MARINE CORPS RESERVE FORCES

IN OPERATION IRAQI FREEDOM

Lessons Learned

Reserve Combat Assessment Team

November 2003

DEDICATION

Dedicated to the memory of those Reserve Marines killed during Operation Iraqi Freedom.

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Semper Fi.

ACKNOWLEDGEMENTS

Note from Colonel Cancian: With this report I conclude 33 years of Marine Corps service. I hope that this report helps build a better Corps for those Marines who come after me. To all my shipmates over these many years I wish fair winds and following seas. Many have retired, a few have died in the service of Corps and country, all are remembered with gratitude. Semper fi.

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EXECUTIVE SUMMARY

I. METHODOLOGY. Operation Iraqi Freedom (OIF) provided a rare opportunity to understand what works and what does not work in real conflict. To take advantage of this opportunity for learning, the Commandant created a Combat Assessment Team. Its mission was to systematically collect and objectively analyze combat data on critical warfighting issues. Because reserve forces played such a large role in this operation, the Reserve Affairs (RA) department at Headquarters Marine Corps (HQMC), Manpower and Reserve Affairs (M&RA), created a reserve forces team to operate as an element of the overall combat assessment team to analyze reserve issues in depth. The reserve team collected three types of data both in the contiguous United States (CONUS) and outside CONUS (OCONUS)—interviews, surveys, and documentation. The team interviewed and surveyed virtually every mobilized reserve unit, hundreds of Marines mobilized as individuals, and the active duty commanders for whom they worked. Based on this extensive corpus of material, the team developed this report. The report lays out the major reserve issues and lessons learned, with conclusions and recommendations as appropriate.

II. BACKGROUND. Experiences of the Marine Corps Reserve occur in the broad context of total Marine Corps capabilities and the National Security Strategy. From this context several insights emerge:

- The Marine Corps relies on its reserve component. Because the active duty Marine Corps with its many global commitments is stretched thin even in peacetime, it needs its reserve component during major combat operations. **During Operation Desert Storm (ODS), for example, the Marine Corps mobilized more of its reserve component than any other service (63%). The same was true during this conflict as the Marine Corps again called up proportionally more of its reserve component than any other service (48%).**
- The Marine Corps Reserve is an expeditionary, warfighting organization. The reason for this heavy usage in major combat operations is that all Marine Corps Reserve units are designed for warfighting and expeditionary operations.
- Reserve forces can provide a prudent economy of force measure. A key advantage of reserve forces is their low cost. **When mobilization time and peacetime training allow reserve units to meet required wartime standards, reserve forces can save the Marine Corps money without increasing risk.**
- Reserve forces must adapt to the new national strategy. In 2001 the Department of Defense announced a new strategy that abandoned the two Major Theater War (MTW) strategy of the 1990s and adopted a new set of principles for force planning. Recommendations for improvement in reserve performance must be made in the context of this strategy. **Many mobilization difficulties would be mitigated or eliminated with more time and more certainty. However, the new strategy calls for less time and foresees less certainty. Therefore, recommendations that ignore these new strategic principles are not viable.**

III. THE SUCCESS STORY. The Marine Corps' reserve forces are one of the great success stories of the war. They showed that they were skilled warfighters who could perform as

advertised—muster, train, deploy, and fight—and do it, not as second stringers who would suffice in an emergency, but as highly motivated, highly competent Marines.

Marine reservists fought on the front lines from the first minute of the war to the last. In addition, support units made great achievements such as building the longest bridge and establishing the largest fuel farm in Marine Corps history. After the war, reserve infantry and Light Armored Reconnaissance (LAR) battalions governed entire provinces on their own. Active duty commanders greatly appreciated reserve capabilities and enthusiasm, an appreciation that began at the highest levels: "We could not have done what we did without the reserves," noted LtGen Conway, Commanding General (CG) I Marine Expeditionary Force (MEF).

Many non-battle achievements are worth noting: Unit mobilization was rapid and smooth, taking only five days on average; Marine reserve units deployed rapidly and arrived when needed; 99% of Selected Marine Corps Reserve (SMCR) Marines reported for duty; 98% of Marines were medically fit; and less than ½ of 1% of SMCR Marines requested some sort of waiver.

The experience of ODS and subsequent mobilizations has convinced planners that use of reserve forces is politically viable, the Marine Corps needs reserve augmentation to fully participate in major combat operations, reserve units will show up when called, and reserve units have the training to participate effectively. This was an important step forward, not just for reservists, but also for overall Marine Corps warfighting capabilities.

The foundation of this success was the individual Marine. Active duty commanders spoke about reserve Marines in extremely glowing terms. Many of the reasons for this success are so second nature to Marines that they are often overlooked: reservists attend the same schools, participate in the same exercises, and are held to the same standards as active duty Marines. Marine officers and many enlisted have extensive active duty experience. The Inspector-Instructor (I-I) staffs come from the active duty force, set high standards, and are integrated with the reserve unit. Finally the demanding Mobilization and Operational Readiness Deployment Test (MORDT) program ensures a high state of readiness.

General Hagee, Commandant of the Marine Corps, summed it up: ***"Our Marine reservists are Marines first and there was absolutely NO DIFFERENCE in performance – on the ground, in the air, in logistics."***

IV. ISSUES. The Team identified twelve issues for in-depth analysis. These issues came from several sources: "100 Weight Issues" from the overall combat assessment effort, the Joint Lessons Learned Team, the Desert Storm Battle Assessment Team, input from HQMC (RA), input from Marine Forces Reserve (MARFORRES), and input from the broader reserve community.

ORGANIZE

1. _Force Structure_. Is the Marine Corps Reserve properly structured for this kind of war?

CONCLUSIONS

- Force structure demands fell unevenly. In greatest demand for both ODS and OIF were motor transport, communications, medical, C-130s, civil affairs, Light Armored Vehicles (LAV), Amphibious Assault Vehicles (AAV), and engineer support. Although future conflicts may not levy the same demands as ODS and OIF, these mobilizations may give insights into areas where additional structure might be warranted.
- In OIF, reserve Force Service Support Group (FSSG) units were used a little more as units than had been true in ODS, but many units were still parceled out to staff Combat Service Support Detachments (CSSDs)/Combat Service Support Groups (CSSGs). Irrespective of how reserve units are actually used, reserve FSSG capabilities should be requested by unit, not as inventories of individuals.
- Because Marine reserve units may be used for missions different from what they were designed for and expected, organizational and intellectual flexibility is important.

RECOMMENDATIONS

- Designing force structure is a complex task involving synchronization of recruiting, equipment, training, and facilities. Further, it is based on future needs, not past experience. All of these considerations lie beyond the scope of this report. However, the suggestions of senior active duty officers and the basic usage data cited in this report may help follow-on efforts design future force structure.
- Even the most well-designed force structure will require some adaptation to meet unforeseen requirements. Mobilization planning should be clear that some unit missions might be "non-standard" to fit the needs of the theater commander.
- Changes in reserve FSSG structure should be made in the context of any changes to the active duty FSSG structure.

2. _Family Support_. How well did the Marine Corps take care of reserve families?

CONCLUSIONS

- Support provided to reserve families was rated from fair to good, with relatively few ratings of poor/unsatisfactory. This was a great improvement from ODS, reflecting a decade of effort.
- Support for Marines in units was stronger than for individuals.
- The KVP, new to the reserves since ODS, was uneven. Peacetime Wartime Support Teams (PWSTs) and commanders described the program very positively; survey results, however, were more mixed.

- Health care was a major concern for all Marines and families before mobilization, but only a relatively small percentage indicated having any problems.
- A new problem is rumor control—rapid and widely accessible information means that accurate and inaccurate information flows from theater to families at great speed.

RECOMMENDATIONS

- Develop better briefings on Tri-Care that not only explain what Tri-Care provides, but how to best use Tri-Care given different circumstances:
  - Near a base or military medical facility.
  - Not near a facility but in a relatively developed area.
  - In rural and semi-rural areas.
- Recognize that getting families accustomed to a new health care system may take several briefings and some personalized attention. Consider specially training one member of the PWST to handle Tri-Care issues.
- Exercise unit KVP routinely before mobilization.
- Use multiple mechanisms to communicate with reserve families—newsletters, phone trees, e-mail lists, phone watches, websites. The more mechanisms, the better: the increased flow of accurate information will help control rumors.

3. _Employment._ *How has mobilization affected reservist jobs and income?*

CONCLUSIONS

- Employers have been very supportive.
- One-third of Marines experienced an increase in income after mobilization. One-third experienced no effect. One-third experienced a financial loss in excess of 10% of their income.
- Though employers were supportive, some Marines (18%) expect to have employment problems upon their return from active duty.

RECOMMENDATIONS

- Continue to work with the committee for ESGR to ease the transition of reservists back into their civilian jobs.
- Ensure that all demobilizing reservists are briefed about Uniformed Services Employment and Reemployment Rights Act (USERRA), ESGR, and other reemployment rights available.

4. _Eligibility for Security Clearances._ *Did Marines have the clearances they needed to do their jobs?*

CONCLUSION. Wartime operations require many more, and higher, clearances than peacetime policies allow. The Marine Corps, therefore, needs to greatly expand the number and level of clearances held by reservists.

RECOMMENDATIONS

- Change policy to allow more Individual Mobilization Augmentees (IMA), and SMCR Marines to maintain their eligibility for the highest level of clearance they held during active or reserve duty. Allow investigations to be completed even though a Marine is within two years of End of Active Service (EAS).
- The justification for reserve clearances should be based on wartime Gaining Force Commander (GFC) needs—Marine Corps, joint, and combined—rather than peacetime Marine Table of Organization (T/O) structure.
- The Marine Corps should base its needs not only on T/O line numbers within the reserve structure, but on the estimated number of billets required to be filled by reserve Marines during major combat operations. The Marine Corps should budget adequate funds to support this level of investigations.
- MARFORRES should review its T/O and upgrade appropriate billets that need greater access to classified data.
- Manpower, Plans, and Policy (MPP) MPP-60 should be given the additional mission of coordinating wartime GFC and joint needs beyond internal Marine Corps T/O structure.
- HQMC needs to review policy and make appropriate changes to procedures in order that the Marine Reserve establishment has the clearances needed to meet expected wartime needs.

TRAIN

5. *Training Readiness. Were units and individuals adequately trained? Who should be responsible for training mobilized reserve units and individuals? Who should provide the resources?*

CONCLUSIONS

- Units, up to the company level, were well trained to accomplish the missions assigned. Battalions also seem to have done better than in ODS. The emphasis on battalion level training since ODS seems to have had a positive effect. With the exception of 4th LAR, however, each of the combat battalions expressed the opinion that having at least some post-mobilization training was necessary for the battalions to perform as well as they did. None of the FSSG battalions that were employed as battalions received any unit training while at their Station of Initial Assignment (SIA)/Intermediate Location (ILOC), yet they accomplished their assigned missions in theater.
- Individuals.
  - Marines in units were generally well trained in their Military Occupational Specialty (MOS) to perform the missions assigned and were judged to be equivalently trained to active duty Marines.
  - IMAs were generally a success. They activated quickly, had familiarity and knowledge of the staff and billet requirements for which they were assigned, and generally performed well.

