

Analysis of “Culture General” Concepts in DoD Training Programs

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This is the second of four planned “mini-reports” produced by the Center for Advanced Operational Culture’s (CAOCL’s) Translational Research Group (TRG). It is a product of a year-long research project¹ on the “Global Training and Advising Course,” which is offered by the Marine Corps Security Cooperation Group (MCSCG).

Mini-reports are non-conclusive, and intended to be narrow snapshots of the data leading up to the final research report. Because the researcher is in Quantico and the stakeholders at MCSCG are in Ft. Story, these mini-reports also generate discussion that is otherwise difficult to initiate due to the physical distance between the staff members.

Introduction:

The primary purpose of this report is to compare aspects of a “culture general” conceptual approach that have been integrated into three military training programs. A “culture general” approach is designed to guide Marines in problem framing, asking questions, and gathering appropriate culturally specific information to solve an issue. Culture general concepts and skills can be applied to any culture around the world and are thus applicable to any operational environment. These concepts and skills have gained “renewed interest”² across the DoD in recent years, and multiple social science research efforts have identified which core competencies and sub-competencies military personnel might require. “Culture general cognitive concepts” can be defined as factual knowledge necessary to perform a task, and “culture general skills” relate to competency in performing a task (often physical, but also cognitive).³ This report shows which culture general core competencies have been integrated into a small sample of military training programs, how they are described in a lesson plan, and how they were integrated into training (in the case of CAOCL).

The jumping off point for this analysis is MCSCG’s “Basic Advisor Course.” Though the course is made up of twenty-plus lessons (depending on the advising team and mission), the six lesson plans discussed in this analysis are those which include culture general concepts. CAOCL has five lesson plans that also integrate culture general concepts, and are taught individually or in combination with “culture specific” briefs (i.e. often focused on a geographic region). Three lessons from the Army Research Institute advisor course are also included in this analysis because they also include culture general concepts.

This report starts broadly with culture general as it appears in research for the military, and gradually focuses in on one descriptive case study. Viewed another way, it starts with a “clean” and straightforward conceptualization of culture general and moves to the slightly messier mechanics of how to integrate it into training. From a scholarly point of view, the report is a summary of a small sample of DoD curricula at a certain point in time. A curriculum developer may benefit from the practical information, starting with

¹ This research project is conducted under MCCDC Human Subjects Research – Protocol # MCCDC.2013.0003-IR-EP7-A/CAOCL STUDY. This joint research project between CAOCL and MCSCG will provide an actionable assessment of how Marines who receive advisor skills training from MCSCG view its impact on how they approach mission planning and interacting with a foreign population. This paper is a non-conclusive interim report.

² Gallus, J., Gouge, M., Antolic, E., Fosher, K., Jasparro, V., Coleman, S., Selmeski, B., Klafehn, J. (2014). *Cross Cultural Competence in the Department of Defense: An Annotated Bibliography*. Special report 71, US Army Research Institute for the Behavioral and Social Sciences. Ft Belvoir, VA.

³ Ibid.

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what culture general is, moving to the tables that cross-reference concepts and skills across training programs, and finally examining excerpts from a “master document” CAOCL uses to track concepts and skills in its curriculum. Within the Marine Corps, MCSCG and CAOCL may use this information to look for ways to share institutional expertise and utilize economies of scale where possible, maximizing their shrinking budget dollars even further.

Both the Table of Contents below and this paragraph will help you keep track of the many elements in this report. The first table provides a quick top-level summary of the three programs that were analyzed for this report, including dates they were published and observed (if applicable) for this research (Table 1, pg. 3). To broaden this comparison beyond the lesson plans, I have included two versions of a “developmental sequence” of “cross-cultural competence” (3C) skills (Figure 1 & 2, pgs. 4-5). At a quick glance, a reader can use these sequences to understand what 3C is, and how these skills might be addressed in military training over time. After this, I drill down to show how each program of instruction has integrated culture general. There are two tables (Table 2 & 3, pgs. 6-13) showing “culture general cognitive concepts” and “culture general skills,” (as defined earlier) across three training programs (MCSCG’s, CAOCL’s, & ARI’s). According to these tables, culture general has begun to be institutionalized on a lesson-by-lesson level, which is a positive step for those who are proponents of this approach in the military. The next table (Table 4, pgs. 14-19) drills down even further into one lesson plan. This granular view may be useful for curriculum developers, who can use the table to see how other curriculum developers described or applied culture general concepts and skills. Next is a descriptive case study (pgs. 20-21) from CAOCL. Where Tables 2, 3, and 4 show what is in CAOCL’s lesson plans, this case study describes how it got there, which was not by happenstance. MCSCG or ARI may have gone through a similar selection and prioritization process, given that each of their training programs includes a different subset of concepts and skills out of the sum total represented in research on culture general competence.

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Table 1: Index of culture general training programs analyzed in this report

A quick reference guide to the three different training programs used for this analysis, including some caveats with regard to the research process. Among the three programs, there are differences in audience and recommended training time.

