by NATO members deployed on operations or in garrison, by families and acquaintances of NATO members, embedded journalists or other media, and the general public. Such information or imagery may, either individually or in conjunction with other information, provide adversary analysts with insights into NATO current operations, equipment, capabilities, tactics and intentions, or may provide information that puts personnel in specialist roles or their families at risk.

43. The authorities and guidelines respecting public electronic communications are no different than those for other forms of external communication. Just as a letter to the editor by a NATO military representative is subject to an approval process, the mere fact that the technology exists to allow virtually anyone to broadcast to the world, does not give blanket authority for NATO personnel to do so. That said, the Internet provides the

NATO soldier, sailor or airman/airwoman with excellent opportunities to distribute useful and compelling information about NATO activities to audiences.

44. NATO members are entitled to communicate with friends, family and colleagues, and may share experiences with the broader public, provided they adhere to the provisions of security and propriety. NATO personnel are to consult with their chain of command before publishing NATO-related information and imagery to the Internet. The chain of command has expert advisors, such as public affairs and intelligence staffs, who will ensure that such published information is not ultimately prejudicial to NATO operations and personnel.

45. Exercises and Training. More than a hundred NATO exercises and training events both small and large are conducted every year, and are listed annually in an MC-approved program. This is in addition to nationally sponsored exercises to which NATO and partner nations are invited to participate, and these are the sole responsibility of the sponsor nation.

46. Both the NATO military HQ that is scheduling the NATO exercise and the office conducting the exercise need to give early consideration to the public affairs value and/or the necessity of informing publics about it. Often, media will be aware of the fact that an exercise is being planned well before any formal acknowledgement of it by NATO. Given the long lead time to prepare logistics support and in some cases a need to conduct community relations activities to sensitize populations to the fact that NATO forces will be exercising in the area, PA engagement and support from the outset is required.

47. The scope of PA support and whether an Initial Exercise News Release (IENR) is needed to publicly and formally announce the exercise needs to be assessed by a PA practitioner. Major exercises in particular are an important element of the organisation's overall information effort. In contrast, a small CPX or a training event on a highly technical subject is not usually likely to warrant a very active PA strategy.

48. The office conducting the exercise will recommend whether an IENR is advisable based on the exercise intent, size, scale, scope, and potential for becoming a news item. The exercise approach and IENR (if one is required) is subject to approval and issue by the office scheduling the exercise. Where there is a question about whether there are political considerations or implications with the exercise (geographic location, type of exercise, nations participating, etc.), the office scheduling the exercise will seek guidance from higher authority, up to and including the MC through the IMS PAA if need be. The PA chain through to the IMS is to be informed and copied on the release ahead of its public distribution.

49. The Military Committee through the IMS PAA can direct the responsible Strategic Command Chief PAO to provide an IENR for MC approval or guidance/approval by the NAC. In this case, the draft material should be staffed through the chain of command at least four weeks before the intended publishing date.

50. Classification of Information. Almost all NATO documents and information are by nature classified and thus PAOs face daily decisions and dilemmas respecting what can or cannot be released to the public. Obtaining formal authority from the originator to

release classified information can be an unwieldy and lengthy process, even though all or part of the information may already be publicly available. The unduly restrictive classification of information can also limit the institution's ability to quickly but accurately respond to queries or to proactively engage audiences in the interests of managing issues and thus the organization's reputation. As such, NATO military PAOs need to be thoroughly familiar with NATO policies respecting the classification and management of information so as to make informed and considered judgements respecting releasability. If in doubt, Command and higher functional PA guidance should be sought.

PUBLIC AFFAIRS ON OPERATIONS

51. Accreditation and Registration of Media. Accreditation of journalists and other media representatives is a national responsibility. The NATO Public Diplomacy Division is responsible to verify journalists accredited to NATO HQ. To manage access to NATO media information centres, facilities, properties and people, NATO military PA staff will register media and may issue a NATO photo-registration card. This card does not guarantee access and does not serve as a substitute for official identification documents, such as passports or national identification cards. Media representatives must also meet other requirements imposed by host nations, such as visas.

52. Registration of media provides an important opportunity for deployed NATO military PAOs to meet with journalists preparing to cover activities, including the chance to explain rules and regulations respecting safety, operational security, logistics, and to provide background and operational context. In addition to learning which media are active in their area, it provides the PAO with an occasion to begin developing a relationship with the journalist.

53. Media Information Centres. All NATO-led military operations or other activities involving a major deployment of forces will establish a facility in theatre, which will normally take the form of a NATO Media Information Centre (NMIC) in a location and facility as accessible to the news media as security conditions allow. Media have a right to be in theatre and to cover NATO activities. NMICs should also be established for major training events. Media Information Centres (MICs) subordinate to the NMIC may be established.

54. The demand for news about a particular NATO activity is not necessarily directly related to the size of the deployed force. A small deployment can generate sustained international attention, whereas a large force that has been operating without incident may attract very little interest. As such, the number of PA staff and other resources assigned must be regularly assessed and task-tailored.

55. Media Integration. NATO Allies should encourage access of the media to Alliance operations and other NATO activities, including hosting accredited media representatives at field headquarters or units. Media can be represented by accredited journalists (Art. 79, Protocol I, 1977), war correspondents (Art. 4, Geneva Protocol III, 1949) or freelance journalists. Only the journalists with the statute of war correspondents can benefit from all the rights given by the Geneva Convention. As PA is a Command responsibility, the decision to host media in NATO HQs or units on operations is at the discretion of the affected HQ commander, in accordance with direction from theatre HQ

and/or the policies established by the ACO HQ. Nations that individually establish media embedding programs are encouraged to see that media are offered opportunity to meet with and be briefed by senior NATO officers or officials prior to being embedded. Ground rules respecting operational security and privacy are operation- or activity-specific and are the responsibility of ACO. Media representatives hosted by NATO will sign a waiver of liability exempting the nation and organisation from any claims that might arise as a result of any injuries, harm or damage.

56. Media Travel and Life Support. Media representatives at all levels need to understand the challenges the military faces in working in fluid environments, and accept that blanket protection of media personnel will not be possible. Accordingly, journalists who expect to work in these types of environment should be trained in risk evaluation and the fundamentals of working alongside the military. The responsibility rests with the individual or the individual's employer to ensure that they are appropriately prepared and trained for the assignment.

57. Journalists will be expected to equip themselves with their own personal protective equipment (body armour, helmet). However, accredited correspondents may be issued with appropriate specialist protective clothing as well as being provided any required training in its use. Media who are hosted by NATO should be afforded life support (including accommodation and food), and may have access to communications and transport as the local situation and conditions permit.

58. Significant Incidents. Significant incidents including casualties, accidents and damage to property or equipment involving NATO forces will quickly generate media and public interest and will be publicly acknowledged at the lowest appropriate level in the NATO chain of command. Such announcements will be made in close coordination with the nations and organisations involved. Nations, as well as organisations working closely with Alliance forces, retain the prerogative to release specific details about incidents involving their personnel, property or equipment, including the names of those killed or injured, the details of damaged property or equipment, and the status of investigations or medical treatment.

59. Casualties. NATO PA offices in theatre will acknowledge deaths or serious injuries to personnel under NATO command in accordance with the PA principles. A number of considerations will inform when this is, and each case or incident will be dealt with individually. Ideally, NATO military PA will inform media first, and thus be ahead of adversary efforts to shape and frame media coverage of the situation for their own purposes. This holds true in the case of single or multiple casualties from one or more nations.

60. Release of the name, nationality and personal details of a service member or service members who die/dies or is seriously injured is a national responsibility.

61. Where casualties are incurred during an ongoing operation, relevant and verified information will be disseminated by NATO PA to the media in a timely fashion, while respecting the prerogative of troop contributing nations to confirm the nationality and detailed nature of casualties and the detailed circumstances of the event. This requires speedy and proactive coordination to ensure message consistency amongst NATO and national PA communications.

62. The NATO CPAO in theatre will ensure close coordination with respective senior in-theatre national military representatives. The Public Diplomacy Division at NATO HQ has the means and mechanisms to communicate with troop contributing nations' delegations and PA authorities in national capitals.

LEXICON OF TERMS

This lexicon groups together the most frequently used terms pertaining to public affairs work in NATO. Public affairs products are listed separately for ease of use. The terms used here are in the process of being submitted to the MC Terminology Committee to be considered for inclusion in AAP-6 NATO Glossary of Terms and Definitions.

ACCREDITATION
The formal recognition of a journalist or other media representative by an official national entity or international organisation; can also refer to the accreditation card or other document issued to the media representative.

AUDIENCE
A specified group or persons to whom NATO public affairs efforts are directed.

BLOG
First-person Internet-based journal of personal views and opinions. Some achieve mass appeal or commercial status and compete with established and recognised news organisations.

CHECK AGAINST DELIVERY
Used to inform media that a speech text released prior to it being given (usually provided under embargo) must be compared to the actual speech, which takes precedence and should be used when quoting therefrom.

CHIEF PUBLIC AFFAIRS OFFICER (CPAO)
The senior PAO in a NATO permanent or field headquarters. The CPAO is the Commander's public affairs advisor and official spokesperson, reporting directly to the Commander. Responsible to plan and implement the PA campaign.

CITIZEN JOURNALIST
A person who independently gathers and reports news, views or opinions using means other than through a media organisation.

COMMUNITY RELATIONS (COMREL)
One of the three pillars of NATO military PA. Refers to the relationship between military and civilian communities in proximity to NATO installations in the Alliance's member nations, including the general public, business, service organisations, and other non-media entities.

EMBARGO
An agreement with one or more media representatives or organisations not to publish defined information before a specified date and time. This is usually applied to protect time-sensitive information.

FACILITIES
Transport, briefings, shelter, communications, power, etc., which enable media to gather (witness, hear) information, record (type, visual, audio) it, and transmit it via commercial or military means.

FREELANCE(R)
An independent journalist not employed continuously on a full-time basis with any one media organisation. They usually sell their work to one or more media organisation(s) on a piece by piece basis during temporary assignments.

GROUND RULES
Conditions mutually agreed in advance with a media representative that govern the terms of an interview or other activity and the use of that information.

INFORMATION ACTIVITIES
Actions designed to affect information and/or information systems, performed by any actor.

INFORMATION OPERATIONS (INFO OPS)
A military function to provide advice and coordination of military information activities in order to create desired effects on the will, understanding and capability of adversaries, potential adversaries and other NAC approved parties in support of Alliance mission objectives. See MC 422.

INITIAL EXERCISE NEWS RELEASE (IENR)
The initial news release formally announcing a NATO military exercise. The responsibility and authority for this rests with the officer scheduling the exercise and is produced in consultation with higher HQ where there are public and/or political sensitivities.

INTERNAL INFORMATION
One of the three pillars of NATO PA. Organisational communication with NATO members, civilian employees and family members of those serving with or affiliated to NATO. It does not include activities of officers or managers for the purpose of informing their staffs of unit or section developments or communications that provide administrative direction. Also referred to as Command Information.

JOURNALIST
A person employed by a media organisation to gather and report news.

JOURNALISTS IN AREAS OF ARMED CONFLICT
Contrary to war correspondents, the Geneva Convention recognises "journalists engaged in dangerous professional missions in areas of armed conflict" (Article 79, Protocol I, 1977). These are journalists not accompanying the armed forces of one of the belligerents. Such journalists are guaranteed the same protections accorded civilians under the Geneva Convention.

MEDIA
Those organisations or persons who gather and disseminate news; also refers to the mediums by which news is transmitted (newspapers, TV, radio, Internet, etc).

MEDIA ESCORT
A person assigned to accompany journalists and other media representatives.

MEDIA INFORMATION CENTRE (MIC)
One or more centres subordinate to an NMIC that are operating in forward locations.

MEDIA OPERATIONS
All activities pertaining to managing the interaction with the news media; can refer to the function responsible for such activities, such as the "media operations section."

MEDIA POOL
News media who mutually agree to gather and share material with a larger group when access to an activity or event is limited, typically when news media support resources cannot accommodate a large number. Some ground rules may be agreed in advance to ensure that different types of media are granted access. In general, the PAO should indicate the availability of the breakdown of seats available and leave selection of who is in the pool to the media representatives.

MEDIA REPRESENTATIVE
All persons accredited as journalists, including those who directly support the gathering and reporting of news, such as producers, researchers and photographers, excluding drivers, interpreters, or others not directly involved in the news process.

NATO MEDIA INFORMATION CENTRE (NMIC)
A public affairs facility established to host and inform journalists and other media representatives in a NATO operations mission or exercise area. A NMIC will normally contain a briefing area, offices for public affairs staff, and should offer telephone, internet and other services to media representatives.

NATO MILITARY PUBLIC AFFAIRS (PA)
The function responsible to promote NATO's military aims and objectives to audiences in order to enhance awareness and understanding of military aspects of the Alliance. This includes planning and conducting media relations, internal communications, and community relations.

PROPAGANDA
Information, ideas, doctrines, or special appeals disseminated to influence the opinion, emotions, attitudes, or behaviour of any specified group in order to benefit the sponsor either directly or indirectly:

- Black: purports to originate from a source other than the true one.
- Grey: does not specifically identify any source.
- White: disseminated and acknowledged by the sponsor or by an accredited agency thereof.

PSYCHOLOGICAL OPERATIONS (PSYOPS)
Planned psychological activities using methods of communication and other means directed to approved audiences in order to influence perceptions, attitudes and behaviour, affecting the achievement of political and military objectives. See MC 402.

PUBLIC AFFAIRS APPROACH
The level of public profile to be adopted. It may change in time, space and phase of any operation. An approach can be very active, active or reactive, and be different for external and internal audiences.

PUBLIC AFFAIRS OFFICER (PAO)
A person trained and qualified to practice public affairs. In NATO, a person posted or hired into a position established as a PAO.

PUBLIC DIPLOMACY
The totality of measures and means to inform, communicate and cooperate with a broad range of target audiences world-wide, with the aim to raise the level of awareness and understanding about NATO, promoting its policies and activities, thereby fostering support for the Alliance and developing trust and confidence in it. See SG(2003)0876(INV).

PUBLIC DIPLOMACY DIVISION
The Division located at NATO HQ Brussels, and headed by an Assistant Secretary-General, responsible to explain the NATO organisation's policies and objectives to the public. See NATO Handbook, 2006.

REGISTRATION
The process of confirming the credentials of a journalist or other media representative. The media representative may be required to fill out a registration form and provide proof of identity and affiliation with a news organisation. NATO may issue a photo-registration card to facilitate access.

SECURITY AT THE SOURCE
The practice of protecting sensitive or classified information where it originates. In PA, this means ensuring that media representatives are not unintentionally exposed to sensitive or classified information and cannot intentionally or unintentionally report it.

WAR CORRESPONDENT
A journalist who reports, or has reported, firsthand on war or armed conflict. Under the Geneva Convention, (Article 4, Protocol III 1949) a war correspondent is a journalist or other media representative accompanying the armed forces of a belligerent; if captured while accompanying armed forces, a war correspondent is to be accorded the status of a prisoner of war.

PA PRODUCTS:

BACKGROUNDERS
An explanation of an issue, activity or program, usually to provide context and perspective for the use of journalists. Can refer to a product, generally a written piece, or to a verbal briefing and/or presentation by a spokesperson.

FACT SHEET
An overview of data and information on a specific topic. Generally is a collection of factual information as reference material, and short on the effort to impart explanations.

IMAGERY
All materials that identify NATO personnel, equipment or activities through the use of visual images.

INTERNET POSTING
The process of loading a presentation or product onto a publicly accessible server, and creating the links required to make the item publicly "live."

MEDIA ADVISORY
An alert to inform media agencies of an upcoming newsworthy event or activity.

MEDIA LINES
Also called Talking Points and/or Messages. Organizationally approved responses to an issue for use by spokespersons when dealing with media.

MASTER MEDIA MESSAGES
Overarching, key 3-5 points developed by a higher political or military authority and incorporated into the products and activities of subordinate organisations. Ultimately, reduces even the most complex of issues into a manageable number of remarks of soundbite-length.

MEDIA OPPORTUNITY
Also called Press Point, Newser, Presser, Media Availability. A chance for media to meet with an organisational spokesperson, usually on camera and often before or after a notable meeting or activity. Is distinguished from a *news conference* in that the setting in a media opportunity is regarded as more impromptu and less formal, with quite limited time with the spokesperson and not necessarily with a view to imparting "new news."

NEWS RELEASE
Information designed to notify audiences, particularly media, of an event, issue or activity that is newsworthy, and generally, something that has just happened or is just about to happen. Usually provides an organizational position, view and/or statement.

NEWS CONFERENCE
A group of two or more media purposefully gathered to obtain information from an organisational spokesperson. Implies there is something new or newsworthy to impart; otherwise, use a *media opportunity*.

PUBLIC AFFAIRS GUIDANCE (PAG)
Addresses emerging public affairs issues or issues likely not covered by existing plans or guidance, and issued as required by CPAOs. At a minimum, PAG will summarize the issue, identify lead organisation(s), name spokespersons, list messages, and provide coordinating instructions.

PUBLIC AFFAIRS PLAN
Details relating to the planning and conduct of a PA-related activity; in effect the "execution" paragraph detailing what will be done, where, when, how and by whom. Can be an annex to an operations or contingency plan, or stand on its own.

PUBLIC AFFAIRS STRATEGY
A document that provides a broader public affairs approach that sets overall themes and goals for an organisation or initiative. Should include master messages. Action-oriented PA plans derive their guidance from PA strategies approved by higher authorities.

QUESTIONS AND ANSWERS
A document that provides spokespersons with organizationally approved lines to a series of questions expected from media.

STATEMENT
Remarks by the speaker at the event, usually to public audiences.

ANNEX A.3 ACO Public Affairs Policy ACO Dir. 95-1

NATO UNCLASSIFIED

SUPREME HEADQUARTERS
ALLIED POWERS EUROPE
B-7010 SHAPE BELGIUM

GRAND QUARTIER GÉNÉRAL
DES PUISSANCES ALLIÉES
EN EUROPE
B-7010 SHAPE - BELGIQUE

ACO DIRECTIVE
NUMBER 95-1

TT 204432
23 May 2008

ALLIED COMMAND OPERATIONS (ACO) PUBLIC AFFAIRS

This directive is a rewrite of Allied Command Europe (ACE) Directive 95-1, "ACE Public Information", dated 03 June 2003.

REFERENCES:
A. MC 0457/1 NATO Military Policy on Public Affairs, dated 19 Sep 07.
B. MC 0458/1 NATO Education, Training, Exercise and Evaluation Policy, dated 27 Mar 06.
C. AD 95-2 ACO Strategic Communications, dated May 08.
D. Bi-SC Exercise Directive (ED) 75-3, dated 01 Aug 07.
E. ACO Public Affairs Handbook Version 2008.

1. **Applicability.** This directive is applicable to all ACO headquarters/units and forces under the operational command or control of ACO headquarters/units. This directive should be used as a guide for the preparation of local directives and policies. It should also be used as a basis for developing and fielding ACO, and national, Public Affairs (PA) support structure to meet Alliance PA support requirements in Peace, Tension, Crisis and Conflict.

2. **Supplementation.** Supplementation is authorised. ACO Chief Public Affairs Officer (CPAO) at Supreme Headquarters Allied Powers Europe (SHAPE) is to be provided with a copy of any such supplement.

3. **Interim Changes.** Interim changes are authorised when approved by the Director of Staff (DOS).

4. **Purpose.** This directive states policies, responsibilities, procedures, organisation, and concept of PA activities in ACO, including ACO PA support to Partnership for Peace (PfP) exercises.

5. **Table of Contents**

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CHAPTER 1

PUBLIC AFFAIRS MISSION AND DOCTRINE

1-1. **Introduction**

a. The need to communicate effectively with a wide range of audiences is not just desirable, it is essential to gain understanding and support for NATO's operations. Public support for NATO's missions and tasks follows from public understanding of how the Alliance makes a difference to international peace and security. Public confidence, in turn, is enhanced by NATO's ability to achieve its mandate in a way that is open, transparent, and consistent with member nation values and expectations.

"The Parties to this Treaty reaffirm their faith in ... the Charter of the United Nations.... They are determined to safeguard the freedom, common heritage, and civilisation of their peoples, founded on the principles of democracy, individual liberty, and the rule of law."

- Washington Treaty, 1949

b. Military PA policy in NATO and the nations derives from the higher principles of democracy that includes freedom of expression and of the press. Commanders and Public Affairs Officers (PAOs) are in theory bound by NATO policies to inform the public **directly,** such as through the Internet or through the media, and by international law not to impede the media or freedom of expression.

c. NATO's adversaries use multiple tools at their disposal to inform and persuade the international community that they have the moral high ground and that NATO does not. They use technology and speed to their advantage, often disregarding truth in the process. This is the public environment in which NATO operational commanders must conduct their missions. In an effects-based approach to operations, enhancing support for the Alliance by maintaining credibility is **the effect** for the PA function.

1-2. **Mission.** The mission of ACO PA is to support Alliance aims and objectives through truthful, accurate and timely public release of information about the operations and activities of forces assigned to, or under operational command or control of the Supreme Allied Commander Europe (SACEUR) and ACO headquarters (HQ), consistent with NATO and national policies for operational security, and the privacy of forces and personnel involved.

1-3. **Functions.** The three basic functions of NATO military PA are:

a. **Media Relations** – activities designed to provide information through all mass communication means to NATO audiences. Commanders and staffs, through their PAOs, should be prepared to, for example: respond to media inquiries; issue statements; conduct briefings and interviews; arrange for access to permanent and operational units; and distribute information

including imagery, all as a means to develop relations with the purveyors of news.

b. **Internal Communications** – efforts to facilitate communication with and among NATO military personnel, civilians working for those organisations, and their families. Its purpose is to inform about the command or HQ, its people and its activities, and is distinct from administrative information or direction from the chain of command that is normally found in administrative or routine orders. Effective programs to keep internal audiences informed about significant developments that affect them and the work of their HQ creates an awareness of the organisation's goals and activities, increases work quality, and makes command personnel more effective representatives of the organisation. Those people in turn spread the message to their acquaintances, in effect becoming force multipliers.

c. **Community Relations** – programs usually associated with the interaction between NATO military installations in NATO member states and their surrounding or nearby civilian communities. These programs can take the form of addressing issues of interest to, and fostering relations with such audiences as the general public, business, academia, military-related associations, and other non-news media entities.

d. Reference E, ACO Public Affairs Handbook Version 2008, is a 'hands-on' manual for ACO PAOs on how to conduct these three basic public affairs functions. It expands on this ACO directive and is to be considered doctrinal in nature.

1-4. **Doctrine/Principles of Information.** ACO PA doctrine and principles apply across the spectrum from peace to conflict, and the principles of NATO military PA outlined in MC 0457/1 apply in ACO. PA is a command responsibility. The PA function at each level of command is directly responsible to the commander/command group. It may not be further delegated or subordinated to any other staff function below the command group. Commanders at all levels must ensure that PA planning parallels operational planning so that the following principles are achieved:

a. Truthful, accurate and timely release of information to the general public to inform them of NATO's operations, and facts and issues facing the Alliance.

b. PA activities in support of NATO operations respect the democratic principles of openness and transparency in the communication process. ACO PAOs shall never lie to or intentionally mislead the public.

c. Requests for information on topics within the purview of NATO and ACO will be answered in as timely a manner as possible, following these guidelines:

(1) ACO PAOs will limit their comments to information that is within their purview and headquarters responsibility. ACO PAOs are not a

source of national information. Requests for information that falls within the responsibility of the nations will be referred to the appropriate MOD information office.

(2) Requests for information with a political context will be referred, without comment, to the Press & Media Section of the NATO Public Diplomacy Division (PDD), if not previously co-ordinated and approved.

(3) Requests for information with significant legal content or implications (which are not always obvious) should be answered only after consultation with the appropriate legal office / advisor.

(4) Information should be provided unless its release is precluded by potential impact on ongoing operations, current security classification, policy, headquarters or national restrictions.

(5) Information should be provided without censorship and all bona fide media agencies will be provided equal access to information.

(6) Information should not be classified or otherwise withheld to protect ACO from criticism or embarrassment.

1-5. **Policies for Release of Information**

a. ACO PAOs must determine what information about the Alliance's operations is releasable. The principles of openness and transparency should be balanced against the principle of operational security for NATO operations. In respecting the principle of operational security, no PA activity should undermine:

(1) the safety of personnel involved in a NATO operation; or

(2) the likely success of a NATO operation or activity.

b. The principle of operational security may place limits on NATO's ability to live up to demands for complete openness; however, every effort should be made to be as open and transparent as possible within the law of war when informing the public about NATO's military operations.

c. Commanders must determine what information should be publicly released, and establish release priorities. Guided by its PA principles, NATO defines three military PA approaches:

(1) **Very Active.** Significant and deliberate effort will be invested to promote awareness, visibility and to "push out" information. This approach is called for where real public interest is anticipated or desired and may be supported by a wide range of PA products and activities. Examples include NATO's engagement in Afghanistan, deployment of

the NATO Response Force (NRF), and major field exercises. 'Open House' type activities also fall into this category.

(2) **Active.** Routine effort will be invested to promote public awareness; the range and scope of information products or support activities are generally limited. This approach may be used when the activity is expected to have some audience interest, or where the public affairs return on investment given the time and resources expended is expected to be modest. Examples include minor field exercises.

(3) **Reactive.** Efforts are not made to promote wide awareness, but a PA plan and media lines may be developed in anticipation of media or public queries. As such, being reactive still means being responsive to queries: not answering the phone or saying "no comment" are not options. A reactive approach could be used when little to no public interest is anticipated; where operational security, policy, privacy, propriety, or higher guidance indicates that an active or proactive approach is not appropriate; or when full disclosure is not yet possible. It should be noted that a reactive PA approach can damage NATO's reputation if this approach is used when a "mistake" on the Alliance's part occurs.