- Globally sourced individual augmentees (IAs), particularly Individual Ready Reserve (IRR) officers being assigned to a high level staff, had preparation shortcomings that are described in the Section IV. 9, Individual Augmentees.
- Multiple command changes, and unclear or unspecified responsibility for supporting the training of mobilized reserve units at the SIA/ILOC greatly constrained training at the SIA/ILOC.

RECOMMENDATIONS

- Continue battalion level training exercises/emphasis for reserve combat arms battalions to maintain the improved performance levels demonstrated during OIF.
- If possible, activate battalion staffs as early as possible before the mobilization of the battalion's main body to assist in the transition. This would provide the staffs time to conduct a mission analysis, verify mobilization preparations, and conduct any necessary coordination with the GFC not already accomplished. At a minimum, conduct extra drills for the staff when mobilization seems imminent.
- Give MARFORRES a role in supporting the training of mobilized reserve units at the SIA/ILOCs with ammunition, transportation, supplies, and equipment, though the kind of training conducted should be dictated by the GFC. MARFORRES already has training and equipment oversight before mobilization and has a structure established to execute these functions. Ammunition to support MARFORRES units already exists at many SIA/ILOCs around the country and can be redistributed to support the training needs of activating units. The GFC can work with MARFORRES and the bases to identify priorities for training and which units should have priority on ranges in order to meet the GFC's requirements.
- Send "Report for Planning" notices to SMCR units and MARFORRES as soon as reserve augmentation/reinforcement is deemed necessary. This will allow the GFC to coordinate with the SMCR unit to identify tasks and missions that may affect unit training and equipment needs.
- Back to basics. Reserve units want more emphasis on basic individual and unit skills. Thus, an infantry unit may emphasize attack, defend, patrolling, and marksmanship, whereas a motor transport unit may emphasize convoy operation, route reconnaissance (Recon), and individual and crew served weapons proficiency. This implies a reduction in "adventure" training—i.e., training that, while exciting, does not relate to a unit's primary mission.
- Training on Mission Essential Task Lists (METLs) beyond the basics could be accomplished through Training Exercise Without Troops (TEWTs), and battalion staff planning exercises so that the concepts are familiar.

EQUIP

6. _Equipment_. _Did reserve units have the equipment they needed?_

CONCLUSIONS

- The short answer to this question is no, Marine reserve units did not have all the equipment their commanders believed they needed. Contributing factors included Training Allowance (T/A) versus Table of Equipment (T/E), and T/E versus Authorized Allowance (A/A) shortfalls, late arrival of Career Transition Assistance Program (CTAP), lack of communication equipment, and late arrival of sealifted equipment.
- Compatibility of equipment between active and reserve forces was much improved over ODS and virtually seamless, the exception being radios.
- Initial Remain Beyond Equipment (IRBE) did not provide the amount of equipment that had been expected.

RECOMMENDATIONS

- Review and improve the process for bringing activated SMCR units up to their T/Es and A/As. Given MARFORRES' familiarity with SMCR T/Es and T/As and its considerable work thus far on what happened and why, it may be more effective for MARFORRES to have a role post-mobilization, rather than putting the entire burden on the GFC, which may be located half a world away. Although the GFC will always have to specify the requirement, MARFORRES may be able to help with the CONUS coordination involved in identifying shortfalls, locating equipment, and shipping equipment to the unit.
- Clarify command responsibilities—MARFORRES, MFLant, Marine Component Command (when different), GFC—especially in situations where the GFC has already deployed.
- Exercise Force Deployment, Planning, and Execution (FDP&E) procedures more extensively in peacetime so all organizations and personnel are familiar with their roles.
- Begin filling—not just planning to fill—the shortfall between T/A and T/E or A/A as soon as Report for Planning notices are published.
- Review unit after action reports, with specific attention to communications gear, to determine the appropriate T/E for all units.
- Increase the amount of gear held in CTAP, and review the table of standard sizes to determine whether it fits the Marine Corps profile.
- Revisit the idea of career issue, where a Marine would be issued his entire allowance for the duration of his career. This could minimize the problems associated with CTAP, particularly with the USMC's move to the new digital camouflage utilities.
- Encourage liaison between reserve units and GFCs during the "report for planning" period.

PROVIDE

7. <u>*Mobilization Process*</u>. *Was the process effective and efficient?*

   CONCLUSION. The Marine Corps Reserve is getting good at mobilization. For those institutions that pay attention, practice makes them, if not perfect, at least better.

In OIF, units rapidly passed through the mobilization process. Pay administration, general administrative matters, and I-I integration were success stories, and were great improvements over ODS. However, the processes for issuing orders and active duty identification (ID) cards to SMCR Marines need improvement. Additionally, there were significant problems related to the mobilization of Navy personnel.

RECOMMENDATIONS

- Mobilization Notification. Provide Warning Orders as early as possible to allow Marines at least six days to address their personal affairs. Continue to resist proposals that require 30 days notice without allowing the service some flexibility in implementation.
- Pay. Work to improve the pay system's ability to provide correct entitlements to all mobilized Marines. Ensure that all Commanding Officers (COs) know about NAVMC 1116 payments.
- Admin. Allow reserve units to perform their own administration at the battalion/squadron Reserve Training Center (RTC), with a small detachment brought forward into theater to assist as a unit cell at a consolidated reserve admin section. Because mobilization is so administration intensive, consider augmenting admin sections on mobilization.
- Medical. Provide better and more available documentation through use of SNAP-Automated Medical Systems (SAMS) or an equivalent system to track immunizations, physicals, prescriptions, etc. When mobilized Marines are held back because of medical reasons, send them forward to their units when they become fit for duty.
- Dental. Encourage greater use of dental insurance, such as the Tri-Care Selected Reserve Dental Program.
- Waiver Policy. Clarify the process regarding who has authority to decide what, and where the Marine goes once a Delay, Deferment, and Exemption (DD&E) request has been submitted.
- Line 10s. Grant the authority down to the company level to screen and determine which line 10 Marines to take and which to leave at the RTC.
- Pay Group Fs. Push them forward to join/rejoin their units immediately upon completing their Initial Active Duty Training (IADT).
- I-I Integration. Continue the current policy.
- PWSTs. Ensure they are available by phone at all times when the unit is deployed, and that they have a continuous presence in the RTC during normal work hours with additional after hours availability as required to assist with family support.
- Orders. Improve Reserve Order Writing System's (ROWS) ability to generate orders for a large unit in a timely fashion.
- ID Cards. Change procedures so that ID card production is not a mobilization bottleneck.
- Corpsmen. Mobilize them on the same schedule as their SMCR unit. Keep them with their unit as much as possible. Develop mobilization information systems that can exchange information.

8. *Mobilization Processing Centers (MPCs) and Mobilization Support Battalions (MSBs).*
How effective was the mobilization process for individuals?

      CONCLUSION. The Marine Corps' three MPCs and two MSBs worked through many challenges to process the flow of individuals. The MSBs were able to quickly process hundreds of reservists for active duty on an average of only 4.5 days. However, this task was made more difficult by incompatible and inaccurate data systems and late execution. Organizational structure may have been excessive for the tasks actually assigned.

      RECOMMENDATIONS

- Activate the MPCs early enough so that they are up and running before the flow of mobilized reservists becomes heavy.
- Create one unified administrative system to mobilize Marines as recommended in Section IV. 9, Individual Augmentees, of this report.
- If combat replacements (now called "combat augmentees") will continue to be used in future conflicts, then continue to muster and communicate with IRR Marines to update personal data.
- Revise the Mobilization Plan (MPLAN), now called the Mobilization, Activation, Integration, and Deactivation Plan (MAID-P), to fix the current shortcomings of the mobilization process described in this section. Provide MPCs/MSBs with increased funding during major combat operations so they are not a burden on their bases.
- Mobilization models used by HQMC should be reviewed in light of the limited numbers of combat replacements/augmentees called up for OIF. If combat replacements/augmentees are to be used, mobilize them in time to be processed, trained, and forwarded to affect operations.
- Consider reducing the number of MPCs. Miramar, CA, and Cherry Point, NC, processed very few Marines (about 360 and 190 respectively) and numbers for similar operations in the future are unlikely to be any larger. Both Marine Corps Air Stations (MCASs) are only an hour drive from the Camp Pendleton, CA, and Camp Lejeune, NC, MSBs/MPCs. The structure of their IMA Detachments associated with MPCs could be better served elsewhere. The authorized T/O of the Reserve Support Units (RSUs) at Camp Pendleton and Camp Lejeune should be adjusted to meet the anticipated flow through at their locations.
- Align the number of IMPCs with a better estimate of the number of IRR Marines to be mobilized. Give the IMPCs more authority to screen out unqualified reservists.
- IMPCs are of little value except in times of large IRR mobilizations. They provided little support that the MPCs/MSBs could not provide. They were given no authority or medical capability to screen for Marines who were not qualified for active duty. Their input to MCMPS took 24 hours to effect. Many Marines were already at the MPCs/MSBs by the time they were noted in MCMPCs as reporting to the IMPC.

9. *Individual Augmentees (IAs). Is the current process effective in matching individuals with requirements? Would it be better to use reservists only to backfill billets and to send active duty personnel forward? Is the process too slow for the new National Security Strategy?*

CONCLUSION. The process for matching reservists with augmentation requirements was uneven. Where reservists trained with active duty units for duty in specific billets, performance was excellent. Where reservists were globally sourced for service in unfamiliar organizations (especially on high-level staffs where many reservists had little experience), their active duty leaders believed that the results were uneven. This led some observers to question whether reserve augmentees should be used for warfighting at all. While the main problem was training and experience in joint and high-level staff procedures, timeliness was also a problem.

The three keys to success were:

1. Individual skills matched to the type of billet and level of command
2. Linkage between reservist and gaining command before the conflict
3. Time to learn the specific job.

The problem was not with the officers running the assignment system or with the officers being assigned. The problem was systemic—too many constraints.

If the Marine Corps Reserve wants to continue to supply individuals to warfighting headquarters during combat operations, it must make significant changes to its global sourcing process for matching individuals with requirements.

RECOMMENDATIONS. The IMA detachment/MACE system works well and will continue to provide highly trained reservists for senior staffs. However, the IA global sourcing system needs to consistently fill joint and service requirements with the highest quality augmentees on a timeline that meets the rapid pace of future warfighting. The current system does not always do that. Unless the Marine Corps Reserve wants to get out of the business of globally sourcing individuals to warfighting HQ, it needs to consider a variety of changes:

- Assign the best qualified Marines to these augmentee requirements, not the most available Marines. As one senior officer observed: "We need to set these reserve officers up for success, not failure."
  - One way to due this would be to task organizations – MSTP, MCU, MCIA, HQMC staff organizations – with providing IAs and to give them the latitude to choose how this is done. The organization could send an active duty Marine, activate a reservist and send him, or send an active duty Marine and activate a reservist for backfill. This way decision makers closest to the Marines involved would make the hard tradeoffs.[1]
- Treat IA assignments as monitors would, looking at the whole person, particularly their experience and education—both military and civilian—to make the best match to a requirement. Give the people making these assignments information equivalent to what a monitor has. Include information on civilian experiences and qualifications, for example by making the Reserve Qualification Summary available on line.
- Expand use of information systems to identify and to track both billets and individuals.