	CAOCL	MCSCG	Army Research Institute (ARI)
<i>Name of program</i>	“Operational Culture General”	“Advisor Skills”	“Cross-Cultural Advising”
<i>Number of lessons analyzed (of total)</i>	5/5	6/12	3/5
<i>Type of audience</i>	General purpose forces (GPF); LCpl-LtCol, primarily junior enlisted ranks; class size up to 200+	Selected from the GPF for advisor teams; LCpl-LtCol, primarily E5s and O2s; Reservists and AD; class size up to 50+	Selected from the GPF for advisor teams
<i>Total recommended training time</i>	15 hours ⁴	18 days ⁵	Unknown ⁶
<i>“Publication” date</i>	May, 2013	March, 2013	December, 2011
<i>Dates classroom instruction was observed by researcher</i>	None ⁷	May-December, 2013	January, 2013

⁴ To my knowledge, since the 2013 course content review board, only “Apply Operational Culture” has been taught by CAOCL staff. Since all five culture general lesson plans have not been taught as a single course, this time of fifteen hours is an estimate based on the prior (older) versions of the same five lesson plans.

⁵ This is the total **recommended** training time for all twelve of the lessons included under the “Advisor Skills” segment of the course. Both the “Advisor Skills” segment and the full “Basic Advisor Course” offered by MCSCG vary according to each security cooperation team and their allotted time for training.

⁶ I do not have complete information about the Army’s advisor training program. In January 2013 I was invited by MCSCG to attend a course taught by ARI personnel at Ft. Story. At that time, I received a set of DVDs from ARI instructors, which are the basis of this analysis. The instructor-led course I attended in Ft. Story was slightly different from what is on the DVDs. Whereas the DVDs represent the training program itself, I participated in what might be closer to a “train the trainer” model.

⁷ I have not seen CAOCL instructors teach the CAOCL culture general curriculum since its revision in 2013. One reason is because it was not necessary for this longitudinal research project. Another is because these lessons are rarely taught, and frequently by CAOCL liaison officers at the MEFs, as compared to CAOCL’s “culture specific” briefs or language instruction. I have seen MCSCG instructors teach CAOCL’s 2010 culture general curriculum multiple times from May-December 2013.

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Figure 1: Cross-Cultural Competencies: Novice to Senior.
 Reid, P., Steinke, J., Mokuolu, F., Trejo, B., et al (2012). A Proposed Developmental Sequence for Cross-Cultural Competence Training in the Department of Defense. DEOMI Technical Report No. 01-12. Washington, D.C. (p.29)

3C EMERGENT COMPETENCIES	SUB-FACETS OF CROSS-CULTURAL COMPETENCE			
	NOVICE (Pre-Requisite)	PRIMARY (101)	INTERMEDIATE (201)	SENIOR (301)
Self-Awareness in a Cultural Context	* Leveraging personality attributes * Self-identification	* Self-identification in a cultural context * Socialization/ Re-socialization to Service * Perception of others	* Self-identification in a cultural context	* Self-identification in a cultural context
Self-Regulation	* Self-monitoring	* Self-monitoring * Emotional regulation	* Self-monitoring * Emotional regulation * Resilience	* Self-monitoring * Emotional regulation * Resilience
Acquisition of Cultural Knowledge		* Learning through observation * Self-initiated learning * Inquisitiveness	* Learning through observation * Self-initiated learning * Cultural learning	* Learning through observation * Self-initiated learning * Cultural learning
Cultural Perspective-Taking		* Suspending judgment * Mental models & Schema development * Cultural sensemaking	* Cognitive flexibility * Socialization * Low need for closure * Suspending judgment * Cultural sensemaking	* Cognitive complexity * Suspending judgment * Cultural sensemaking
Communication		* Nonverbal & verbal communication * Patience * Language proficiency	* Nonverbal & verbal communication * Patience * Inquisitiveness * Cognitive complexity	* Nonverbal & verbal communication * Patience * Inquisitiveness * Cognitive complexity
Self-Efficacy			* State optimism * Self-confidence	* State optimism * Self-confidence
Interpersonal Skills			* Self-presentation * Respect for cultural differences * Relationship & rapport building * Willingness to engage * Cognitive complexity	* Self-monitoring * Building trust * Negotiation * Relationship & rapport building * Willingness to engage * Cognitive complexity
Cultural Relativism			* Cultural sensemaking * Inclusiveness * Suspending judgment	* Cultural sensemaking * Inclusiveness * Suspending judgment

Figure 2: Cross-Cultural Competencies: Baseline to Advanced

CORE COMPETENCIES & SUPPORTING ENABLERS	SECONDARY CROSS-CULTURAL COMPETENCIES		
	BASELINE (101)	INTERMEDIATE (201)	ADVANCED (301)
CULTURAL REASONING Inclusiveness; Tolerance for cultural uncertainty; Self-efficacy			* Applies cultural explanations of behaviors; sense-making * Demonstrates cognitive complexity * Suspends judgment
INTERCULTURAL INTERACTION Patience; Inquisitiveness; Willingness to Engage; Openness to Experience; Self-Efficacy		* Develops self-monitoring skills * Develops cognitive complexity * Develops nonverbal & verbal communication skills * Develops survival language skills * Understands the elements required for communication planning * Develops trust-building tactics * Develops negotiation skills	* Applies self-monitoring skills * Demonstrates cognitive complexity * Demonstrates nonverbal & verbal communication skills * Develops language proficiency * Engages in communication planning * Demonstrates trust-building tactics * Demonstrates negotiation skills
CULTURAL PERSPECTIVE-TAKING Tolerance for Cultural Uncertainty; Self-efficacy	* Recognizes existence of other worldviews * Develops cultural scripts based on cross-cultural mental models * Suspends judgment	* Refines cultural scripts based on cross-cultural mental models * Develops cultural explanations of behaviors * Suspends judgment * Engages in cognitive flexibility	* Applies cultural scripts based on cross-cultural mental models * Applies cultural explanations of behaviors; sense-making * Suspends judgment * Engages in cognitive flexibility
CULTURAL LEARNING Inquisitiveness; Openness to Experience; Self-efficacy	* Acquires cultural knowledge * Learns through observation * Learns the rules about survival language and expressing nonverbal behaviors; sociolinguistics	* Refines cultural knowledge * Learns through observation * Develops cognitive complexity * Develops the understanding of one's own and other cultures	* Applies cultural knowledge * Learns through observation * Demonstrates cognitive complexity * Advances the understanding of one's own and other cultures
SELF-REGULATION Resilience; Emotional Stability; Self-efficacy	* Recognizes the importance of self-monitoring * Engages in reflection & feedback processes * Perceives and understands emotions	* Develops self-monitoring skills * Engages in reflection & feedback * Develops emotion regulation strategies * Understands attitudes toward cultures	* Applies self-monitoring skills * Engages in reflection & feedback * Applies emotion regulation strategies * Manages attitudes toward cultures
SELF-AWARENESS Leveraging personality attributes; Self-efficacy	* Understands self in a cultural context * Understands the factors that shape one's worldview * Understands self in a cross-cultural context	* Refines concept of self in a cultural context * Refines understanding of the factors that shape one's worldview * Refines concept of self in a cross-cultural context	* Advances the understanding of one's own culture

