

ADRIAN WOLFBERG, Ph.D.

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EDUCATION

Ph.D. Management (Decision-making for Policy), Case Western Reserve University, Cleveland, OH; 2014

Dissertation: *A Theory of Overload and Equivocality Effects on Learning during Knowledge Transfer within Policy Making Dyads*. Committee: Kalle Lyytinen (Chair), Linda Argote, Richard J. Boland, J.P. Stephens

M.S. National Security Strategy, National War College, Washington, DC; 2003

M.S. Systems Management and Logistics, University of Southern California, Los Angeles, CA; 1987

B.S.-equiv. Mathematics, University of South Carolina, Columbia, SC; 1977

Honors B.A. Individualized Studies: Transformation of Modern Culture, York University, Toronto, Canada; 1974

ACADEMIC POSITIONS

Visiting Professor Chairman of Defense Intelligence 2014-Present
Department of National Security and Strategy, M.S. program, U.S. Army War College

Adjunct Professor Qualitative Methods and Publication Dissemination Advisor 2014-Present
Weatherhead School of Management, Ph.D. program, Case Western Reserve University

PROFESSIONAL PUBLICATIONS – PEER REVIEWED

Wolfberg, A. (2017). How Generals Consume Intelligence. (under review by *Intelligence and National Security*).

Wolfberg, A. (2016). The President's Daily Brief: Managing the Relationship between Intelligence and Policymaking. (accepted by *Political Science Quarterly*).

Wolfberg, A. (2016). How Information Overload and Equivocality Affect Law Enforcement Intelligence Analysts: Implications for Learning and Knowledge Production. (accepted by *Journal of Intelligence & Analysis*).

Wolfberg, A. & Young, B.A. (2016). Is Intelligence an Instrument of National Power? (accepted by *American Intelligence Journal*).

Wolfberg, A. (2015). Beyond Tradecraft: Intelligence Analysts Learn through "Non-tradecraft" Behaviors. *Journal of Intelligence & Analysis*, 22(3), 25-42.

Wolfberg, A. (2014). Communication Patterns between the Briefer and the Policymaker. *International Journal of Intelligence and Counterintelligence*, 27(3), 509-528.

Wolfberg, A. & Dixon, N.M. (2011). Speaking Truth to Power: Nurturing a Reflective Culture at the U.S. Defense Intelligence Agency. *Reflections*, 10(4), 1-12.

Wolfberg, A. & Pelley, B. (2009) The Role of Innovation: Creating a Culture of Improvement. *American Intelligence Journal*, 26(2), 30-36.

Wolfberg, A. & Stumborg, M. (2007) Achieving Clarity in a Constantly Changing Environment. *Reflections*, 8(3), 11-22.

Wolfberg, A. (2006). Full Spectrum Analysis: A New Way of Thinking for a New World. *Military Review*, 86(4), 35-42

Wolfberg, A. (2004). The Challenges of Creating a New Analytical Culture. *American Intelligence Journal*, 22(1), 11-20.

PRACTITIONER PUBLICATIONS

- Wolfberg, A.** (2016). Communication, Perspectives, Backgrounds & Roles, Part III. *Insight, December*. (in press)
- Wolfberg, A.** (2015). Communication, Perspectives, Backgrounds & Roles, Part II. *Insight, February*.
- Wolfberg, A.** (2014). Communication, Perspectives, Backgrounds & Roles, Part I. *Insight, July*.
- Wolfberg, A.** & Stewart, K.C. (2010). Bringing the "Wall of the Unknown" Down: Reframing Complex Problems. *Small Wars Journal*, 6(5).
- Wolfberg, A.** (2009) Defense Intelligence Agency's Knowledge Lab: Lessons from Really Changing Intelligence. *Inside Knowledge*, Part I, 12(4) and Part II, 12(8).
- Wolfberg, A.** (2008) Viewpoint: Crossing Boundaries. *Government Executive*, 40(6).
- Wolfberg, A.** & O'Connor, J.T. (2007). Crossing Boundaries to Build Change, *Journal of the Academy of Sharing Knowledge (ASK)*, 27(July).
- Anklam, P. & **Wolfberg, A.** (2006). Creating Networks at the Defense Intelligence Agency. *Knowledge Management Review*, 9(1).
- Wolfberg, A.** (2006) Viewpoint: A Formula for Success: Sometimes You Have to Shake up the Status Quo. *Government Executive*, 38(15).

BOOK CHAPTERS.