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[1] Interview #13

- Use a centralized database to match requirements to qualified individuals.
- Develop an in-transit visibility system that tracks individuals from one reporting site to another.
- Ensure that this information is visible to all appropriate commands in order to show the status of a request for a billet as well as where an individual is in the reporting process.
- Keep individuals informed of their status.
- Keep all the above up-to-date in real time.

- To the extent possible, identify and validate GFC augmentation requirements as early as possible in the process, thus allowing more time to identify and to assign the best-qualified individuals and giving augmentees more time for on-the-job training (OJT). GFC should provide as much information as possible about its expectations for the billet.
- Broaden the pool of reserve Marines trained in joint operations and high-level staff processes.
  - Aggressively implement the Reserve Component (RC) Joint Officer Management Program (DODI 1215.20), signed in January 2003.
  - Take advantage of emerging Joint Professional Military Education (JPME) courses that will be available, for example, the Naval Reserve Distance Learning Course and the Advance JPME course that will be taught at the Joint Forces Staff College in Norfolk (3 weeks to complete in residence and 29 weeks via distance learning).
  - Develop a way to track these officers in the personnel system.
- Increase MSTP's MTT visits to high-level reserve staffs—MACEs, MSCs, IMA detachments. Focus such training on knowledge that augmentees would need—Marine Corps Planning Process (MCPP), componency, augmentation/liaison doctrine, battle rhythm.
- Consider expanding the IMA program to produce more Marines experienced in joint and higher HQ operations. Consider redistributing IMA billets from the supporting establishment to warfighting organizations, especially from IMA detachments not heavily used in ODS and OIF.
- Consider creating a general support MEF Staff IMA unit. This would require fewer billets than providing additional IMA billets to each MEF; Marines from this unit would be mobilized and sent to any staff where the need for an augmentee was greatest.
- Make IMAs available for global sourcing unless their detachment is specifically excluded by the Commandant of the Marine Corps (CMC).
- Expand the pool of potential IAs by including Marines from designated SMCR HQ. MARFORRES took many of the listed actions during OIF. The proposed change would make this a matter of policy, so these Marines are available earlier in an operation. These actions will add about 500 officers to the existing pool of 1,500 in IMA detachments and MACEs.
  - Make all personnel at 4th Division and 4th MAW HQ available for global sourcing since these HQ will not be used as complete entities.
  - Make all personnel at FSSG HQ available if the plan does not call for it to be used as an entity.

- Make personnel in two of the three infantry regimental HQ available.
- Make personnel at 14th Marines available for sourcing as soon as it is clear that plans do not include it as a force fires HQ. This regiment is a particularly rich source of Marines who are comfortable operating at the force level and have relevant operational experience.
- Make personnel in two of the three aircraft group HQ available.
- Make personnel in Maintenance Battalion and Supply Battalion HQ available since these units have never been used as entities and, given FSSG organization, are unlikely to be used.
- Make non-integrating I-I staff of mobilizing units available; backfill with PWST.
- Work to get more flexibility from the Office of the Secretary of Defense (OSD). One possibility would be to get authorization for the service to call up whatever reservists it thought appropriate as long as it stayed within a total reserve manpower cap. Thus, OSD would still control the size of the mobilization, but the process could speed up.
- To the extent that Marines in IMA detachments or in MACEs had shortcomings, both active duty organizations and reserves need to take action. Active duty organizations need to take ownership of their detachments—invest the time to train them, hire the right people, and know what their capabilities are. This will pay great dividends when those Marines are needed. Reserve commanders need to purge the program of individuals who are not measuring up.

10. *The Total Force*. *How well did the Total Force integrate?*

CONCLUSION. Units integrated well. However, at the individual level, reservists felt that active duty Marines did not accept them initially, but did accept them eventually. Like all outsiders, reserve units had to prove themselves. However, tensions sometimes went deeper, and reservists recounted many stories of put-downs and condescension by active duty Marines. Although some degree of active/reserve tension is probably inevitable, all Marines should be treated with respect.

RECOMMENDATIONS

- **Circulate report results.** Publish and circulate these results widely so that all Marines are aware of these issues.
- **Establish a zero-tolerance policy**. Treat all Marines alike. Establish and enforce a zero-tolerance policy against discriminatory or abusive words and actions.
- **Increase education on the reserves**. Incorporate into Officer Candidate School (OCS), TBS, recruit training, and Professional Military Education (PME) training sessions that describe the role and contributions of reserve forces to Marine warfighting efforts. These sessions should be candid in discussing both strengths and weaknesses of all components, and their mutual reliance as part of the Marine Total Force.
- **Everyone a Marine**. Where possible, eliminate use of the terms "reserve," "reservists," and "USMCR" and instead use the unit designation, such as "4th Marine Division/Wing/FSSG," or "augmentee." This was done in World War II and did much to erase the distinction between regular and reserve after mobilization. After

all, if large portions of a component are fighting on the frontlines, taking fire on convoys, and flying air support into hot zones, they are no longer "in reserve."

- **Exercises.** Develop more exercises with both reserve and active forces involved.

11. _Deployment Timeline_. _Did the call up of reserve forces delay the launching of the operation?_

CONCLUSION. Marine reserve units mobilized quickly and arrived in theater when needed. After strategic mobility constraints, the primary cause of delay, for all forces, active and reserve, was the ponderous Request For Forces (RFF)/Deployment Order (DepOrd) process, a process that will probably continue in some form. However, there are some things the Marine Corps Reserve can do to accommodate itself to this new process.

RECOMMENDATIONS. Decisions about the RFF/DepOrd process lie at a much higher level than the Marine Corps Reserve. However, the Marine Corps Reserve can adapt itself to this challenging process. Leaning forward in future conflicts, even when requirements are uncertain, and taking some preparatory actions as guidance is evolving, will speed reaction and improve unit performance. These actions are hard because they entail some bureaucratic risk. Inaction is bureaucratically safer. However, the key is to do what is right for the warfighters. Potential actions include the following:

- Extra drills/ADSW for key leaders. The Marine Corps Reserve did this preparing for OIF, and it was very successful.
- Administrative drill for all. Before ODS the entire Marine Corps Reserve held an extra weekend drill dedicated to mobilization preparation. This allowed units to spot and correct problems early and not in the rush of activation. By doing some administrative processing before mobilization, instead of after, this action, sped up the deployment process by two days. Many units did this on their own before OIF.
- Double drills. Instead of one drill weekend per month, conduct two.
- Acceleration of AT. Very difficult to do but it provides the highest level of training. If a unit is going to war, why not do it?

12. _Sustainability of Reserve PERSTEMPO_. _Are reserves being used too much?_

CONCLUSIONS

- Whether the Marine Corps Reserve can sustain the high pace of PERSTEMPO is ultimately a recruiting and retention question. Therefore, these need to be tracked closely to detect early any signs of weakness. Data are inconclusive at this time. On the one hand, many Marines expressed negative opinions about continuing in the reserves as a result of their mobilization. On the other hand, survey data suggest that attitudes are more positive than after ODS where, despite very negative attitudes expressed in post-war surveys, there was no retention drop.
- Many reservists are available as individuals for voluntary duty but using volunteers is not a viable substitute for mobilizing units.

RECOMMENDATIONS

- Closely track recruiting and retention across the entire Marine Corps Reserve.
- In particular, monitor recruiting and retention in units with extensive activations – 2/25, 2/23, VMGR 234/452, and 3d and 4th CAG.
- Use reserve volunteers for augmentation of active duty units and organizations, but not as a substitute for entire units.
- Re-survey units that have been activated for OIF 6 and 12 months after they are deactivated to compare attitudes and beliefs.

A reserve tank sends Saddam a message

I. METHODOLOGY

> *"The problem is we won the war. Now Marines will say, 'See, it works.' They will go back to their old ways and fail to acknowledge those areas we have learned from this fight that are clearly in need of change."*
> -- Reserve unit CO

The Enduring Freedom Combat Assessment Team (EFCAT) was originally created to take advantage of the opportunity for learning presented by operations in Afghanistan in 2001-2002. Its mission was to systematically collect and objectively analyze combat data on critical warfighting issues. Organized by MCCDC, the team included members from all elements of the Marine Corps. After submitting its report (signed officially on 13 January 2003), the team disbanded. However, even before it had published the summary report on operations in Afghanistan, the EFCAT began planning and coordinating for a follow-on effort in support of OIF. As Marine deployments for OIF accelerated, MCCDC created a new team covering an even broader set of issues because of the larger scale of operations. CMC approved these plans on 14 February 2003,[2] and the team deployed within a week. Because reserve forces played such a large role in this operation, the RA department at HQMC (M&RA) created a reserve forces team (called EFCAT-R) to operate as an element of the EFCAT and to analyze reserve issues in depth.

Operation Iraqi Freedom provided a rare opportunity to understand what works and what does not work in real conflict. In peacetime, all plans, policies, and doctrine are at least partly theoretical since none can be subjected to the ultimate test of their validity. Even the most conscientious organization cannot fully anticipate the future. Exercises give important insights but do not stress human beings, logistical systems, and equipment as real combat operations do. Further, it is easy to paper over disagreements and ignore inconsistencies when the stakes are low and much activity is simulated. For this reason, when large-scale combat operations occur, the Marine Corps aggressively investigates lessons learned.

This report. This report is part of that larger Marine Corps effort to understand the nature of modern war and to shape the Marine Corps for future success. A product of the Reserve Forces Issue Team of the EFCAT-R, this report draws on an extensive corpus of data collected in Southwest Asia (SWA) and in CONUS during and just after the recent conflict. The report lays out the major issues and lessons learned, with conclusions and recommendations as appropriate. Although drawing from extensive primary sources and incorporating the insights of many Marines, it is a research paper and does not necessarily represent the official views of the Marine Corps.

Data Collected. The team collected three types of data both in CONUS and OCONUS: interviews, surveys, and documentation.

1. Interviews. In all, the reserve forces team conducted approximately 175 separate interview sessions with a total of 250 individual Marines. Extensive field notes and over 100 hours of audiotapes documented these interviews. Interviews were conducted in the

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[2] ALMAR 012-03

field while units were still mobilized so recollections were fresh. The MCCDC server maintains the electronic version of this documentation. The interviews were in six categories:

- Key reserve commanders and staff officers. The team interviewed virtually every reserve company commander and above using a standard series of questions (see Appendix A). These questions covered topics from training and preparations before mobilization, to the mobilization process itself, through field operations, and finally to demobilization. The questions were intended to elicit judgments, observations, and data on critical issues.