1-6. **Strategic Communications in NATO and ACO**

a. In concert with other political and military actions, Strategic Communications (StratCom) is used to advance NATO's aims and operations through the coordinated, appropriate use of Public Diplomacy, PA and Information Operations (Info Ops). This is done at NATO HQ level.

b. Within ACO, StratCom takes in all components of the information campaign, but Public Diplomacy and political guidance are the responsibility of NATO HQ. Therefore, at the ACO level, StratCom will be conducted in concert with other military actions and **following** NATO political guidance, to advance ACO's aims and operations through the coordinated, appropriate use of PA and Info Ops, in cooperation with the Public Diplomacy Division. In essence, StratCom is the umbrella under which Info Ops and PA reside.

c. Within ACO, StratCom will be conducted only at the SHAPE level and not by the subordinate operational commands.

1-7. **Relationship to Information Operations**

a. As outlined in MC 0457/1, PA and Info Ops are separate, but related functions. They directly support military objectives, counter adversary disinformation and deter adversary actions. They both require planning, message development and media analysis, though efforts differ with respect to audience, scope and intent. All military information activities must be closely coordinated with PA in order to ensure consistency in the messages to external audiences and to promote overall effectiveness and credibility of the

campaign. Info Ops is a military function to provide advice and coordination of military information activities in order to create desired effects on the will, understanding and capability of adversaries, potential adversaries and other North Atlantic Council (NAC) approved parties in support of Alliance mission objectives. PA is not an Info Ops discipline. While coordination is essential, the lines of authority will remain separate, the PA reporting relationship being direct to the commander. This is to maintain credibility of PA and to avoid creating a media or public perception that PA activities are coordinated by, or are directed by Info Ops. Beyond coordination of efforts, messages, or being informed of these activities, PA will have no role in planning or executing Info Ops, Psy Ops, or deception operations.

b. PA is distinct from Info Ops in that:

(1) PA transcends the theatre of operations - PA speaks to theatre, regional, international, and member-nation audiences.

(2) PA is conducted continually through the war-peace continuum.

(3) PA is targeted at both internal and external audiences.

(4) PA is the only function that is mandated to communicate through the news media.

(5) Info Ops and Psy Ops seek to influence decision makers or the behaviour of target audiences through careful study and targeting.

(6) Using objective words and images, PA seeks to inform broad or target audiences and thus negate the influence of biased or erroneous information. PA may **not** use deception in its communication.

(7) Info Ops and Psy Ops are often applied in a calculated fashion.

(8) PA is routinely executed within minutes.

1-8. **Relationship to Nations.** There is a special relationship between nations assigning troops to ACO missions and to NATO's PA efforts. It is understood that nations have their individual national political and operational imperatives, but it is in everyone's interest that NATO and the nations say the same thing regarding missions, activities and incidents. As such, PAOs will coordinate with appropriate national military authorities to coordinate messaging as and when required. Liaison at the highest levels, such as with a nation's Ministry of Defence (MOD), should occur through NATO PDD at NATO HQ in Brussels. This can be arranged through ACO PAO at SHAPE. NATO PDD and SHAPE PAO provide all relevant information such as master narratives, media lines and imagery to nations on a regular basis. Nations should likewise provide their relevant documents to NATO and ACO for passage to subordinate formations.

CHAPTER 2

PUBLIC AFFAIRS ORGANISATION AND RESPONSIBILITIES

2-1. **General**

a. PA is a strategic military asset for commanders at all levels. Therefore, the PA structure in ACO should be robust enough to foresee events or issues of public impact, plan for efficient application of the Alliance PA principles, and to carry out media operations in support of the NATO's plans and operations.

b. As stated in Chapter 1, within ACO's static locations and on deployed operations, the PA function at each level of command is directly responsible to the commander/command group. It may not be further delegated or subordinated to any other staff function below the command group.

c. The Chief PAO at every level of command in ACO is **responsible** to the commander and **responsive** to the ACO PA chain, or technical network. This network (PA technet) is a non-official and non-restrictive communications network used by all PAOs to reach each other across NATO. It is also a strategic asset for PAOs and commanding officers.

d. To respond effectively in a timely manner, while attempting to keep up with the very fast pace at which media are working on their own networks, it is of primary importance that PAOs maintain direct contacts with PAOs at all levels of authority to effect immediate information sharing and coordination.

e. The PA technet is there to support commanding officers with their day-to-day operations, while respecting and not interfering with the existing chain of command. It provides assistance, advice, support, and effective co-ordination. While there is no direct chain of command in the PA technet, there are informal or responsive lines of communication from ACO PAO at SHAPE, through subordinate HQs to static and deployed ACO units under SACEUR's command.

f. The execution of PA plans will, in many cases, require the deployment of PA personnel from various levels of the NATO Command Structure (NCS) in order to establish Media Information Centres (MICs), conduct PA activities on the ground or to augment PA staffs that are currently engaged. Every PA office within ACO must anticipate requirements and be prepared to support other NATO PA activities, both within and outside NATO's traditional area of responsibility (AOR).

2-2. **Organisation**

a. ACO headquarters—SHAPE—and each ACO subordinate headquarters down to the Joint Force Command (JFC), Joint Command (JC), and

Component Command (CC) level, and all ACO missions, must include in their organisational structure a PA office. That office must be manned and equipped to perform the tasks and responsibilities outlined in this directive.

b. The personnel manning of individual PA offices will vary according to each command's specific mission; however, each office must, at a minimum, be organised to conduct the following PA tasks: advice to the commander, PA planning, media relations, media analysis, imagery, internet, internal communications, and community relations. The office should be manned sufficiently to enable these functions to be continued during periods that require the deployment of PA personnel to support other ACO operations and during periods of prolonged PA activity, e.g. crises.

2-3. **Responsibilities.** Responsibilities for PA in ACO are as follows:

a. **General.** PA is a command responsibility. Commanders and staffs must communicate with the internal and external publics of NATO and non-NATO nations in order to gain understanding of the Alliance's objective and missions.

b. **ACO Chief Public Affairs Officer (CPAO) at SHAPE.** The ACO CPAO at SHAPE is SACEUR's principal PAO and **designated** spokesperson (SACEUR is the **principal** military spokesperson for NATO operations). The CPAO will assign his/her resources in order to conduct the following tasks:

(1) Develop and promulgate to subordinate commands PA guidance, as well as PA plans, including objectives and policies in accordance with guidance received from NATO HQ and SACEUR.

(2) Participate in the Operational Planning process and in all the Battle Rhythm meetings during crisis/operations.

(3) Ensure that guidance and directions are included in the PA annexes of all SACEUR-originated OPLANs and Contingency OPLANs (COPs), and appropriate Support Plans (SUPPLANs).

(4) Test these policies and procedures and train exercise players in ACO-wide and SHAPE command post exercises (CPX). (Note that essentially training is an ACT responsibility).

(5) Plan and co-ordinate PA involvement in the deployment phase of ACO subordinate commands and Combined Joint Task Forces (CJTF) forces.

(6) Inform and advise SACEUR, J(F)Cs/JCs/CCs, and the SHAPE Command Group (CG) on all aspects of PA activities and public/media opinion/trends.

(7) Prepare and co-ordinate the clearance and approval of PA products, including news releases about ACO operations and activities, release approved information to the public, and provide daily news summary and analysis.

(8) Collect, review, summarise and analyse public / media opinion/ trends of news items/reports from periodicals and wire services on a 24-hour, 7-day basis. Monitor radio and television broadcasts.

(9) Liaise with the Info Ops and Psy Ops functions under the auspices of the Chief StratCom to be aware of Info Ops campaigns, but have no role in planning or executing them.

(10) Maintain liaison with PA staff at NATO HQ, SHAPE Chief Strategic Communications (CSC), J(F)Cs/JCs/CCs, ARRC, HQ NAEW and CFC, the Combined Joint Planning Staff (CJPS), the Partnership Co-ordination Cell (PCC), future CJTF/Deployable Joint Task Force (DJTF)/mission HQs, Crisis Response Operations (CRO) HQs and the MODs, United Nations (UN), European Union (EU), Organisation for Security and Cooperation in Europe (OSCE), EUROCORPS and any European force deploying under NATO Command.

(11) Plan, co-ordinate and direct major cross-regional PA activities of ACO J(F)Cs/JCs/CCs.

(12) In co-ordination with the Executive Assistant to COS for Cooperation (EACOS COOP) develop and promulgate policies and procedures for ACO PA activities in support of PfP exercises, and other cooperative issues including CRO.

(13) Provide all possible assistance to news media representatives covering ACO issues and activities.

(14) Conduct news briefings on PA issues and events of public interest as required.

(15) In conjunction with SHAPE protocol and other appropriate SHAPE staff, organise and conduct unclassified briefings/discussions about ACO operations for visitors to SHAPE.

(16) Organise a NATO Presentation Team to conduct NATO information briefings as required to NATO, PfP and NATO-candidate nations.

(17) Serve as the proponent for standardisation of manning, equipping and training, throughout the ACO PA community for effective PA in peacetime, tension, crisis and conflict.

(18) Advise and assist the PCC, as required, concerning media and

PA/opinion issues.

(19) Provide media training to PA personnel, ACO commanders and subject-matter/technical experts in conjunction with ACT PA.

(20) In times of crisis, ACO CPAO at SHAPE will:

(a) Establish a PA presence with the SHAPE Strategic Direction Centre (SDC), in accordance with the Crisis Establishment of the SDC.

(b) Conduct media relations activities from the ACO headquarters (SHAPE) Media Information Centre.

(c) Provide two officers to the Media Operations Centre (MOC) at NATO HQ when activated.

(21) Develop policy and procedures for release of information to the public via the Internet.

(22) Promulgate the Annual ACO PA Plan.

(23) Maintain the NATO still imagery database.

(24) Ensure that proper information/document management archival practices are in place in accordance with applicable NATO directives.

c. **SHAPE Deputy Chief of Staff Operations (DCOS OPS) and Deputy Chief of Staff Support (DCOS SPT) will:**

(1) Support the accomplishment of ACO's PA mission and activities by assisting the PA staff in developing talking points/media response lines (MRLs), and by making 'subject matter experts' available for background sessions, briefings, panels, question and answer (Q&A) sessions, and other contacts with media representatives and public groups.

(2) Ensure that CPAO is integrated into the strategic planning process for ACO's mission and operations, and that information is made available to the ACO headquarters PA staff in a timely manner.

(3) Ensure adequate resources are assigned to the PA function to allow mission success.

d. **J(F)Cs/JC/CC CPAOs.** JFC/JC/CC CPAOs are their commanders' strategic and tactical PA advisors. They will:

(1) Comply with PA policies, guidance and procedures established by ACO CPAO at SHAPE.

(2) Develop and promulgate to subordinate commands PA policies, objectives, guidance and procedures, which supplement and reinforce those established by ACO CPAO at SHAPE.

(3) Ensure that these policies, procedures, and requirements are reflected in detail in CC-originated OPLANs, COPs and SUPPLANs.

(4) Inform and advise their commanders and staffs on all aspects of PA operations.

(5) Participate in the command group planning process.

(6) Gather and prepare information about ACO/JFC/JC/CC activities and release-approved information to the public in support of the commander's mission.

(7) Maintain liaison with ACO headquarters (SHAPE) PA and subordinate PA organisations, plus national PA authorities within their region and with the EU, OSCE, UN and Non-Governmental Organisations (NGOs) as appropriate.

(8) Inform their higher PA tech net organisation immediately when significant events occur.

(9) Test their policies and procedures, as well as ensure training of appropriate exercise players in ACO-wide and JFC/JC/CC CPXs.

(10) In co-ordination with ACO headquarters (SHAPE) PA staff, ensure that sufficient, qualified PA personnel and equipment are available at each level of command in the JFC/JC/CC to conduct effective and efficient PA activities on a continuous, sustained basis. Keep ACO CPAO at SHAPE informed of actions taken to obtain necessary PA personnel, equipment and funding

(11) Organise and conduct unclassified briefings for public groups in order to contribute to the successful conduct of the commander's mission.

(12) Provide all possible assistance to news media representatives covering JFC/JC/CC issues and activities.

(13) Act as delegated spokesperson for their commanders.

(14) Provide ACO PAO staff at SHAPE with daily summaries and analyses of significant regional news items on NATO/ACO issues and activities, and provide public/media opinion/trends as information becomes available.

(15) Develop and co-ordinate PA activities, policies, Initial Exercise News Releases (IENRs) and PA operations in support of JFC/JC/CC-

level exercises.

(16) Serve as the proponent for manning, equipping, training, and budgeting requirements and priorities throughout the respective JFC/JC/CC PA community. Ensure appropriate staffing, communications/word processing/audio-visual compatibility and redundancy, and budget allocation for effective PA in peacetime, crisis periods and conflict.

(17) In times of crisis, J(F)Cs/JCs/CCs will:

(a) Establish a PA cell in their HQ crisis management office or similar organisation upon its activation.

(b) Submit initial and follow on PA Situation Reports (SITREPs) to ACO CPAO at SHAPE.

(c) Ensure that PA data is included in J(F)Cs/JCs/CCs ASSESSREPs when required.

(d) Be prepared to assume PA responsibility for forces coming under JFC/JC/CC operational control.

(18) Develop and maintain a web presence in compliance with the ACO Internet policy. Supervise and co-ordinate regional release of information through the internet.

(19) Provide still and video imagery to the NATO imagery database on a continuous basis.

(20) Propose inputs to the ACO PA Plan.

e. **Operations.** A designated CPAO for an operation is the primary advisor to the commander for all the PA activities of the command. She/he controls and directs the activities of the MIC through the MIC director. She/he provides PA guidance to subordinate formation and unit PAOs upon TOA.

f. **National Authorities**

(1) Upon receipt of SACEUR's Request for Activation of national forces, nations should notify SACEUR and appropriate higher HQs in advance of release of any information regarding the activation, deployment or employment of those forces.

(2) Upon transfer of national forces (either in-place forces or external reinforcements) to SACEUR's operational command, national authorities should:

(a) Ensure that responsibility for PA activities relating to the operations of those forces is transferred to SACEUR simultaneously.

(b) Coordinate with and support SACEUR's PA policies and activities when pursuing national PA activities related to those forces, including the use of NATO Standard Operating Procedures (SOP) as outlined in this document, in the ACO PA Handbook, and other guidance as promulgated specifically for missions.

(c) Ensure the timely implementation of applicable plans to augment/support ACO PA organisations with personnel, facilities and equipment as specified in PA annexes of Contingency Operations Plans (Annex X).

g. **Commanders of Forces under SACEUR's Operational Command will:**

(1) Comply with ACO PA policies, objectives, guidance and procedures.

(2) Provide PA liaison personnel and other resources as specified in PA annexes of appropriate Operation Plans (Annex X).

(3) Ensure that the organic PA assets of their forces are available to support ACO PA activities.

h. Individuals serving in ACO are required to contact, cooperate and co-ordinate with their NATO PA office before making any written or oral presentation to the media or general public on ACO/NATO topics. Such policies, whether set by a participating nation or a mission HQ, shall be as open and transparent as possible, the aim being to maximize the flow of information to the public.

2-4. **Transfer of PA Responsibility for Forces Transferred to SACEUR's Authority**

a. Until nations transfer authority to SACEUR for their forces, the planning, co-ordination and conduct of PA actions relating to these forces will remain a national prerogative. ACO PAOs should never comment on specific contributions of/by any particular nation, unless specifically approved by the nation.

b. When authority for these forces is transferred to SACEUR, SACEUR will simultaneously assume responsibility to plan and conduct PA actions that relate to the military operations of these forces. This will be done in co-ordination with the nations concerned. When TOA forces are assigned to

NATO formations or HQs, those commanders will assume these responsibilities.

c. In order to effect the transfer of PA responsibility for forces coming under SACEUR's command at TOA, ACO and national PAOs should be familiar with the methods by which authority is transferred and with the timing of transfer.

d. For certain contingencies--particularly those involving SACEUR's Strategic Reserves (SR)--when operational command of forces is transferred to SACEUR prior to the arrival of forces in their employment areas (e.g. the forces initially stage in locations outside their eventual employment areas)--SACEUR will retain PA responsibility until such forces are committed or assigned to a NATO mission/HQ.

FOR THE SUPREME ALLIED COMMANDER, EUROPE:

James Selbie
Brigadier General, CAN Army
Director of Staff

DISTRIBUTION:

B, BB, G, GG

AMENDMENTS/COMMENTS

Users of this directive are invited to send comments, amendments and suggested improvements to the ACO Public Affairs Office at SHAPE (Attn: Chief Public Affairs Officer)

ANNEX A.4 ACO StratCom Policy ACO Dir 95-2

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SUPREME HEADQUARTERS ALLIED POWERS EUROPE

GRAND QUARTIER GÉNÉRAL DES PUISSANCES ALLIÉES EN EUROPE

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ACO DIRECTIVE (AD) 95-2

ACO STRATEGIC COMMUNICATIONS

REFERENCES:
A. PO(2009)0141, NATO Strategic Communications Policy, dated 29 Sep 09.
B. SHJ5/08-205837, SACEUR's Strategic Plan, 2008-2012, Issue 2, dated 03 Dec 08.
C. SACEUR's Vision for ACO, dated 17 Jul 07.
D. MC 422/3 NATO Military Policy on Information Operations (Final), dated 08 Jul 08.
E. MC 457/1 NATO Military Policy on Public Affairs (MIL DEC), dated 19 Sep 07.
F. MC 402/1 NATO Military Policy on Psychological Operations (Final), dated 17 Apr 03.
G. ACO Comprehensive Operations Planning Directive (Draft), dated 25 Sep 09.

1. **Status**. This Directive supersedes Allied Command Operations (ACO) Directive 95-2, dated 15 September 2008.

2. **Purpose.** To provide guidance on the planning and conduct of Strategic Communications within ACO.

3. **Applicability.** This directive is applicable to all ACO headquarters/units and should be used as a guide for the preparation of local directives.

4. **Supplementation.** Supplementation is authorised. SHAPE Chief of Strategic Communications (CSC) is to be provided with a copy of any such supplement.

5. **Publication Updates.** Updates are authorised when approved by the Director of Staff (DOS), SHAPE.

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6. **Proponent**. The proponent for this directive is the Office of the Chief of Strategic Communications (CSC), SHAPE.

FOR THE SUPREME ALLIED COMMANDER, EUROPE:

James Selbie
Brigadier General, CAN Army
Director of Staff

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CHAPTER 1

BACKGROUND

1-1. **Operating Environment**

a. ACO is operating in an era where the global role of information and media is critical to success. The alliance must justify itself to many parties, but especially its members and partners while under more operational pressure than at any time in its history.

b. The global information environment has ushered in unprecedented changes including offering opportunities to our opponents, and traditional institutions will struggle to manage these new challenges unless they are bold in reforming their structures, mindsets and working methods. Such is the importance of information in mission success that, on occasion, policies and actions will even need to be adapted in response to the imperatives of Strategic Communications.

1-2. **Key Challenges.** All of the key challenges facing NATO have a critical information component, whether it is countering our opponents' use of information, especially in asymmetric campaigns, or working to sustain the support of our publics and opinion leaders by ensuring they fully understand what is being done in their name.

1-3. **StratCom's Role.** Strategic Communications (StratCom) has a central role to play throughout all stages of operations and in managing public perceptions, and is at the heart of leading and managing our response to the challenges of the information era. StratCom will contribute positively and directly in achieving success in ACO operations and activities through its integration in all aspects of operational and policy planning and execution.

1-4. **Guidance to Subordinate HQs.** As all headquarters pursue implementation of the new Peacetime Establishment (PE), all must remain flexible and open/adaptive to potential requirements for re-organisation/structural change driven by such areas as advances in social media.

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CHAPTER 2

DEFINITIONS, MISSION AND PURPOSE

2-1. **Definitions.** The concept of StratCom is not new to NATO, but it will require novel approaches to achieve effectiveness. StratCom as generally understood takes in all components of the information campaign, but Public Diplomacy and political guidance is the responsibility of NATO HQ. The NATO definition of Strategic Communications is (Reference A):

a. **NATO Strategic Communications:** the coordinated and appropriate use of NATO communications activities and capabilities - Public Diplomacy, Public Affairs (PA), Military Public Affairs, Information Operations (Info Ops) and Psychological Operations (PSYOPS), as appropriate - in support of Alliance policies, operations and activities, and in order to advance NATO's aims.

b. As Public Diplomacy and Public Affairs are led by NATO HQ, **within ACO StratCom is defined as:** In cooperation with NATO HQ, the coordinated and appropriate use of Military PA, Info Ops and PSYOPS which, in concert with other military actions and following NATO political guidance, advances NATO's aims and operations.

c. StratCom will adhere to the relevant NATO policies, MC422/3 on Information Operations, MC402/1 on Psychological Operations, and MC457/1 on Public Affairs, which highlight both the need for co-ordination between all elements of the information community, but also the continuing separation between differing disciplines.

2-2. **Mission and Purpose**

a. To make a major contribution to Alliance success through gaining and maintaining understanding and support for NATO/ACO and its operations, particularly among NATO nations, partners, and within our areas of interest. This enhanced understanding and support covers a broad range of audiences, and also encompasses the concept of making potential or actual opponents aware of, and therefore influenced by, NATO/ACO power and will to succeed.

b. StratCom will support ACO's mission as described in SACEUR's Strategic Plan 2008-12. This will place StratCom at the heart of policy, planning and implementation and, as an integrated part of the overall effort help develop practical strategies that contribute to mission success.

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c. In order to ensure the consistency of message that is vital to maintain credibility, StratCom will, in coordination with NATO HQ[1], provide oversight of the various components of the information community as they deliver strategic effects in their focus areas.

d StratCom outputs will be designed to reflect the expected tone outlined in SACEUR's Vision (Reference B) for ACO. The values embodied reflect the enduring qualities of our militaries, the Alliance, and our societies.

[1] In the context of this directive," NATO HQ" refers to all of the StratCom stakeholders within the IS and IMS.

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CHAPTER 3

ORGANISATION & RESPONSIBILITIES

3-1. **Introduction.** At all levels within ACO StratCom is a Command responsibility and a Command Group function. StratCom provides a cross-divisional coordinating and enabling function, and on StratCom issues shall facilitate cooperation between J staffs, NSCC, POLAD, PA, Info Ops and/or PSYOPS.

3-2. **SHAPE Organisation & Responsibilities.** Within ACO CSC has the lead for developing and proposing necessary StratCom guidance/directives for implementation and assumes responsibility for those implementing tasks assigned. SHAPE StratCom will therefore operate as a co-ordinator and catalyst for action. In accordance with SACEUR's StratCom direction and guidance, CSC is also responsible for the coordination of military PA, Info Ops and PSYOPS outputs in support of StratCom plans and outputs; and, for overseeing the execution of the plans, in coordination with NATO HQ and subordinate ACO HQs. This work will be guided by the following ACO StratCom supporting structure:

a. SACEUR's StratCom Direction and Guidance (D&G). SACEUR will chair a monthly SHAPE 4* meeting, attended by Chief Strategic Communications (CSC), to provide StratCom D&G and approve StratCom proposals.

b. StratCom Working Group (SCWG). CSC will chair a monthly ACO StratCom WG, at working level, to oversee the development and implementation of StratCom policy, plans and activities (see Annex A).

3-3. **Subordinate HQ Organisation and Responsibilities.** While ensuring that StratCom remains a Command responsibility and a Command Group function, subordinate HQs are to create or adapt information coordination structures, processes, and procedures that are appropriate to their particular circumstances. However these must support ACO's StratCom Mission and Purpose as set out in Chapter 2, and SACEUR's strategic intent articulated in his Vision statement. Subordinate HQ StratCom activities are to be coordinated with, and in support of, SACEUR's direction and guidance. Within subordinate HQs, StratCom staffs shall be responsible for facilitating:

(1) The production and upkeep of HQ engagement plans.

(2) Subject Matter Expert support to deployed forces under HQ command.

(3) StratCom advice to the HQ Command Group.

(4) Specialist advice to Higher HQ during the development of StratCom plans and associated messages.

(5) Message alignment and synchronisation throughout the HQ and with subordinate HQs.

(6) Specialist input in support of StratCom capability development.

3-4. **Working Methods.** The diverse nature of StratCom and wide geographic location of stakeholders, demands innovative working processes and offers opportunities to develop operating practices more in tune with the flat, network structures found both in information era businesses and among our opponents. ACO StratCom will place strong emphasis on collaborative working through a Community of Interest approach which provides physical and virtual linkages between relevant stakeholders.

3-5. **Linkages.** Within ACO, CSC is responsible for developing and maintaining a robust formal linkage with the NATO HQ Public Diplomacy Division (PDD) and the Public Affairs Advisor, International Military Staff (PAA/IMS). CSC is also responsible for developing and maintaining formal linkages within SHAPE and between SHAPE StratCom and StratCom Advisors (and associated staffs) at subordinate HQs.

3-6. **Strategic Effects.** StratCom is not a standalone capability. The integration of StratCom into all aspects of policy development, the Comprehensive Operations Planning Process and execution, underpinned by the appropriate use of Measures of Effectiveness, is critical to mission success. At SHAPE, the Strategic Effects Team[2] will be required to provide integration and synchronisation with policy advice, key initiatives and 4*CG strategic objectives, in support of current and future operations.[3]

3-7. **Coordination.** Coordination of activities between all elements of the information community is vital to the effective delivery of StratCom outputs. ACO HQs should ensure that effective StratCom engagement is established with external organisations and groups which contribute to the delivery of StratCom effects. For example, in the interest of alignment and efficiency, there will periodically be a requirement to coordinate StratCom activities with non-NATO StratCom stakeholders such as HQs US CENTCOM and US EUCOM. The ACO StratCom coordination mechanisms are set out in Annex A.