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Table 2: Culture general cognitive concepts & culture general skills
 A comparison of three military training programs, based on materials (lesson plans, DVDs, and student outlines) observed/collected in 2013. The **culture general cognitive concepts** and **culture general skills** that received the most emphasis in these lessons are listed in the far left column.

[*] in a column instead of an [x] indicates this concept is not explicit or differs from more commonly accepted definitions.

CULTURE GENERAL	Sub-concept	CAOCL					MCSCG						ARI		
		AOC	CTI	CNV	IFP	RCS	OC	SPT	BRR	CCC	CTI	RCS	C	BR	TT
Culture		x					x								
	Operational Culture	x					x								
	Operational culture in mission planning	*					*								
Five dimensions		x			x		x								
	Environment, Economy, Social Structure, Political Structure, Belief Systems	x			x		x								
Hofstede’s dimensions															
	Individualist/Collectivist				x				x	*			*	x	x
	Power Distance													x	
Communication Styles															
	Direct/indirect									*			x		x
	High/low context			x	x	*						*	x		x
	Agency/fate				x										
	Task/relationship								x					x	
	Time orientation				x	x						x	x	x	
	Formal/informal				x										x
Reciprocity		x			x				*					*	*
	Types (generalized, balanced, negative)	x													
Holism		x													

Lesson Plan Key: **AOC**- Apply Operational Culture; **CTI**- Communicate through an Interpreter; **CNV**- Communicate Non-Verbally; **IFP**- Interact with a Foreign Population; **RCS**- Recognize Culture Stress; **OC**- Operational Culture; **SPT**- Social Perspective Taking; **BRR**- Building Rapport and Relationships; **CCC**- Cross-Cultural Communication; **C**- Communication; **BR**- Building Relationships; **TT**- Teaching and Training

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CULTURE GENERAL		CAOCL					MCSCG					ARI			
Concept	Sub-concept	AOC	CTI	CNV	IFP	RCS	OC	SPT	BRR	CCC	CTI	RCS	C	BR	TT
Variation		*													
Stereotypes										X			X		
Local norms & values					*									X	X
Mobilization		X													
Identity		X	X												
	Family/kinship/tribal	X	X				X				X			X	
	Age	X	X				X				X				
	Gender	X	X				X				X				
	Profession & education										X				X
	Fixed/chosen/impact of conflict	X													
	Class	X	X				X								
	Ethnicity/race	X	X				X								
	Religious membership	X	X				X							X	
	Ascribed vs. achieved status	X					X								
	Status hierarchy													X	X
	Community													X	
Cultural impact on teaching															X
Interpreters			X	X		*				X	X	*			
	Categories (1-3)		X								X				
	Language ability		X								X				
	Loyalties and danger		X								X				
	Select/ assess/ employ/ manage		X								X				
Culture Stress							*					*			
	Stages						*					*			
	Symptoms						*					*			

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CULTURE GENERAL		CAOCL					MCSCG						ARI		
Concept	Sub-concept	AOC	CTI	CNV	IFP	RCS	OC	SPT	BRR	CCC	CTI	RCS	C	BR	TT
	Manage						*					*			
	COSC flowchart						*					*			
Avoid mirror-imaging			x	x	x										x
Perspective Taking		x	x	x	x			x						x	x
	Bias (Fundamental attribution, Naïve realism, Confirmation, In-group/out-group)							x							
	Theories							*							
	Emotional (Empathy/Sympathy)							*							
Emotional regulation	<i>Also: Maintain tact and bearing</i>			x	x	*		x				*			x
	Assessing self & others	x				*		x				*			
	Suspending judgment	x		x	x										x
	Adapting														x
Building Rapport			x		x				x		x			x	
	Basic components (understanding, respect, trust)								x						
	Considerations								x						
	Importance to mission														x
	Effective rapport building				x										x
	Recovery														x
Verbal communication			x	x	x	x	x	x	x	x	x	x	x	x	x
	Expression/tone												x		
	Greetings and farewells									x				x	