- Active duty commanders with reservists working for them. The team, with occasional help from other EFCAT teams, interviewed virtually every active duty commander who had reservists working for him. The purpose was to get their perspective on reserve forces, particularly on training and performance. The team strongly believed that talking within a community—whether reservists, intelligence, Nuclear, Biological, Chemical (NBC), or Combat Service Support (CSS)—did not provide a sufficiently broad perspective. The users of the community's product also needed to be consulted. The team used a standard set of questions, listed in Appendix A, in these interviews.

- Reserve Marines, NCOs, SNCOs, and officers. To supplement observations by commanders, the team interviewed groups of other reserve Marines. In general, these Marines were asked only three questions: What went well, what did not go well and, if you were Commandant, what would you change?

- I-I staffs/PWST. The team did a telephone survey/interview of 42 I-I/PWST staffs that had units from their drill center activated. These staffs were asked a series of questions about the mobilization process, essentially the same questions asked of the reserve units. The purpose was to get a different perspective on the mobilization process. These questions are also in Appendix A.

- MPCs. The Team interviewed key personnel at all three MPCs and the two MSBs.

- Marine Corps Reserve Support Center (MCRSC), HQMC, and MARFORRES. The team interviewed key staff members at these senior HQ.

2. Reserve Survey. The team conducted a survey by administering questionnaires. (The questionnaire is at Appendix B; background data on responses is at Appendix C). Both the size and the representativeness of the sample were excellent. To increase the response rate, the questionnaires were generally administered on the spot in person. To distribute the survey widely, the team visited almost every unit with more than 50 reserve Marines in it (see Appendix D). A total of about 4,000 responses were received out of approximately 21,000 mobilized reservists on duty at the time of the survey.

The surveys were put into an Access database that was the basis for producing the various quantitative insights described in this report.

3. Documentation. The EFCAT has collected thousands of documents electronically, some relevant to reserve issues. In addition, the team sought out specific information where it was needed to illuminate issues. Studies and Analysis Division at MCCDC will maintain this data when the EFCAT disbands.

Follow-on efforts. This report will feed into a variety of follow-on efforts:

- The overall EFCAT report on OIF.
- The Comprehensive Review, an on-going study of the Marine Corps Reserve to structure it for the 21st century.
- Marine Corps input for the Joint Staff/OSD study on active/reserve mix.
- Marine Corps input to (Joint Forces Command) JFCOM's Joint Center for Lessons Learned (JCLL) Team.
- MARFORRES' internal lessons learned effort.
- Marine Corps Working Groups on deployment, mobilization, and individual augmentees.

Related efforts. This paper is not intended to be the sole work on Marine reserve forces during the recent conflict. Other efforts will focus on specific topics of interest to individual HQ. In addition, two efforts outside the Marine Corps will provide insights on all reserve forces, including the Marines. First, the OSD (RA) has begun conducting a periodic survey on reserve attitudes. Over time this survey will identify trends. Second, the Committee for ESGR is conducting a detailed survey looking at mobilization effects on reservists' civilian employment.

Center for Marine Corps Lessons Learned System (CMCLLS). This paper does not replace lessons learned that units may enter into the developmental CMCLLS.

The Enduring Freedom Combat Assessment Team (EFCAT)
leaves its mark on a wall at Camp Commando, Kuwait

II. BACKGROUND

"You get three times the Marine with a reserve Marine. You get a trained and experienced Marine. You get someone who has a second career with other skills they can bring to bear in a pinch. You get a mature individual with considerable other life experience."
-- Sgt Major of a reserve unit

Chronology.

Date	Activity
Sep 01	Terrorists attack US homeland. President signs Partial Mobilzation authority.
Nov 01	Detachments from I MACE and 3rd CAG activated to augment I MEF CE Co B, 1/23 sent to Guantanimo Bay
Jan 02	2/25 (Rein) activated in support of II MEF for OpTempo relief VMGR 234/452 activated in support of 2nd and 3rd MAW
Feb 02	2/23 (Rein) activated in support of II MEF for OpTempo relief
Jul 02	Detachments from 4th FSSG, I MACE activated to augment I MEF
Aug 02	Detachment MACS-24 activated to support II MEF
Nov 02	Final Detachment from I MACE activated to support I MEF
Dec 02	Detachment 4th MAW activated to support CG 4th MAW 2/25 (Rein) released from active duty
Jan 03	MAJOR UNIT ACTIVATIONS begin in support of I MEF 2/25 Reactivated in support of I MEF VMGR 234/452 and 2/23 activations extended
Feb 03	Unit activations continue MSBs at Camp Lejeune and Camp Pendleton are activated to support processing of CRC's
Mar 03	Major reserve unit activations end Last unit activated is Dental Co. C, 4th Dental Battalion on 26 March
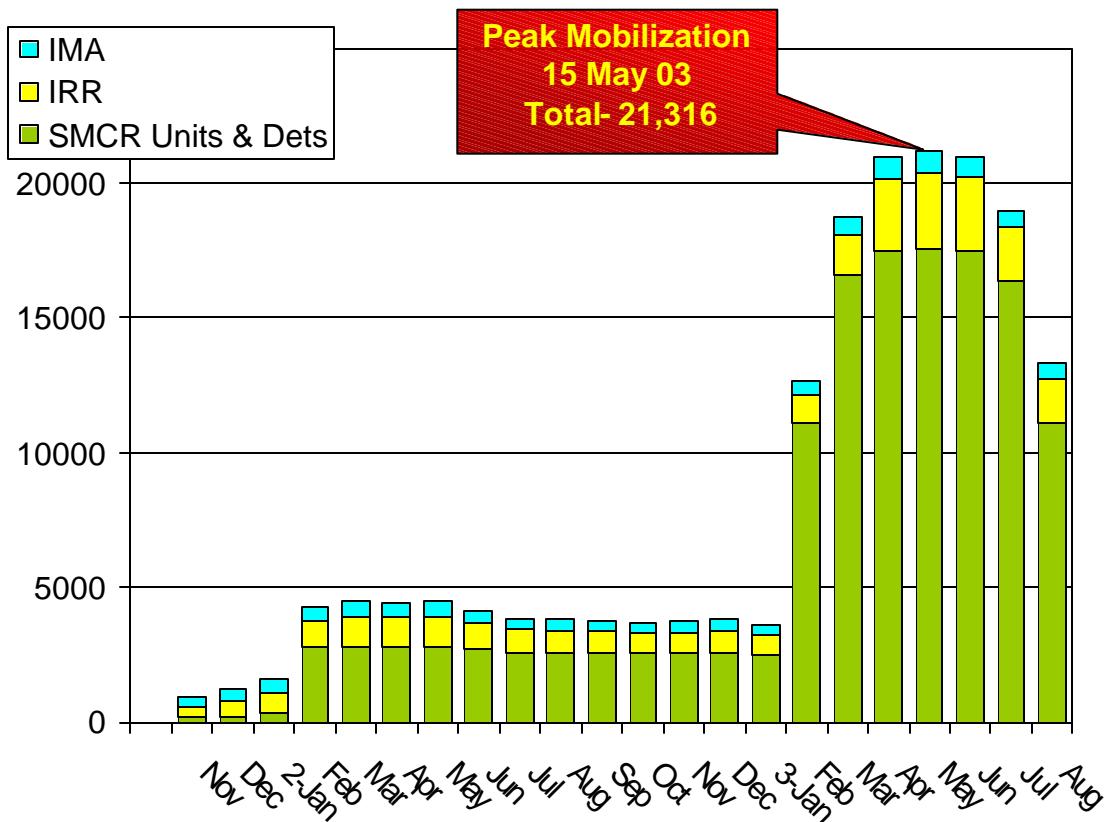
Peak Mobilization
15 May 03
Total- 21,316

Legend: IMA, IRR, SMCR Units & Dets

X-axis: Nov Dec 2-Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec 3-Jan Feb Mar Apr May Jun Jul Aug

The Marine Corps relies on its reserve component. Because the active duty Marine Corps with its many global commitments is stretched thin even in peacetime, it needs its reserve component during major combat operations. **During ODS, for example, the Marine Corps mobilized more of its reserve component than any other service (63%). The same was true during this conflict as the Marine Corps again called up proportionally more of its reserve component than any other service (48%).**

	% Mobilized
Army Nat'l Guard	24%
Army Reserve	33%
Air Nat'l Guard	20%
Air Force Reserve	21%
Navy Reserve	13%
Marine Corps Reserve	**48%**

Source: HQMC RA; EFCAT R calculations. Data as of May 2003[3]

Further, the reservists constituted a large proportion of Marines in theater. As shown in the table below, over 11% of all Marines in OIF were reservists. Only the Air Force had a proportionally larger reserve component in theater than the Marine Corps.

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[3] Data for all components calculated for drilling reservists only, both in numerator (# mobilized) and denominator (Reservists available). IRR excluded from both. As time goes on and OIF continues, cumulative percentage for all components will increase.

	Marine Corps	Navy	Army (incl National Guard)	Air Force (incl National Guard)
Active	74,405	60,615	233,342	54,955
Reserve	9,501	2,056	19,549	9,291
Reserve %	**11.3**	**3.3**	**7.7**	**14.5**

Source: USCENTAF Report 30 April 2003, "OIF by the Numbers"

The Marine Corps Reserve is an expeditionary, warfighting organization. The reason for this heavy usage in major combat operations is that all Marine Corps Reserve units are designed for warfighting and expeditionary operations. Although it can perform homeland security missions and has executed these in the past, the Marine Corps Reserve is primarily designed to augment and reinforce the active duty units of the Marine Corps in their expeditionary role as the nation's 911 force. The chart below shows how extensively Marine reserve units have supported the warfighting commanders.

SUPPORTED MAGTFs and COMMANDS

ISO *I MEF:*
- 2nd Bn, 23rd Marines
- 2nd Bn, 25th Marines
- 3rd Bn, 23rd Marines
- 1st Bn, 14th Marines
- 8th Tank Bn
- 4th Tank Bn
- 4th AAV Bn
- 4th LAR Bn
- 4th Recon Bn
- 4th Force Recon Co
- HQ Bn 4th MARDIV
- HQ Bn 4th FSSG
- 4th Landing Support Bn
- 4th Supply Bn
- 4th Maintenance Bn
- 6th Communication Bn
- 6th Motor Transport Bn
- 6th Engineer Support Bn
- 3rd ANGLICO
- MACG-48
- VMGR-234
- VMGR-452
- HQ 4th MAW
- 4th Combat Engineer Bn
- 4TH Medical/Dental Bn
- I MACE
- 3rd Civil Affairs Group
- 4TH Civil Affairs Group

ISO *II MEF:*
- 1st Bn, 25th Marines
- MWSG-47
- 4th Maintenance Bn
- 4th Landing Support Bn
- 4th Supply Bn
- II MACE
- Intelligence Bn

ISO *MARFORRES:*
- D/S NBC Plt, 4th FSSG
- Inst Det, Graves Registration
- HQ 4th MARDIV
- HQ 4th MAW
- HQ 4th FSSG

ISO *MLC:*
- B Co(REIN), 1st Bn, 24th Marines
- C Co(REIN), 1st Bn, 24th Marines
- MWCS-48

ISO *MARCENT:*
- HQ Co(-), 24th Marines
- Det MACS-24
- A Co, 1st Bn, 24th Marines
- HQ Btry, 14 Marines
- HQSVC Co 4th CEB

ISO *SOCCENT:*
- Det A, 4TH ANGLCIO

ISO *24th MEU(SOC):*
- HMH-772

ISO *26th MEU(SOC):*
- Det D, 4th CAG

The challenges of a new national strategy. In 2001 the Department of Defense announced a new strategy as a result of the administration's Quadrennial Defense Review. This strategy abandoned the two MTW strategy of the 1990s and adopted a new set of principles for force planning:

- Defending the US homeland
- Deterring aggression forward in key regions
- Swiftly defeating aggression in overlapping major conflicts, including the possibility of regime change in one
- Conducting the global war on terror
- Preparing for a broader portfolio of military capabilities
- Transforming warfighting capabilities

Recommendations for improvement in reserve performance must be made in the context of this strategy. **Many mobilization difficulties would be mitigated or eliminated with more time and more certainty. However, the strategy calls for less time and foresees less certainty. Therefore, recommendations that ignore these new strategic principles are not viable.**

Further, many observers believe that these changes – greater speed, forward deployments, more but lower level conflicts—imply a force that is more heavily active duty than the older two MTW force.[4] The challenge for the Marine reserve community is to show that it can adapt to this new strategy and continue to provide the current level of augmentation and reinforcement capabilities.