[2] The Strat Effects Team will formally stand-up as part of DCOS Capability, Plans & Policy's staff under the PE Review.
[3] Where effects and conditions need to be generated above the Operational level.

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CHAPTER 4

EXECUTION

4-1. Narrative

a. Sustainable support for any institution or campaign is founded on both logic and instinct. NATO/ACO therefore needs to ensure that, firstly, it has a core narrative that resonates with its audiences, and, secondly, its operations and actions are consistent with that narrative. The NATO narrative, of **a democratic, multinational alliance uniting across borders to guard, with courage and competence, against threats to our homes**, has not changed. However, the continuing relevance of this narrative in the face of today's complex security challenges has yet to be convincingly articulated.

b. Development of an updated NATO story should be led by NATO HQ. ACO will contribute to its creation and ensure it is disseminated, adapted and interpreted at all appropriate levels.

c. The review of NATO's Strategic Concept, with its stated commitment to public consultation, provides a powerful opportunity to re-invigorate the NATO narrative and more clearly articulate NATO's relevance.

4-2. Themes and Messages

a. Broad themes and messages, including for operations, are determined by NATO HQ. ACO's main role is to take these themes and messages, and interpret them appropriately at the strategic, operational and theatre level. SACEUR's primary requirement is the imaginative and active implementation of our messages in ways that reach out to, and influence, our audiences. This will include explanations for and justifications of our high-level policies and actions, kinetic and otherwise, to appropriate audiences. ACO, led by StratCom will:

(1) Actively participate in the process of generating themes and messages that go to the NAC, and ensuring they take account of operational realities.

(2) Disseminate messages quickly and widely in accessible and easily understood format.

(3) Ensure themes and messages are regularly monitored, adapted and updated.

(4) Seek to seize opportunities to spread our messages in a 24/7 information environment.

(5) Ensure a clear linkage between actions and messages. Actions accompanied by themes and messaging provide the most powerful StratCom effects. ACO must listen to key audiences and respond either through explanation or justification, or,

if necessary, be prepared to modify policies or actions, followed by effective messaging.

b. In collaboration with NATO HQ, SHAPE StratCom will identify and develop the high level themes and messages required to support ACO activities and operations, and direct their dissemination throughout ACO, thereby ensuring message alignment. Theatre-specific StratCom direction and guidance will be provided on a case by case basis through SACEUR-approved OPLANs, SUPLANS and Directives. SHAPE StratCom will provide further guidance, coordinated with NATO HQ, to subordinate HQs for specific operations.

4-3. **Audiences**

a. NATO/ACO must communicate to a wide variety of external audiences, with differing interests and priorities, some of which overlap. These range from conventional media, through NGOs and other international bodies to, adversaries in theatres of operation. External audience analysis and assessment capabilities will be essential to the success of this process.

b. There is a need to maximise theme and message coherence across the Alliance and its Partners, and ACO will co-operate closely with nations, especially when communicating to their domestic audiences, and avoid public differences between NATO as a body and NATO nations. Close co-ordination is also required with NATO HQ, which has primacy in engaging with NATO nations.

4-4. **Engagement and Empowerment**. The dynamic nature of the information era requires that ACO adopts a multi-facetted engagement process. Effective communication also requires interaction, highlighting the need to listen as well as speak. In addition to managed engagement activities, specifically by senior leadership, nominated spokespersons and subject matter experts, ACO staff must be empowered to engage appropriately. Empowerment will amplify ACO messages and extend audience penetration. Traditional and internet-based information technologies must be utilised to maximise the impact of this new approach, and the associated risks actively managed by senior leaders. In this manner, ACO can transition away from a 'one to many' communications posture towards a 'many to many' engagement approach.

4-5. **Technology and Capability**

a. Traditional print, radio and television media continue to be vitally important, but new Internet-driven information technologies are increasingly dominant. Moreover, by their nature, they are developing in rapid and often unpredictable ways that present conceptual, organisational and resource challenges, especially to traditional bodies such as NATO.

b. In order to meet this new challenge ACO will respond on two levels:

(1) Intellectual and organisational. ACO must create adaptable structures, and embrace innovative processes such as collaborative working, staffed by empowered individuals who are encouraged to be creative in responding to this changing environment.

(2) Resourcing. ACO must fund, equip and train to stay abreast of, and exploit, both traditional and new media.

c. SACEUR expects continued emphasis to be placed on resolving the existing resource, equipment and training challenges currently experienced across the StratCom capability area - from tactical to strategic level. It is noteworthy that some of NATO's adversaries have significantly more advanced and effective StratCom capabilities than those possessed by the Alliance - this key gap must be closed.

4-6. **Measures of Effect/Assessment.** Non-kinetic effects are hard to assess, and there are limits to the degree that statistics can measure influence. There is a place for both objective and subjective analysis. ACO must not fall into the trap of valuing what can be measured over what actually matters. Notwithstanding, today's information and measurement technologies offer the potential to better assess our performance and to develop meaningful indicators of effectiveness. All ACO HQs must work closely to improve capability in this area of weakness within ACO.

4-7. **Capability Development**

a. A NATO StratCom Concept is being developed under ACT leadership, with close engagement of stakeholders within NATO HQ and ACO.

b. A standing Bi-SC working group should be used to pursue further progress in StratCom capability development.

c. National and NATO training in the individual information disciplines (Info Ops, PSYOPS and PA) is also essential to the effective delivery of StratCom and StratCom support to operations. This is an area which requires timely, substantial and sustained improvement in delivery.

d. Exploitation of internet-based information technologies will require concerted effort from all StratCom stakeholders within NATO HQ, ACO and ACT.

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ANNEX A TO
AD 95-2
DATED 9 NOV 09

ACO STRATEGIC COMMUNICATIONS COORDINATION

1. NATO HQ StratCom Standing Body.

   a. Chaired by ASG PDD.

   b. ACO represented by CSC.

2. Monthly SHAPE StratCom Working Group, with a core membership of:

   a. SHAPE: CSC, Dir SDC, J3 SDC, J2 SDC, PAO, J5 PLX, J5 CMD, NSCC, INTAF, J3 Info Ops, J3 PSYOPS.

   b. J(F)Cs (routinely by VTC): StratCom Advisors.

   c. NATO HQ: PDD, MOC, IMS PAA & Info Ops.

3. Weekly ISAF-focused StratCom VTC (led by NATO HQ).

   a. NATO HQ: PDD, MOC, IMS PAA & Info Ops, IS Ops & Int.

   b. SHAPE: CSC, PAO, J3 SDC, J2 SDC, J3 Info Ops, J3 PSYOPS.

   c. JFC Brunssum: StratComAD, Info & Influence section, PAO.

   d. HQ ISAF: StratCom, Spokesman, SCR Spokesman, CJPOTF.

4. Monthly KFOR-focused VTC led by (JFC Naples).

5. Annual NATO-wide StratCom conference. Routinely held each Spring for all StratCom stakeholders within NATO and selected external invitees, including academics and civilian contractors.

6. Ad-Hoc StratCom seminars/Working Groups. Held as required, usually with participation from NATO StratCom stakeholders only, and designed to focus on specific issues/topics

7. NATO StratCom Community of Interest. Sustained engagement with internal and external StratCom stakeholders through exploitation of computer-based technologies to establish a virtual forum.

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ANNEX A.5 ACT PA Policy ACT Dir. 95-10

NATO UNCLASSIFIED RELEASABLE TO PFP

NORTH ATLANTIC TREATY ORGANISATION

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ACT DIRECTIVE
NUMBER 95-10

3 September 2008

PUBLIC AFFAIRS POLICY

This Allied Command Transformation (ACT) directive will be included in the next publication of the List of Effective ACT Directives Index. This directive supersedes ACT 95-10 Directive dated 23 August 2005.

References: A. MC457/1 Military Policy on Public Affairs, 14 Sept 07
B. MC458/1 NATO Education, Training, Exercise, and Evaluation Policy, 27 Mar 06
C. ACO Directive 95-1, "ACO Public Information"
D. ACT Directive 75-2/D, "JFATG for Public Information," 1 Oct 07

1. **Applicability**. This directive applies to all of Allied Command Transformation, including its subordinate commands and staff elements, hereafter referred to as "the command."

2. **Interim Changes**. Interim changes are authorised when approved by the HQ SACT Chief of Staff.

3. **Purpose**. This directive describes the Public Affairs (PA) responsibilities of ACT commanders, directors, managers, public affairs officers (PAOs), and personnel. It further describes the requirement for all ACT subordinate commands and staff elements to establish or designate a PAO, and to acknowledge ACT PA as the leading agent and senior resource in establishing and operating their PA organisations. In addition, this directive elaborates on key policy aspects of public affairs.

4. **Overview**. HQ SACT PA is a branch within the Command Group that reports to Supreme Allied Commander Transformation, and advises Deputy SACT and Chief of Staff. It also provides overall guidance for NATO PA policy, doctrine, and training, including oversight of public affairs courses at NATO Education and Training Facilities.

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5. **Responsibilities**

a. **ACT Public Affairs.** ACT Public Affairs is mandated to globally communicate SACT's vision and messages, and to lead PA activities for the command. PA is also responsible for Community Relations and Internal Communication campaigns and for coordinating all ACT media engagements. PA is a command responsibility of the highest priority. Among the key tasks of the PA branch are to:

(1) Act as the senior advisor to the Commander on all public affairs matters.

(2) Facilitate contact with PA officials at other NATO and non-NATO entities as necessary to support the command's mission.

(3) Coordinate and respond to queries and reports from external media sources to include:

(a) Developing media plans that include themes, messages, and approaches to measure and assess effectiveness;

(b) Researching media outlets and their representatives; and

(c) Providing feedback on media coverage of interest in print, video, and audio products.

(4) Contribute to the coordination of the command strategic engagements and communications efforts.

(5) As resources allow, provide PA training to subordinate commands and PA support to exercises to include:

(a) Developing comprehensive training materials

(b) Providing trained and qualified PAOs/trainers

(6) Develop and maintain command information products, such as:

(a) News articles for Web and *The Transformer* magazine

(b) Web-based audio ("podcasts") and video ("vidcasts") news products

(c) Media Advisories

(d) Press Releases

(e) Trifolds, brochures and booklets

(f) Fact sheets

(g) Other written and A/V products as required

(7) Ensure that all command information products adhere to NATO Visual Identity Guidelines and ACT corporate identity standards.

(8) Manage, oversee and provide contractor and staff instructions for all publicly accessible ACT command web sites, to include guidance on design, architecture, content and maintenance.

(9) Coordinate PA at parallel and higher levels within NATO and the nations.

(10) Facilitate media training of subject matter experts designated to discuss command matters of interest.

(11) Plan and perform command briefer training and certify command briefers.

(12) Perform other PA-related tasks as directed by command group leadership.

b. **PA Manning, Subordinate Commands and Staff Elements**. All ACT subordinate commands and staff elements shall have at a minimum one established or designated PAO. If a peacetime establishment PA post does not exist, or the post is vacant, an officer (OF 2 or higher), senior NCO (OR7 or higher) or civilian equivalent shall be designated as PAO. With regard to a PA post, the following policies will be upheld:

(1) The PAO may not be double-hatted as an Information Operations or Psychological Operations officer, but will in accordance with NATO PA policy MC 457 co-ordinate with these functions.

(2) PAOs shall report directly to the commander and be granted proper access to senior staff and staff meetings.

(3) PAOs shall be given adequate time and resources to fulfil their PA functions.

(4) PAO advice and guidance shall be sought and incorporated at the earliest possible stages of planning or management issues throughout the organization.

(5) PAO contact information must be forwarded to HQ SACT PAO.

(6) PA personnel shall attend the next available NATO School PA course after being assigned. The HQ SACT CPAO may waive this requirement if the nominee has completed an equivalent, NATO-recognized PA course.

c. **PA Functions, Subordinate Command and Staff Elements**. PAOs at ACT subordinate commands and staff elements must keep both their commander and HQ SACT PA informed of their PA activities. Specifically, such designated PAOs:

(1) Shall work directly with the news media to address inquiries or disseminate information specific to their organisations.

(2) In consultation with their chain of command, shall immediately inform HQ SACT PA about any significant events or issues that may attract news media attention.

(3) Must inform HQ SACT PA on, and provide copies of, any significant news media coverage in a timely manner – in English if at all possible.

(4) Shall provide input and support to ACT-wide internal and external communication vehicles, such as the ACT web site and magazine.

(5) Shall ensure that their command has a web site, to include a section for PA-related information and command PA phone and e-mail contact. PAO is responsible for ensuring that the site's layout is within NATO Visual Identity Guidelines and that content is relevant, accurate, without classification, and up-to-date.

6. **Coordination**

a. **HQ SACT PA**. HQ SACT PA will coordinate with the NATO Public Diplomacy Division Press & Media Section, NATO Spokesperson, IMS PA Advisor, and the Allied Command Operations PAO on a routine basis. During crisis or for special requirements, additional coordination will occur as needed.

b. **Subordinate PAOs**. Subordinate PAOs will inform HQ SACT PA of all routine information activities on a weekly basis via an e-mail report and conference call. HQ SACT PA will promulgate timings for conference calls and reports to include key issues, planned training and education, exercise support, special events, media relations, web developments and requests for assistance/ guidance. Subordinate PAOs shall provide 24-hour advance notice if unavailable for the conference call and submit negative responses if nothing to report by e-mail.

(1) Subordinate PAOs may co-ordinate with parallel NATO, national, or other PA entities for routine matters. During crisis, if HQ SACT PA is not accessible in a timely manner, subordinate PAOs may liaise with higher levels of command as required, but must keep HQ SACT PA concurrently informed.

(2) Where HQ SACT or SACT leadership is to be mentioned in PA products or engaged in PA activities, HQ SACT PA must be informed and consulted well in advance.

c. **Command Personnel**. All personnel will coordinate with PA in regard to the public release of information.

d. **PA Training and Education**. All PA training and education involving ACT organisations, including where acting in support of NATO HQ or ACO, must be coordinated with and validated by ACT PA and must adhere to the Joint Functional Area Training Guide for Public Information.

e. **Requests for Public Affairs Support during Exercises or Events**. All requests for PA support, active or reserve, for any exercise or major event must be coordinated with and validated by ACT PA.

7. **Release of Information**. References A through C delineate information release policies and procedures.

FOR THE SUPREME ALLIED COMMANDER TRANSFORMATION:

Jan Arp
Lieutenant General, Canadian Forces
Chief of Staff

DISTRIBUTION: (HQ SACT DIR 35-1)
Lists I, II, III, IV, VI

ANNEX A.6 ACO Social Media Policy ACO Dir. 95-3

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SUPREME HEADQUARTERS ALLIED POWERS EUROPE

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ACO DIRECTIVE (AD) 95-3

SOCIAL MEDIA

REFERENCES:
A. PO(2009)0141, NATO Strategic Communications Policy, dated 29 Sep 09
B. ACO Directive 95-2, ACO Strategic Communications, dated 19 Nov 09.
C. MC 0457/1 NATO Military Policy on Public Affairs dated 18 Sep 07.
D. ACO Public Affairs Handbook 2008, dated May 08.

1. **Status.** This is a new Allied Command Operations (ACO) directive and is effective upon receipt.

2. **Purpose.** To provide guidance on the utilisation of social media for official business within ACO.

3. **Applicability.** This directive is applicable to all ACO headquarters/units and should be used as a guide for the preparation of local directives.

4. **Supplementation.** Supplementation is not authorised.

5. **Publication Updates.** Updates are authorised when approved by the Director of Staff (DOS), SHAPE.

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6. **Proponent.** The proponent for the Directive is the Office of the Chief of Strategic Communications (CSC), SHAPE.

FOR THE SUPREME ALLIED COMMANDER, EUROPE

James Selbie
Brigadier General, CAN Army
Director of Staff

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CHAPTER 1

BACKGROUND

1-1. **Introduction**

a. Reference A acknowledges that public electronic communications offer NATO additional means of communicating its message in order to meet its objectives. Reference B also highlights the important role to be played by new media[1] in the delivery of effective Strategic Communications outputs within ACO. One element of new media, social media[2], is a 21st century phenomenon which is yet to be exploited to any significant degree within ACO for a number of reasons including technical limitations associated with NATO information/ computer system architecture and concerns over INFOSEC/OPSEC. However, social media offers potential to amplify and extend the scope of messaging by ACO, through non-traditional means. Empowerment of the individual and decentralisation of message delivery lies at the heart of successful exploitation of social media.

b. This directive will focus on the use of social media as a means by which internal and external communications and messaging can be enhanced. In addition, they provide a powerful means by which commanders can outline their broad intent and promote the concept of Mission Command. Moreover, social media tools also have the potential to support development of new business processes which could provide enhanced organisational agility while reducing bureaucracy and manpower requirements.

1-2. **Key Challenges**. As with any Internet-based capability, there are challenges, vulnerabilities and risks that must be identified, understood and mitigated in respect of social media tools. We cannot promote the use of these social media tools for their own sake - they must provide value-added to ACO's operational and business outputs. However, nor can we ignore the prevalence and burgeoning growth of new media and social media. Through using social media tools, we can improve our awareness of what is happening and enhance our assessment of the reactions of a wide audience; and then engage as appropriate. The freedom to communicate using these tools must though be balanced with the need to protect OPSEC, the privacy of information, personal safety, and guard against cyber attack and hostile or inadvertent mis/dis-information. Commanders must therefore identify the desired effects to be achieved through the use of these tools, and then guide and actively manage their use accordingly. Similarly, while the use of social media offers potential to improve process efficiency in the medium to longer term, the 'cost' of diverting limited staff effort to social networking activities and local technical considerations (such as access to workstations and bandwidth limitations) must also be factored-in when developing local guidance and implementation plans.

[1] New media is a generic term for many different forms of electronic communications that are made possible through the use of computer-based technologies.
[2] Social media are designed for dissemination through social interaction using internet- and web-based technologies to transform broadcast media monologues (one-to-many) into social media dialogues (many-to-many).

1-3. **Aim**. The aim of this directive is to provide guidance to enable military and civilian staff within ACO to make use of social media, while protecting their own, subordinate headquarters, ACO and NATO interests, and to thereby contribute to the effective delivery of ACO's internal and external communications objectives.

1-4. **Guidance to Subordinate HQs**. ACO subordinate headquarters are to adopt this directive, but to develop their plans for the use of social media tools, as appropriate to their particular circumstances, within the guidelines provided. Commanders are strongly encouraged to embrace and exploit, to the maximum extent local conditions permit, the potential benefits of social media tools within their areas of responsibility. Notwithstanding an initial selection of tools to be used, flexibility will be required to determine the most appropriate tools for a given headquarters and a free exchange of experiences is actively encouraged in order to spread best practice. Moreover, Commanders are required to satisfy themselves that appropriate risk mitigation and risk management processes are in place. A key mitigation means is staff training and education, to include periodic social media refresher training, along with security awareness promotion for all staff. Notwithstanding, the underlying principle should be one of empowering staff to play an active role in the delivery of both internal and external communications objectives.

1-5. **Requirements**. Social media tools will complement traditional communications means in contributing to the delivery of ACO's internal and external communication requirements. Internal communication requirements will predominantly be met through the use of ACO's current intranet services and other traditional means. External communications requirements will be met through use of traditional means, and the full range of computer-based technologies, including social media, via the public internet.

a. **Internal Communication Requirements**. There are 4 primary internal communications objectives:

(1) To convey the Commander's intent and philosophy to staff.

(2) The timely passage of information from senior leadership to staff, and for dissemination of time-sensitive news.

(3) To improve the level of awareness and understanding of staff of their role within the NATO 'corporation'.

(4) To foster a sense of empowerment among the staff, and to promote internal innovation and interaction.

b. **External Communication Requirements**. There are 3 primary external communications objectives:

(1) To broaden and deepen the understanding of ACO's role with external audiences.

(2) To engage with external audiences, to explain our mission and generate additional support, and to temper opposing views.

(3) To solicit ideas from external audiences that may help ACO develop its

thinking on specific issues and to nurture 3rd party advocates.

1-6. **Ways and Means**. Meeting these diverse communication requirements demands a coherent multidimensional communication approach to maximise breadth of audiences and audience penetration. Social media tools have significant potential to support achievement of these objectives. Compared to traditional media, it is generally quicker, less-complex technically and cheaper to produce products for social media. In addition, social media tools provide a means for far swifter updating of information and near instantaneous responses, compared to traditional means. Contemporary audiences increasingly demand to be part of the discussion rather than the passive recipients of information. Social media facilitates such engagement and enables us to reach both existing and additional, potentially significant, audience groups. Nevertheless, a valid and important place remains for traditional means such as verbal briefings and print copy.

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CHAPTER 2

SOCIAL MEDIA TOOLS

2-1. **Introduction**. A large number of social media communication tools are readily and freely available. New products are being released continuously and there is a high software refresh rate. In addition to a wide range of Web log (blog) applications such as WordPress and Blogger, the most popular social networking and micro-blog tools include LinekdIn, Facebook and Twitter. Wikipedia is an example of a new media tool which has led to the development of an extensive information reference source through collaborative contributions. Each tool tends to develop its own market emphasis and associated share, and some are geographically concentrated. For example, LinkedIn tends to be used by business professionals, and claims 40 million users in over 200 countries. Facebook and Twitter also have a global presence[3] focusing on social networking and have increasingly become a platform for marketing and public relations. Other tools, such as Skyrock (whose membership is concentrated in parts of Europe), may offer potential for reaching out and engaging with more specific audience groups.

2-2. **Official Sites**. In meeting the communications requirements outlined in Chapter 1, maximum use at all levels should be made of existing social media capability. When posting information in an official capacity, the following posting process is to be followed:

a. Identify the specific audience for the information.

b. Determine the appropriate social media tool to use.

c. Perform content review of information prior to posting (see also Chapter 3).

2-3. **SHAPE Official Sites**. At SHAPE, SHAPE PAO will remain the sole entity managing SHAPE's official presence on social networking sites. Only SACEUR and designated representatives are authorised to publish to such a site on behalf of SHAPE; other personnel may do so only in a 'non-official' capacity, unless specific Command approval is first obtained. SHAPE PAO currently manages three social media capabilities: SACEUR's Blog, the SHAPE Facebook site and the SHAPE Twitter presence. Initial efforts within SHAPE will be targeted therefore at maximising SHAPE's internal and external engagement via these tools as complementary activity to traditional engagement means. The following sub-paragraphs (provided for information only) outline SHAPE's current position and plans to extend use of existing tools. Subordinate level headquarters are invited to adopt a similar approach.

a. **ACO Blog**. Within the existing ACO Blog site at www.acositrep.com, SACEUR contributes with his periodic 'From the Bridge' posts. Additional posts from senior SHAPE leadership are encouraged in order to maintain an interesting and dynamic blog presence.

b. **SHAPE Facebook**. The SHAPE Facebook site will continue to be managed by SHAPE PAO. It is accessed via links on the SHAPE website at www.nato.int/shape. This is an open group to which anyone with a Facebook account can contribute. However, as

[3] Facebook claims to have 307 million registered users (August 2009).

noted in paragraph 2-3, comments representing SHAPE official views will only be posted by authorised personnel.

c. **SHAPE Twitter**. The SHAPE Twitter site is managed by SHAPE PAO and is accessed via links on the SHAPE website at www.nato.int/shape. SHAPE's Twitter presence is focused on alerting 'followers' to content posted elsewhere (for example, SACEUR's blog). SHAPE PAO will continue to be the sole corporate face within SHAPE to 'tweet'.

2-4. **Personal Sites & Personal Interaction on Public Sites**. There is a growing trend toward a blurring of the division between personal and work related use of social media tools. While personnel are at liberty to maintain personal websites and blogs, access to such tools from NATO communications and information systems is governed by Reference B, which requires individuals to gain prior approval from Commanders. Commanders are therefore to determine the relative merits of enabling or restricting such use, and to issue local direction accordingly. In addition, personnel who elect to post via their personal user account are to be reminded to exercise caution in offering personal opinion which could be interpreted or misconstrued as an official ACO/NATO position. Similarly, reasonable limitations on free speech (such as no political commentary while in uniform) extend equally to comments on social networking sites when identified by rank or photos in uniform. Personal posts should not contain product endorsements or inflammatory comments. Moreover, personnel are strongly encouraged to include a disclaimer in their posts when they are readily identifiable (via online profile or other means) as NATO staff members. For consistency across ACO, the following disclaimer message is recommended:

The views, thoughts, and opinions offered are personal and do not represent endorsed or official policy.

2-5. **Style**. Social media engagement is most successful when approached in a personalised, conversational, manner. There is little or no place for formal statements which are best-suited to formal corporate websites (such as www.nato.int), formal verbal or written statements (such as media releases) or publications (such as NATO's periodic Afghanistan Report). A conversational and relaxed style will attract others to offer opinions and to engage in discussion.

2-6. **Developing Engagement**. The life blood of successful social media networking is frequent, substantive and credible contributions. Commanders will need to consider how best to meet the demand for frequent contributions within their headquarters. However, a vibrant and dynamic engagement will be necessary sustain a meaningful social networking presence. In addition to senior leadership involvement, Commanders may consider identifying and encouraging specific staff members (from a broad spectrum of age/rank/experience) to participate in social media networking (either generally and/or on specific issues).

2-7. **Posting Guidelines**. All information that is posted to the Internet must be UNCLASSIFIED or non-classified and releasable to the public. Additionally, the following summary indicates the types of information that are **not** to be displayed on any public accessible website including personal blogs.

a. Pre-decisional, proprietary, or commercially-sensitive information.

b. Information that is not based either on personal experience or the scope of personal duties.

c. Information - other than authorised news releases - about casualties prior to confirmation that next of kin have been notified.

d. Information - other than authorised news releases - regarding events or incidents currently under investigation.

e. Information that is under copyright (in particular photographs from the www) or trademark, without permission of the holder.

f. Unit or other personnel lists/rosters, charts or directories, or names, addresses and telephone numbers of unit members.

g. Information about the future activities or movements of units or individuals which include details of time and/or location.

h. Any image, still or motion, of any military operation or activity unless that image has been cleared for release by the proper authority.