- Wolfberg, A.** (2010). Smart Mentoring to Increase Network Connectivity. In Cross, R. et al. (Eds.), *Organizational Networking Fieldbook: Best Practices, Techniques and Exercises to Drive Organizational Innovation and Performance*. San Francisco, CA: Jossey-Bass.

BOOK REVIEWS

- Wolfberg, A.** (2016). Review of *Why Spy? The Art of Intelligence*, by Brian Stewart and Samantha Newbery. *Parameters* 46(1), 127-128.
- Wolfberg, A.** (2009). How Being Different Makes a Difference. [Review of *The Difference: How the Power of Diversity Creates Better Groups, Firms, Schools, and Societies*, by S.E. Page]. *Communique*, March.
- Wolfberg, A.** (2008). Making Teamwork Work: Balancing Agency Needs with Your Day-to-Day Job. [Review of *Senior Leadership Teams: What it Takes to Make Them Great*, by J.A. Burruss, J.R. Hackman, D.A. Nunes, and R. Wageman]. *Communique*, November/December.
- Wolfberg, A.** (2007). Collaboration: Engine for Creativity. [Review of *Group Genius: The Creative Power of Collaboration*, by K. Sawyer]. *Communique*, November/December.
- Wolfberg, A.** (2007). The Importance of Listening to Advice. [Review of *Taking Advice: How Leaders Get Good Counsel and Use It Wisely*, by D. Ciampa]. *Communique*, September/October.
- Wolfberg, A.** (2007). Harnessing Innovation through Collaboration. [Review of *Wikinomics: How Mass Communication Changes Everything*, by C. Heath and D. Heath]. *Communique*, July/August.
- Wolfberg, A.** (2007). Making Your Message Stick. [Review of *Made to Stick*, by C. Heath and D. Heath]. *Communique*, May/June.
- Wolfberg, A.** (2007). Evidence-Based Management: Can it Be Used in the Intelligence Community? [Review of *Hard Facts: Dangerous Half-Truths and Total Nonsense*, by J. Pfeffer and R.I. Sutton]. *Communique*, March/April.

Wolfberg, A. (2007). Leading Change: The Real Story. [Review of *Leadership Without Easy Answers*, by R.A. Heifetz]. *Communique*, January/February.

Wolfberg, A. (2006). Cultivating Every Source of Knowledge. [Review of *Infotopia: How Many Minds Produce Knowledge*, by C.R. Sunstein]. *Communique*, December.

Wolfberg, A. (2006). Ground-Breaking Gadgets and Innovation. [Review of *The Art of Innovation*, by T. Kelley]. *Communique*, September/October.

CONFERENCE PRESENTATIONS – REFEREED SUBMISSIONS

- Aug 2014 **Academy of Management (AOM) Annual Conference**
Learning within Knowledge Transfer Dyads – A Mixed Methods Study Using an Information Perspective. Philadelphia, PA
- Oct 2013 **International Studies Association – International Security Studies Section Conference**
Beyond Tradecraft: Why we Need to Change the Way we Teach and Train Intelligence Analysts. Washington, DC
- Aug 2013 **Academy of Management (AOM) Annual Conference**
Do Filtering, Dialogue, and Networking Improve Learning in Equivocal and Information Rich Contexts? – A Study of Sense-Making Policy Making Contexts. Lake Buena Vista, FL
- Nov 2012 **Five Eyes/IC Centers for Academic Excellence Analytic Conference**
Communicating Analytical Results to Policymakers: What Works? Linthicum, MD
- Aug 2012 **Academy of Management (AOM) Annual Conference**
Communicating through Thick Boundaries: The Case of Informing National Policy Making. Boston, MA
- Apr 2012 **International Studies Association – International Security Studies Section Conference**
Critical Conversations between Individuals with Little Shared Context: The Intelligence Briefer and the Policy Maker. San Diego, CA
- Nov 2011 **Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) Conference**
Critical Public Sector Conversations between Individuals with Little Shared Context. Toronto, Ontario, Canada
- Jan 2006 **International Conference on Intelligence Ethics**
Goodness: A Dialogue between Intelligence Analyst and a Consumer of Intelligence. Washington, DC
- Jul 2005 **Teaching Intelligence in America’s Universities**
The DIA Knowledge Lab and Learning Organizations. University of Maryland
- May 2005 **International Conference on Intelligence Analysis**
Investing in the Social Capital of Knowledge. Washington, DC