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CULTURE GENERAL		CAOCL					MCSCG					ARI			
Concept	Sub-concept	AOC	CTI	CNV	IFP	RCS	OC	SPT	BRR	CCC	CTI	RCS	C	BR	TT
	Cross-cultural questioning							*							X
Non-verbal communication				X	X			X	X						
	Gestures			X					X	*					
	Body language		*	X					X	*	X				
	“Universal” facial expressions							*		*					
	Interpersonal distance/posture/ seating			X				X		X	X				
	Eye contact									X	X		X		
	Backchannels (nodding/verbal agreement)									X					
	Categories			*					X	*					
	Avoid mistakes and insult			X		*			*			*			
	Context			X											X
Observation				X	X	*			X			*			X
	Changes in baseline		X		X		X	X				X			
Saving face					X	*						*	X	X	X
Influencing															
	Methods (compliance, commitment)								X						
	Cialdini’s 6 principles (scarcity, authority, consensus, liking, reciprocity, consistency)									X					

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CULTURE GENERAL		CAOCL					MCSCG						ARI		
Concept	Sub-concept	AOC	CTI	CNV	IFP	RCS	OC	SPT	BRR	CCC	CTI	RCS	C	BR	TT
Negotiation									X						
	Bargaining (integrative, distributive)								X						
	Impact on negotiations (time, environment, self, non-verbal)								X						
	Roles (mediator, negotiator, arbitrator)								X						

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Table 3: Culture general skills & sub-concepts

A comparison of three military training programs, based on materials (lesson plans, DVDs, and student outlines) observed/collected in 2013. The **culture general skills** that received the most emphasis in these lessons are listed in the far left column. This table is separated out to show how skills encompass cognitive concepts (e.g. “perspective taking”) and action steps (e.g. “avoid ethnocentrism.”)

[*] in a column instead of an [x] indicates this concept is not explicit or differs from more commonly accepted definitions.

SKILLS		CAOCL					MCSCG						ARI		
Concept	Sub-concept	AOC	CTI	CNV	IFP	RCS	OC	SPT	BRR	CCC	CTI	RCS	C	BR	TT
Avoid Mirror-Imaging			X	X	X									X	
Assessing self & others		X	X			*		X			X	*			
Suspending judgment		X		X	X									X	
Perspective Taking		X	X	X	X			X						X	X
	Process							X							
	Avoiding ethnocentrism							X							
Emotional regulation	<i>(Also: Maintain tact and bearing)</i>			X	X	*		X				*			X
	Reframing							X							
	Acting-making							X							
	Physiological regulation					*		X				*			
Interpersonal skills		*	X	X	X	*	*	X	X	X	X	*	X	X	X
	Mirroring tone/posture		X	X							X				
	Interpreting non-verbal communication			X				X		X					
	Assess temper & intent			X	X			X							

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SKILLS	Sub-concept	CAOCL					MCSCG						ARI		
		AOC	CTI	CNV	IFP	RCS	OC	SPT	BRR	CCC	CTI	RCS	C	BR	TT
	Adopt covert strategies			X											
	Saving face				X	*						*	X	X	X
Acquisition of cultural knowledge		X	X	X	X	*	X	X	X	X	X	*	X	X	X
	Five dimensions	X					X								
Communication			X	X	X			X	X	X	X		X	X	
	Select, employ, manage interpreters		X								X				
	Planning/rehearsal /debriefing		X												
	Negotiation								X						
Observation				X	X	*		X	X			*			X
	Assess the situation			X	X			*							
	Create/refine/prioritize guesses			X	X			*							
	Validate guesses			X	X			*							
Manage culture stress						*						*			
	Avoid time conflicts													X	
Building rapport			X		X				X		X			X	
Culturally appropriate instruction															X

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SKILLS		CAOCL					MCSCG						ARI		
Concept	Sub-concept	AOC	CTI	CNV	IFP	RCS	OC	SPT	BRR	CCC	CTI	RCS	C	BR	TT
	Assess needs + establish credentials														X
	Alternatives to lecture-based approach														X
	Adapt instruction														X
	Assess learning appropriately														X
Influence/change behavior	<i>Also: Compliance and commitment</i>								X						
	Use influence tactics								X						
	Use influence techniques								X						
Select/ assess/ employ/ manage interpreters			X								X				
	Assess background & loyalties		X								X				
	Avoid biases		X												
	Speaking and phrasing		X								X				
	Controlling the conversation		X								X				
	Managing your audience		X								X				
	Safety and welfare		X								X				

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Table 4: Culture general knowledge, skills, and practical application exercises in each lesson plan

- a. This is a comparison of a single lesson plan on communication that is common to all three training programs. In MCSCG, it is titled “Cross Cultural Communication” (CCC). There are two CAOCL lesson plans that include similar content: “Communicate Non-Verbally,” (CNV) and “Interact with a Foreign Population” (IFP). The lesson in ARI’s training is “Communication” (C).
- b. The left-hand column includes most of the prominently emphasized concepts (or sub-concepts) in the lesson plans. Some concepts were emphasized and described in similar ways, others were not. This is described briefly in the right-hand column.
- c. The table is followed by a “call out” section which discusses some of the curriculum choices in more detail.