Reserve forces can provide a prudent economy of force measure. A key advantage of reserve forces is their low cost. The Marine Corps has more needs—for forces, equipment, operations, and facilities – than it has resources to satisfy them. Studies have confirmed the long-standing assumption that reserve units cost significantly less than their active duty counterparts, particularly for non-flying units. (See table below.) **When mobilization time and peacetime training allow reserve units to meet required wartime standards, reserve forces can save the Marine Corps money without increasing risk.** Thus, the 5% of the Marine Corps budget allocated to the reserves supports about 25% of its combat power and the Marine Corps can allocate more resources against its unmet needs.

Type Unit	Annual Cost* (% of equivalent active duty unit)	Long Term Cost** (% of equivalent active duty unit)
USMCR Infantry Bn	25%	30%
USMCR Tank Bn	32%	44%
USMCR CH-46 Squadron	51%	72%
USMCR F-18 Squadron	55%	~75%

*"Annual Cost" includes MilPers and O&M.
**"Long-Term Cost" includes annual cost plus pro rata share of equipment replacement.
Sources: "Costs of Reserve Forces," RAND; USMC Input to Report of the Reserve Forces Policy Board, 1997.

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[4] See, for example, "Guard, Reserve to Be Reorganized," Washington Times, July 14, 2003, p.1

III. THE SUCCESS STORY: MARINE RESERVISTS IN OPERATION IRAQI FREEDOM

> *"Our Marine reservists are Marines first and there was absolutely NO DIFFERENCE in performance—on the ground, in the air, in logistics."*
> -- General Hagee, Commandant of the Marine Corps

The Marine Corps' reserve forces are one of the great success stories of the war. They showed that they were skilled warfighters who could perform as advertised—muster, train, deploy, and fight—and do it, not as second stringers who would suffice in an emergency, but as highly motivated, highly competent Marines.

- 6th Engineer Support Battalion (ESB) built a Hose Reel Fuel line system 90 miles long, capable of pumping a half-million gallons of diesel fuel every day, from Kuwait to Iraq. They did this by operating 24 hours a day in the heart of enemy territory, and finished ahead of schedule.

- 2/23 was the lead element for RCT 1 for several days during the attack north and was involved in the operation to secure the UN Compound in Baghdad.

- A reserve unit, Co. B, 4th LAR, made the first two kills of Iraqi armored vehicles.

- 6th Engineer Support Battalion constructed the largest tactical fuel farm in Marine Corps history, with a capacity of 1.8 million gallons. It also operated, for a period of about 30 days, the V Corps Tactical Petroleum Terminal in Iraq, with a fuel capacity of 6.8 million gallons, reported to be the largest in Army history.

- Bridge Co A, 6th ESB, while attached to 8th ESB during OIF, built the longest IRB bridge in Marine Corps history. The bridge spanned the Tigris River and reached a length of 155 meters.

- 60% of the personnel in the MEF Combat Operations Center were reservists.

- Reserve combat units proved themselves capable of independent operations. During Phase IV (Stability Operations) 3/23 and 2/25 covered entire provinces by themselves.

- Four reserve maneuver battalions mobilized and deployed to Central Command's (CENTCOM's) AO.

- Reserve tanks, LAVs and AAVs fought in the front lines from crossing the Kuwait/Iraq border to the securing of Tikrit.

- The crews from the two reserve VMGR squadrons conducted almost all of the assault support missions, considered to be the most difficult missions for C-130's.

Commanders greatly appreciated reserve capabilities and enthusiasm, an appreciation that began at the highest levels:

- "We could not have done what we did without the reserves." LtGen Conway, CG I MEF.
- "I can't say enough for the reserves…they were every bit as good as the active forces and proved it time and time again, in combat and Phase IV operations. Our reserve was envied as much by the Army as our MAGTF capability" BGen Natonski, CG 2d MEB, Deputy CG II MEF.[5]

This enthusiasm was shared by many other active duty commanders.

- "Wow! Team players, good attitude, willing to do whatever was needed. Just wanted to contribute."[6]
- "Everyone in this [joint] HQ will tell you that the Marine Corps Reserve is different. They cannot tell the difference between active and reserve."[7]
- "We could not have done it without them." (Many times)
- "If you ever need a foreign language interpreter, go to a reserve unit from New York City. They have everything."
- "Our reserve communicators were actually a step ahead of the regulars because of their civilian digital experience."[8]

Other non-battle achievements are worth noting:

- Unit mobilization was rapid and smooth, taking only five days on average.
- Marine reserve units deployed rapidly and arrived when needed.
- 99% of SMCR Marines reported for duty.
- 98% of Marines were medically fit.
- Less than ½ of 1% of SMCR Marines requested some sort of waiver.
- HMH-772 deployed with 24th MEU(SOC).
- 1/25 deployed to Okinawa providing OPTEMPO relief to active duty battalions and participating in operations in the Philippines.
- A/1/24 deployed to Horn of Africa to provide force protection to the Joint Task Force.

A key change in OIF was that Marine planners accepted from the beginning the premise that reserve units would be involved. The situation was quite different before ODS. As the ODS after action report noted for that conflict:

> *Unlike the Army, the Corps maintains a balanced structure and does not have large gaps in certain areas such as combat service support. Therefore, the argument goes, the Corps does not need immediate reserve augmentation. Marine Corps policy states that*

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[5] Quotes from the Commanders Conference, Quantico, Virginia, July 2003
[6] Interview #116
[7] Interview #3
[8] Interview #172

reserve support is not needed for the first 60 days of conflict. However, events showed that this was not quite true.[9]

Indeed, before ODS a senior Marine officer boasted that his service did not need reservists to fight a war.

The experience of ODS and subsequent mobilizations convinced planners that use of reserve forces was politically viable, the Marine Corps needed reserve augmentation to fully participate in the warfight, reserve units would show up when called, and reserve units had the training to participate effectively. This was an important step forward, not just for reservists, but also for overall Marine Corps warfighting capabilities.

The foundation of this success was the individual Marine. Active duty commanders spoke about reserve Marines in extremely glowing terms.

- "Very strong MOS skills!"[10]
- "Training level from individual to company was very strong! Regimental S3 looked at it (2/23) as just another battalion."[11]
- "Hungry, aggressive, and did everything assigned."[12]
- "Jobs were assigned by capability, not active or reserve, and it was a seamless integration."[13]
- "There was no difference between the reserve and active Marines."[14]

The reasons for success.
    Many of the reasons for this success are so second nature to Marines that they are often overlooked. Yet these reasons need reiteration because they are, in fact, unusual and extremely effective.

- Reservists go to all the same schools as their active duty peers. Reserve enlisted attend the same warrior training—boot camp, SOI—and MOS schools as active duty Marines and are completely integrated with them in that training. Reserve officers also go to OCS, TBS, and MOS schools and, therefore, have the same standards and formative experiences as do their active duty peers. They are Marines.

- All officers and many SNCOs have significant prior active duty. Reserve officers average 6.4 years of active duty. [15] Having served on active duty for many years, they know the places, jargon, and experiences of the Corps.

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[9] Marine Corps Reserve Forces in Southwest Asia, Battle Assessment Team, LtCol Mark F. Cancian, 1991, p. 41
[10] Interview #109
[11] Interview #104
[12] Interview #163
[13] Interview #163
[14] Interview #119
[15] According to survey results, 5.6 years for officers in units (that is, excluding individual augmentees like IMAs who tend to be more senior).

- The reserve unit training experience parallels the active duty force. While certain timelines are adjusted due to the reserve's compressed training schedule, the annual requirements are virtually the same: PFT, BST, rifle range, pistol range. The exercises are the same: CAXs, Mountain Warfare Training Center, amphibious exercises, and JCS exercises like Millennium Challenge.

- A strong I-I system that does three things: first, it continually brings fresh active duty experience into reserve forces. Second, it gives reserve units the extensive support they need to sustain an aggressive training program. Third, as I-I staff members rotate back into the fleet, they bring a body of experience working with reservists. This latter had real warfighting implications in OIF as former I-Is, comfortable with reservists, understanding their personnel and training systems, and knowing how to employ them, used reserve units to maximum effect. The I-I system is even stronger now than during ODS because battalion I-Is are board selected. **A key effect of the I-I system is that Marine reserve units do not need to be certified as ready before deployment, as do the reserve units of other services. Thus, Marine reserve units can deploy more quickly.**

- An I-I staff integrated with the reserve unit. In ODS the I-I staffs had remained behind, depriving reserve units of that portion of a developed team. In OIF many of the I-I staffs deployed with the units, providing an additional measure of expertise and experience, plus credibility with active duty units.

- A demanding MORDT program. Many reservists pointed to the MORDT as a crucial element in preparing their unit. This unannounced muster and inspection ensures that the unit's rolls in fact consist of Marines who will show up when needed. It simulates the administrative aspects of the mobilization process so that the process is a familiar exercise. Finally, it inspects many areas critical to mobilization such as embarkation.

- A recruiting program that brings in many college students and graduates. About 40%-55% of reserve enlisted Marines have a college degree or are college students.[16] Of particular note is the split IADT program that allows a student to attend boot camp one summer and MOS training the following summer. While administratively inconvenient, the program brings in many very highly qualified recruits.

The bottom line is that there are not two different sets of military experience, one active duty and the other reserve. There is only one experience, a Marine experience. This is unlike the reserve components of other services where entire careers can be made in the reserves.

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[16] <u>Marine Corps Reserve Forces in Southwest Asia</u>, Battle Assessment Team, LtCol Mark F. Cancian, 1991, p.9. This 1991 study cited 40%. This number has been rising and may now be as high as 55%. Estimates must come from survey data and special studies because manpower databases do not track student status.