PROFESSIONAL SERVICE

Activities in Scholarly Organizations

Co-Founder and Co-Managing Editor, *Engaged Management ReView*

Chair, Intelligence Working Group of the Army War College

Reviewing Activities

Academy of Management Annual Conference

International Conference on Information Systems Annual Conference

Engaged Management Scholar Annual Conference

ACADEMIC AWARDS

Outstanding Ph.D. Research Award, Case Western Reserve University, 2014

Non-profit Fellowship, Case Western Reserve University, 2010-2014

Pi Mu Epsilon, elected to membership in the mathematical society, University of South Carolina, 1978

PROFESSIONAL EXPERIENCE

Summary: National security and interagency policymaking. Focus on strategy, decision-making and policy. In-depth experience creating and implementing, as well as conceptual understanding, of how policy and strategy is formed in large, complex organizations gained through working in both field roles and in senior level Defense Department, Cabinet, and White House engagements, and through academic teaching at the masters and doctoral level addressing decision-making in the national security arena.

CASE WESTERN RESERVE UNIVERSITY, Cleveland, OH

2014 - Present

Part-time, teaching assistant in the management Doctoral Program (2015 - Present)

Doctoral students are highly successful executives in small- to mid-size companies, public and non-profits.

- Part of faculty team co-teaching executives in cohort, lock-step academic setting focusing on strategy-related research topics.
- Qualitative methods advisor for five doctoral students during AY15 and AY16.

Co-Founder and Co-Managing Editor (2014 - Present)

• Co-created and co-managing editor for *Engaged Management ReView*, a practitioner-scholar peer-reviewed, open-access, online journal of strategy-related research in private and public sector organizations.

DEFENSE INTELLIGENCE AGENCY (DIA), Washington, DC

1993 - Present

Chair, Defense Intelligence Studies, U.S. Army War College, Carlisle, PA (2014 - Present)

Masters-degree students are Army Colonels (or equivalent) destined for senior leadership positions.

- In AY15 and AY16, taught two courses Fall semester: Theory and Strategy of War; and National Security Policy and Strategy.
- In AY16, volunteered as lesson author for two lessons in National Security Policy and Strategy.
- In AY15 and AY16, co-taught two courses Spring semester: National Security Policy Program; and National Intelligence Studies elective. Was course director for National Intelligence Studies elective in AY16.
- Research advisor for six Strategic Research Project and two Civilian Research Project students during AY15. Comparable number of advisees in AY16.
- Responding to the J7/Joint Staff Military Education Coordination Council (MECC) Working Group requirement, initiated, proposed and received Army War College leadership approval to research combat arms general officer views about senior service school education on national intelligence. Research underway.

Senior Intelligence Officer, Policy Division, Office of Strategy, Policy and Performance (2012 - 2014)

Newly-created role responsible for uncovering cross-functional problems and designing cross-boundary solutions.

- Identified organizational inefficiencies, developed strategy, and brought disparate stakeholders together to reduce costs by >\$30M annually in an area involving complex interactions between intelligence professionals from multiple government agencies worth hundreds of millions of dollars annually.
- Initiated first-ever peer-based evaluation of 307 internal DIA-wide policies covering Operations, Human Resources, Finance, and Compliance to eliminate redundancies and improve cross-boundary efficiency.

Chief, Process Improvement Branch, Office of the Chief of Staff (2010 - 2012)

Led agency's Lean Six Sigma program as well as identified complex operational problems and developed solutions. Managed staff of 6.

- Saved \$150K annually by designing/implementing a decentralized operating model for Lean Six Sigma.
- Reduced risk of cyber-attacks by uncovering major system-wide supply chain vulnerability. Developed new operating model and persuaded multiple stakeholders to collaborate to implement solution.
- Improved efficiency of global crisis intelligence and operations monitoring facilities by developing innovative solution to consolidate 12 centers to five. Recommendation approved by Director-DIA and implemented.

Chief, Knowledge Laboratory, Office of the Chief of Staff (2005 - 2010)

Change agent. Conceived, created, and led a new organization, a Knowledge Laboratory, to improve DIA's capacity to meet strategic goals and objectives. Staff of 16. \$3M annual budget totaling \$15M.