CULTURE GENERAL KNOWLEDGE		
CONCEPT	SOURCE	COMMENTS
Stereotypes	MCSCG- CCC; ARI-C	Identical definitions.
Cross-cultural interaction concepts <i>(collectivism & individualism; high & low context; individual agency & fate; face-saving; interpersonal distance; perception of time; formality levels)</i>	CAOCL- IFP	CAOCL groups these seven concepts together under one heading. MCSCG and/or ARI also incorporate collectivism & individualism, high & low context and face-saving explicitly (and other concepts implicitly) in MCSCG-CCC and ARI-C. (See below).
Four Foundational Concepts <i>(collectivism & individualism; direct & indirect; face saving; expressive communication)</i>	ARI-C	ARI identifies four concepts as “foundational” throughout its lesson, employing audio and video cues to signify their importance. Of these four concepts, only “expressive communication” is unique to ARI’s lesson plan, the other concepts also appear in MCSCG-CCC and CAOCL-IFP & CNV. (See below).
Collectivism & Individualism	MCSC-CCC; ARI-C; CAOCL- IFP	One of Hofstede’s dimensions ⁸ is referenced in all three of these lesson plans. MCSCG’s lesson includes sub-concepts of “horizontal” and “vertical” collectivism. ARI’s lesson categorizes this as one of the four “foundational concepts.” CAOCL’s lesson includes this as one of seven “cross-cultural interaction concepts.”
Direct & indirect communication styles	MCSCG-CCC; ARI-C	MCSCG’s lesson contains identical definitions and explanations as ARI’s; both lessons are quoting FM 3-07.1 ⁹ (“Security Force Assistance” field manual). ARI’s lesson categorizes this as one of the four “foundational concepts.”
High & low context	ARI-C; CAOCL- IFP & CNV	ARI’s lesson describes these as sub-concepts under direct/indirect communication (also referred to as “high & low scan”). CAOCL’s lesson includes these as one of seven “cross-

⁸ McSweeney, B. (2002). Hofstede’s model of national cultural differences and their consequences: A triumph of faith—a failure of analysis. *Human Relations*, 55 (1): 89-118.

⁹ According to the Army Training and Education Network, this manual has been superseded by FM 3-22 “Army Support to Security Cooperation.”

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		cultural interaction concepts.”
Individual agency & Fate-oriented	CAOCL- IFP	CAOCL correlates individual agency-oriented groups to “individualism” and fate-oriented groups to “collectivism” (though they are not described as sub-concepts).
Face saving	ARI-C CAOCL- IFP	ARI’s lesson describes this as another of the “four foundational concepts.” CAOCL’s lesson describes this only briefly, as compared to the ARI lesson.
Interpersonal distance	CAOCL- IFP & CNV	CAOCL covers this concept as it relates to body language and as one of seven “cross-cultural interaction concepts.” MCSCG does not use this term, but covers a similar idea in three other lessons not discussed in this paper.
Perception of time	CAOCL- IFP	CAOCL includes this as one of seven “cross-cultural interaction concepts.” MCSCG and ARI do not use this specific term in the lessons discussed here, but cover time orientation in other lesson plans.
Formal & informal	CAOCL- IFP	CAOCL includes this as one of seven “cross-cultural interaction concepts.” ARI covers a similar idea in another lesson not discussed in this paper.
Non-verbal communication	MCSCG-CCC; CAOCL- CNV	Both lessons use identical definitions. CAOCL’s lesson quotes <u>Operational Culture for the Warfighter</u> .
Gestures & body language	MCSCG-CCC; CAOCL- CNV	Both lessons use identical definitions.
Examples of body language	MCSCG-CCC	MCSCG’s lesson includes eye contact; personal space; lack of gestures; emotions; winking; nodding; shaking of the head; hand gestures.
Symbols	MCSCG-CCC; CAOCL- CNV	MCSCG’s lesson uses the same wording as in CAOCL’s 2010 lesson plan. CAOCL’s lesson includes idea of “mobilization” as it relates to symbols.
Effective non-verbal communication	MCSCG-CCC; CAOCL- CNV	MCSCG’s lesson uses the same wording as in CAOCL’s 2010 lesson plan; it also includes seating arrangements & greetings (as they apply to passers-by) and rank appropriate behavior, such as shaking hands, hugging, and kissing. CAOCL’s lesson includes understanding context, concepts of personal space, warnings about mistaken non-verbal cues, and adopting covert strategies to avoid insult.
Expressive communication	ARI-C	ARI defines expressiveness as speaking loudly or softly, using gestures, emotion, ornate language, gaze avoidance, etc. It is the fourth of the “four foundational concepts.”
Seven expressions of universal non-verbal communication (<i>happiness; sadness; boredom; fear; anger; surprise; disgust</i>)	MCSCG-CCC	MCSCG includes the information on seven “universal” facial expressions under non-verbal communication.