Additionally, personnel should be strongly advised against posting personal information that might compromise the security of the poster and/or his/her family.

2-8. **Comments**. Participation in social media networking sites (for internal or external communications objectives) is to actively encourage comment, discussion and potentially argument. Candid, substantive debate is a fundamental characteristic of a successful social media site; opinions that differ from those of NATO and its subordinate headquarters contribute positively to the debate. Exclusion of counter-views will swiftly limit popularity and credibility, disruptive or malicious contributions are readily identified and contributors generally self-regulate content after a very short period. However, when available, the ability to screen out comments before they are posted shall be used. The ACO Comments policy is at Annex A.

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CHAPTER 3

SECURITY AND TECHNICAL CONSIDERATIONS

3-1. **Introduction**. The use of social media explicitly involves the posting of information to publically-accessed websites. They consequently lead to an increased potential for INFOSEC/OPSEC infringements resulting from unintentional release of sensitive or classified information to a public forum. Social media tools do not, of themselves, introduce any new INFOSEC threats. However, from an OPSEC perspective, social media tools extend the scope (in terms of means and time) by which threats may occur. For example, social media tools have been used to socially engineer individuals and, in cases of identity theft, authorised use in the workplace may extend individual vulnerability if social media tools are already being used outside the workplace. However, misuse of social media, including its potentially diversionary effects, is not a technology or security problem, but primarily a management issue addressed through education and managerial supervision. Blanket bans on the use of social media tools would deny ACO the opportunity these tools represent for better internal and external communications, collaboration and public outreach. Whereas the release of information into the public domain has previously been tightly controlled (with release authority usually vested in the CPAO of the relevant headquarters), exploitation of social media will require a measured and carefully managed deregulation of authority to release information and greater empowerment of the individual. Equipping the individual with the means, training, and relevant guidance to release information is therefore vital. Deregulation will also place additional technical demands on the information architecture which has limited bandwidth, and with limited availability of, and staff access to, unclassified workstations. In addition, expanded use of social media will expose the information infrastructure to increased risk of compromise.

3-2. **Security Considerations**

a. Operational security is paramount. It is incumbent upon all personnel to consider the potential of creating risk to themselves, their families, their peers and the mission by publishing information to the Internet. Information and/or imagery may individually, or in conjunction with other information, provide insights into current ACO operations, equipment, capabilities, tactics and intentions, or may provide information that puts personnel in specialist roles or their families at risk. Further guidance for individuals on maintaining security online is provided at Annex B.

b. All information that is posted to the Internet must therefore be UNCLASSIFIED or non-classified and releasable to the public. Knowingly or unknowingly releasing classified information into the public domain may violate specific regulations and could lead to legal and/or disciplinary action being taken. Therefore, if there is any doubt about the OPSEC implications of content, authors/originators must first consult with their line manager and seek specialist advice as appropriate.

c. In order to mitigate the risks of OPSEC violations, individuals authorised to use social media on an official basis are to be specifically briefed on the potential risks associated with their use, by the J2 Security Awareness Cell (or similar headquarters body). They should also be issued with an aide memoire to reinforce the briefing. In addition, access to

social media tools should be configured to allow the display of a workstation screen splash page to further reinforce the "DOs and DON'Ts" of social media networking.

3-3. **Technical Considerations**

a. Local bandwidth availability and access to NATO Unclassified workstations will influence the degree to which social media can be employed in each headquarters. Moreover, the current information systems do not prioritise between applications and bandwidth to/from the internet is shared equally amongst all applications and users. It will therefore be necessary to assess locally the potential impact of extended use of social media on business outputs and to regulate their use accordingly. Simple operating restrictions may help mitigate the impact, such as avoiding use of video streaming which is extremely bandwidth heavy. While ACO aspires to enable universal staff access to social media, selective lifting of restrictions by workstation will also help limit the impact, as well as potentially constraining the scope for OPSEC breaches. However, the technical and administrative management burden of such an approach needs to be factored-in to local judgements.

b. As social media tools require access to the public internet, their use will inevitably increase the risk of malware, spam, phishing and hacking (and impersonation) being introduced into ACO information systems. Although defence in depth exists (including Intrusion Detection Systems, Firewalls and anti-virus software), previous incidents have confirmed that NATO is a target for cyber espionage and that our systems may be compromised prior to alerts from defence systems. However, the ability of network perimeter defences to adequately protect the internal systems will be constrained when using social media networking sites as most of the associated security risk is at the application level; user awareness and user end point services (anti-virus) are the key security protection mechanisms.

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CHAPTER 4

IMPLEMENTATION

4-1. **Introduction**. The successful exploitation of social media in support of ACO's internal and external communications requirements, and the potential they offer to support changes to business processes, will be dependant on a number of factors. These include, availability/access to appropriate social media tools, familiarity with and confidence in their use, and staff discipline to remain 'in their lane' of expertise/responsibility when posting information into the public domain. The value-added for staff participants will vary from post to post and individual to individual. There should be no compulsion to use social media, and national restrictions on the use of social media shall be respected. Commanders should seek to encourage authorised staff to determine themselves how they might best exploit the capability, to experiment and innovate, and to share their experiences widely (both internally and throughout ACO) to promote the spread of 'best practice'. By empowering and enabling staff, and by harnessing staff creativity and enthusiasm, ACO can gain considerably from the extended use of social media in support of its operational and business outputs. However, the risks associated with expanded use of social media and deeper empowerment of the individual as a communicator requires Command acknowledgement and active management.

4-2. **Initial Steps**. In recognition of the security and technical considerations previously outlined, and of ACO's very limited experience with social media, Commanders are encouraged to consider a measured approach. They should consider where the benefits of social media might allow most leverage. In addition, they should consider an initial degree of empowerment commensurate with local technical limitations.

a. By beginning to use social media networking tools in a relatively modest fashion, OPSEC/INFOSEC concerns can be managed, while allowing for a degree of experimentation. In addition, training can be focused on a limited audience and subsequently adapted on the basis of experience and as conditions demand.

b. The number of social media tools available for use should also be restricted initially, until experience has been developed and judgements can be made on their utility. To provide a common ACO-wide approach, Commanders are encouraged to limit access to the following single tools which provide a social networking tool (Facebook); a bookmarking tool (Delicious); a micro-blog tool (Twitter); a stills photo tool (Flickr); and a video tool (Vimeo). Other tools may provide greater utility for discrete user groups but approval for their use shall be considered on a case-by-case basis, having first conducted an INFOSEC assessment of the tool under consideration.

4-3. **Progress Reporting**. In order to formally gauge progress on the use of social media across ACO, Commanders are to provide a brief 6 monthly update to SACEUR by 30 April 10 and 31 October 10. The report should highlight positive and negative aspects of the use of social media and their future plans.

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ANNEX A TO
AD 95-3
DATED DEC 09

SOCIAL MEDIA - ACO COMMENTS POLICY

1. It is ACO policy to allow comments by external users on its corporate web presences where this supports wider communications objectives, for example by enabling better engagement with audiences.

2. Where an answer can be given quickly and simply, we will respond directly to online questions and queries. More difficult or detailed questions should be referred to existing official channels of accountability. Press queries should be directed to the appropriate ACO Public Affairs office.

3. External users are to be asked to follow the same guidelines as apply to ACO staff when they use social media. Namely, users must not knowingly transmit:

a. Offensive, indecent or obscene material or abuse images and literature.

b. Material which can reasonably be considered as harassment or, or insulting to, other people or organisations.

c. Material in violation of copyright or used in breach of a licence agreement.

d. Spam (electronic junk mail) or chain mail.

e. Material that could be, by its presence on an ACO website, reasonably expected to embarrass or compromise ACO (although comments that disagree with ACO **are** allowed).

f. Commercial activities which are not connected to ACO business.

g. Material designed to mislead people about who originated or authorised it (for example, through misuse of signatures).

h. Attempts to compromise ACO CIS, prevent legitimate access to them, damage them or seek to cause degradation of performance or denial of service.

i. Attempts to gain unauthorised access to ACO CIS or content for which there is no permission (hacking).

j. Attempts to access, amend, damage, delete or disseminate another user's files, emails, communications or data without the appropriate authority.

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k. Material in violation of the right of privacy as understood under applicable international treaties, agreements, Host Nation laws and NATO regulations

3. Comments which are judged as in violation of these guidelines will be withheld, edited or removed. ACO reserves the right to ignore, limit or suspend comments or responses to comments, locally or universally and without prior notice if it is judged that these are becoming a waste of official funds or time.

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ANNEX B TO
AD 95-3
DATED 03 DEC 09

GUIDANCE ON MAINTAINING SECURITY ONLINE

1. The following paragraphs outline the main categories of information that could be at risk when using social media, the hostile groups that might seek this information and the potential consequences if this information is compromised.

2. **Personal Information**. Personal information is always at a premium in the criminal and espionage world. Personal information may also enable hostile intelligence agencies or terrorists to target you or your family. It is also possible to give away information about yourself unintentionally through linkages made with other people. It is important therefore to safeguard details of your personal information. Items of information which could be used to take advantage of you and your family include:

a. Full Name, Date and Place of Birth.

b. Full Home Address, Telephone Numbers.

c. Passport details, National ID Card Details.

3. **Account Details**. Criminal groups may try to gain access to online, telephone or other accounts using your account details. It is important that such information is not given to third parties. Information such as that listed below could be used for criminal activity or blackmail:

a. Account Numbers, Logins, or User IDs.

b. Passwords, Pin Numbers.

c. Memorable Phrases, Security Questions.

4. **Details About Your Work**. Hostile intelligence services and terrorist organisation may seek details about your work or your unit/establishment. Information such as establishment/unit locations, telephone numbers, rank, staff number, position or role, could enable your establishment/unit to be targeted. Moreover, images can give away important information, so check to make sure that ID cards/official passes, keys, computer screen, paper documents and other potentially sensitive materials or equipment are not visible.

5. **Operational Information**. When directly involved in operations or supporting them, information protection becomes even more important and attempts to gather information by hostile agencies or groups may become more determined. The hostile exploitation of information may be used by an adversary to counter our operations putting lives and assets at

greater risk. It may also damage our credibility with allies and potentially lead to withdrawal of their support. Do not release online information about:

a. Operational Programmes, Deployment Details, Mission-Specific Information.

b. Capability Shortfalls, Casualty Details, Morale.

6. **Protecting Information**. In addition to withholding the types of information described above, there are a number of simple steps to protect you, friends and colleagues online:

a. Understand and apply your security settings; do not give out unnecessary information when registering; do not share logins or passwords, and change passwords regularly.

b. Make sure photographs do not give away information you want to protect.

c. Only post items that would be acceptable to your family, friends or colleagues.

d. Choose online friends careful and be circumspect in the information you share; be respectful about disclosing information about friends and colleagues - respect their privacy and maintain their security.

7. **Information Released in Error**. Security is everyone's responsibility. If you see information on the public internet that you believe may have been released without appropriate authorisation, report the matter immediately to your Commander or Line Manager, so that mitigation action can be taken. If information is sensitive, personal or operational in nature, report the matter immediately via the chain of command to the local Security Officer.

ANNEX B ACO Policy on the Release of Information

ACO PAOs will release as much information as possible to the public commensurate with operational security, next-of-kin (NOK) notification and national policies.

The following are the general policies for the release of information during NATO operations. Specific policy should be addressed in the OPLAN, which in turn, will be approved by the Military Committee and the North Atlantic Council.

Personal Information

a. Avoid release of inappropriate personal information. Generally the name, rank, position and nationality of a service member is appropriate, but national policies will dictate. Some nations encourage the release of hometowns in order to draw public support but other nations discourage this policy for security reasons.

b. It is usually inappropriate to release the names of family members, pay scales, or other information of a personal nature.

Casualty Information

Deaths or Killed in Action.

a. NATO PA offices in theatre will acknowledge deaths or serious injuries to personnel under NATO command in accordance with the PA principles. Ideally, NATO military PA will inform media first, and thus be ahead of adversary efforts to shape and frame media coverage of the situation for their own purposes.

b. Release of names, nationalities and personal details of service members killed or seriously injured is a national responsibility. Where casualties are incurred during an ongoing operation, relevant and verified information will be disseminated by NATO PA to the media in a timely fashion, while respecting the prerogative of troop contributing nations to confirm the nationality, detailed nature of casualties and the circumstances of the event. This requires speedy and proactive coordination to ensure message consistency amongst NATO and national PA communications.

c. PAOs should take care to ensure that the casualty release does not identify the nation (e.g. if only one nation is operating in a particular region, announcing that region will identify the nation and subvert the national prerogative to release the information). Pro-active staff work will identify the potential for such issues and the ACO PAO should coordinate ahead of time for an amicable solution with the nation.

Wounded, hospitalised or ill.

a. National policies dictate the release of information with respect to wounded and sick NATO service members.

b. OPSEC, patient welfare, privacy, and NOK/family considerations are the governing concerns related to media coverage of wounded, injured, and ill personnel located in medical facilities or other casualty collection and treatment centres.

c. Permission to interview or photograph a patient, including those during medical procedures, will be granted only with the consent of the attending physician or facility commander and with the patient's informed consent, witnessed by the person responsible for escorting the journalist. "Informed consent" means the patient understands his or her picture and comments are being collected for news media purposes and they may appear in any news media reports. The attending physician will confirm that the individual is medically capable of giving informed consent.

Persons Missing in Action.
a. The issue of missing persons is particularly important since it may be necessary to withhold information due to the security classification of the information (i.e. in anticipation of a rescue mission or the need to safeguard the information from an adversary in the event the person is trying to evade capture).

b. A restriction on a journalist's access or an embargo on the release of information related to a missing person may be established in such cases.

National Issues Related to Involvement in NATO Operations

National Caveats.
a. NATO and ACO do not discuss national caveats or restrictions imposed on forces involved in NATO operations. Such caveats are national business, outside the prevue of ACO PAOs to comment.

b. Should question regarding national caveats be posed, the PAO will politely decline to discuss, while inviting the journalist to contact the appropriate MOD.

National Troop Contributions.
a. The political headquarters will take the lead on announcing national troop contributions. Although the numbers might be taken from the theatre personnel tracking systems, NATO HQ will validate the numbers with the various national authorities to ensure that the number is accurate and releasable.

b. Once NATO HQ releases the number (typically on the product named "the Placemat"), ACO may refer to those numbers.

Prisoners of War and Detainees

a. The Geneva Conventions relative to the Treatment of POWs need to be taken into consideration when providing the media information about POWs. While the conventions do not specifically mention the release of public information, various language in the conventions clearly imply some limitations.

b. Article 13 states that POWs must be protected "against insults and public curiosity." Public curiosity certainly can be taken to mean the news media. Article 14 states that POWs are "entitled in all circumstances to respect for their persons and their honour." If potentially disrespectful images were released to the media, or

if the release of an image in itself could be seen a disrespectful, this could be seen as a violation of the conventions.

c. Finally, Article 16 states that, taking into consideration other provisions in the convention, “all prisoners shall be treated alike.” Thus, to single out a prisoner of war to be displayed on TV, might be construed as a violation of the convention.

d. This is not to say that prisoners should never be shown on TV or exposed to the media. The need to inform the public may well mitigate the release of images or information about POWs if this is done appropriately and with respect for privacy.

e. Finally, ultimate responsibility for the release of information about POWs is left to the POW Information Bureaus called for in the conventions. These bureaus collect and share information so nations and next of kin can be duly informed.

f. When it comes to the release of information about prisoners of war, it is prudent to be very cautious. The privacy rights of prisoners must be weighed against the need to inform the public. General images designed not to embarrass or single out prisoners, but simply to inform the public, are likely acceptable.

Court Proceedings, Indictments, Investigations and Evidence

a. Details about active investigations. Neither PAOs nor Spokespersons should comment on on-going investigations, whether procedural or criminal. Most investigations into criminal wrong-doing will be handled by either host nation or alliance national authorities. PAOs should acknowledge an on-going investigation and refer questions to the respective authority.

b. War crime indictments. NATO does not prosecute war crimes, therefore any queries with respect to war crimes or indictments should be referred to either the national authority or the presiding organisation (e.g. The Hague).

Operational Security and Rules of Engagement

a. Information about Special Operations Forces. Names, units, tactics, techniques, and procedures should not be released or discussed without the NATO Special Operations Force Commander’s expressed authorisation. Respect national rules concerning release of information regarding SOF.

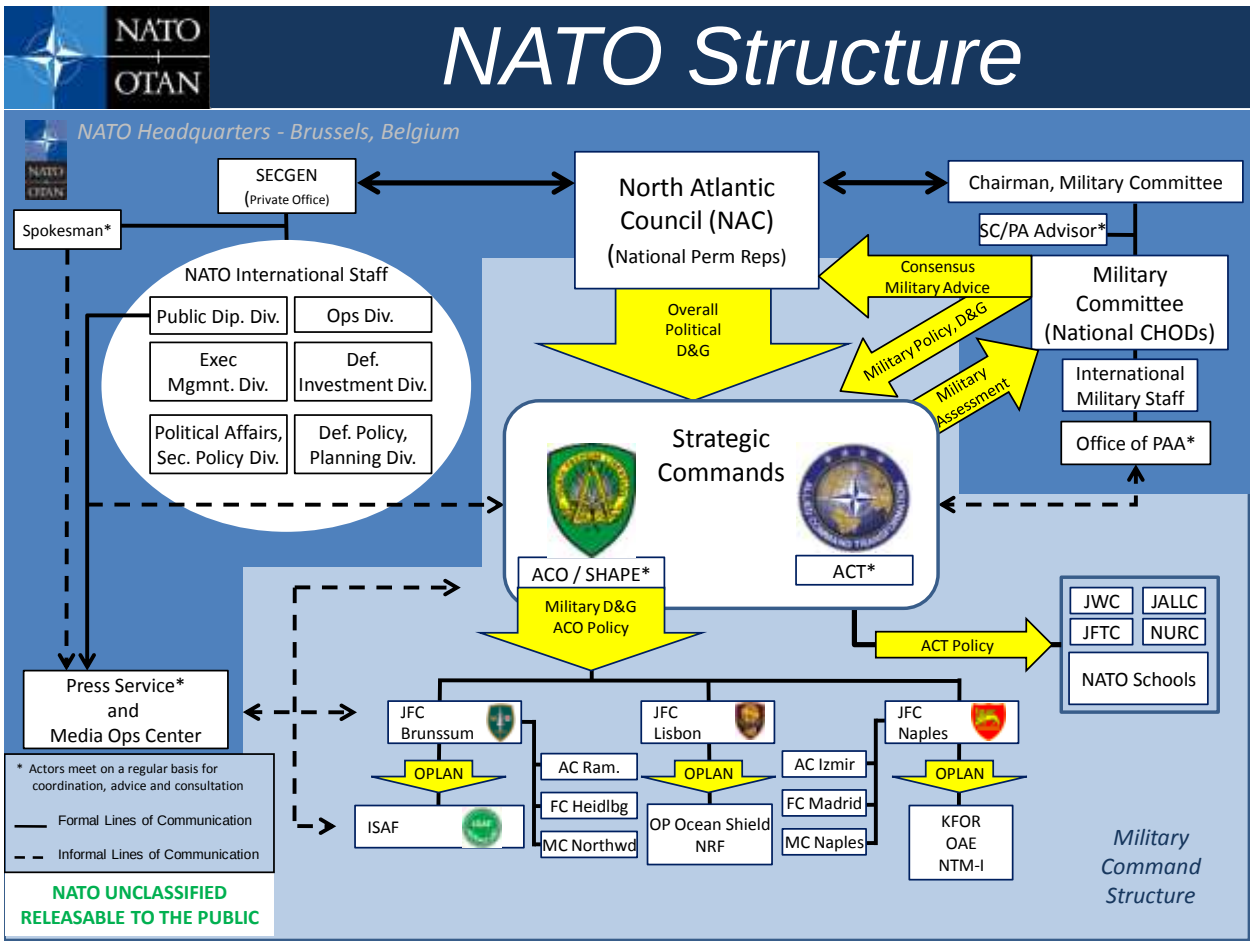
b. Intelligence gathering/sharing. Information regarding intelligence gathering, sharing or collecting should not be released or discussed.

c. ROE. Details about Rules of Engagements and detailed Escalation of Force procedures should never be released or discussed.

When in doubt, consult your Legal Advisor and Higher HQ PAO

ANNEX C NATO Structure, Policy and Command and Control

NATO structure and policy development is depicted in the following organisation chart. Although this is a simplified depiction, it gives the reader a general idea of the various organisations and bodies involved in NATO policy development and execution.



NATO Headquarters

The NATO Headquarters, in Brussels, Belgium, is the political headquarters of the Alliance and the permanent home of the North Atlantic Council, NATO's senior political decision-making body. It is home to national delegations of member countries and to liaison offices or diplomatic missions of partner countries. The work of these delegations and missions is supported by NATO's International Staff and International Military Staff, which are also located within the Headquarters.

The NATO Headquarters provides a site where representatives from both the civilian and military side of all the member states can come together in order to make political decisions on a consensus basis. It also offers a venue for dialogue and cooperation between partner countries and NATO member states, so that they can work together in their effort to bring about peace and stability.

Each NATO member country has a delegation at NATO Headquarters in Brussels, Belgium.

The delegation has the status similar to an embassy and is headed by an Ambassador or Permanent Representative (PERM REP), who acts on instructions from his or her capital and reports back to the national authorities.
The responsibility and task of each delegation is to represent its member country at NATO. The authority of each delegation comes from its home country's government, to which it reports back on NATO decisions and projects.

Each member country is represented on the North Atlantic Council (NAC), the most important political decision-making body within NATO, by the PERM REP. The length of the Ambassador's appointment depends on his or her home country. It generally ranges from one to eight years. The Ambassadors are supported by their national delegation, composed of advisers and officials who represent their country on different NATO committees, subordinate to the NAC. Each member country is represented on every NATO committee, at every level, and therefore the delegations are sometimes also supported by experts from capitals on certain matters.

An important function of the delegations at NATO Headquarters is the consultation process.
Consultation among the delegations can take place in many forms, from the exchange of information and opinions; to the communication of actions or decisions which governments have already taken or may be about to take and which have a direct or indirect bearing on the interests of their allies. Consultation is ultimately designed to enable member countries to arrive at mutually acceptable agreements on collective decisions or on action by the Alliance as a whole.

Decisions made by the NAC represent the accepted agreement of each and every nation. Decisions are made by unanimous consent. Proposals are normally put ‘under silence’ with a correlating deadline. In effect, this means that if no objections are raised prior to the deadline (i.e. breaking silence) the decision is accepted by each nation and therefore constitutes a decision by the NAC.

NATO Secretary General and International Staff

The NATO Secretary General (SECGEN) is the senior international statesman nominated by the member nations as Chairman of the North Atlantic Council, Defence Planning Committee, Nuclear Planning Group and of other senior committees. He also acts as principal spokesman of the Organisation, both in its external relations and in communications and contacts with member governments.

The work of the North Atlantic Council and its committees is supported by the International Staff, comprised of the Office of the Secretary General, six functional Divisions, the Office of Resources and the Office of Security. Each Division is headed by an Assistant Secretary General (ASG).
The International Staff (IS) is an advisory and administrative body that supports the work of the national delegations at different committee levels and assists in implementing their decisions.

The International Staff supports the process of consensus-building and decision-making as well as implementing and enforcing the decisions of NATO committees. The IS is responsible to the Secretary General, who decides who is appointed to the

staff. Members of the IS owe their allegiance to the Organisation throughout the period of their appointment.

Military Committee

The Military Committee (MC) is NATO's highest military authority, providing NATO's civilian decision-making bodies – the North Atlantic Council, the Defence Planning Committee and the Nuclear Planning Group - with advice on military matters. The MC is composed of the chiefs of defence of all 28 member countries and is a headed by the Chairman of the Military Committee (CMC).

The CMC is elected by the alliance Chiefs of Defence (CHODs) and serves for normally a three year term. He represents their consensus-based views as the principal military adviser to the Secretary General, the North Atlantic Council and other senior NATO organisations. He guides the Committee's agenda and deliberations, listening to views and working to reconcile divergent national positions or policy differences to fashion advice that all can agree to.

The MC's principal role is to provide direction and advice on military policy and strategy. The MC provides the North Atlantic Council, NATO's highest political authority, with consensus-based military advice - that is, advice agreed to by all CHODs. It is responsible for recommending to NATO's political authorities those measures considered necessary for the common defence of the NATO area and for the implementation of decisions regarding NATO's operations and missions.

The MS is an integral part of the decision-making process of the Alliance, representing an essential link between the political decision-making process and the military structure of NATO, translating political guidance into military direction to NATO's Strategic Commanders.

The Military Committee also plays a key role in the development of NATO's military policy and doctrine within the framework of discussions in the Council, the Defence Planning Committee, the Nuclear Planning Group and other senior bodies. It is responsible for providing military guidance to NATO's two Strategic Commanders – Supreme Allied Commander Operations and Supreme Allied Commander Transformation.

In this context, the Committee assists in developing overall strategic concepts for the Alliance and prepares an annual long-term assessment of the strength and capabilities of countries and areas posing a risk to NATO's interests.

In times of crises, tension or war, and in relation to military operations undertaken by the Alliance such as its role in Bosnia-Herzegovina, Kosovo and Afghanistan, its role is to advise the Council or Defence Planning Committee of the military situation and its implications, and to make recommendations on the use of military force, the implementation of contingency plans and the development of appropriate rules of engagement.

It is also responsible for the efficient operation of agencies subordinate to the Military Committee.