C/1/24 leaves its mark on a bombed out aircraft shelter

IV. ISSUES

The Team identified twelve issues for in-depth analysis. These issues came from several sources:

- "100 Weight Issues." These were collected by the EFCAT from CMC and the major Marine Corps advocates. Several pertained, directly or indirectly, to reserve forces.

- JCLL Team. Joint Forces Command created a lessons learned team that collected data in theater and developed a report on its findings. Several of these findings related to reserve forces.

- Desert Storm Battle Assessment Team. This lessons learned effort devoted one of its 15 reports to reserve issues. Some of the problems identified 12 years ago have been fixed, others persist.

- Input from HQMC (RA).

- Input from MARFORRES.

- Input from the broader reserve community. These perspectives were gathered in a series of outreach meetings with reserve organizations like the Marine Corps Reserve Association, the Reserve Officers Association, and the National Committee for Employer Support of Guard and Reserve. These meetings related primarily to employment and family support.

ORGANIZE

1. Force structure. Is the Marine Corps Reserve properly structured for this kind of war?

CONCLUSIONS

- Force structure demands fell unevenly. In greatest demand for both ODS and OIF were motor transport, communications, medical, C-130s, civil affairs, LAV, AAV, engineer support. Although future conflicts may not levy the same demands as ODS and OIF, these mobilizations may give insights into areas where additional structure might be warranted.

- In OIF, reserve FSSG units were used a little more as units than had been true in ODS, but many units were still parceled out to staff CSSDs/CSSGs. Irrespective of how reserve units are actually used, reserve FSSG capabilities should be requested by unit, not as inventories of individuals.

- Because Marine reserve units may be used for missions different from what they were designed for and expected, organizational and intellectual flexibility is important.

DISCUSSION. One of the EFCAT's "100 weight" issues was, "Is the Marine Corps properly structured for this kind of war?" The discussion below examines the reserve element of this force structure question.

Unit usage. Reserve unit usage in ODS and OIF may give some insights into future requirements. However, this must be done with caution. Every conflict is different, and there is no guarantee that any future conflict will have force requirements similar to ODS or OIF. Different conflicts will stress different elements of the force structure. Indeed, a key element of the current national military strategy is unpredictability in geography, threat, and mission. Therefore, flexibility is crucial.

That said, force structure demands fell unevenly in both ODS and OIF. Some kinds of units were used heavily while others were not. The table below shows unit usage in OIF.[17]

Percentage, by personnel, activated during Operation Enduring Freedom (CONUS and OCONUS)

(Bar chart showing units from top to bottom: Div HQ Bn, 6th Motor T Bn, 6th ESB, 6th Comm Bn, Med Bn, VMGR, 4th MAW HQ, CAGs, 4th LAR Bn, 4th AAV Bn, 4th LSB, I MACE, II MACE, FSSG HQBn, MAG HQ, MWSS, IMA, ANGLICOs, MACG-48, 4th Supply Bn, Inf Bn, CH-53, HQ 4TH MarDiv, Inf Regt HQ (3), Force Recon, Recon Bn, HQ MWSG-47, Tank Bn's, 4th Maint Bn, 4th ComBat Eng, Arty Batteries, 4th Dental, 14th Mar HQ, HMLA, CH-46, FA-18. X-axis: 0 to 100.)

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[17] The artillery units were not used as artillery but in other roles such as mortuary affairs and MARCENT rear security.

Percentage activated for Operation Desert Storm (Estimate)
(CONUS and OCONUS)

Unit	Percentage
6th Motor T	100
6th ESB	100
6th Comm Bn	100
Med Bn	100
VMGR	100
CH-53	100
CAGs	100
LAV Bn	100
AAV Bn	100
Inf Bn	100
Inf Regt HQ	100
ANGLICOs	100
LSB	100
Tank Co	100
CH-46	100
ComBat Eng	100
HMLA	100
FSSG HQBn	85
Arty Bn HQ	80
Arty Batteries	80
MAG HQ	75
MWSS	75
MACG-48*	65
4th Supply Bn	62
Recon Co	50
4th Maint Bn	20
4th Dental	10
A-4/FA-18	0
Wing HQ	0
Div HQ	0

The table above shows estimated force structure usage (measured by mobilized manpower) from ODS.[18]

There are some important differences. Because ODS was larger, more reserve units were used. In part, however, this was driven by a large number of units assigned to "V MEF" in CONUS as a hedge against additional contingencies, something not repeated in OIF. Further, there are some differences in types of units used even though the conflicts were fought in the same location against the same enemy. Nevertheless, from an overall perspective, in both conflicts there was a relatively greater use OCONUS of certain kinds of units – Motor Transport, LAR, AAV, CAGs, C-130s, and communications. Others were used relatively less. Still others were not used at all—ighter/attack aviation. Finally, HQ above battalion/squadron level have generally been used since ODS for sourcing detachments and individuals only, not as units. One regiment HQ was used operationally in ODS (an employment not considered by the MEF to be very successful). One group HQ was used as a unit during OIF but as backfill in CONUS.

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[18] Note: Data for ODS is much less refined than that for OIF. Thus these are rough estimates.

Force structure suggestions. Unmet needs in OIF engendered suggestions for changes in Marine reserve force structure. All of the additional units described below, if implemented, would be good candidates for the reserves because the capabilities are needed mainly for major conflicts. The on-going Comprehensive Review of the Marine Corps Reserve[19] has anticipated some of these force structure proposals, and these are noted.

Senior logistics commanders and planners at the FSSG, MEF, and MLC had several suggestions:[20]

- Heavy Equipment Transporters (HETs). Every logistics flag officer and senior staff officer recommended that the Marine Corps acquire some HETs, perhaps a company. The eight-wheel-drive M1070 HET transports tanks, armored fighting vehicles, recovery vehicles, self-propelled howitzers, and heavy construction equipment. HETs are especially needed to unload the MPF because without HETs tanks and armored vehicles cannot leave the port area. Currently the Marine Corps has no HETs and relies on the Army. However, the Army has a hard time supporting both its needs and those of the Marine Corps in the early phases of an operation.

- POL transportation. An additional truck company with 5,000 gallon refuelers. The logistics general officers thought that POL movement was the key to logistics success in this operation but came close to breaking. The Army is supposed to provide much of this capability according to executive agency agreements but, again, has a hard time meeting both its own needs and those of other services.

- Military Police. Perhaps as much as an additional battalion. All reserve MPs were sent into theater and the Marine Corps still needed to get a battalion from the Army. MPs were needed for convoy security, which was a big challenge, as well as EPW handling, and traffic control. In a conflict, demand for MPs also increases at CONUS bases and stations for force protection, so it is hard to free up a lot of active duty MPs for deployment. Note: The Comprehensive Review proposed creating two "security battalions" with anti-terrorist/force protection platoons to cover some of these missions.

- Additional line haul. OIF put great demands on line haul capability, and the Army, which had executive agency responsibility, could not fully support the Marine Corps' requirements. Buying more vehicles would mitigate the problem, but vehicles are expensive and funds are limited. However, additional line haul capability need not entail more vehicles, just more drivers. In both ODS and OIF the Marine Corps was short of drivers to operate available military vehicles and leased civilian vehicles. As an expedient, other units—artillery, landing support—were broken up to get at their drivers.

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[19] According to data obtained from Executive Summary, Report to MARFORRES Comprehensive Review Group, Jan 2002

[20] Interview s: #114, #101, #34, #1; See, also, "Professional Talk Logistics", Col Matthew Blackledge, Marine Corps Gazette, August 2003, p.40-44

- Mortuary affairs. This capability is always needed in wartime, but was improvised in both ODS and OIF. This mission has such high visibility and is so sensitive that it needs more attention. Existing reserve structure is dual tasked with MP missions. The reserve structure needs to be changed to include a dedicated platoon.[21] Note: The Comprehensive Review has proposed doing this.

- Translators. The MEF desperately needed translators during all phases of the conflict but especially during the Phase IV stabilization operations. The translators that the MEF did have were "worth their weight in gold," as one senior officer put it. Getting more translators would therefore be very valuable. There are many approaches the Marine Corps might take. Three actions suggested were as follows:

  - Form an IMA detachment of globally sourced Marines with language skills. (Note: The Comprehensive Review proposes to create a section in the CAGs to employ linguists from the IRR.)
  - Identify Marines with language skills in the personnel system, even if the Marine has not taken the proficiency test. (Note: Much of this may have already been done.)
  - Establish a unit that would screen, orient, train, equip, and supervise civilian translators who are hired, either directly or indirectly, by a subcontractor who specializes in such work. Such an approach acknowledges that developing military linguists is very difficult, that the range of languages that might be needed is very broad, and that the numbers needed in any particular conflict are very large.

Communications planners said that they needed more communications assets, especially for echelons above corps communications linkages. In OIF 80% of all Marine Corps communications assets—active and reserve—were deployed to CENTCOM. What was left was inadequate to support a second theater. This is also a good capability for the reserves because it is only used when a full MEF and MARFOR are deployed.[22]

In OIF, contrary to prewar doctrine, medium lift assets were dedicated to casualty evacuation (CASEVAC), a tasking that was considered successful.[23] Wing planners suggested that in future operations, reserves might take the mission of casualty evacuation.

4th Division might build a CFLCC liaison cell, comparable to the extremely successful CAOC liaison cell in the 4th Wing. In this way both MACEs would not need to develop the capability.[24]

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[21] See EFCAT Initial Operations Report, "Mortuary Affairs Operations", Maj Vohr, June 2003
[22] Interview #115
[23] Interview #108
[24] Interviews #2, #108. As a general observation, it might be worthwhile deconflicting the augmentation preparations and expectations of the MACEs, 4th Div/Wing/FSSG and various IMA detachments. That is, clarifying which organization will supply which liaison and augmentation requirement. For example, a CAOC liaison cell could, in theory, come from 4th MAW, a MACE, or an IMA detachment.

Marines with intelligence MOSs were the only individuals aside from linguists involuntarily activated from the IRR in order to fill staff augmentation billets. Even so, senior Marines in the intelligence community noted that they could fill only a portion of the intelligence augmentation requirements.[25] Therefore, building additional pools of intelligence Marines might be helpful. (Note: The Comprehensive Review proposed establishment of an intelligence battalion, which could be used to source augmentees.)

To fill shortfalls the Marine Corps received a number of units from the Army. Most of these areas are discussed above. There are a few additional areas where the Marine Corps might consider developing some of the capabilities internally. For example:

- Units designed for chemical, biological, or nuclear operations, especially for decontamination. The needs are great, the Marine Corps' capabilities are modest, and the threat is increasing. (Note: The Comprehensive Review proposed a reserve augmentation element for CBIRF and the creation of NBC platoons.)
- Tactical psyops.
- Mobile public affairs detachments.

Finally, senior officers noted that reserve structure needs to complement the active structure, not duplicate it – e.g., 4th FSSG need not have the same number and type of battalions as an active duty FSSG. However, each piece of the structure must be capable of seamless integration with active duty forces.