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Rapport	CAOCL-IFP; MCSCG-CCC* ARI-C*	CAOCL’s lesson defines “negative” and “positive” rapport, and gives ways to establish positive rapport; it also defines the concept of “reciprocity.” *MCSCG and ARI dedicate an entire lesson plan not discussed in this paper to rapport building (“Building Rapport & Relationships” and “Building Relationships.”)
Four components of observation	CAOCL-CNV & IFP	CAOCL also includes this segment in an additional lesson plan. The components include: direct observation, context (place, time, and purpose), inferences, and validation.
CULTURE GENERAL SKILLS		
CONCEPT	SOURCE	COMMENTS
Interaction skills <i>(suspending judgment, maintaining tact and bearing, perspective taking)</i>	CAOCL- IFP & CNV	CAOCL typically groups these three cross-cultural skills together, where MCSCG isolates “perspective taking” for a separate lesson.
Suspending judgment	CAOCL- IFP & CNV	CAOCL lists this as one of three “interaction skills.”
Maintaining tact and bearing	CAOCL-IFP	CAOCL lists this as one of three “interaction skills.”
Perspective taking	CAOCL-IFP & CNV; MCSCG-CCC*; ARI-C	CAOCL lists this as one of three “interaction skills.” *MCSCG dedicates a separate lesson plan to perspective taking (“Social Perspective Taking”).
Avoiding mirror-imaging	CAOCL-IFP & CNV	CAOCL combines with the “maintain tact and bearing” skill (mentioned above). It is also combined with “suspending judgment.”
Assessing temper & intent	CAOCL-IFP & CNV	CAOCL describes this as observing and assessing other people’s demeanor and behavior (also relates to content from “Combat Hunter” training program used in the USMC).
Building rapport	CAOCL-IFP; ARI-C*; MCSCG-CCC*	CAOCL discusses this is in relation to both using observation skills and establishing effective rapport. *MCSCG and ARI dedicate an entire lesson plan not discussed in this paper to rapport building (“Building Rapport & Relationships” and “Building Relationships.”)
Interpreting non-verbal communication	CAOCL-CNV	CAOCL’s lesson recommends using the four components of observation (described above).
PRACTICAL APPLICATION		
CONCEPT	SOURCE	COMMENTS
Explain an interaction	MCSCG-CCC; ARI-C	MCSCG and ARI use the same “critical incident” video & similar checking for understanding questions. In the video, an Army officer describes how he asked an Afghan elder about snipers, and the elder responded by describing seasonal weather patterns.
Employ non-verbal communication	CAOCL- CNV	CAOCL’s lesson describes a scenario of Marines involved in disaster relief efforts who are working at a food distribution center where a woman and a young man arrive and communicate non-verbally. Applies the 4 components of observation to this example.

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Applying observation and interaction skills to rapport	CAOCL-IFP	CAOCL’s lesson includes watching a video of actual Marines holding a <i>shura</i> in Garmsir, and analyzing the video based on observation skills and knowledge of interaction concepts, such as rapport building, non-verbal communication, and cross-cultural communication.
Identifying cross-cultural dynamics	ARI-C	ARI’s lesson contains a video of an Army Captain and an Afghan seeking a construction contract, though the position advertised is for a vehicle maintenance contract. It asks students to pay attention to “direct/indirect communication,” “face-saving” and “expressive communication.”
Identifying communication patterns	ARI-C	This application from ARI’s lesson plan is assigned as homework. Students are asked to observe people and notice their expressiveness, direct and indirect communication, and any potential differences with someone from another country.

Call outs: choices in prioritization and framing in each lesson plan

1. Prioritizing content:
 - a. MCSCG and ARI both chose to address “building rapport” as a stand-alone lesson. CAOCL chose to address “non-verbal communication” as a distinct lesson. On the flip side, non-verbal communication is discussed in two of MCSCG’s lesson plans, and CAOCL discusses rapport building in two of its lessons.
2. Unequivocal statements:
 - a. As a result of its 2013 course content review board (see “descriptive case”, pgs. 20-21), CAOCL made a conscious choice to remove unequivocal statements from its lessons. For instance, its “Communicate Non-verbally” lesson from 2010 stated: “if a person is laughing, exchanges handshakes [...] they are clearly being welcoming and content with the situation and event.” Yet this is untrue in some contexts; for instance, some people smile or laugh out of nervousness or fear rather than “contentedness.”
 - b. MCSCG’s written lesson plan has this description of indirect communication: “an indirect North American communicates very differently than an indirect Japanese, Saudi, or Honduran person” (p.7). While this is a good reminder that all indirect communication is not the same, the phrasing suggests that an “indirect North American,” an “indirect Honduran,” etc. exists, which is not the case. It is inaccurate to suggest that individuals (or whole countries or continents) are entirely direct or indirect communicators. North Americans communicate indirectly at times, as do people on other continents. For warfighters, it might be helpful to focus on the clear distinctions between indirect and direct communication so that they can identify the general types, and save specific applications for a “culture specific” brief.
3. Gaining audience “buy-in”:
 - a. Each lesson plan has made different choices about how to engage its audience. ARI’s DVD-based lessons include several video clips from expert and “foreign national” perspectives, in addition to integrating advisors’ personal experiences taken from

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qualitative interviews.¹⁰ These diverse “narratives,” both voice-over and video, add variety so that the lesson is not a pure lecture. CAOCL’s PowerPoint presentation includes mostly photographs and an occasional video. The lesson plan, however, is written so the instructor describes concepts using a “who are we”/“who are they” framework. For example, for a concept like symbols, the lesson plan includes information about the “blood stripe” of the Marine uniform. This allows Marines to reflect on these aspects in their own culture before applying that principle to others. While the MCSCG lesson plan is not as explicit as CAOCL’s in telling instructors how to apply the concepts in the lessons, in practice, MCSCG’s instructors do share their experiences as advisors or ask open-ended questions to invite students to share their experiences.¹¹