The NATO Strategic Commands are responsible for the development of defence plans for their respective areas, for the determination of force requirements and for the deployment and exercise of the forces under their command control.

Allied Command Operations

Allied Command Operations (ACO) is located at Supreme Headquarters Allied Powers Europe (SHAPE), near Mons, Belgium, and is responsible for all Alliance operations wherever it may be required.

The command structure is based on functionality rather than geography. There are three tiers of command: strategic, operational, and the tactical or component level.

At the strategic level, Allied Command Operations is commanded by Supreme Allied Commander Europe (SACEUR). SACEUR is dual-hatted as the commander of the US European Command, which shares many of the same geographical responsibilities. ACO is responsible for among other things, force generation for the various NATO missions, once approved by the NAC and tasked by the MC.

The operational level consists of three standing joint force commands (JFCs) in Brunssum, The Netherlands, Naples, Italy, and in Lisbon, Portugal all of which can conduct operations from their static locations or provide a land-based Combined Joint Task Force (CJTF) headquarters.

The component or tactical level headquarters consists of six Allied Component Commands, which provide service-specific – land (Allied Force Commands Heidelburg and Madrid), maritime (Allied Maritime Commands Northwood and Naples) or air (Allied Air Commands Ramstein and Izmir) – expertise and support to the operational level.

Allied Command Transformation

Allied Command Transformation (ACT) leads the transformation of NATO's military structure, forces, capabilities and doctrine. It enhances training, particularly of commanders and staffs, conducts experiments to assess new concepts, and promotes interoperability throughout the Alliance.

Headquarters, Supreme Allied Commander Transformation (HQ SACT), located in Norfolk, Virginia, directs ACT's various subordinate commands including the Joint Warfare Centre (JWC) in Norway, the Joint Forces Training Centre (JFTC) in Poland, the NATO Undersea Research Centre NURC) in Italy, the Joint Analysis and Lessons Learned Centre (JALLC) in Portugal, various NATO schools and Centres of Excellence.

There are direct linkages between ACT, NATO schools and agencies, as well as the US Joint Forces Command, with which ACT Headquarters is co-located.

For a more detailed explanation of NATO Policy, please see:
http://www.nato.int/cps/en/natolive/structure.htm

NATO Public Affairs linkage

The Public Affairs function of the alliance is headed by the Public Diplomacy Division of the International Staff. Specifically, the Press Service takes the lead with respect to communications, with the MOC taking the lead as the primary element overseeing media operations and outreach for the ISAF mission and other special projects.

Through direction and guidance from the SECGEN and with input and approval by the NATO Spokesman, the press service develops communications guidance and messaging for the alliance.

These communications plans are then taken by ACO and ACT and developed into military plans, typically in the form of operation plans public affairs annexes, fragmentary orders, public affairs guidance and media lines.

Due to the fluid nature of the media environment, often the Press Service will require direct contact with the operational and tactical levels of the military structure. Agreements stand which allow such contact, provided the military chain of command is informed of the contact.

The Press Service and MOC do not have direct tasking authority over the military structure at any level. However, in the interest of alliance cohesion and unity of effort, amicable solutions should be sought to accommodate the needs of all levels of the communications structure.

ANNEX D NATO Visual Identification Guidelines

NATO HQ has developed a very comprehensive visual identification guide for use of the NATO logo found in its entirety on the NATO Secret WISE Page at:

http://hww.nato.int/em/VisualIdentityGuide/images/NATO%20VIG%202004%20lowres.pdf.

Relevant excerpts are included in this annex as a reference. The majority of the guide has been omitted for brevity.

The NATO logo as a modular concept

The NATO logo is the most important element of the overall visual identity. It consists of different components, which can be extended depending on its use. The predominant component is the Compass set in the middle of four squares featuring two shades of blue. This part of the logo can never be changed. It will appear in the same configuration on every NATO communication tool.

The second component of the logo is the black & white name box NATO / OTAN. English and French being NATO's two official languages, the standard configuration for use on stationery and publications is the English / French version. The use of the bilingual version is obligatory. It cannot be substituted by other language versions.

When used in the heading of specific publications, the logo determines the shape and size of the whole heading. It becomes part of the heading. In order to preserve the distinctive quality of the NATO logo, no alterations should be made – whether to its form, colour or otherwise. The logo should be accurately presented according to the mandatory standard proportions and orientation as illustrated here. It should not be outlined or italicised. No objects, letters, numbers or symbols should be superimposed on it.

The Compass

Since the early history of NATO, the Compass has been its predominating symbol and is widely recognised by many audiences. To preserve this recognition, the Compass remains the most important component of the NATO logo. To reinforce the impact of the Compass, it has been placed on a blue background and divided into 4 quadrants, reinforcing the idea of a multi-faceted mission for NATO.

The blue colour is used to illustrate the 'Atlantic' dimension of the Alliance and to underline NATO's cooperative approach.

Using the Compass as a stand-alone symbol

The logo is universal enough and the Compass so closely related to NATO, that in exceptional circumstances where there is not enough space to use the full logo-combination with the name box, or when the material or the size is not suitable to use the complete logo-combination, the Compass can be used as a standalone symbol. This solution may be appropriate for branding purposes on flags, bags, boxes, vehicles, buildings, pins, etc. However, this solution is only acceptable when the medium does not allow, for technical reasons, to use the full logo-combination with the name box.

The name box NATO / OTAN

The second component of the logo is the name NATO / OTAN in the standard configuration English and French. The use of these languages is compulsory. They cannot be replaced by other language versions of the name NATO.

The name boxes are situated in the folder “NATO_Name Box”.

About the use of typefaces and alphabets

The name NATO / OTAN is always printed in capitals. The size of the letters is in proportion to the size of the black box and cannot be changed. The space between the letters should be similar to the one in the example. The black box is divided in two by a horizontal white line. A small vertical line marks the centre of the black box. Within publications, Garamond CE MT can be used for subtitles, quotations and captions. The main corporate typeface for NATO’s written communications is Arial. This font should be used for the body text of publications. Arial (and Garamond CE MT) have been chosen as typefaces as they can be used in almost all alphabets. Arial (and Garamond CE MT) are available in Roman as well as in Greek, Cyrillic, Turkish and other alphabets. For NATO in-house use, the Garamond or Arial fonts appearing in software used throughout NATO Headquarters are appropriate equivalents.

The logo-combination

The Compass and the name box together form the standard NATO logo. Depending on their use, they can be combined in a vertical or horizontal way.

The vertical NATO logo

The size of the Compass and the name box are equal and fit perfectly together. Due to the colours used, the Compass and the name box are clearly distinguishable. Only in grey-scale an additional horizontal white line is needed to distinguish both parts.

The horizontal NATO logo

Both components can also be arranged in a horizontal way. Again there is enough distinction in colour to visually differentiate between the two elements. Only in the grey-scale version, a vertical white line needs to be added.

NATOhor_CMYK.eps

NATOhor_GREY.eps

NATOhor_LineART.eps

Standard combination of logo elements

The logo-combination illustrated here is the first complete signature of NATO. It contains the visual identifying mark of the Compass and the written identity of NATO. People cannot be mistaken: this is clearly NATO and no other organisation. In this way the standard logo combination is the primary base of the whole house-style. It will determine all applications of other logo-combinations. Therefore it should be used wherever possible. For items where the whole combination is too difficult to apply, the Compass can be used as a stand-alone symbol, but these are the only exceptions to the rule. See also Chapter 1.2.7 for the use of the Compass.

Correct use of the logo

Many factors can influence the visual impact of the logo. To ensure that the best results are achieved, certain rules should be respected. Everyone at NATO should carefully consider the size and the execution of the logo every time it is used. Not all possible environments / situations in which the logo will appear can be foreseen in advance. In addition, visual identity guidelines should not unduly restrict creativity and imaginativeness of designers. Therefore these guidelines are limited to the most frequent applications and are confined to a minimum set of rules.

It is of the utmost importance for the success of NATO's new visual identity that all NATO communication activities and tools show consistency in the application of the visual identity guidelines. It will improve recognition of NATO products, show coherence within the Organisation and increase the impact of communications.

The logo size

The size of the logo should always be in balance with the space available. However, there are minimum sizes that depend on the capacity of the medium to reproduce the fine thin lines of the logo. Sizes in which those thin lines risk disappearing should be avoided.

For the NATO logo, the critical limit for high-class printing is a size of 1.5cm x 1.5cm for the Compass. For newsprint the critical size becomes 2cm x 2cm because the screen used for newsprint does not allow the printing of fine details. Printing on materials other than paper can cause the same problems: jute for example, needs a far bigger logo than paper. Even the critical size is for most non-paper material too small. In these cases at least two times the critical size should be considered as a safe minimum size.

Several main formats can be distinguished in determining the size of the logo. These are:

1. Stationery
For a DIN A4/US-sized paper a size of 2cm x 2cm for the Compass, and 2cm x 4cm for the combined logo is recommended. Envelopes, compliment slips, fax and memo sheets should use the same size logo: 2cm x 2cm, i.e. 2cm x 4cm for the combined logo. Only the business card is an exception. Due to its small size the logo will be reduced to 1.5cm x 1.5cm.

2. Publications in DIN A4 / US
Publications usually carry on the front cover the logo as a “signature”, i.e. on its own and thus not part of a masthead. When NATO is the publisher or editor of the publication, and when the logo is used on a DIN A4/US-sized paper, the width of the Compass is preferably 4cm x 4cm or 3cm x 3cm as a minimum. When NATO is not the publisher of a publication, the Compass should be 2cm x 2cm or 1.5cm x 1.5cm.

For NATO publications in DIN A5 format and for flyers, the preferred size of the Compass on the front cover is 3cm x 3cm, and accordingly 3cm x 6cm for the combined logo. The logo as part of a masthead. When the logo-combination is combined with other items, like titles, dates and numbers and covers the complete masthead of a publication, its size is 4cm x 8cm on a regular DIN A4/US-format.

3. Smaller and larger formats
Posters and billboards should have larger logos, smaller leaflets and flyers should feature on the front cover logos of the same size as on the DINA4/ US and A5 publications. Whenever possible, logos smaller than used on the DIN A4/US paper or on the DIN A5 format should be avoided. For publications with a larger size than DIN A4/US, the logo should be enlarged to the same proportions needed for scaling the DIN A4/US format to that specific publication. The reverse can be applied when, for example, promotional items are smaller than a DIN A4/US format. In this case the logo should be reduced to the same proportions necessary for scaling the DIN A4/US format down to the smaller publication size.

Where different publications in different sizes need to function together for a common purpose (e.g. when placed in the same folder), it may be preferable to keep the logo in the same size.

Protection of logo integrity

The colours of the logo should never be switched. Verification strips for checking the

colours on all printed material have been included in the last chapter of this manual. Modifications of the logo's typography such as in-lines, outlines, shadows etc. are not allowed. Neither the proportions nor the typography of the logo should be altered. The grey-scale or line-art versions of the logo should not be used in a full colour environment. The logos should be used in the way they appear on the CD-ROM and on the NATO Intranet.

The logo should not be distorted in any way, e.g. by using shadows or halos. An exception can be made in animations of the logo. But even then the result of the animation should be the logo as it is, without changes.

Co-branding for NATO Agencies and Commands

NATO's visual identity guidelines as approved by the Secretary General in 2002 apply to NATO as a whole and should thus be used throughout the Organisation. As such, they also reach out to NATO Agencies and Commands. Simultaneously, this appliance of the Guidelines has to reflect that NATO with its network of Agencies and Commands is not a monolithic bloc but rather a multifaceted organisation. In light of this context, NATO's visual identity guidelines foresee in essence a co-branding approach whereby Agencies and Commands can establish a strong visual link to NATO by combining their respective emblem or coat of arms with NATO's logo on their range of public information material such as websites, publications, letterhead, business cards etc. This approach has the advantage that Agencies and Commands can be directly visually associated with NATO while allowing for a prominent individual feature to profile the distinctive identity of the respective Agency or Command.

Example of co-branded letterhead (40%)

Basic rules for this co-branding are the following:

• The overall rules of NATO's visual identity guidelines, especially those of chapter 1, The NATO logo, should be respected.

• It is understood that Agencies and Commands have in most cases an established emblem or coat of arms which they can and should retain.

• In combining their respective emblem or coat of arms with the NATO logo, the NATO logo has to remain in the top left corner of the information material while the visual symbol of the Agency or Command should be placed in the top right corner. The latter can therefore be displayed at the same level and in the same size as the NATO logo. However, emblems or coat of arms from Agencies and Commands should not be directly attached to the NATO logo since this would equal infringing the integrity of NATO logo itself.

Please consult chapter 5.9.2. for the design of co-branded websites. More specific solutions to this co-branding would have to be sought on a case-by-case basis. NATO's Public Diplomacy Division at NATO Headquarters is available to provide further advice and guidance upon request.

NATO OTAN

Media Advisory

September 2002

VISIT TO NATO BY THE PRESIDENT OF KAZAKHSTAN, ON TUESDAY 20 MARCH 2001

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North Atlantic Treaty Organization - Organisation du Traité de l'Atlantique Nord
Press & Media - Presse & Médias
1110 Bruxelles Belgique
E-Mail: press@hq.nato.int - Tél: 32 2 707 50 41 - Fax: 32 2 707 50 57 - Internet: www.nato.int

NATO press release

Press information needs to be available in colour for press material that is handed out at major press briefings and press conferences or sent to the media by post. The line-art version is used for information that is being sent by fax to ensure a better visibility. It is also a cost-effective solution for day-today use, e.g. via photocopies. The text of the press releases should be typed in Arial, 12pt.

The Press release templates are available on the CD-ROM in the NATO_TEMPLATES_QUARK folder and the NATO_TEMPLATES_WORD folder.

NATO OTAN

Press Release

September 2002

COMMUNIQUÉ DE PRESSE M-NAC-D-1 POUR DIFFUSION IMMÉDIATE

REUNION DU CONSEIL DE L'ATLANTIQUE NORD EN SESSION DES MINISTRES DE LA DEFENSE TENUE A BRUXELLES

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North Atlantic Treaty Organization - Organisation du Traité de l'Atlantique Nord
Press & Media - Presse & Médias
1110 Bruxelles Belgique - Internet: www.nato.int
E-Mail: press@hq.nato.int - Tél: 32 2 707 50 41 - Fax: 32 2 707 50 57

NATO media advisory

Other material directed at the media such as media programmes and background briefings, can also be presented in the same way as press releases. Also the stickers on press photos should be branded with the NATO logo.

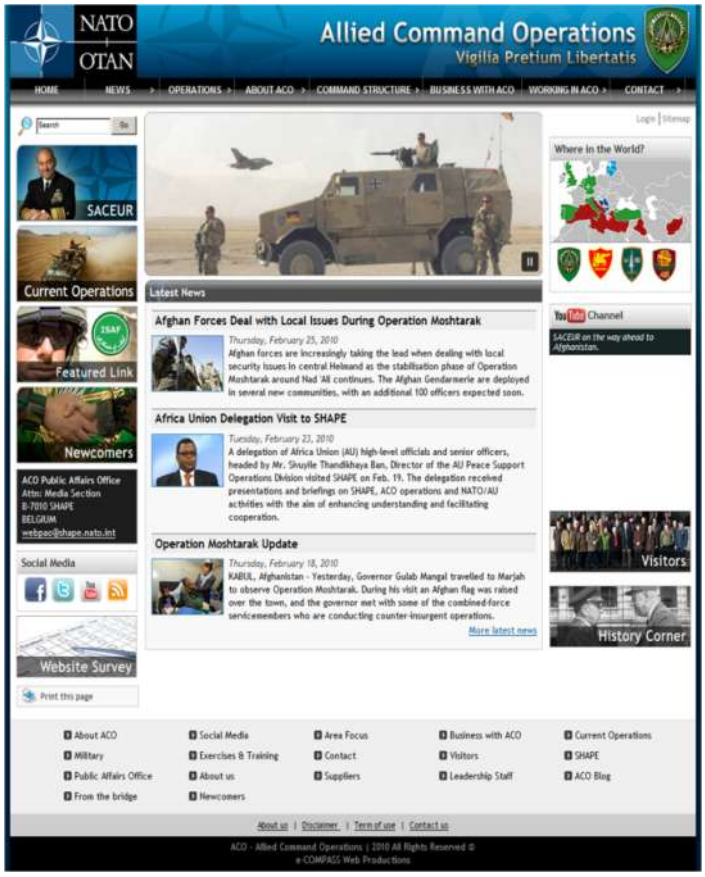
The corresponding templates are available on the CD-ROM in the NATO_TEMPLATES_QUARK folder and the NATO_TEMPLATES_WORD folder

The NATO website

The NATO website is visited on a daily basis by a wide audience. The NATO identity needs to be applied to this communication tool in the same way as with publications and other information material, ensuring consistency in presentation. Examples for the application of the style are presented on this page. In the annex, a style sheet can be found as a full print-out. A cascading style sheet (html) is available on the CD-ROM.

Websites of NATO Commands, Agencies and Committees

Most of the NATO Commands, Agencies and Committees have a website. While in the past the approach to their design and look used to be very different, the gradual introduction and application of the visual identity guidelines has allowed to create a growing family of NATO related websites over recent years. In order to achieve this consistency in the look of websites and a clear link to NATO, a basic template is proposed and regularly applied.



This template is in line with the overall co-branding approach as described in Chapter 3.2. This template follows a simple, flexible three-column format and allows the use of relevant illustrations in the header as well as the respective Command, Agency or Committee logo, coat of arms, etc. Attention has been paid to the fact that this specific logo or coat of arms should be given the same weight as the NATO logo. In the annex, style sheets can be found as A4 print-outs.

Annex E NATO Force Generation and Manpower Issues

1. Introduction. NATO manning for standing headquarters, operational headquarters and operational capabilities are managed through Peacetime Establishments (PE), Crisis Establishments (CE), and Combined Joint Statements of Requirements (CJSOR). The recruiting and soliciting for nations to fill those posts are conducted through the Flags-to Post (FTP) assignments Manpower Coordination Conferences (MCC) and Force Generation process and is the primary responsibility of DSACEUR.

2. Reference. The detailed regulations governing the CE and Force Generation process are contained in ACO Directive 45-3, Allied Command Operations Crisis Establishment Management. The following are selected excerpts to provide ACO PAOs a working understanding of the terms and process.

3. Definitions.

   a. **Force Generation.** The overall process of defining capability requirements then soliciting nations to fill those requirements.

   b. **Flags to Post.** The recruiting process which solicits and selects national bids to each post on the CE at OF-5 level and above. For posts at OF-4 level and below the MCC is used.

   Following the NAC Force Activation Directive, a force generation process is triggered by SHAPE releasing the Activation Warning (ACTWARN). A Combined Joint Statement of Requirements is drawn up by SHAPE Capabilities, Plans & Policy division and generally includes the HQ CE as the first line serial. It is necessary to build a HQ CE for the control of every operation so that effective management of the manpower committed to CRO HQs can be undertaken. The posts on the HQ CE are usually distributed to nations based on force contributions to the CJSOR. Countries that provide leadership for an entire operation or mission, or take responsibility for distinguished elements, are identified as “lead.” For example, the lead country for a given operation or mission might provide the command element and a significant part of the forces, and will also be responsible for filling the remainder of the force required.

   Once the CE and CJSOR are completed, the Support Division, Human Resources Management Directorate will staff a proposal to DSACEUR for his approval after which he releases the proposal to nations for their agreement. In broad terms the process follows the principles of simplicity, transparency and adequacy seeing nations rewarded for their contributions (quality and quantity) of CJSOR capabilities, strictly related to the mission requirements and the risks incurred. Each mission is treated separately. DSACEUR is required to notify the Military Committee (MC) of agreements made with Chiefs of Defence (CHOD) over the allocation of flag posts. New flag posts should be advertised to all TCNs for bids, after which DSACEUR will make a selection based on suitability and national CJSOR contributions. Once this selection is made, each ‘post’ is then matched to a national flag. This nation

is then responsible for maintaining this post with a trained and qualified service member.

c. Operational headquarters manning is allocated through the **Crisis Establishment (CE)** - A CE is a table setting out the authorised posts for a Crisis Response Organisation (CRO) unit, formation or headquarters. The CE is the mechanism for the provision and sustainment of qualified manpower to the HQ. Manning for the ACO headquarters is allocated through the **Peacetime Establishment (PE)** – A PE is a table setting out the authorised peacetime manpower requirement for a unit, formation or headquarters. The PE dictates manning at SHAPE, the JFCs, Allied Component Commands, etc.

   The full PE or CE would consist of:

   a. The establishment table (manning document in Excel spreadsheet format),
   b. The organisation chart (PowerPoint depiction of the reporting chain and command structure), and
   c. The Job Descriptions (JDs) that support authorised posts.

d. Capability requirements are defined in the **Combined-Joint Statement of Requirements (CJSOR)** – The CJSOR is a force catalogue indicating types of capabilities for NATO defence planning scenarios. This catalogue does not deal in specific numbers of troops required to fill minimum manning. Rather, realising that each nation approaches military capabilities differently with respect to technology, training, and manpower, the CJSOR lists the capability required for a particular mission or task. For example, a CJSOR might define a requirement to provide a flight line repair capability. To some nations this capability might be filled most easily by two service members with a bulldozer, while another national solution might be more manpower and less machinery intensive. Ultimately, the CJSOR says what needs to be done and the nation completes the task with what they can offer.

4. Modifications to the CE/CJSOR-

a. Periodic Mission Review. The Periodic Mission Review (PMR) is the process by which the military command structure assesses the current state of a particular operation and provides feedback and recommendations to the Military Committee, which in turn provides the results to the NAC. Recommendations normally include changes to the mission, political objectives and end state and military tasks so the NATO command is prepared to meet its objectives. The PMR is conducted at least annually but might be performed more frequently if so directed.

   The recommendations from the PMR often influence changes to the CJSOR and CE. Familiarity and involvement in the PMR process can pay dividends when attempting to increase capacity and capabilities in theatre.

b. After each Manpower Organisational Review (MOR), a new CE is presented to TCNs to enable them to bid for posts. Nations' offers are provided to

Contingency Ops & Plans (COP) in HRM, and are finalised or de-conflicted during a Manpower Coordination Conference (MCC).

c. Change Proposals. SHAPE Support Division, Human Resources Management Directorate, COP maintains the master CE for each HQ, which can be viewed on the SHAPE WISE Portal. SHAPE HRM COP is the sole authority for alterations to the CE. Any proposed amendments to the CE by the theatre HQ must be provided to SHAPE HRM COP through the chain of command, and staffing by SHAPE Divisions will take place as appropriate when functional advice is required. Subsequently, any endorsed alterations to the CE will be communicated to the requesting HQ.

d. Standby Posts. Some posts may be deactivated by putting them under standby status for a specific period. During this time, if a need for activating these posts is forthcoming, then they will be opened. At this point they will be offered to the nations for their bids. The posts not needed to be opened again will be deleted normally after the successive MOR.

e. Voluntary National Contributions (VNCs). VNCs are military or civilian personnel voluntarily appointed by TCNs either to temporarily meet a request for additional manpower, or to meet a national requirement. VNCs are not normally part of the CE/PE, but are to be recorded on the manning roster for tracking purposes. Civilian VNCs are not subject to NATO regulations, directives, policies, in-theatre SOPs applicable to the NATO civilian workforce; they are subject to the regulations of their respective country.

f. Civilian Personnel

1) NATO International Civilian (NIC). NICs are employed by a NATO command or agency and are normally sent to CRO on orders from their parent organisation and their status is governed by the SOFA.

2) International Civilian Consultant (ICC). When functions within a Theatre HQ are civilianised, and require international experience, ICCs will be selected to fill specific to theatre requirements. .

3) Local Civilian Hire (LCH). Functions within a Theatre HQ which require locally employed civilians will be filled by LCHs who are selected to fill specific to theatre requirements.

5. Restrictions/Constraints.

a. SACEUR is the ultimate authority for all CEs with responsibility delegated to DSACEUR. JFCs and Operational Commanders must obtain DSACEUR approval prior to any CE or CJSOR change becoming final.

b. National manpower is deployed to a PE or CE on the basis that it will be employed to an agreed post and for an agreed length of time. As a rule, all deviations from this principle should be agreed with the local Senior National Representatives (SNRs) prior to the change. In exceptional circumstances

operational events may require prioritisation of activities within PE/CE's, which may necessitate a temporary realignment of staff in an expeditious manner. To meet these requirements, the senior NATO Commander in theatre may authorise reassignments of CE staff in support of pressing operational requirements. The local SNR shall be informed in advance of any changes in post allocation. Any permanent reassignments require prior approval by the local SNR.

c. Military posts should be filled by military personnel meeting JD requirements. In filling posts at and below OF 4, an individual ranking one above or below the required grade may be accepted. Prior approval from Director Human Resources Management (formerly ACOS J1) SHAPE is required for all posts where the incumbent is not the same rank as that stated in the CE.