- Conceptualized, co-designed, and reviewed and approved lesson plans for three experiential training courses: Bridging the Gap, Critical Discourse, and Full Spectrum Analysis.
- Employed action research methodologies to multiple employee engagement projects including Critical Discourse, Full Spectrum Analysis, and Crossing Boundaries.
- Implemented 50 customized, intervention pilot projects responding to DIA strategic goals ranging between three months to four years to increase knowledge sharing and operating effectiveness.
- Improved agency-wide operations by increasing employee engagement in problem solving through creation of a "Crossing Boundaries" program, generating 427 solutions of which 52% were implemented. Improved employee morale, increased knowledge sharing across organizations, and reduced inefficiencies. Prepared and delivered monthly introductions and a review of the strategy implementation status.
- Attacked 12 longstanding, intractable intelligence problems by improving data-sharing and bringing disparate experts together. Four projects won Director of National Intelligence awards.
- Increased knowledge sharing by reducing communication inefficiencies through new "Critical Discourse" program, a small cohort-based project where a total of 250 employees gained insight into their ineffective communication patterns especially in times of crisis. Program cited as "life-changing" by employees.
- Reduced time to deliver intelligence reports (over 2,000 annually) to policy-makers and military leaders by over 20% by identifying inefficiencies in editing and review processes within a very large analysis department.
- Decreased organizational resistance to change by constructing unique methodology that revealed hidden, contradictory strategic goal preferences of top, middle, and low managers and frontline employees.

Strategic Planner, Office of the Chief of Staff (2003 - 2004)

Member of a two-person team to implement special projects tasked by the Director, DIA.

- Co-authored DIA strategic plan under the personal direction of the Director and Chief of Staff of DIA. Researched strategic plans throughout the U.S. government and commercial sector, adopted lessons from best of breed.
- Led 15-member team analyzing DIA performance and lessons learned in support of 2003 Iraq War. Uncovered findings never previously understood; led to increases in cultural awareness, "red teaming," and language training.
- Improved effectiveness of agency strategic plan by developing and implementing first-ever process to operationalize the key goals of the plan. Implemented through eight 10-person teams. Became model for subsequent DIA strategic planning efforts.
- Championed focus for the DIA to becoming a true learning organization. Received buy-in and commitment, which led to creation of the DIA Knowledge Laboratory, resulting in multiple improvements.

Student, National War College (2002 - 2003)

- Received top honors in final oral exam, and won Dean of Faculty Excellence in Writing Award.

Senior Intelligence Analyst, Counterdrug Office, Directorate for Analysis (2000 - 2002)

Responsible for quality of counter-narcotics analysis in South America.

- Improved security of the U.S. by leading 6-person team to create first-of-its-kind 2,000-name database of potential terrorist-related drug traffickers, and then handed off final product to a Combatant Command.

Executive Agent to the White House, Office of National Drug Control Policy (1997 - 2000)

Reported to White House Director of Intelligence. Led staff of 4. Responsible for intelligence product used by Cabinet Officer for counterdrug performance and funding. Collaborated with 13 agencies and five U.S. departments.

- Prepared and delivered intelligence-based policy assessment briefings to the Quarterly J3/Interdiction Coordinator Interagency Conference, whose key attendees were the J3 and comparable level of civilian senior executives from the departments of State, Justice, Customs, and Transportation, along with agencies such as the Central Intelligence Agency, Drug Enforcement Administration, and the U.S. Coast Guard.
- Employed scientific-based research techniques to the Consolidated Counterdrug Database, the U.S. government's single source of illicit drug movement around the world, overhaul and expand data collection, analytic methodology, data integration, and data review processes from multi-agency sources including the Drug Enforcement Administration, the Department of Defense, State Department, and other agencies, enhancing data quality and coherency.
- At request of Cabinet Officer Honorable Barry McCaffrey, personally met with Venezuelan President Hugo Chavez and was successful in persuading him to adopt a U.S.-friendly policy through an analysis of drug trafficking patterns.
- On a periodic basis, met personally with McCaffrey to discuss status of U.S. interagency supply-side strategy against Western Hemisphere cocaine trafficking.
- Improved U.S. counterdrug operations in South America by developing analytic methodology to allocate resources. Awarded Director of Intelligence Certificate of Distinction.
- In response to concerns of methodological validity, personally briefed VADM Vern Clark, USN, Joint Staff's Director of Operations, multiple times in one-on-one meetings, eventually convincing him of analytical validity resulting in his decision to allocate resources for counterdrug operations.
- Improved operations along U.S. Southwestern border by using analytic methodology of drug trafficking movements. Analysis shown to President Clinton who ordered massive shifting of U.S. resources from Florida to Texas/Mexico border.
- Achieved U.S. policy consensus across the interagency of counterdrug effectiveness by raising controversial data inconsistencies and resolving key interpretation disagreement – one view of the U.S. winning war on drugs, other view the U.S. losing war on drugs – by persuasion of new analytic methodology.
- Detected executive level difficulties interpreting analytic assessments, and created and successfully implemented a mid-level coordination interagency review council, serving as an intermediary between low-level analytical working group and executive-level management group. Became model of trans-hierarchical collaboration with U.S. interagency.