Combat Service Support. A perennial issue is whether in peacetime the FSSG should continue to organize by functional battalions or be reorganized into integrated packages (CSSDs, CSSGs, CSSEs). The team heard many suggestions for such a change. There are strong arguments both for and against each approach. The EFCAT logistics group is considering the issue for the Marine Corps overall.[26]

The reserve CSS experience in OIF was a little different from ODS.

> *[In ODS] most reserve CSS battalions were used as inventories of MOSs rather than as units. Whereas combat and combat support reserve units were used as battalions and companies, CSS units were used as companies, platoons, detachments, and even as individuals (with the exception of 6th Motor Transport Battalion which was used as a battalion). This occurred for two reasons: first, CSS augmentation generally occurs at lower levels because the MOS communities are relatively small. Second, by the time the reserve units arrived in SWA there were already two FSSGs of battalion headquarters in theater, and there was little need for more. As a result, the requirement for reserve CSS augmentation was stated in terms of numbers of MOSs.[27]*

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[25] Interview #164, #29

[26] See, for example, "Brute Force Combat Service Support: 1st FSSG in Operation Iraqi Freedom", <u>Marine Corps Gazette</u>, August 2003, p.39

[27] <u>Marine Corps Reserve Forces in Southwest Asia</u>, Battle Assessment Team, LtCol Mark F. Cancian, 1991, p.34

In OIF reserve FSSG units were used a little more as units. The 6th ESB and 6th MT were used intact. 4th Medical Bn, 4th LSB, and 6th Comm deployed as battalions but were detached out.

Irrespective of how reserve units are actually used, one senior staff officer with considerable experience with the reserves strongly recommended that reserve FSSG capabilities be requested by unit. "We never have a precise enough fix on our requirements to specify numbers and types of MOSs [for that broad a requirement]."[28] In general that was done, though some intervening HQ occasionally proposed that capabilities be requested not units.

Mission Flexibility. "It's a pick up game," as one senior officer said. Marine Corps Reserve units are designed to fit projected wartime needs. But every conflict is different, with unexpected demands and unanticipated missions. **Thus Marine reserve units may be used for missions different from what they were designed for and expected.** This was true in ODS [29] and was true again in OIF. For example:

- The MRAOG was used as individuals, not as a complete unit.
- A/1/14 was used for mortuary affairs.
- 1/24 was broken up and used as companies for force protection for Wing and FSSG units.
- MWCS-48, an aviation communications unit, provided communications for the fleet hospital of Marine Logistics Command.
- MAG 42 HQ was used as individual fillers.
- 4th ANGLICO was planned to provide fire support liaison for SOCOM missions.

This is not an abuse or a slight, but a reflection of the warfighting commander's needs.

Adaptations worked more smoothly, however, if reservists were able to participate in the decision, or at least were in the room when the decision was made. Then senior reserve commanders could fully explain the context and rationale to their Marines. If the decision was just handed down, the decision could look arbitrary and then rumors took over**.**

RECOMMENDATIONS

- Designing force structure is a complex task involving synchronization of recruiting, equipment, training, and facilities. Further, it is based on future needs, not past experience. All of these considerations lie beyond the scope of this report. However, the suggestions of senior active duty officers and the basic usage data cited in this report may help follow-on efforts design future force structure.
- Even the most well-designed force structure will require some adaptation to meet unforeseen requirements. Mobilization planning should be clear that some unit missions may be "non-standard" to fit the needs of the theater commander.
- Changes in reserve FSSG structure should be made in the context of any changes to the active duty FSSG structure.

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[28] Interview #115

[29] Marine Corps Reserve Forces in Southwest Asia, Battle Assessment Team, LtCol Mark F. Cancian, 1991, p.31-32

Two LAVs from A/4th LAR at Al Kut Air Base
(Blair Field), Iraq

2. *Family Support. How well did the Marine Corps take care of reserve families?*

CONCLUSIONS

- Support provided to reserve families was rated from fair to good, with relatively few ratings of poor/unsatisfactory. This was a great improvement from ODS, reflecting a decade of effort.

- Support for Marines in units was stronger than for individuals.

- The KVP, new to the reserves since ODS, was uneven. PWSTs and commanders described the program very positively; survey results, however, were more mixed.

- Health care was a major concern for all Marines and families prior to mobilization, but only a relatively small percentage indicated having any problems.

- A new problem is rumor control – rapid and widely accessible information means that accurate and inaccurate information flows from theater to families at great speed.

DISCUSSION

Overview. In ODS, support to Marine reserve families after they deployed had varied from outstanding to poor. I-I staffs apparently were not sure what their continuing responsibilities were to mobilized units and the their families. Few units had formal programs in place.

By the time of OIF, the Marine Corps Reserve had clarified responsibilities and established two formal programs to help respond to the needs of reserve families. Those programs were the KVP and the Pre/Post-War Support Teams.

The KVP was modeled on the active duty program and designed to provide a family-to-family network for communicating information about the unit, get families to help families with problems they may be facing, and to provide a support group for families to use in time of need.

The PWST was originally designed to provide a system by which the I-I staff could turn over responsibility for the reserve center, and for supporting the KVP once the unit and the I-I staff had deployed.

The table below compares perceptions of family support in ODS with OIF. Essentially, about 15% of Marines have moved their response from the "poor" category to the "good" category.

Overall, how good was the support your family received?

Note: Tabulations include only Marines with families.
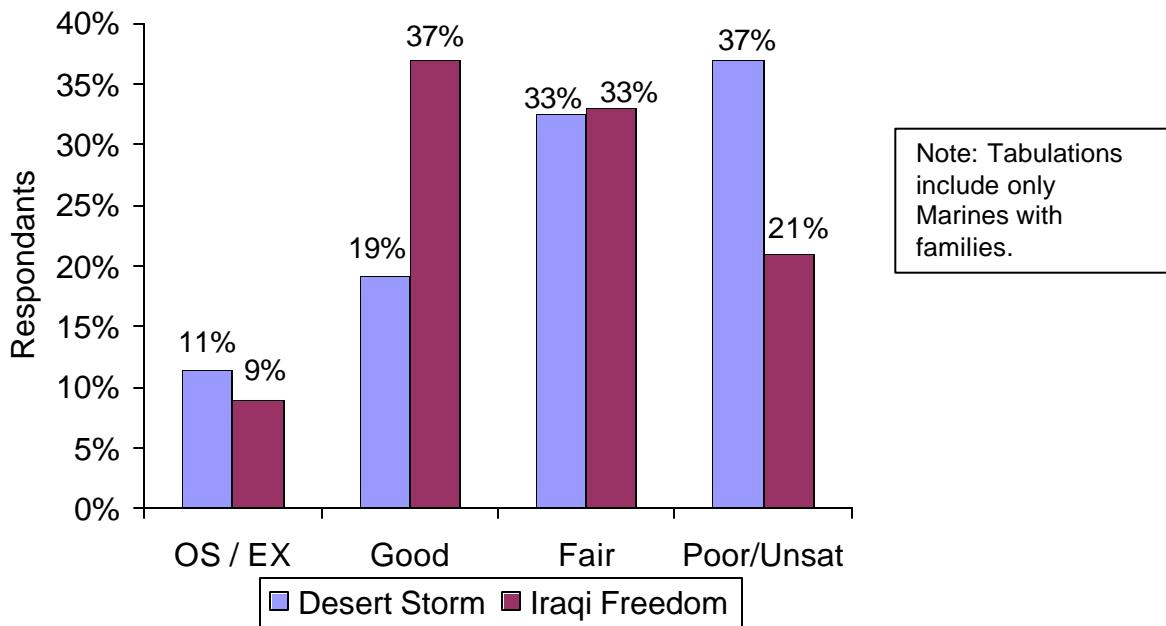
Dissatisfiers. Although the results were an improvement from ODS, one-fifth of the Marines (21%) still rated family support "Unsatisfactory," and another 33% rated it as only "Fair." There is much room for improvement. However, these ratings must be viewed cautiously. Due to limited number of phone calls, virtually no email, and almost no mail for many weeks, many Marines were probably unsure about the quality of support. It may be worth the effort to survey the families of our Marines to see now how they feel about particular aspects of support.

In 2002 the OSD (RA) did a survey of spouses of mobilized reservists from all services, including the Marine Corps. The survey asked top-level questions and did not delve into the details of support. Its not surprising conclusions were:

- "Those more senior in rank, those married longer, those activated more than once, and those spouses with military experience fared much better…"
- "Spouses with children under 5, more preparatory tasks to do, a change in income, taking time away from the job, and marginal support from employers did not cope as well."

It recommended that "continued emphasis be placed on unit family readiness programs."[30]

Units vs. Individuals. Marines in units rated family support higher than Marines mobilized as individuals. The table below compares their perceptions.

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[30] "Key Findings of 2002 Survey of Spouses of Activated National Guard and Reserve Component Members," OSD Reserve Affairs

Overall, how good was the support your family received?
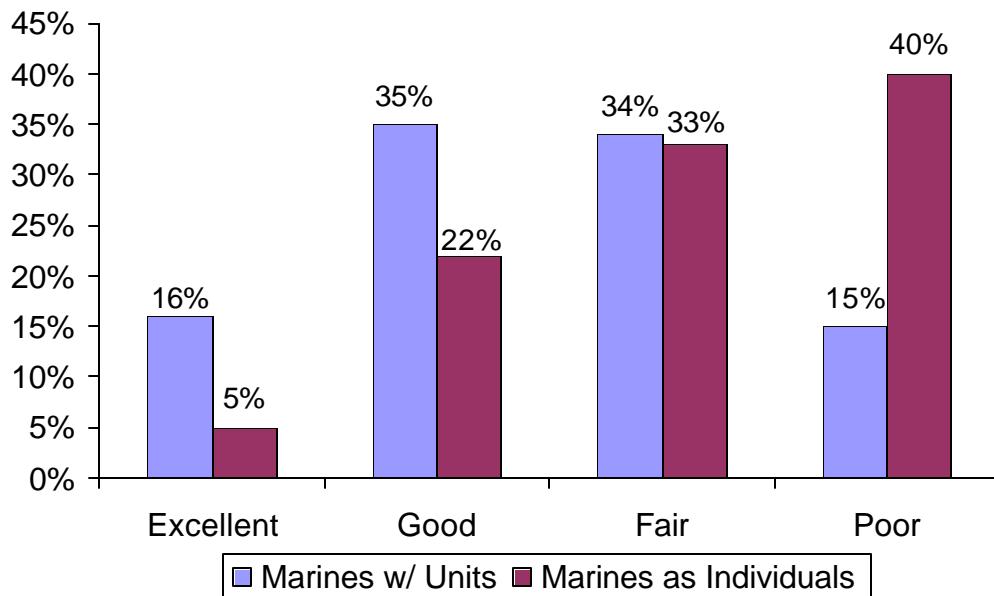
Forty percent of individual augmentees rated family support as poor. The reason is probably that individuals did not have a reserve unit from which to get support. Lines of responsibility might also be blurred. Who, for example, is responsible for supporting an IA's family if he drills at Quantico, is administered by MCRSC, and is attached to MARCENT but Temporary Attached Duty (TAD) to CENTCOM? The answer devised during the war was that the I-I staff nearest the reservist's home was responsible—but that may not be easy since there was no previous relationship.