6. Other Administrative Notes.

a. Tour Length and Rotation Policy. Personnel rotation policy is a national responsibility. The OPLAN will specify the recommended tour length and a minimum tour length of 6 months is the norm. It is important that the senior leadership should provide continuity to the direction of the campaign and therefore the tour length policy for OF-5 and above is normally 12 months. It is possible that a number of other specified posts at OF-4 and below will have extended tour lengths. The recommended tour length is shown on the CE.

b. International Evaluation Reports (IER). Should a participating nation request an IER for any personnel assigned to a CRO HQ, theatre HQ J1 will process the IER in accordance with Reference I. The chain of command is responsible for ensuring that the signed report is correctly filed and that the original is handed over to the NCC/NSE for filing in the individual's personal file in his parent unit.

c. Leave policy is a national responsibility that cannot be dictated by NATO. SHAPE guidance is that individuals should be entitled to 2.5 days leave per month for a 6-month tour and two 96-hour passes. If the SNRs in theatre all agree to a unified policy, then the operational commander can impose a single coordinated policy based on national guidelines, which will avoid a single nation being advantaged or disadvantaged. It is the prerogative of the operational commander to set the key post manning policy within the HQ, which can be used to regulate manning levels.

d. Lack of Suitability due to Language Inadequacy. Due note is to be taken of the CRO Language Policy sponsored by SHAPE Support Division, Human Resources Management Directorate and personnel arriving in theatre with inadequate English language skills against the JD requirement shall be reported to the NCC/NSE and to the chain of command, with the aim to replace the individual as soon as possible. The concerned SNR is to take any necessary actions to solve this issue to the benefit of all parties involved, whilst SHAPE Support Division, Human Resources Management Directorate will inform the concerned NMR of the situation.

e. Discipline. Discipline is a national responsibility. However, any serious outbreaks of ill discipline, which are likely to attract unfavourable media attention, should be forwarded via the chain of command.

ANNEX F Primer on Strategic Communications in ACO

References:

PO (2009) 0141, NATO Strategic Communications Policy, dated 29 Sep 09
ACO Directive (AD) 95-2, ACO Strategic Communications, dated 19 Nov 09

NATO Definition – Strategic Communications. The coordinated and appropriate use of NATO communications activities and capabilities – Public Diplomacy, Public Affairs (PA), Military Public Affairs, Information Operations (Info Ops) and Psychological Operations (PsyOps), as appropriate – in support of Alliance policies, operations and activities, and in order to advance NATO's aims.

ACO Definition – Strategic Communications. In cooperation with NATO HQ, the coordinated and appropriate use of Military PA, Info Ops and PsyOps which, in concert with other military actions and following military guidance, advance NATO's aims and operations.

Introduction
All aspects of NATO activities have a critical information and communication component. Strategic Communications is not an adjunct activity, but should be inherent in the planning and conduct of all operations and activities, political and military, across all lines of operation. The vision is to put Strategic Communications at the heart of all levels of policy, planning and execution, and then, as a fully integrated part of the overall effort, ensure the development of practical, effective strategy that make a real contribution to success.

Under NATO policy, NATO HQ is responsible for the Public Diplomacy and Public Affairs aspects of Strategic Communications and provides leadership and guidance for NATO Strategic Communications across all levels of the Alliance.

From a military perspective, the Strategic Communications process not only seeks to coordinate the work of the traditional communication functions of Public Diplomacy, PA, Info Ops and PsyOps, with each other, but also with the critical operational non-kinetic and kinetic elements which often convey far more meaning and have an immeasurably greater impact on people's perceptions than words or imagery alone ever could.

Principles of Strategic Communications

The following principles are intended to provide the framework within which Strategic Communications planning and execution should be conducted by NATO military forces. These principles might well be thought of as the boundaries, mindset and cultural imperatives that enable Strategic Communications.

Collaboration. Strategic Communications is a consistent, collaborative process that must be integrated vertically from strategic through tactical levels, and horizontally across stakeholders. Leaders coordinate and synchronise capabilities and instruments of power within their area of responsibility, areas of influence, and areas of interest to achieve desired effects. It is unlikely that NATO will act alone. Ideally,

all those who may have an impact on the information environment should be part of the communication synchronisation effort.

Comprehensiveness. Communication no longer has boundaries, in time or space. All players are communicators, wittingly or not. Everything NATO and its partners does and says, or fails to do and say, has intended and unintended consequences. Every action, word, and image sends a message, and every team member is a messenger, from the individual soldier in the field to the commander to the political leadership. Every operation, even the smallest tactical engagement, can have Strategic Communications consequences, and unintended audiences are unavoidable in the global information environment. Therefore, NATO leaders must consider the many possible communication outcomes as they plan operations.

Credibility. NATO must always be the best and most reliable source of information about its own actions and intentions. Credibility and consistency are the foundation of effective communication; they build and rely on perceptions of accuracy, truthfulness, and respect. Actions, images, and words must be integrated and coordinated internally and externally with no perceived inconsistencies between words and deeds or between policy and deeds. Achieving these high levels of credibility requires properly trained, educated, and attentive communicators, operations planners and leaders who are attuned to the communication aspects of the mission.

Agility. NATO must have the capacity to communicate rapidly while maintaining high standards for accuracy. Strategic Communications should focus on long-term end states or desired effects. Rapid and timely communication during, and in advance of, evolving conditions is important as these situations may result in strategic consequences. Communication must reach the intended audiences through customised messages relevant to the intended audiences. Strategic Communications involves aligning actions, images, and words to support policy and overarching strategic objectives. Acting within friendly and adversarial decision cycles is also important because tempo and adaptability affect perceptions of credibility. Frequently there will be a limited window of opportunity for specific messages to achieve a desired result.

Deliberation. Strategic Communications should focus on achieving specific desired effects in pursuit of a clearly defined end state. This does not imply there is no obligation to communicate solely to inform. Strategic Communications must support the high degree of transparency of action and intent required by the open, democratic societies that make up NATO member states. Communication processes, themes, targets and engagement modes are derived from policy, commander's guidance and intent, and operational planning. Strategic Communications considerations must guide all an organisation does and says. This requires the matching of message delivery means, communication channels, messengers and audiences, while understanding that true audience segregation is unachievable.

Leadership. NATO's leaders must decisively engage and drive the Strategic Communications process. To ensure integration of communication efforts, leaders should place a high priority on communication. Successful Strategic

Communications – integrating actions, words, and images – begins with clear, coordinated leadership intent and guidance that are considered in the operational planning process. Leaders must properly resource Strategic Communications at a priority comparable to other important areas such as logistics and intelligence.

Continuity. Strategic Communications requires diligent and continual analysis and assessment feeding back into operational planning and action. Strategic Communications supports the organisation's objectives by adapting as needed and as plans change. This requires collaboration across all lines of operations. Effective Strategic Communications processes require the capacity to operate at a sufficient tempo to meet the demands of the communication environment.

Understanding. Effective Strategic Communications requires analysis and understanding of NATO's relationships and place in the information environment. It involves active listening, engagement, and the pursuit of mutual understanding, which leads to trust. Success depends upon building and leveraging relationships. Leaders should take advantage of these relationships to place NATO's policies and actions in context prior to operations or events. Consideration of the needs of other stakeholders while developing operational plans and policies is vital to achieving a successful Strategic Communications outcome. Experience, religion, culture and knowledge provide the context which shapes people's perceptions and judgment. Concepts of moral values are relative to an individual's societal and cultural narrative. Economic well being and resultant perceived needs are part of a person's overall experience. Audiences determine meaning by interpretation of our communication with them; thus what we think we say, do or show, may not be what an audience hears or sees. Acting without understanding our audiences can lead to critical misunderstandings with serious consequences.

Creativity. In the battle of competing narratives, NATO's own narrative must be the compelling foundation of all its communication efforts. It is the fundamental story of who we are as a people and an organisation and what we aspire to achieve through all of our actions. Our narrative is the common reference point that should guide the development of all of the Alliance's kinetic and non-kinetic plans. Creativity must be the touchstone for all of the means NATO uses to communicate this narrative; creativity in the mediums we choose to reach our audiences, such as the extensive use of social networking, and creativity in the products which we create to capture our audience's imagination and help them to understand and accept our message.

Empowerment. Empowerment is the process of enhancing the capacity of leaders, individuals, groups or organisations to make choices and to transform those choices into desired actions and outcomes. In NATO military structures, the authority to communicate or release information, including imagery and other communication products, has traditionally been restricted to commanders and those they specifically designate. Effective Strategic Communications is enhanced by a decentralisation of communication authority and the empowerment of all personnel to communicate the NATO narrative through actions, words and imagery. This requires acceptance of risk as this in some cases may eliminate the refinement process that has traditionally ensured the accuracy of the information released by NATO. In the current and foreseeable future global information environment, the use of new and emerging technology such as internet or mobile telephone based social media has resulted in

a requirement to release information in as close to real time as possible; as events unfold, not minutes or hours later. By empowering our people to communicate, NATO will help ensure that it is not only the best source of information about the Alliance, but the first, best source as well.

Audiences

Strategic Communications assists the various components of the information community to identify messages, audiences and delivery methods, while ensuring the vital overall consistency and synchronisation of actions, words and imagery. Strategic Communications requires that considerable effort must be made to understand and engage critical audiences and stakeholders, understanding that in today's information environment, audiences can never be completely segregated. This makes audience targeting efforts a particular challenge.

Assessment

Strategic Communications is an integrated part of an overarching campaign plan. As such, the effects of Strategic Communications need to be assessed within the comprehensive approach by the commander's campaign assessment group. This assessment will be within the overall context of diplomatic, information, military, and economic initiatives in order to understand synergies and avoid cross-conflicting effects within the comprehensive effort. This is also where the holistic effort should be analysed and adjusted against the effects of the adversaries' comprehensive approach.

Conclusion

Synchronisation of communication efforts with military actions throughout the planning, preparation, execution and assessment of all missions ensures the greatest benefit for NATO in the information environment. Effectively employed Strategic Communications can potentially achieve strategic and operational level objectives in a manner that lessens the requirement for combat in many operations.

Attachment – article illustrating applied StratCom in a military operation

Afghanistan conflict an 'information war'

By Jonathan Marcus
BBC News diplomatic correspondent
12 Feb 2010

It's called shaping the battlefield. It's not the traditional air onslaught or artillery barrage designed to weaken an intended enemy before the offensive goes in. Instead it's now about shaping the information battlefield, because in Afghanistan - and in modern warfare in general - information has become the new front line. At the very heart of NATO and the Pentagon, the disciples of the new art of "strategic communications" know that perceptions matter.

NATO's top commander in Afghanistan, Gen Stanley McChrystal, made this point explicitly in a recent interview. "This is all a war of perceptions. This is not a physical war in terms of how many people you kill or how much ground you capture, how many bridges you blow up. This is all in the minds of the participants."

Any information you send out carries with it a variety of messages. Take the current operation in Helmand. It has been broadcast widely in advance. It even has a not-so-catchy title: Operation Moshtarak, which in Dari translates as "together". So there you have it, already three messages, if not more.

The operation's title is in a local language and it stresses the idea of partnership - doubly signifying that this is a joint operation between NATO and Afghan government forces doing the job "together". The advance warning too sends a crucial signal - it is part of a deliberate and explicit strategy to encourage civilians to take precautions; to calm and inform tribal leaders; and perhaps to encourage some Taliban fighters to make themselves scarce.

"This operation has certainly been telegraphed in advance far more than previous operations," one NATO insider said, "but the alliance has been doing this kind of thing for some time. "The message is clear. We are determined to take the area, but in such a way as to minimise violence", the official said. "But if we have to fight for it, we will win."

That sounds just a bit more like the traditional kind of message you would expect at such a time, but the reality is that on the information battlefield, just as in operations on the ground, things have changed dramatically. What began as inducement or encouragement for troops to lay down their arms, or basic instructions to civilians not to get in the way of military operations - think leaflets dropped by aircraft in World War II - has blossomed into almost a social science of cause and effect.

Psychological operations or "psy-ops" of the 1950s have morphed into information warfare. There have been uneasy debates about where the boundary line between this and the traditional press officer's role should be because, let's face it; the media is an involuntary actor in this drama too. However the new discipline of strategic communications seeks to go beyond information operations, press briefings and leaflet drops. It is, in the words of one alliance official, "an over-arching concept that seeks to put information at the very centre of policy planning."

When you are fighting wars within communities in an effort to secure popular support for one side or another - the traditional struggle for hearts and minds - you can see how central the concerns of the new strategic information warriors have become. In some ways, this is at the very core of modern counter-insurgency strategy.

However there are limitations, not least those related to the ubiquity of the modern mass media. As Michael Clarke, director of the Royal United Services Institute in London said: "Strategic communications can only ever give out one message. They've tried in the past to put out split messages and it doesn't work."

So much of what people hear in Helmand province, they also hear in Britain and in other troop-contributing countries. "There's a positive side to this," says Mr Clarke, "It's a consistent message, but the danger is that if things on the ground get messy, there will be no hiding from it." The information frontline is in effect everywhere.

This growing centrality of information and the need to shape perceptions inevitably prompts critics to suggest that this is all not so new after all - isn't it just one huge propaganda exercise writ large? Not surprisingly, one of the new NATO information warriors disagrees. "In strategic communications, the messages you are sending must fit the facts on the ground," he says. "The discipline is about bringing perceptions and reality together to achieve an effect."

Many critics may remain unconvinced seeing the whole thing as a giant spin-machine intended to accentuate the positive and present one particular carefully-controlled narrative of events. Because that, in a sense, is what is at stake - it is a battle for the narrative.

Whose interpretation of what is happening is going to prevail? This new focus raises uncomfortable questions for anyone involved in the information business. Perceptions matter in another way too.

There is unlikely to be a tidy end to the Afghan conflict. Nobody really can define what "victory" or "defeat" in the traditional sense might mean. So, if it is to be an untidy conclusion, what people think about it - how they judge the outcome - really does matter.

It used to be said that: "Britain won its wars on the playing fields of Eton." But now a new kind of warfare means that the information battle has to be fought on multiple fronts by multiple actors. From the fields of Helmand to the small towns of Kansas; from the tribal areas of Pakistan to British cities where voters girded themselves for the 2010 General Election, the news from the Afghan battle-front will shape perceptions - and these perceptions will inevitably shape future policy.

Annex G Basic Journalism and ACO Print Style Guide

Introduction

Within PA, applied journalism is the term that describes using journalistic skills and writing techniques to deliver specific messages to target audiences. Although journalism usually refers to the print medium (newspapers, magazines, and periodicals), for the purposes of this chapter, applied journalism also includes writing for radio and television and the Web.

All ACO PAOs shall use the principles of applied journalism in preparing ACO PA products in support of NATO PA activities or objectives.

The following section covers the basic types of applied journalism writing formats that are used in a variety of products prepared for release to the external media: News Releases, Media Advisories, Fact Sheets and Radio Beepers.

The News Story

A news story must be of *immediate* importance. Editors are interested in covering events that are coming up immediately, but they are never interested in hearing an account of what happened yesterday or last week. Immediacy is the single most important factor in hard-news stories.

In addition to immediacy, below is a list of other factors which contribute to an event's newsworthiness:

- **Prominence** - is there someone famous, notorious, or political involved?
- **Proximity** - is the event in the community?
- **Controversy** - is the event likely to provoke public discussion?
- **Conflict** - are people or groups of people opposing each other?
- **Relevance** - is the story likely to be of interest to the public?
- **Money** - is there a money angle?
- **Timeliness** - does it relate to a specific current event?
- **Entertainment** - is the story funny or amusing?
- **Danger** - is there risk involved?
- **Human interest** - is there something in the story that will appeal to readers' common experience or emotions?
- **Immediacy** - is the story relating to something happening now?
- **Consequence** - is there a significant impact on people?
- **Progress** - is the story showing an evolution of some sort?
- **Oddity** - will people be interested by the oddity of the story?
- **Emotion** - will the story touch the feelings of the readers?
- **Suspense** - is the story creating suspense?

The news story format is what is used most often in the 'news release,' as referred to by NATO, is a mechanism to *release news.* The private sector often uses the term 'press release'.

Generally, the information in a news story must answer the following questions: Who, What, When, Where, Why, How, and How much? (We call these the 5 Ws and 2 Hs)

All information you receive from an interview should be put into one of the boxes below. When you have done this, your lead will become clear and you will be able to easily write your news release or news story in the style that is the accepted structure throughout the news industry.

WHO?	• Full details of person or group spelled out: rank, first name(s), last name(s) • Full details of unit spelled out
WHAT?	• Explain succinctly what happened/is being announced • Round numbers up or down (NATO is deploying about 3000 soldiers, rather than NATO is deploying 2987 soldiers)
WHEN?	• Day and month • You don't need the calendar year if the event/ announcement is in the same year
WHERE?	• Exact location keeping in mind operational security issues if that is a factor
WHY?	• Explain the significance of the news event • If there are operational security considerations that preclude releasing this information, say so
HOW?	• How did an incident happen? • If there are operational security considerations that preclude releasing this information, say so • If this information is part of an investigation into an incident/accident, then say the information cannot be released because of an ongoing investigation
HOW MUCH?	• What is the cost, if relevant? For example, if you are announcing a major equipment purchase, the cost of that purchase is relevant
OTHER INFO?	• For example, information for a 'Note to Editors': how to register media for an event, how to gain access to your military installation, exact street address, who to contact for more information, ground rules on taking imagery

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The news story is particularly effective for conveying factual information in a concise, standard format. Always write news stories in the active voice and the present tense, in the same way as you write a news release. Be careful to avoid jargon, slang and

abbreviations (however, on second reference abbreviations are acceptable to most nations' journalism standards).

News stories should also include quotations from your key organisation representatives. These quotations, if used judiciously and effectively can contribute to the news releases readability and credibility.

The ideal news release fits on one or two size A4 pages.

On first reference to an individual person or specific unit spell it out fully, using the full rank title, first and last names, in accordance with the individual's national style. On second and subsequent references use only the individual's last or family name. Except, when preparing material in French, NATO's other official language, abbreviations are not used.

Inverted Pyramid Format

As for structure, most news stories are constructed from the top down. The classic news-release format is the inverted pyramid: lead, bridge and body. If the information is arranged in order of importance and the editor finds the news release too long for the space available, the editor can easily cut the story from the bottom up without removing the most significant material.

The Lead

The lead is the most important element of the news story and entices the reader into the rest of the story. A good lead is usually about 15 to 25 words. It also answers as many of the five Ws and two Hs as possible. Below is the standard news lead.

The Standard Lead

> ***KABUL, Afghanistan –*** *Five NATO forces were killed and six others wounded by a road-side bomb in Regional Command West at approximately 2 p.m. Oct. 15 while executing a routine mission.*

The Bridge

The bridge provides the transition from the lead to the body of the news release. It usually contains key information, such as the "why," not contained in the lead. To revisit the lead above, a typical bridge paragraph might read:

> *Three of the wounded are in critical condition and have been flown to Germany for further treatment. The other three wounded are being treated locally.*

The Body

The body fills in those secondary or less important details that the lead and the bridge did not cover. Although this material is the "first to go" if the editor is short of

space, it is still worth including, since it may appear in media coverage if space permits. A body paragraph for the CFB Anywhere news release could look like this:

> *NATO takes every precaution to ensure that military members are trained and equipped to react to incidents like this. Due to the quick response of the medical evacuation helicopter and crew, several of the critically wounded were stabilised enough for transport for further care.*

Feature Writing

Another form of applied journalism writing style is the feature story, sometimes referred to as 'soft news'. Feature stories are often ideal for unit or community newspapers or as a Hometowner Release (see Annex 9-F).

To convince an editor that a story idea has feature potential, the subject material must be timely and of interest to your intended audience. Once you are sure the idea meets those criteria, you must decide which of the two basic types of feature story you think is most likely to be printed—the human-interest story or the informative story.

The human-interest feature story focuses on how an event affects an individual, or group of individuals.

The informative feature story examines a subject or event in considerable depth. The feature is a good way to tell a story from a positive viewpoint, as long as the appropriate subject material is emphasised.

PRODUCTS

The News Release

The news release serves not only as a source of information, but also provides notice to editors and news directors of policy developments, operations, events, and activities they may wish to cover in greater depth using their own resources. As a fair and common practice, news release should be sent to all appropriate media agencies that you deal with simultaneously via fax, email or internet. 7.5 All ACO news releases must be approved by the appropriate level authority potentially contentious or significant releases should be coordinated with higher headquarters *before release*. See Annex 4-K for a News Release Example.

Ideally, the contents of a news release should be distributed by the chain of command to the internal military/civilian audience before the media receives it - particularly if it is very negative or tragic information.

The news release is just one way of achieving a specific communications objective or effect. Bear in mind, however, that not all activities warrant the issuing of a news release. After all, a news release is supposed to be about something newsworthy—it is not a form of free advertising. If you send out a news release that does not contain any news, pretty soon the media will ignore your news releases – to your detriment! News releases are issued when you have *news* to *release.*

A sample news release and a checklist to assist you in preparing a news release are annexed to this chapter.

The Media Advisory

The media advisory is also an important tool in the PAO toolbox. As the name implies – a media advisory is mechanism to *advise* the *media*.

Unlike the news release, a media advisory is used to advise or inform news agencies of upcoming, newsworthy events or activities. Media advisories may announce news conferences, speeches by prominent individuals, visits by foreign dignitaries, or the release of major policy papers, to cite just a few examples. A media advisory is issued when you want to let the media know that something is going on. See Annex 4-L for a Media Advisory Example.

Backgrounders or Fact Sheets

Backgrounders or fact Sheets are prepared to provide detail about a comprehensive subject or a subject that is detailed and complicated. A backgrounder or fact sheet document will often be prepared to accompany a news release and will contain amplifying or background information on a particular subject. This background information is not necessarily news, so it does not go into the news release but it is important information and very germane to the story. Backgrounder or fact sheet documents allow media outlets (most often print media) to get more in depth into a story. See Annex 4-M for a Fact Sheet/Backgrounder Example.

Photo Cutlines and Captions

Well-composed, strong photos can contribute greatly to the appeal of news and feature stories. Occasionally, photographs are strong enough to stand alone without a story; they are called ‘Stand-Alone Photos’ and include a skeleton cutline.

Cutlines

A cutline is a stand-alone statement that accompanies a photo release. It contains the five Ws in a single sentence, the same as a lead, and a line of additional information, usually, one of the two Hs.

There are a few basic guidelines on how to write photo cutlines:

- Always write in the present tense.
- Identify the action – clearly explain what is happening in the picture.
- Clearly identify people seen in the picture, usually from left to right.
- Identify the location.

Captions/Skeleton Cutline

A caption is the written material that goes with photographs to support news stories or feature articles. Captions or Skeleton Cutlines are a minimum of the 5Ws, a lead equivalent.

The chapter on Imagery, Chapter 9, has more details on writing cutlines and captions and should be consulted when PAOs are preparing either of these two products.

The Hometowner

The hometowner is a form of applied journalism peculiar to military PA. It can be a feature story or photo and cutline sent in the form of a News Release to community newspapers in the hometown (hence 'hometowner') of the person featured.

Hometowners use references that link the individual to their place of birth or families' current residence to highlight their efforts abroad, raising personal morale and community support and understanding for the nation's military and NATO. They also blend personal information with information about operations, policies, and activities.

Hometowners are most effective when they originate from operational deployments, field exercises, special events or foreign locations. This gives them enough newsworthiness for editors to use them without compromising their journalistic principles.

The standard hometowner (photo and cutline) should not be more than 150 words. A typical hometowner might read as follows:

> *Airman 1st Class Sarah English, a Panama City, Fl. Native who is currently serving in Joint Forces Command Naples, led a clothing drive for the victims of a recent earthquake the shook the region and destroyed a city just outside of Rome. English is a communications specialist for NATO and is aiding in security and humanitarian operations in the Balkans, Iraq and the Mediterranean Sea.*

Writing for Radio

Radio is the best way to reach the general public almost anywhere, any time of day. This is particularly true if our listening audience does not have a high literacy rate. Radio coverage is instantaneous and can be as simple as picking up the phone.

When preparing a news release/radio beeper, specifically, for radio, it is important to understand that its requirements are very different from those of newspapers and vary from nation to nation. Typically in Western media, radio news broadcasts are seldom longer than five minutes and a radio beeper itself should be 10 to 30 seconds long. It is similar to the format of a paid 'commercial' advertisement.

Writing for radio needs the same attention to basics as writing for the print media. You have to answer the five Ws and two Hs. Your first sentence (or lead) is very important.

As a general rule of thumb, use the following word count to time a radio broadcast item:

- 10 seconds - 25 words;

- 20 seconds - 50 words; and
- 30 seconds - 70 words.

The best way to check the length of a broadcast release is simply to read it out loud and time it yourself. This serves two purposes: first, it gives a truly accurate idea of the item's length; and second, it allows the PAO to decide whether or not the news release has "ear-appeal."

Be flexible to the local customs and styles of the host nation. Not all countries adhere to these guidelines and often expand beepers into much longer segments. Work with the media outlets in advance to ensure that you are meeting their logistic and cultural requirements.

The Public Service Announcement

The Public Service Announcement (PSA) is a communications vehicle for giving public notice of events that can impact directly on the public, such as exercises in the community, or convoys of military vehicles.

PAOs must establish and maintain good relationships with program producers and station PSA co-ordinators because deadlines and formats vary. PSAs can be created in a variety forms: written news release or even a prepared video or audio product that mirrors a 'commercial' advertisement' format. For TV this is typically 10 or 15 seconds clip with a news lead read over the video for audio background.

PSAs are the closest the media comes to offering 'free' advertising. In some nations, public broadcasters must allocate a certain number of hours per month for community service announcements as a condition of their broadcast licence. If this is not a requirement of their nation's licensing requirements, then a form of payment should not be paid in exchange for the service.

Public Service Announcements in many theatres will cross the lines into psychological operations due to their intent of influencing local national behaviour. Defer to your command legal and finance advisors and higher headquarters public affairs for guidance before active participation in these endeavours.

ACO Print Style Guide

For continuity across the numerous language writing styles, use the following when writing for official ACO publications. These are adapted from the Reuters Handbook of Journalism at http://handbook.reuters.com/index.php/Main_Page.

ACRONYMS

Avoid if at all possible. Very few are understandable at first reference. Most are only of use to a specialised audience that has seen them several times before. Where possible replace with a noun such as the committee, the organisation, the inquiry.

BOOK AND FILM TITLES

Books, films, plays, poems, operas, songs and works of art: capitalise every word in the title apart from conjunctions, articles, particles and short prepositions, e.g. “The Rise and Fall of the Third Reich”, “The Merchant of Venice”, “Gone with the Wind”. The same is true of radio and television programmes other than news and current affairs, e.g. “American Idol”.