Intelligence Analyst, Counterdrug Office, Directorate for Analysis (1993 - 1996)

Member of team responsible for counter-narcotics analysis in Latin America.

- Led the Joint Staff J2 crisis request for information (RF) team with the most improvements in first year of operations to manage non-DoD crisis requests for DoD crisis intelligence needs, during one year rotational assignment.
- Increased agency's speed and quality in responding to information request during crises.
- Improved effectiveness of counterdrug operations by developing and implementing transparency in the collection management function via first-of-its-kind interagency working group.
- Reduced illegal drug shipments to the U.S. by pioneering analytic methodology for real-time tracking and targeting of drug trafficking shipments for U.S. law enforcement agencies.

INTERNATIONAL IMAGING SYSTEMS, Milpitas, CA**1990 - 1993****Sales Support Engineer, Sales Department**

Designed integrated hardware/software solutions in United States Air Force, foreign government, and commercial imaging systems for intelligence, defense, natural resource management, and agriculture applications.

ESL, SUBSIDIARY OF TRW, Sunnyvale, CA**1988 - 1990****Knowledge Engineer, Research and Development Department**

Translated customer requirements into engineering specs for use in building United States Navy intelligence workstations for anti-submarine warfare applications.

UNITED STATES NAVAL RESERVES**1988 - 1997****Reserve Intelligence Officer, Office of Naval Intelligence**, Washington, DC (1988-1997)

- Created and implemented innovative multi-disciplinary analytic technique for assessing operational status of Chinese submarine activity, which was adopted by the Office of Naval Intelligence.
- Assumed crisis collection management duties replacing active duty personnel during reserve weekends.
- Retired from the Navy Reserves as a Lieutenant Commander.

UNITED STATES NAVY**1980 - 1988****Indications and Warning Officer, Joint Staff, Director of Intelligence**, Pentagon (1984-1988)

- Warned Chairman of Joint Chiefs, ADM Crowe, USN, in face-to-face meeting of Russian collusion with Libya during ELDORADO CANYON, a key U.S. operation to demonstrate freedom on navigation, based on innovative analysis of intelligence data. Verified three weeks later by the National Security Agency. Awarded Service Achievement Medal.
- Detected the first warning of the existence of an operational surface-to-surface SIIKWORM missile site threatening U.S. and allied naval vessels in the Persian Gulf.

Reconnaissance Officer, Fleet Air Reconnaissance Squadron Two, Naval Air Station, Rota, Spain (1981-1984)

- Mission Commander aboard 7-person jet signals intelligence aircraft; operated from six aircraft carriers supporting U.S. operations in the Middle East and Persian Gulf.

Commissioning and Flight Training, (1980-1981)

- Electronic warfare and electronic support measures training, Corry Station, Pensacola, FL.
- Advanced navigation training, Mather AFB, CA.
- Basic navigation training, NAS Pensacola, FL.
- Aviation Officer Candidate School commissioning source, NAS Pensacola, FL.

UNITED STATES AIR FORCE RESERVES**1978 - 1979****Enlisted Aircraft Mechanic**, 60th Operations Support Squadron, Travis AFB, Fairfield, CA.

- Scheduler for C-5 and C-141 transport aircraft.

UNITED STATES AIR FORCE**1976 - 1978****Enlisted Aircraft Mechanic**, 4507th Consolidated Aircraft Maintenance Squadron, Shaw AFB, Sumter, SC.

- Maintained and serviced OV-10 tactical reconnaissance aircraft.

LEADERSHIP DEVELOPMENT PROGRAMS

GEMSTONE Leadership Development Program, DIA, 2008

Navigating Complex Challenges Program, Center for Creative Leadership, 2006

Defense Leadership and Management Program (DLAMP), Department of Defense, 2005 (DSLDP-precursor)

National War College graduate, 2003

Intelligence Community Civilian Joint Duty Qualified, 2001

U.S. Naval Reserve Intelligence Officer, Retired, various programs prior to 1997

PROFESSIONAL AWARDS

Defense Intelligence Director's Award, 2009

Executive Office of the President of the United States Special Achievement Award, 1999

Director of Central Intelligence National Intelligence Certificate of Distinction, 1998

Navy Achievement Medal, 1992

Defense Meritorious Service Medal, 1988

Joint Service Achievement Medal, 1987