4. Contextualizing research, and avoiding “universals”:

- a. All three lesson plans draw on similar research for the “culture general” concepts. Sometimes these lessons include verbatim material. However, “borrowing” material without a full understanding of the concepts or the research they are founded on can lead to misinformation. The following are two examples of misunderstood research that, while useful, are nevertheless problematic when presented as unequivocal facts:
 - i. Hofstede’s dimensions: as indicated in this report, Hofstede’s dimensions, especially individualist/collectivist, are in all three lesson plans. In Hofstede’s original book, Culture’s Consequences (1980), he described four (later five) dimensions of national culture based on data from quantitative surveys of IBM employees in 1967 and 1973.¹² While Hofstede’s work continues to inform training to this day (especially in corporate environments), his research has also received a great deal of criticism from researchers who question the notion of a “national” culture, as well as his research methodology.¹³ While students do not need to know the details of this scholarly debate, curriculum developers should tread carefully. Unequivocal statements, especially about an entire nationality, such as “the Japanese are collectivist,” should be avoided. In that same vein, sub-concepts, such as “vertical” and “horizontal” collectivism (p. 5 in the MCSCG lesson plan) should also be avoided. These sub-concepts are not particularly useful to warfighters, especially if the instructor is not confident enough in the research to be able to offer examples of types of “vertical” and “horizontal” collectivism. In the end, Hofstede’s dimensions are a helpful tool for thinking about how communication differs across culture groups, but they are not useful when applied as “universal rules.”
 - ii. Universal expressions: MCSCG’s lesson plan is the only one in this analysis that describes “seven universal facial expressions.” However, in my observations for this research project, both ARI and Blue Canopy have taught similar

¹⁰ O’Conor, A., Roan, L., Cushner, K., & Metcalf, K. (2009). *Cross-Cultural Strategies for Improving the Teaching, Training and Mentoring Skills of Military Transition Team Advisors* (Technical Report No. 1255). Ft Leavenworth, KS: U.S. Army Research Institute for the Behavioral and Social Sciences.

¹¹ For more, see CAOCL’s mini-report sent March 2014, “Analysis of ‘Cross-Cultural Communications’ Lesson Plan.”

¹² McSweeney, B. (2002). Hofstede’s model of national cultural differences and their consequences: A triumph of faith—a failure of analysis. *Human Relations*, 55 (1): 89-118.

¹³ Ibid.

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information.¹⁴ ARI and Blue Canopy lessons also demonstrated proprietary software that helps students practice identifying facial expressions in increasingly shorter amounts of time. The popularity of this approach to understanding non-verbal communication does not accurately represent the most recent research on the topic of facial expressions. For instance, the results in one experiment indicate cross-cultural consistency in how participants from different countries grouped facial expressions (“negative,” “positive,” and “neutral”), and this was more statistically significant than when they were asked to name emotions (“happy,” “sad,” “angry,” etc.).¹⁵ To do justice to this body of research, ARI, Blue Canopy, and MCSCG would ideally incorporate more recent and ongoing scientific results into their units on facial expressions. On the other hand, it is understandably difficult for curriculum developers to keep up with the latest reputable scientific findings and subsequently update lesson plans. Simplifying may be the best solution. What warfighters need to know is that “reading” facial expressions is important in assessing non-verbal communication.¹⁶ Warfighters should also be aware that assigning “universal” meanings to facial expressions is flawed, especially in cross-cultural environments.

¹⁴ ARI: “Facial Expression Unit” observed January 2013; Blue Canopy: “Facial Analysis and Profiling” observed October 2013. ARI and Blue Canopy discuss seven facial expressions, but where MCSCG includes “boredom,” they substitute “contempt.”

¹⁵ Lindquist, K., Gendron, M., Barrett, L., & Dickerson, B. “Emotion perception, but not affect perception, is impaired with semantic memory loss.” Chapel Hill, NC. Retrieved online 5 March 2014 from an embedded link (below): http://www.unc.edu/~kal29/docs/Lindquistetal_Emotioninpress.doc.

¹⁶ There is understandable concern among advisors and trainers who may encounter “blue on green,” “insider threat,” or other security situations, and who may want to be alert to non-verbal communication in order to anticipate sudden violence. However, the MCSCG lesson on “universal facial expressions” is not presented in that context, and I am not aware of the evidence that this lesson, as written, would be useful in those specific situations.

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Descriptive Case: Selecting culture general concepts and skills through a collaborative process

At the height of OIF and OEF, CAOCL’s pre-deployment training was mostly “culture specific,” and its instructors were often native-born Iraqis or Afghans who taught Marines both language and culture. At the same time, CAOCL wrote its training and readiness (T&R) manual that included “performance steps,” such as “Communicate Non-Verbally.”¹⁷ In addition to culture specific instruction in the classroom, CAOCL was developing its computer-based Regional, Culture, and Language Familiarization (RCLF) program,¹⁸ for officers and enlisted. In this program, each Marine (Sgt and above) will spend a career specializing in one of seventeen regions.

As the RCLF program expanded, CAOCL staff wanted to augment its organization of regional information around the “five dimensions of operational culture”¹⁹ with additional culture general concepts that could be applied to their regional studies and in other contexts as well. To do this, there needed to be agreement on which of the many culture general concepts and skills would be best suited for CAOCL curriculum. First, anthropologists, geographers, and other subject matter experts (SMEs) in the Translational Research Group (TRG) provided a white paper and other documents that presented a broad range of culture general concepts and skills. After reading these, RCLF staff met regularly with TRG staff and discussed these concepts and skills in greater detail, with the intent of agreeing on a definitive and useful “list.” If someone in the discussion didn’t understand a concept, like “reciprocity,” the TRG staff could explain it, and RCLF analysts would offer regional or personal examples to illustrate and clarify the concept. Staff created outlines and drew diagrams on white boards to clarify or organize information. Lists were created then refined further. From those conversations, CAOCL staff determined a subset of culture general concepts (such as reciprocity and holism) and skills (such as suspending judgment) that are most relevant to the Marine audience. They then listed and tracked these concepts according to where they would appear in the RCLF learning “blocks.”