DATES

Use the sequence month/day/year, e.g. Iraq’s invasion of Kuwait on Aug. 2., 1990, led to... or the August 2 invasion or the August 1990 invasion. If a specific date is used, put the year inside commas. Spell out months in text but abbreviate them followed by a full stop when they are used with a specific date – Jan.1, Feb. 14, Aug. 5, Sept. 11, Oct. 24, Nov. 5, Dec. 25.

In datelines, use Jan Feb March April May June July Aug Sept Oct Nov Dec with no full stop. If you need to abbreviate for a table use the first three letters of each month: Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec. There is no full stop. When spelling out duration, write the tournament runs from May 22 to 24 not runs from May 22-24. Write arrived on Monday not arrived Monday and on Tuesday, on Wednesday, on Thursday rather than yesterday, today, tomorrow. An exception is made for copy in the Americas, where because of subscriber preferences our style is to drop the “on” before days of the week. Write the 1939-45 war but from 1939 to 1945 not from 1939-45. Similarly between 1939 and 1945 and not between 1939-45. Write 9/11, not 9-11.

FOREIGN LANGUAGE PHRASES

Use such phrases or quotes only in exceptional cases, for instance where no generally recognised English equivalent exists. They must always be explained, e.g. Dismissing the libel action, the judge said, “De minimis non curat lex" (a Latin phrase meaning, 'The law does not concern itself with very small matters’).

JARGON

Jargon is specialised language unfamiliar to the average reader, e.g. remuneration, de-escalation, methodology, going forward, thought leadership, downside risks. If you have to convert into better English a word such as confrontation, use the most conservative of its various meanings. Beware the language used by financial professionals. Political and military jargon is riddled with euphemisms to conceal meaning. Unless you are directly quoting someone, turn jargon into clear English. Journalism jargon -- newsflow, obits, stringers, paras, rejigs -- should not appear in our stories. Words like obituary should be written in full

KILOMETRE

Use km (no full stop, same singular and plural) at all references, except in a phrase such as hundreds of kilometres. To convert to miles roughly multiply by 5 and divide by 8, precisely multiply by 0.621.

KM PER HOUR

First reference, kph on second and subsequent references.

MILITARY

If in doubt, use the generic term or leave it out. Avoid military jargon, which is particularly impenetrable. However, an attempt should be made to understand it. Jargon is encouraged in the armed forces to reduce the emotional element in the business of killing people, to encourage secrecy and to reduce the number of words in issuing orders. Faced by an inquisitive civilian, the military may deliberately obfuscate or evade admissions of defeat or error with an avalanche of esoteric terms and acronyms. Know them, but do not use them. For example **collateral damage,** military-speak for striking unintended targets, whether people or buildings. Also, **friendly fire**, which means attacking your own side by mistake in combat. Do not use either unless in quotes. Prefer plain English. Similarly, avoid military metaphors.

AIRCRAFT

Use aircraft rather than plane. Most airliners and military aircraft are jets so there is normally no need to specify that an aircraft is a jet. Warplane – is one word. Do not use the American term airplane or the term fighter jet. Capitalise but do not put in quotation marks the names of aircraft, e.g. Concorde, Flogger, Tomcat. When the number designating an aircraft is preceded by a letter or letters, hyphenate, e.g. Boeing 747 but DC-10, F-111. Be specific when giving aircraft models in economic stories because there are cost differences, e.g. Boeing 747-400 not just Boeing 747. Use makers' names in the form given in Jane's All the World's Aircraft, e.g. MiG-21. Give numerals for aircraft speeds, e.g. Mach 1 not Mach one. Aircraft names use a hyphen when changing from letters to figures, no hyphen when adding a letter to figures, e.g. F-15 Eagle/747B, but Airbus 3000 is an exception.

air base – two words. So also air raid but airspace and airstrike.

AWACS – Airborne Warning And Control System. Aircraft equipped with search radar, height-finding radar and communications equipment for controlling weapons, generally other aircraft, surveillance and early warning. The United States uses modified Boeing 707s with rotating radar domes above the fuselage. The U.S. Navy uses a smaller AWACS, the twin-engine turboprop E2C Hawkeye with a revolving dome. It flies from aircraft carriers and is built by Northrop Grumman Corp.

stealth –Do not capitalise stealth.

strafe – to machinegun or rocket from the air. Do not use in referring to aerial bombing or ground-to-ground attacks.

UAV – Spell out unmanned aerial vehicle on first reference.

warplane – One word.

ARMOURED VEHICLES

If in doubt about the name of any of these just call it an armoured vehicle. An artillery piece such as a gun or howitzer may be mounted on tracks or wheels and be self-propelled. Journalists have mistaken self-propelled guns for tanks.

armoured fighting vehicle (AFV) – neither a tank nor an armoured personnel carrier, but a hybrid evolved in an era of fast-paced warfare in which infantry must keep up with tanks. An AFV like the Bradley Fighting Vehicle used by the U.S. military carries a squad of infantry. The Soviet-designed BMP-1 carries infantry and is armed with an anti-tank missile launcher and a 73mm gun. The British GKN Warrior is a 25-tonne tracked armoured vehicle with a 30mm cannon.

armoured personnel carrier (APC) – A tracked or wheeled vehicle that carries small groups of infantry into battle. It provides protection against small-arms fire and shell splinters, and may be armed with machineguns. The Soviet designed BTR-60 has gunports down the side.

tank – The main battlefield weapon, combining firepower, mobility and protection. They are tracked, and usually armed with a large gun of perhaps 105mm, 120mm or 130mm calibre firing with the help of computerised target selection and fire control. Shells hardened with depleted uranium may be used to pierce armour. The secondary armament consists of one or more machineguns. The M1-A1 and M1-A2 Abrams used by the U.S. army have top speeds of 40 mph (60 kph). The British Challenger tank is designed to survive nuclear, chemical and biological attack.

BATTLE

battlefield – one word. Also battlefront and battleground.

battledress – one word.

BDA – Military shorthand for Bomb Damage Assessment. Avoid both unless in quotes. Spell out BDA in brackets if used in a quote

ceasefire – one word

fighting – This is relative. It ranges from hand-to-hand combat to the risk of an exchange of intercontinental ballistic missiles. Avoid ‘fierce’ fighting and ‘heavy’ fighting unless casualties are known to be heavy or the fire intense. Spell out what is meant. Avoid using ‘infantry fighting’ simply because combatants are on foot. It implies a set-piece engagement not, for instance, a few militiamen jumping garden walls and blasting away with rifles.

gunbattle – one word. So also gunfire as well as gunman and gunpoint.

no man’s land – no hyphens

offensive – An offensive is more specific than an attack. It is an extensive attack over days, weeks or months often on a wide front or an entire theatre of a campaign or war by air, sea or ground forces and sometimes all three.

raid – Use only when a force attacks and then leaves an objective, as opposed to occupying it.

MILITARY TITLES

Ranks should never be abbreviated and should be capitalised when referring to a specific individual. In general, ranks in the armed forces of the main English-speaking countries such as the United States, Britain and Australia are not hyphenated, e.g. Lieutenant Colonel, Rear Admiral, Air Chief Marshal. However, there are exceptions, such as Canada and India, which hyphenate their titles and we should follow the local practice. At second and subsequent reference, use the surname OR his or her rank, e.g. Major General John Brown becomes either Brown or the general (not the major general). Ranks in the non-English-speaking world should be translated without hyphens.

SERVICE COMPONENTS

Service components are never capitalised when referring to the service as a whole, e.g. the U.S. army, the French navy. Exceptions are armies that have a unique name, e.g. the Palestine Liberation Army, the Red Army. Capitalise army when referring to a specific formation, e.g. the U.S. 1st Army, the British 8th Army. Use figures for military units: 1st Army not First Army.

air force - two words unless referring to U.S. Air Force One.

Marine - Capitalise when referring to the U.S. Marine Corps or when referring to its members. e.g. Six U.S. Marines, the U.S. Marines, Marine operations. Do not refer to them as "soldiers".

SHIPS

warship – A naval vessel, though not necessarily an armed one. The term does imply the ship is a combatant but a fleet auxiliary – a navy ship carrying stores, fuel and ammunition – is a warship. Warships vary in armament and in size, from a few hundred tonnes to tens of thousands. Identify the type – e.g. fast patrol-boat, corvette, frigate, destroyer, cruiser. Never use battleship as a synonym for warship.

aircraft carrier – A floating airfield, it carries fixed-wing aircraft on its flight deck and/or helicopters. It should not be confused with other classes of warship, such as frigate, destroyer or cruiser. These may also carry helicopters but they are not aircraft carriers.

assault ship – A warship designed to support amphibious and air operations against a land- based enemy. They carry helicopters, landing craft, commandos or marines, and may carry amphibious armoured vehicles.

battleship – A specific class of warship, the battleship is obsolete. It is not to be confused with other classes like corvette, minesweeper, patrol boat, frigate, destroyer. Do not use as a synonym for warship.

submarine – In naval parlance a boat rather than a ship. A submarine may fight submerged or on the surface, using torpedoes or missiles – the missiles being tactical or strategic. There are two main submarine types depending on the method of propulsion: nuclear and diesel electric.

UNITS, FORMATIONS

Units, formations, army – Use capitals when you write the title of a specific unit e.g. the 1st Infantry Division but otherwise say division. Also note that there are many national exceptions to these broad definitions.

squad – The basic building block of an army, equivalent to the British section of eight soldiers. Three squads or sections form a platoon. platoon – The essential tactical unit in any army, capable of patrolling, attacking and defending independently. Usually about 30-strong, an infantry

platoon - Typically has three sections or squads. The platoon may be led by a sergeant or a junior commissioned officer. It may have its own light machinegun and mortar units of two or three men each as well as anti-tank weapons and possibly shoulder-fired anti-aircraft missiles. In a cavalry (armoured) unit the platoon is often called a troop of three or four vehicles. Some armies use troop instead of platoon in their artillery units.

company – Usually three platoons commanded by a major or captain. In a cavalry unit the term squadron may be used. Artillery may be organised in batteries of six to a dozen guns, rocket-launchers or mortars.

battalion – The basic building block of any big military formation, a battalion comprises about 500 to 1,000 soldiers, broken down into companies, platoons, squads or sections. It is usually commanded by a lieutenant-colonel. It is the highest single-arm unit in many armies i.e. infantry, armoured or engineer battalion. Higher formations tend to be mixed and comprise, for instance, infantry and tank battalions. Some armies use the term regiment for a tank or artillery battalion.

brigade – Several battalions or regiments grouped together. Commanded by a brigadier, as in the British Army, or brigadier-general. Some armies confuse reporters by using regiment to mean a brigade.

division – A group of brigades. Usually commanded by a major-general, it can contain all elements needed to operate independently and is then effectively a small self-contained army.

corps – Usually at least two divisions. Often commanded by a lieutenant-general.

army – At least two corps. Tends to be the command of a full five-star general or, a marshal or field marshal. The army group – of several armies – was a feature of the big land battles of World War Two.

infantry – Soldiers who fight on foot. Traditionally, infantry marched into battle. Mechanised infantry refers to foot soldiers carried to the battlefield in trucks. In modern armies, infantry is carried into battle in armoured vehicles, supported by tanks and artillery.

regiment – Be careful with this term. Use varies. Find out precisely what is meant in any particular case. It can be used as a synonym for either a battalion or a brigade. Also, a regiment in the British army may have one or more battalions but these rarely serve together as or in a brigade. The 1st battalion of the Royal Halberdiers may be part of an armoured brigade formed for service in the Middle East while the 2nd battalion of the same regiment is in Scotland.

special forces – Lower case unless referring to a specific unit title. Use with care, as special forces can refer to anything from highly trained organised units to militia thugs used for diabolical purposes. Also avoid using the subjective terms crack and elite.

squadron – As with regiment, be careful. Many but not all cavalry (armoured) regiments are broken down into squadrons and troops. Some air forces are organised on the basis of squadrons – each with several flights – and grouped as wings. The term squadron may also refer to a group of ships, a small fleet usually put together for some particular task.

task force – A force organised for a special operation.

troops – Use in the plural for large, round numbers – scores, hundreds, thousands – of soldiers, not for small specific numbers. ‘France sent 5,000 troops

to the Gulf' is correct. Guerrillas killed three government troops is wrong. A troop may also be a small unit of armour or guns.

WEAPONS

air-to-ground – Hyphenate. Also anti-aircraft.

artillery –Avoid saying "big guns" or "heavy artillery" to dramatise events.

SAM – Spell out on all references Surface-to-air missile.

unconventional weapon – Avoid. It is often used by "conventional" military forces to refer to effective methods or weapons they do not have, do not understand and generally disapprove of. Using a bamboo spike smeared with excrement may have been unconventional to the U.S. soldier impaled on it, but it came naturally to a Vietnamese irregular. Depending on who is speaking, the term "unconventional weapons" might also mean nuclear, germ or chemical weapons. Be specific.

WMD – The abbreviation for weapons of mass destruction. Spell out on first reference. Usually taken to mean biological, chemical and nuclear weapons.

NATIONAL NAMES

You need not specify a minister's nationality in the first paragraph of a story that names the country and comes from a dateline in that country. Under a Washington dateline, for example, write: Secretary of State Joan Smith said on Friday the United States would... not U.S. Secretary of State Joan Smith said on Friday the United States would ... There is likewise no need to specify the nationality of groups that obviously are of the nationality of the country datelined. Under an Athens dateline it is Police arrested not Greek police arrested.

NATIONALITIES

Nationalities are written out in full and not abbreviated in stories and in sports results. The only exception is U.S. for United States. Use Britain and British (not United Kingdom or Great Britain). Use The Netherlands (not Holland) and Taiwan (not Chinese Taipei). Distinguish between North and South Korea.

NATO

North Atlantic Treaty Organisation (Brussels), the Western military alliance founded in 1949. The initials may be used by themselves at first reference with the full name given lower in the story.

SECURITY COUNCIL

The 15-member United Nations Security Council in New York is the body that takes many of the decisions on U.N. action around the world, often through numbered resolutions, e.g. Resolution 649. It consists of five permanent members with the power of veto over any resolution – Britain, China, France, Russia and the United States. There are also 10 non-permanent members of the Security Council, made up of other U.N. countries which serve in rotation, representing different areas of the world. The Security Council presidency rotates monthly, by English alphabetical listing of its member states.

The U.N. Security Council becomes the council (lower case) at second reference.

SPELLING

The general guide for spelling within Allied Command Operations is the Oxford English Dictionary. Copy originating elsewhere should follow British spelling norms. At all times stick to official spellings for American names and titles, such as U.S. Defense Secretary Robert Gates and U.S. Centers for Disease Control and Prevention. Watch out for regional words that non-English language services and clients will find difficult to understand and translate.

TITLES

Capitalise an official's title when it immediately precedes the person's name, but when the title follows the name or is used alone use lower case, e.g.: President Tom Smith but The president said: "I would like to welcome the British prime minister, Janet Courage."

UNITED KINGDOM

The United Kingdom comprises Great Britain and Northern Ireland. Great Britain comprises England, Wales and Scotland. Use the full or abbreviated form (UK) only to emphasise the inclusion of Northern Ireland with England, Scotland and Wales or if hard-pressed for headline space.

UNITED NATIONS

Spell it out at first reference when used as a noun. It may be abbreviated to U.N. in a headline. As an adjective it can be also be abbreviated at first reference, e.g. the U.N. General Assembly, U.N. High Commissioner for Refugees. Security Council: The 15-member United Nations Security Council in New York is the body that takes many of the decisions on U.N. action around the world, often through numbered resolutions, e.g. Resolution 649. It consists of five permanent members with the power of veto over any resolution – Britain, China, France, Russia and the United States. There are also 10 non-permanent members of the Security Council, made up of other U.N. countries which serve in rotation, representing different areas of the world. The Security Council presidency rotates monthly, by English alphabetical listing of its member states.

Some of the main U.N. agencies:

- **UNEP**: U.N. Environment Programme.
- **UNESCO**: U.N. Educational, Scientific and Cultural Organisation.
- **UNHCR**: U.N. High Commissioner for Refugees. If you wish to avoid using this cumbersome title at first reference, use a form of words like a U.N. agency said or the main U.N refugee agency said, giving the full name lower in the story. Note that there is no U.N. High Commission for Refugees, the correct title of the institution being the Office of the UNHCR.
- **UNICEF**: The acronym can be used for all references to the United Nations Children's Fund.
- **UNIDO**: U.N. Industrial Development Organisation.
- **UNRWA**: U.N. Relief and Works Agency for Palestinian Refugees.

UNITED STATES

Spell it out at all references in text when used as a noun. It may be abbreviated to U.S. in a headline. As an adjective it can also be abbreviated at first reference, e.g. the U.S. State Department. Do not use USA except in quoted passages. Do not use the noun America as a synonym for the United States, although you may use American instead of U.S. as an adjective.

ANNEX H NATO Channel TV and Media Resources

NATO Channel TV

NATO Channel TV is a web-based television channel meant to improve understanding of the Alliance roles. It enables NATO to provide regular news updates and video reports from the different regions where NATO is engaged. Journalist teams are deployed to several NATO operations.

NATO Channel TV is found at www.natochannel.tv. Footage and stories are also available in broadcast quality for journalists and media networks to download. Inquiries into NATO Channel TV coverage can be made through:

Zornitza Venkova
Head of NITV Content, Production and Dissemination
Public Diplomacy Division
NATO HQ
Tel: + 32 2 707 91 40
e-mail- venkova.zornitza@hq.nato.int

or

Sophie Lambert De Rouvroit
Production officer-NITV
Public Diplomacy Division
NATO HQ
Tel :+ 32 2 707 12 27
lambert.sophie@hq.nato.int

Radio and TV Unit

The TV and Radio Unit of the NATO Public Diplomacy Division operates a television studio and ten radio studios. The studios are used primarily for interviews with the Secretary General, NATO Ambassadors, the NATO Spokesman and high ranking military personnel. The TV studio is fully equipped for broadcasting and is permanently linked to the European Broadcasting Union (EBU-Eurovision) via optical fibre. The radio booths are permanently linked with Belgacom, enabling interconnectivity with most types of satellites. The radio studios are operated via ISDN or analogue telephone lines. Tieline POTS codec equipment is available. NATO HQ TV and Radio can be reached through:

Jean-Marc Lorgnier
Head of TV and Radio Unit
lorgnier.jean-marc@hq.nato.int
Tel: +32-2-707 5006
Fax: +32-2-707 4249

The NATO Media Library

The NATO Media Library holds an extensive collection of copyrighted photo and video material taken by free-lance photographers and cameramen. This material illustrates NATO Ministerial and Summit Meetings in Brussels and abroad, VIP visits to NATO Headquarters in Brussels, NATO military exercises, and historical events. The Photo Library consists of black and white and colour negatives and 35mm colour slides. Video material exists in VHS and BETA SP formats. Photo and video material is available through:

E-mail: medlib@hq.nato.int or
NATO Media Library, Nb132
NATO Public Diplomacy Division
1110 Brussels, Belgium.
Fax: +32 (2) 707 4249

ANNEX I Cross-Cultural Communications

When preparing PA products and services for local audiences, work closely with the interpreters and cultural advisors. They are there to provide advice and guidance because they know the culture in which they live and work.

However, when using interpreters be aware of potential biases and capability levels. If possible, crosscheck material with multiple interpreters, preferably from different backgrounds or tribes. Also, be careful of using interpreters that have not lived in the country you are working in for many years. There are sometimes issues with how this individual will be received as they represent you or your leadership in public forum. Their return to the country is sometimes looked on as opportunistic or with disdain by the people in the host nation. Many interpreters are not necessarily assigned to the correct tribal region or posses only certain skills (verbal translation, written translation, computer translation, software expertise, etc.)

When preparing for a forum with simultaneous translation, ensure that you and the designated spokesperson have had a chance to work with the interpreter prior to the event. Interpreters who are brought in to translate at the last minute will not be effective. You need to work with an interpreter so that they learn your speaking style and rhythm. A good interpreter should not only translate the language, but also the tone and nonverbal cues.

Remember these simple guidelines when communicating in different cultures:

a. When possible, work with a cadre of interpreters to maintain flexibility.
b. Ensure you are familiar with the style of your interpreters.
c. Use simple words and imagery that do not have room for interpretation.
d. Do not use humour. Humour does not translate across cultures well.
e. Avoid using terminology or imagery that has historic, religious, political or sexist overtones or interpretations.
f. Provide enough information and context to avoid interpretation and misunderstanding.
g. Respect and use local language(s) (verbal and non-verbal). Verify that your communications respect local norms.
h. Break up text/verbal communications into short statements that can be easily translated.
i. Act and communicate as a guest.
j. Do not expect that you perception of ‘common sense’ is a universal norm. Accepted norms vary from situation to situation and from culture to culture.
k. Remember it will take twice as long to say it in two languages. Plan accordingly. Planning a twenty minute Q and A session through an interpreter will only allow half the questions as in a single language event.

ANNEX J Public Affairs Leaders' Mission Checklist

The following is an example of a leader's checklist to ensure subordinates are prepared for Public Affairs missions. The checklist is intended to be altered as the mission dictates.

Date of Mission:	**Unit:**	**PAO Staff Member:**	
Mission Description			
Mission Requirements		**Mission POC**	**Contact #**
		Link-up Location	**Link-up Time**
		Assigned by	**DTG**
Journalists Analysis (brief back to OIC or NCOIC):			
Reverse Planning Timeline		**Packing List**	
			Reviewed by

ANNEX K Country Codes

AFG - Afghanistan	ALB - Albania	DZA - Algeria	ASM - American Samoa	AND - Andorra
AGO - Angola	AIA - Anguilla	ATG - Antigua Barbuda	ARG - Argentina	ARM - Armenia
ABW - Aruba	AUS - Australia	AUT - Austria	AZE - Azerbaijan	BHS - Bahamas
BHR - Bahrain	BGD - Bangladesh	BRB - Barbados	BLR - Belarus	BEL - Belgium
BLZ - Belize	BEN - Benin	BMU - Bermuda	BTN - Bhutan	BOL - Bolivia
BIH - Bosnia/Herzegov.	BWA - Botswana	BVT - Bouvet Island	BRA - Brazil	IOT – British Indian Ocn
VGB - British Virgin Isls	BRN - Brunei	BGR - Bulgaria	BFA - Burkina Faso	BUR - Burma
BDI - Burundi	KHM - Cambodia	CMR - Cameroon	CAN - Canada	CPV - CapeVerde Isls
CYM - Cayman Islands	CAF - Central Afr.Rep.	TCD - Chad	CHL - Chile	CHN - China,Peop.Rep.
CXR - Christmas Island	CCK - Cocos Islands	COL - Colombia	COM - Comoro Islands	COG - Congo
COK - Cook Islands	CRI - Costa Rica	HVR - Croatia	CUB - Cuba	CYP - Cyprus
CZE - Czech Republic	DNK - Denmark	DJI - Dijbouti	DMA - Dominica	DOM - Dominican Rep.
TMP – East Timor	ECU - Ecuador	EGY - Egypt	SLV - El Salvador	XEN - England
GNQ - EquatorialGuinea	EST - Estonia	ETH - Ethiopia	FLK - Falkland Islands	FRO - Faroe Islands
FIJ - Fiji Islands	FIN - Finland	FRA - France	GUF - French Guyana	PYF - French Polynesia
ATF - French South	GAB - Gabon	GMB - Gambia	GZA - Gaza	GEO - Georgia
DEU - Germany	GHA - Ghana	GIB - Gibraltar	GRC - Greece	GRL - Greenland
GRD - Grenada	GLP - Guadeloupe	GUM - Guam	GTM - Guatemala	GUY - Guayana
GIN - Guinea	GNB - Guinea-Bisseau	HTI - Haiti	HMD - Heard McDonald	HND - Honduras
HKG – Hong Kong	HUN - Hungary	ISL - Iceland	IND - India	IDN - Indonesia
IRN - Iran	IRQ - Iraq	IRL - Ireland, Rep.of	XNI - Northern Ireland	ISR - Israel
ITA - Italy	CIV - Ivory Coast	JAM - Jamaica	JPN - Japan	JRO - Jericho
JOR - Jordan	KAZ - Kazakhstan	KEN - Kenya	KIR - Kiribati	KOR - South Korea
KWT - Kuwait	KGZ - Kyrgyzstan	LAO - Laos	LVA - Latvia	LBN - Lebanon
LSO - Lesotho	LBR - Liberia	LBY - Libya	LIE - Liechtenstein	LTU - Lithuania
LUX - Luxembourg	MAC - Macao	FYM - Macedonia	MDG - Madagascar	MWI - Malawi
MYS - Malaysia	MDV - Maldives	MLI - Mali	MLT - Malta	MHL - Marshall Islands
MTQ - Martinique	MRT - Mauritania	MUS - Mauritius	MEX - Mexico	FSM - Micronesia
MDA - Moldova	MCO - Monaco	MNG - Mongolia	MSR - Montserrat	MAR - Morocco
MOZ - Mozambique	NAM - Namibia	NRU - Nauru	NPL - Nepal	NLD - Netherlands,The
ANT - Netherland Antilles	NCL - New Caledonia	NZL - New Zealand	NIC - Nicaragua	NER - Niger
NGA - Nigeria	NIU - Niue	NFK - Norfolk Island	PRK - North Korea	XNI - Northern Ireland
MNP – North. Marianas	NOR - Norway	OMN - Oman	PAK - Pakistan	PSE - Palestine
PLW - Palau	PAN - Panama	PNG - Papua N.Guinea	PRY - Paraguay	PER - Peru
PHL - Philippines	PCN - Pitcairn	POL - Poland	PRT - Portugal	PRI - Puerto Rico
QAT - Qatar	REU - Reunion	ROM - Romania	RUS - Russia	RWA - Rwanada
SMR - San Marino	STP - Sotom&Princ.	SAU - Saudi Arabia	XSC - Scotland	SEN - Senegal
SYC - Seychelles	SLE - Sierra Leone	SGP - Singapore	SVK - Slovak Republic	SVN - Slovenia
SLB - Solomon Islands	SOM - Somalia	ZAF - South Africa	ESP - Spain	LKA - Sri Lanka
SHN - St. Helena	KNA - St. Kitts-Nevis	LCA - St. Lucia	SPM - St. Pierre Miquelon	VCT - St.Vincent/Gren.
SDN - Sudan	SUR - Suriname	SJM - Svalbard Jan Mayen	SWZ - Swaziland	SWE - Sweden
CHE - Switzerland	SYR - Syria	TWN - Taiwan	TJK - Tajikistan	TZA - Tanzania
THA - Thailand	TGO - Togo	TKL - Tokelau	TGA - Tonga	TTO - Trinidad/Tobago
TUN - Tunisia	TUR - Turkey	TKM - Turkmenistan	TCA - Turks/CaicosIsl.	TUV - Tuvalu
UMI - U.S.Outlying Isls	. VIR - U.S.Virgin Isl.	UGA - Uganda	UKR - Ukraine	ARE - United ArabEmer
GBR - United Kingdom	USA - United States	URY - Uruguay	UZB - Uzbekistan	VUT - Vanatu
VAT - Vatican City	VEN - Venezuela	VNM - Vietnam	XWA - Wales	WLF - Wallisand Futuna
ESH - Western Sahara	SAW - Western Samoa	YEM - Yemen Arab Rep.	YMD - Yemen Dem.Peop	YUG - Yugoslavia
ZAR - Zaire	ZMB - Zambia	ZWE - Zimbabwe		
OTHERS:				
ATA - Antarctica	XUN - United Nations	XEU - European Union	XSP - Outer Space	ARC - Arctic
XSE - At Sea	NTZ - Neutral Zone	XIF - In Flight	XAR - Arctic	ZZZ - Unknown country

Annex L Lexicon of Terms

This lexicon, taken from MC 0457/1 and supplemented, groups together the most frequently used terms pertaining to public affairs work in NATO. Public affairs products are listed separately for ease of use. The terms used here are in the process of being submitted to the MC Terminology Committee to be considered for inclusion in AAP-6 NATO Glossary of Terms and Definitions.