Several months later, CAOCL staff returned to this list of core concepts when it was time to conduct the Course Content Review Board (CCRB) for their five instructor-based lessons (which are included in this analysis). They followed the Systems Approach for Training (SAT) process that is used throughout the Marine Corps, wherein they spent a little over a week in daily meetings discussing each lesson plan. The audience for CCRB was broader than for the RCLF discussions, and included CAOCL SMEs, regional experts, liaison officers, TECOM staff and Marines from other organizations. Because of the time limitations for instructor-based training, the CCRB discussions led to an even shorter list of culture general concepts and skills (drawn from the original RCLF list) that were included in the rewritten lesson plans.

In all of these collaborations, people with different skill sets and backgrounds were invited to participate in these discussions over several days or weeks. Though seemingly inefficient, this collaborative approach contributed to greater efficiencies over time because staff 1) developed a deeper understanding of culture general concepts and skills; 2) discussed and agreed upon ways to frame concepts so that Marines would understand; and 3) gained a better understanding of what is most useful for Marines in the field. As a result, Marines will be exposed to similar concepts and terms, and similar descriptions of those terms, as they receive CAOCL training (either online or classroom-based.)

In both collaborations, staff focused on selecting the most relevant concepts for Marines. For instance, 3C research says “emotional regulation” is an important competency. CAOCL Marines felt that this term was

¹⁷ While non-verbal communication is an important culture general skill, the term “culture general” was not in popular use at CAOCL at the time the T&R manual was originally written. After 2010, culture general concepts and skills received much greater attention among CAOCL staff.

¹⁸ Originally referred to as CMRS, the Career Marine Regional Studies Program. The program name was changed in 2008.

¹⁹ Salmoni, B., & Holmes-Eber, P. (2011). *Operational Culture for the Warfighter*. 2 ed. Quantico: Marine Corps University Press.

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unnecessarily confusing, and suggested “maintaining tact and bearing” as a comparable concept that is frequently used in the Marine Corps. In a longer discussion, CAOCL staff discussed the topic of “change” as it applies to cultures. This is a critical concept, because some (often younger) Marines tend to think a list of “do’s and don’ts” is enough to understand a culture, and they tend to expect that everyone in their area of operations (AO) will behave in exactly the same way. CAOCL staff agreed that the concept of “change” was important, but anthropological terms like “syncretism” or “borrowing,” were too narrow. Ultimately, the group determined that “variation” would convey to Marines that everything is not “black and white” when it comes to cultures. Like “maintain tact and bearing,” this term appears in both the RCLF program and in the “Apply Operational Culture” lesson plan. Not every concept made it “in,” and some concepts were determined to be more important later in a Marine’s career. Thus, negotiation is included in Officer Block 4 of the RCLF program, since it is considered a “higher level” skill, and it is not included at all in CAOCL’s culture general lesson plans, which are aimed at the E3-5 level of understanding and experience.

In the end, this collaboration, while time consuming, has created a useful “road map” that helps ensure that the agreed-upon concepts are included into the curriculum at the appropriate level. See the tables below for excerpts of this “road map” for culture general concepts and skills.

Excerpts from the “road map” of core “culture general,” 3C, and negotiation concepts, dated Feb 14, 2013

Table A: Culture general concepts

Culture general concept	Sub-concept	RCLF block	POI
Holism	N/A	Ob2/Eb3	Operational Culture-General: Apply
Variation	N/A	Ob2/Eb3	Operational Culture-General: Apply
Mobilization	N/A	Ob2/Eb3	Operational Culture-General: Apply

Table B: Culture general skills

Cross-cultural competence	Sub-concept	RCLF block	POI
	Perspective-taking	Ob3/Eb4	Operational Culture-General: Apply, Interact
	Suspending judgment (under perspective-taking)	Ob3/Eb4	Operational Culture-General: Apply, Interact
	Maintaining tact and bearing (“self regulation”)	Ob3/Eb4	Operational Culture-General: Apply, Interact
	Reading non-verbal cues	Ob3/Eb4	Operational Culture-General: Apply, Interact

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Conclusion:

As a mini-report, this is not a comprehensive or exhaustive analysis of these training programs. Though it includes a comparison with the Army Research Institute, this report is primarily intended for audiences at MCSCG and CAOCL. These two Marine organizations share similar responsibilities of preparing Marines to engage foreign populations and foreign security forces. In regard to training, this report has “lifted the hood” on what is “inside” CAOCL and MCSCG instruction, which can assist in future discussions between the two organizations. Right now, four of MCSCG’s lesson plans are very similar to CAOCL’s, and this overlap, for better or for worse, is evident from a quick glance through the previous tables. On the positive side, this means that all Marines have a higher probability of being exposed to culture general concepts and skills, no matter which training they receive. It also means that CAOCL’s reach is greater than it would be otherwise. On the other hand, Marines could feel that they are “wasting their time” hearing the “same thing over and over.” With coordination, MCSCG and CAOCL might align their lesson plans containing culture general concepts so that they reinforce rather than repeat (or worse, undermine) one another. That pitfall can be avoided if CAOCL and MCSCG are aware of each other’s training programs, and if their respective staff members maintain open lines of communication when creating or updating those lessons. Going forward, each may want to leverage the expertise and experience of the other, so that they are not duplicating efforts, but maximizing their training capabilities.

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