ACO PUBLIC AFFAIRS AND ORGANISATIONAL TERMS

ACCOMMODATION - The active support of a media visit or embed by a military unit. As some nations do not authorise media embedding, often the term accommodation will be used to refer to the support of civilian media activities.

ACCREDITATION - The formal recognition of a journalist or other media representative by an official national entity or international organisation; can also refer to the accreditation card or other document issued to the media representative.

ALLIED COMMAND OPERATIONS (ACO) - All units, formations and missions under the command of SACEUR. Its headquarters is called SHAPE.

ALLIED COMMAND TRANSFORMATION (ACT) - All units, formations and missions under the control of SACT. ACT is headquartered in Norfolk, Virginia, USA and is responsible for, among other issues, NATO military public affairs training.

ALLIED COMMAND OPERATIONS PUBLIC AFFAIRS OFFICER (ACO PAO) - Any Public Affairs Officer within the ACO structure, or operating under the command of SACEUR at static HQs, on exercises, missions and operations.

ACO OPEN SOURCE SYSTEM (AOSS) - A computer-based media monitoring platform used by SHAPE and any other ACO public affairs staff to monitor the main news agencies and media archives. At the time of writing, AP, Reuters, AFP, and Factiva© as well as a news imagery archive are available, and the system will continue to evolve. On demand, it can also carry out more focused searches for information.

ARTICLE 5 - The fifth article in the North Atlantic Treaty which stipulates that “The Parties of NATO agreed that an armed attack against one or more of them in Europe or North America shall be considered an attack against them all. Consequently they agree that, if such an armed attack occurs, each of them, in exercise of the right of individual or collective self-defence will assist the Party or Parties being attacked, individually and in concert with the other Parties, such action as it deems necessary, including the use of armed force, to restore and maintain the security of the North Atlantic area.”

AUDIENCE - A specified group or persons to whom NATO public affairs efforts are directed.

CHECK AGAINST DELIVERY - Used to inform media that a speech text released prior to it being given (usually provided under embargo) must be compared to the

actual speech, which takes precedence and should be used when quoting there from.

CHIEF PUBLIC AFFAIRS OFFICER (CPAO) - The senior Public Affairs Officer in a NATO permanent or field headquarters. The CPAO is the Commander's public affairs advisor and delegated spokesperson, reporting directly to the Commander. Responsible to plan and implement the PA campaign.

CITIZEN JOURNALIST - A person who independently gathers and reports news, views or opinions using means other than through a media organisation.

COMBINED JOINT STATEMENT OF REQUIREMENTS (CJSOR) - A force catalogue indicating types of capabilities for NATO defence planning scenarios. This catalogue does not deal in specific numbers of troops required to fill minimum manning. Rather, realising that each nation approaches military capabilities differently with respect to technology, training, and manpower, the CJSOR lists the capability required for a particular mission or task. Ultimately, the CJSOR says what needs to be done and the nations complete the task with what they can offer.

COMMUNITY RELATIONS (COMREL) - One of the three core functions of NATO military PA. COMREL refers to the relationship between military and civilian communities in proximity to NATO installations in the Alliance's member nations, including the general public, business, service organisations, and other non-media entities.

CRISIS ESTABLISHMENT (CE) - A table setting out the authorised posts for a Crisis Response Organisation (CRO) unit, formation or headquarters. The CE is the mechanism for the provision and sustainment of qualified manpower to the HQ.

CRISIS RESPONSE OPERATION (CRO) - all military operations conducted by NATO in a non-Article 5 situation. Crisis response operations can include peacekeeping and peace enforcement, as well as conflict prevention, peacemaking, peace building and humanitarian operations.

DEPUTY SUPREME ALLIED COMMANDER EUROPE (DSACEUR) – Primarily responsible for the force generation effort. Dual-hatted as Commander, European Union military forces.

DIGITAL VIDEO & IMAGERY DISTRIBUTION SYSTEM (DVIDS) – A video distribution and marketing hub that provides a timely, accurate and reliable connection between the media around the world and the military. This capability has been adopted by ACO as the primary tool to provide imagery to both the media and the public.

EMBARGO - An agreement with one or more media representatives or organisations not to publish defined information before a specified date and time. This is usually applied to protect time-sensitive information.

EMBEDDING (MEDIA EMBED) – The act and process of a military unit hosting a media representative for the purpose of reporting operations for more than a 24 hour period. The terms integrating, accommodating and hosting media may also be used.

FACILITIES - Transport, briefings, shelter, communications, power, etc., which enable media to gather (witness, hear) information, record (type, visual, audio) it, and transmit it via commercial or military means.

FLAGS TO POST - The recruiting process which solicits and selects national bids to each post on the CE at OF-5 level and above. For posts at OF-4 level and below the MCC is used.

FREELANCE(R) - An independent journalist not employed continuously on a full-time basis with any one media organisation. They usually sell their work to one or more media organisation(s) on a piece by piece basis during temporary assignments.

FORCEGEN (FG) - The overall process of defining capability requirements then soliciting nations to fill those requirements. Once authorised by the North Atlantic Council, this process is tasked to the DSACEUR.

FORCEGEN CONFERENCE – The meeting between the national military representatives and the DSACEUR to bid and secure positions on the peacetime or various crisis establishments.

GROUND RULES - Conditions mutually agreed in advance with a media representative that govern the terms of an interview or other activity and the use of that information.

INFORMATION ACTIVITIES - Actions designed to affect information and/or information systems, performed by any actor.

INFORMATION OPERATIONS (INFO OPS) - A military function to provide advice and coordination of military information activities in order to create desired effects on the will, understanding and capability of adversaries, potential adversaries and other NAC approved parties in support of Alliance mission objectives. See MC 422.

INITIAL EXERCISE NEWS RELEASE (IENR) - The initial news release formally announcing a NATO military exercise. The responsibility and authority for this rests with the officer scheduling the exercise and is produced in consultation with higher HQ where there are public and/or political sensitivities.

INTERNAL INFORMATION - One of the three pillars of NATO PA. Organisational communication with NATO members, civilian employees and family members of those serving with or affiliated to NATO. It does not include activities of officers or managers for the purpose of informing their staffs of unit or section developments or communications that provide administrative direction. Also referred to as Command Information.

INTERNATIONAL STAFF - The International Staff supports the process of consensus-building and decision-making, and follows up on the decisions of NATO committees. The International Staff includes the Office of the Secretary General, six divisions, each headed by an Assistant Secretary General, and a number of independent offices and is based in Brussels.

INTERNATIONAL MILITARY STAFF - The International Military Staff (IMS) is the executive agency of the Military Committee. It provides staff support to the Military Committee and is responsible for the preparation of assessments, studies and other papers on NATO military matters. The IMS also ensures that decisions and policies on military matters are implemented by the appropriate NATO military bodies. The IMS provides the link between the political decision-making bodies of the Alliance and the NATO Strategic Military Commanders and their staffs.

JOINT FORCES COMMAND (JFC)

JOURNALIST - A person employed by a media organisation to gather and report news.

JOURNALISTS IN AREAS OF ARMED CONFLICT - Contrary to war correspondents, the Geneva Convention recognises “journalists engaged in dangerous professional missions in areas of armed conflict” (Article 79, Protocol I, 1977). These are journalists not accompanying the armed forces of one of the belligerents. Such journalists are guaranteed the same protections accorded civilians under the Geneva Convention.

MEDIA – Any organisation or person who gather and disseminate news; also refers to the mediums by which news is transmitted (newspapers, TV, radio, Internet, etc).

MEDIA ESCORT - A person assigned to accompany journalists and other media representatives.

MEDIA INFORMATION CENTRE (MIC) - One or more centres subordinate to a NATO Media Information Centre that are operating in forward locations. Synonymous with Media Operations Centre.

MEDIA OPERATIONS - All activities pertaining to managing the interaction with the news media; can refer to the function responsible for such activities, such as the “media operations section.” For use in this handbook, the terms media operations is synonymous with media relations.

MEDIA OPERATIONS CENTRE (MOC) - One or more centres subordinate to a NATO Media Operation Centre that are operating in forward locations. Synonymous with Media Information Centre. NATO HQ maintains a standing MOC in Brussels which focuses on ISAF.

MEDIA OPPORTUNITY - Also called Press Point, Newser, Presser, and Media Availability. A chance for media to meet with an organisational spokesperson, usually on camera and often before or after a notable meeting or activity. Is distinguished from a *news conference* in that the setting in a media opportunity is

regarded as more impromptu and less formal, with quite limited time with the spokesperson and not necessarily with a view to imparting “new news.”

MEDIA POOL - News media who mutually agree to gather and share material with a larger group when access to an activity or event is limited, typically when news media support resources cannot accommodate a large number. Some ground rules may be agreed in advance to ensure that different types of media are granted access. In general, the Public Affairs Officer should indicate the availability of the breakdown of seats available and leave selection of who is in the pool to the media representatives.

MEDIA REPRESENTATIVE - All persons accredited as journalists, including those who directly support the gathering and reporting of news, such as producers, researchers and photographers, excluding drivers, interpreters, or others not directly involved in the news process.

MILITARY COMMAND STRUCTURE –

> **Strategic Level -** At the first tier or strategic level, there is the Allied Command Operations (ACO) supported by Supreme Headquarters Allied Powers Europe (SHAPE) as the single headquarters for operation, near Mons/Belgium and commanded by Supreme Allied Commander Europe (SACEUR).
>
> **Operational Level -** Within ACO, the operational level of command is provided by three **Joint Force Command (JFCs),** providing joint operational HQs under the Deployable Joint Staff Element (DJSE) concept if required. JFCs Brunssum and Naples will each be structured and manned to command up to one major joint operation and two smaller joint operations. JFC Lisbon will be able to command up to two smaller joint operations. DJSEs are operational level HQ elements designed to be in theatre as the deployed joint staff for an operational level commander. Six DJSEs, at appropriate levels of readiness, are provided by the NATO Command Structure (four) and NATO Force Structure (two). Each DJSE consists of a Joint HQ Forward Element, a Joint Logistics Support Group (JLSG) HQ Element, and a Forward Support Element, in order to enable the required level of jointness and deployability. These elements can be tailored for specific operations and will be enabled with capability packages as required.
>
> **Tactical Level -** The third tier or tactical level consists of six commands, which provide service-specific – land (Allied Force Commands – AFCs Heidelberg (Germany) and Madrid (Spain)), maritime (Allied Maritime Commands – AMCs Naples (Italy) and Northwood(Great Britain) or air (Allied Air Commands – AACs Izmir (Turkey) and Ramstein (Germany)) – headquarters to the operational level. Although these component commands are routinely subordinated to the joint force commanders, they can be allocated to operations under another commander as the need dictates.

MILITARY COMMITTEE - The Military Committee (MC) is the senior military authority in NATO. It is the primary source of military advice to NATO’s civilian

decision-making bodies – the North Atlantic Council, the Defence Planning Committee and the Nuclear Planning Group and represents an essential link between the political decision-making process and the military structure of NATO. It provides military guidance to the Alliance's two Strategic Commanders and assists in developing overall strategic policy and concepts for the Alliance. It meets frequently at the level of Military Representatives (MILREPs) and three times a year at the level of Chiefs of Defence (CHODs). It is chaired by the Chairman of the Military Committee, who is nominated for a three-year term.

NATO MEDIA INFORMATION CENTRE (NMIC) - A public affairs facility established to host and inform journalists and other media representatives in a NATO operations mission or exercise area. A NMIC will normally contain a briefing area, offices for public affairs staff, and should offer telephone, internet and other services to media representatives. Synonymous with NATO Media Operations Centre.

NATO MILITARY PUBLIC AFFAIRS (PA) - The function responsible to promote NATO's military aims and objectives to audiences in order to enhance awareness and understanding of military aspects of the Alliance. This includes planning and conducting media relations, internal communications, and community relations.

NEWS CONFERENCE - A group of two or more media purposefully gathered to obtain information from an organisational spokesperson. Implies there is something new or newsworthy to impart; otherwise, use a *media opportunity*.

NORTH ATLANTIC COUNCIL (NAC) - The principal political decision-making body within NATO. It brings together high-level representatives of each member country to discuss policy or operational questions requiring collective decisions.

PEACETIME ESTABLISHMENT (PE) - A table setting out the authorised peacetime manpower requirement for a standing unit, formation or headquarters. The Crisis Establishment is a similar concept; however, the CE is used only in crisis or contingency operations, such as ISAF or KFOR.

PROPAGANDA - Information, ideas, doctrines, or special appeals disseminated to influence the opinion, emotions, attitudes, or behaviour of any specified group in order to benefit the sponsor either directly or indirectly:

- Black: purports to originate from a source other than the true one.
- Grey: does not specifically identify any source.
- White: disseminated and acknowledged by the sponsor or by an accredited agency thereof.

PSYCHOLOGICAL OPERATIONS (PSYOPS) - Planned psychological activities using methods of communication and other means directed to approved audiences in order to influence perceptions, attitudes and behaviour, affecting the achievement of political and military objectives. See MC 402.

PUBLIC AFFAIRS APPROACH - The level of public profile to be adopted. It may change in time, space and phase of any operation. An approach can be very active, active or reactive, and be different for external and internal audiences. May also be referred to as PA Posture.

PUBLIC AFFAIRS OFFICER (PAO) - A person trained and qualified to practice public affairs. In NATO, a person posted or hired into a position established as a PAO.

PUBLIC DIPLOMACY - The totality of measures and means to inform, communicate and cooperate with a broad range of target audiences world-wide, with the aim to raise the level of awareness and understanding about NATO, promoting its policies and activities, thereby fostering support for the Alliance and developing trust and confidence in it. See SG(2003)0876(INV).

PUBLIC DIPLOMACY DIVISION (PDD) - The Division located at NATO HQ Brussels, and headed by an Assistant Secretary-General, responsible to explain the NATO organisation's policies and objectives to the public. See NATO Handbook, 2006.

REGISTRATION - The process of confirming the credentials of a journalist or other media representative. The media representative may be required to fill out a registration form and provide proof of identity and affiliation with a news organisation. NATO may issue a photo-registration card to facilitate access.

REPLY (RESPOND) TO QUERY (RTQ) – The process of documenting a journalist's questions and queries, staffing a response and replying to the journalist.

SUPREME ALLIED COMMANDER EUROPE (SACEUR) – responsible for the overall command of NATO military operations and conducts the necessary military planning for operations, including the identification of forces required for the mission and requesting these forces from NATO countries, as authorised by the North Atlantic Council and as directed by NATO's Military Committee. He makes recommendations to NATO's political and military authorities on any military matter that may affect his ability to carry out his responsibilities. He has direct access to the Chiefs of Staff of NATO member countries and may communicate with appropriate national authorities, as necessary, to facilitate the accomplishment of his tasks. In the case of an aggression against a NATO member state, SACEUR, as Supreme Commander, is responsible for executing all military measures within his capability and authority to preserve or restore the security of Alliance territory. SACEUR is dual-hatted as Commander U.S. European Command.

SUPREME ALLIED COMMANDER TRANSFORMATION (SACT) – Commands at the strategic level for the transformation of NATO's military structures, forces, capabilities and doctrines in order to improve the military effectiveness of the Alliance. The SACT is responsible for NATO's training and education programmes, managing commonly funded resources allocated for NATO's transformation programmes and supporting the exercise requirements of Allied Command Operations.

SECRETARY GENERAL(SECGEN) - the senior international statesman nominated by the member nations as Chairman of the North Atlantic Council, Defence Planning Committee, Nuclear Planning Group and of other senior committees. He also acts as

principal spokesman of the Organisation, both in its external relations and in communications and contacts with member governments.

SECURITY AT THE SOURCE - The practice of protecting sensitive or classified information at its origin. In PA, this means ensuring that media representatives are not unintentionally exposed to sensitive or classified information and cannot intentionally or unintentionally report it.

SUPREME HEADQUARTERS ALLIED POWERS EUROPE (SHAPE) – NATO's strategic military headquarters, based in Mons, Belgium, under the command of SACEUR. SHAPE is the headquarters element for Allied Command Operations.

SHAPE PUBLIC AFFAIRS OFFICE - Headed by the ACO Chief Public Affairs Officer (CPAO)

SOCIAL MEDIA (NEW MEDIA) - web-based technologies used for social interaction and to transform and broadcast media monologues into interactive, social dialogues.

(OFFICIAL) SPOKESPERSON – Commanders at all levels are the official spokespersons for their command or unit. As such, they are empowered to interact with the media regarding their command or unit in an official capacity and should be quoted by name.

(DESIGNATED) SPOKESPERSON - An individual designated by a Commander empowered to interact with the media on his/her behalf. This is commonly used to deal with routine, approved responses to media questions, or by Subject Matter Experts when required to clarify an issue. They should be quoted by name. Where practical, Chief Public Affairs Officers should automatically be "designated" by their commanders to facilitate the flow of basic, approved and routine information.

STRATEGIC COMMUNICATIONS (StratCom) - In concert with other political and military actions, Strategic Communications is used to advance NATO's aims and operations through the coordinated, appropriate use of Public Diplomacy, Public Affairs and Information Operations.

VOLUNTARY NATIONAL CONTRIBUTIONS (VNCs) - VNCs are military or civilian personnel voluntarily appointed by TCNs either to temporarily meet a request for additional manpower, or to meet a national requirement. VNCs are typically contributions up-and-above the CE/PE.

WAR CORRESPONDENT - A journalist who reports, or has reported, first-hand on war or armed conflict. Under the Geneva Convention, (Article 4, Protocol III 1949) a war correspondent is a journalist or other media representative accompanying the armed forces of a belligerent; if captured while accompanying armed forces, a war correspondent is to be accorded the status of a prisoner of war.

PA PRODUCTS

BACKGROUNDERS - An explanation of an issue, activity or program usually to provide context and perspective for journalists. Can refer to a product, generally a written piece, or to a verbal briefing and/or presentation by a spokesperson.

FACT SHEET - An overview of data and information on a specific topic. Generally is a collection of factual information as reference material, and short on the effort to impart explanations.

IMAGERY - All materials that identify NATO personnel, equipment or activities through the use of visual images.

INTERNET POSTING - The process of loading a presentation or product to a publicly accessible server and creating the links required to make it publicly “live.”

MEDIA ADVISORY - An alert to news agencies of an upcoming event or activity.

MEDIA LINES - Also called Talking Points and/or Messages. Organisationally approved responses to an issue for use by spokespersons when dealing with media.

MASTER MEDIA MESSAGES - Overarching, key 3-5 points developed by a higher political or military authority and incorporated into the products and activities of subordinate organisations. Ultimately, reduces even the most complex of issues into a manageable number of remarks of soundbite-length.

NEWS RELEASE - Information designed to notify audiences, particularly media, of an event, issue or activity that is newsworthy, and generally, something that has just happened or is just about to happen. Usually provides an organisational position, view and/or statement.

PUBLIC AFFAIRS GUIDANCE (PAG) - Addresses emerging public affairs issues or issues likely not covered by existing plans or guidance, and issued as required by CPAOs. At a minimum, PAG will summarise the issue, identify lead organisation(s), name spokespersons, list messages, and provide coordinating instructions.

PUBLIC AFFAIRS PLAN - Details relating to the planning and conduct of a PA-related activity; in effect the “execution” paragraph detailing what will be done, where, when, how and by whom. Can be an annex to an operations or contingency plan or a stand-alone product.

PUBLIC AFFAIRS STRATEGY - A document that provides a broader public affairs approach that sets overall themes and goals for an organisation or initiative. Should include master messages. Action-oriented PA plans derive their guidance from PA strategies approved by higher authorities.

QUESTIONS AND ANSWERS (Q&A) - A document that provides spokespersons with organisationally approved lines to a series of questions expected from media.

STATEMENT - Remarks by the speaker at the event, usually to public audiences.

BLOG AND SOCIAL MEDIA TERMS

Autocasting – Automated form of podcasting that allows bloggers and blog readers to generate audio versions of text blogs from RSS feeds.

Blog -- Websites where information is posted on a regular basis. Content varies widely, from personal diary-type minutiae to sustained discussion of politics, hobbies or other interests. Some blogs are a “grab bag” of topics, while others focus on a particular subject.

Blog client – (weblog client) is software to manage (post, edit) blogs from operating system with no need to launch a web browser. A typical blog client has an editor, a spell-checker and a few more options that simplify content creation and editing.

Blogger - Person who runs a blog. Also blogger.com, a popular free website for blog hosting.

Blogroll – List of hyperlinks to other blogs or websites the author of a particular blog finds useful or informative to their readership. Inclusion in a blogroll may or may not imply personal endorsement by the blog author of the views or information found in the linked site. Some bloggers are more consistent than others at providing access to opposing or alternate points of view.

Blogstorm – When a large amount of activity, information and opinion erupts around a particular subject or controversy in the blogosphere, it is sometimes called a **blogstorm** or **blog swarm.**

Blogosphere - All blogs, or the blogging community in general. Also called blogistan or, more rarely, blogspace.

Blog site - The web location (URL) of a blog, which may be either a dedicated domain, a sub-domain, or embedded within a web site.

BlogThis – Pioneered by Blogger.com, BlogThis links on a blog allow the reader to automatically generate a blog entry based on the blog entry he/she is reading, and post to his/her blog.

Instalanche – Sudden spike in inbound traffic to a website caused by a link posted from a high-profile blog. Nicknamed for the “Instapundit” website, which covers a wide variety of subjects and frequently drives traffic to blogs that might otherwise have remained relatively obscure.

Mainstream media – (often abbreviated MSM in discussion threads) Term frequently used by bloggers to refer to traditional media such as newspapers and television. As blogging itself becomes more mainstream, some have begun to use the term “legacy media” to refer to the older forms of mass communication.

Milblog – Term for blogs written by members or veterans of any branch of service - Army, Navy, Air Force, or Marines. A contraction of *military* and *blog*.

Permalink - The unique URL of a single post; used when you want to link to a post somewhere.

Ping – The alert in the TrackBack system that notifies the original poster of a blog post when someone else writes an entry concerning the original post.

Podcasting - Contraction of “iPod” and “broadcasting” (but not for iPods only). Posting audio and video material on a blog and its RSS feed; for digital players.

Post - An item posted to a blog. It can be an item, news, photo or a link.

RSS – Really Simple Syndication – Web-based information distribution system that allows instant content flow to websites that choose to subscribe to a particular feed source.

RSS aggregator – Software or online service allowing a blogger to read an RSS feed, especially the latest posts on his favourite blogs. Also called a reader, or feed reader.

RSS feed – The file containing a blog’s latest posts. It is read by an RSS aggregator/reader and shows at once when a blog has been updated. It may contain only the title of the post, the title plus the first few lines of a post, or the entire post.

Sock Puppet – Online alias used by an author to disguise their identity or to create the impression of wide support for a position.

TrackBack – A system that allows a blogger to see who has seen the original post and has written another entry concerning it. The system works by sending a 'ping' between the blogs, and therefore providing the alert.

URL – Universal Resource Locator. The ‘address’ of a website, i.e. www.shape.nato.int.

ANNEX M Handbook Change and Recommendation Submission Form

Comments and recommendations for the ACO/ACT Public Affairs Handbook are welcome. Please submit comments, recommendations and additional products or annexes using the following matrix to:

Allied Command Operations Public Affairs
B-7010 SHAPE
Belgium
Attention: Chief Public Affairs Officer

Email: shapepao@shape.nato.int

Page/Para	Text as Published	Recommended Text (or attach product)	Your Name, Rank, Organisation, Email and Phone Details