For those who do not have spouses, the rating for support to their "families"—girlfriends, common law spouses, children out of wedlock, separated or divorced spouses—was rated as poor. These Marines felt the system only caters to traditional spouses and excluded their loved ones. Marine units, I-I staffs, and PWSTs will need to work more at integrating these "family members" more effectively into the programs.

Attitudes of families. The overwhelming majority of Marine families were supportive of their Marines' mobilization, as the table below shows.

Overall, what was your family's attitude about your mobilization?	
Very supportive	57%
Supportive	33%
Neutral	9%
Unsupportive	1%
Very Unsupportive	0%

Stress on families. Being supportive of a Marines' mobilization, however, does not mean that family life remains unaffected by the mobilization. The table below shows the results of

how Marines felt mobilization had affected their family. The good news is that a third of Marine reservists reported that mobilization benefited their family and another third said that it had no effect. The bad news is that one-third reported that the affect of mobilization was "somewhat negative" or "very negative." Many factors can influence this result, but the responses correlate closely with the data on pay and employment, where 32% of Marines reported a loss of income in excess of 10% as a result of mobilization. Other factors influencing this issue may be single parents, being self-employed, having very young children, and having dependent parents, all of which were mentioned during interviews with Marines in theater.

Overall, how did mobilization affect your family's situation?	
Very positive	9%
Somewhat positive	20%
Little effect	32%
Somewhat negative	30%
Very negative	9%

KVP. The KVP was rated relatively highly. PWSTs and commanders were quite positive in interviews about their networks. Survey results were generally positive. The table below shows the results of the survey regarding how effective Marines felt the KVP was in keeping their families informed.

How effective is your unit's key volunteer program in keeping your family informed?	
Outstanding	18%
Good	25%
Fair	14%
Poor	12%
Do Not Know	31%

For a new program this result is encouraging—only 12% rated the KVP "poor." Nevertheless, there is room for improvement, and it does deserve to be investigated to see what changes could be made in the future.

Unlike in active duty units, the reserve KVP is unused in peacetime except during the Annual Training period. This means that the KVP has little practical experience in functioning, and the families of the Marines may be unfamiliar with the organizational structure, leading to confusion and mistakes as the network is put to work.

The reserve KVP effectiveness is further hampered by the fact that, unlike active duty units that are located on a military base and whose families generally reside within a short commuting distance of the base, reserve units are much more geographically dispersed. This dispersion makes it difficult for reserve units/KVPs to effectively conduct support activities that are typically used to develop group cohesion, friendships, and trust. Field days, family days and unit picnics all become very difficult when dealing with families spread out across hundreds of miles, and many states rather than from around a single base.

Some mechanisms that did work relatively well in helping disseminate news were web sites and e-mail lists. Telephoning worked but was slow and cumbersome. However, families frequently telephoned the RTCs looking for information. Unit newsletters sent by US Mail were widely used, but again were relatively slow in keeping everyone informed as events unfolded. **Phone trees and standard newsletters, however, are still a critical component of the KVP and information network since not every family has a computer or email service.**

Rumor control. Information age technology was a mixed blessing. Rumors flew from Kuwait and Iraq at the speed of light—by cell phone, e-mail, or even embedded press— sometimes initiating a wave of calls to drill centers asking for more information. One drill center reported that when an event occurred in theater affecting their unit, they receive 150 calls in a single day[31] asking about news. Drill centers had the same problem, the entire military had: information moved faster over unofficial channels than it did up the military chain of command.

This problem was compounded for reserve units/families due to the nature of employment of the units being activated. Combat Support and Combat Service Support units were typically broken down into task-organized elements and attached out to support individual combat units across the theater. Problems arose when Marines in one task organized unit, attached to a particular combat unit, would call/email/write home, and tell their families what was going on. This family would then pass along what it knew, but this information may not have been true for the other detachments. When the information did not coincide with the "official" information being put out by the PWST, or with another Marine's story, there was confusion.

This type confusion also affected combat arms units such as tanks, AAVs, LAR, and 4th Recon, all of which had experiences of being detached out to various units and of having the unit they were attached to change over the course of operations.

Some units tried to combat this "rumor mill" by passing word to the families that if information didn't appear on the official unit website, or newsletter, or have the commanding officers' email address as the sender, then it shouldn't be taken as truth. This worked well for units that had fairly continuous email connectivity with the rear, and so could provide current and accurate updates, but not so well with those in Iraq or outlying areas in Kuwait.

Health care. Health care was an issue of particular concern because it affects families so directly. As the table below shows, 2/3 of the activated Marines switched to Tri-care, **but 1/3 kept their civilian health care program.**

Health Care Program	% Enrolled
Tri-Care	67%
Civilian Health Care	30%
No Health Care	3%

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[31] Interview #105

Based on unit interviews, most of those reserve Marines who kept their civilian health coverage did so for five reasons:

- Tri-Care was perceived as less beneficial than civilian health care.
- Tri-Care was too confusing.
- Distance to Tri-Care facilities was too far.
- Tri-Care takes too long to pay and many doctors, particularly in rural and semi-rural areas, do not accept the program.
- Changing to Tri-Care meant changing doctors, which families did not want to do.

Of those Marines who did change to Tri-care, 15% reported having problems in making the change. **The key problems related to information—learning the new forms and procedures—and access to the facilities, not quality of care or extent of coverage.**

During their interaction with the family members of deployed Marines, the PWSTs saw the same thing—the transition from civilian to the military health care system was difficult. The enrollment into Tri-Care is cumbersome and not user friendly, and, in many instances, it required the family members to switch health care providers. Although units received a class about Tri-Care upon mobilization, the mechanics of changing family health care providers was too complex to be covered in a single one-hour session.

Disturbing is the fact that 3% of Marines surveyed stated that they had no health care—even though they are automatically covered by Tri-Care. The OSD spouses survey had similar results (1% said they had no health care). Although a small percentage, it shows a massive misunderstanding of military benefits by some reservists.

Overall, as the graph below indicates, the large majority of Marines reported that their family's health care either did not change or improved following mobilization for OIF. Only 10% reported a decrease in health care benefits.

Overall, how did mobilization affect your family's health care?

Note: Percentages calculated excluding those without dependents.
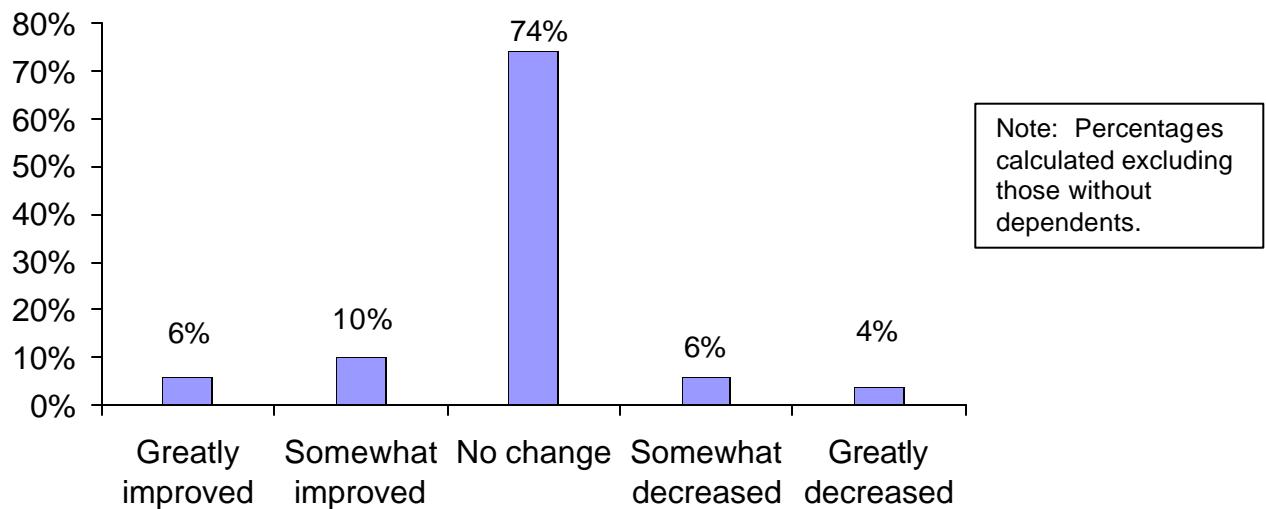
Related study efforts. The OSD (RA) is conducting an online survey of reservist experiences and attitudes. Administered every six months this survey will track reservist attitudes over time. The first survey was in May 2003; results will be available shortly.

RECOMMENDATIONS

- Develop better briefings on Tri-Care that not only explain what Tri-Care provides, but how to best use Tri-Care given different circumstances:

  - Near a base or military medical facility.
  - Not near a facility but in a relatively developed area.
  - In rural and semi rural areas.

- Recognize that getting families accustomed to a new health care system may take several briefings and some personalized attention. Consider specially training one member of the PWST to handle Tri-Care issues.

- Exercise unit KVPs routinely before mobilization.

- Use multiple mechanisms to communicate with reserve families—newsletters, phone trees, e-mail lists, phone watches, web sites. The more mechanisms, the better: the increased flow of accurate information will help control rumors.

3. *Employment. How has mobilization affected reservist jobs and income?*

Reservists Under Economic Fire *Drastic pay cuts. Bankruptcy. Foreclosed homes. They aren't exactly the kind of challenges that members of America's military reserves signed up for when they volunteered to serve their country. But for many, the biggest threat to the home front isn't Saddam Hussein or Osama bin Laden. It's the bill collector. Four in 10 members of the National Guard or reserves lose money when they leave their civilian jobs for active duty, according to a Pentagon survey taken in 2000.*

USA Today, April 22, 2003

CONCLUSIONS

- Employers have been very supportive.
- One-third of Marines experienced an increase in income after mobilization. One-third experienced no effect. One third experienced a financial loss in excess of 10% of their income.
- Though employers were supportive, some Marines (18%) expect to have employment problems upon their return from active duty.

DISCUSSION. Articles like the one cited above[32] have raised the visibility of financial and employment effects of mobilization. This lessons learned project was a good mechanism to continue research into these issues. Results are in line with recently published studies done by the OSD (RA).

Background. Employment status before mobilization.

Employed Full Time	76%
Employed Part Time	10%
Student/Volunteer	12%
Unemployed	2%

Employers. Employers were very supportive. Eighty-two percent of Marines said that their employers were "supportive" or "very supportive." Only 3% of Marines said that their employers were "unsupportive" or "very unsupportive."

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[32] Quotation from USA Today, April 22, 2003, "Reservists Pay Steep Price for Service". USA Today had a series of such articles. Most other media had similar stories.

"What has your employer's response been to your mobilization?"

Response	Percentage
Very Supportive	43%
Supportive	39%
Neutral	15%
Unsupportive	2%
Very Unsupportive	1%
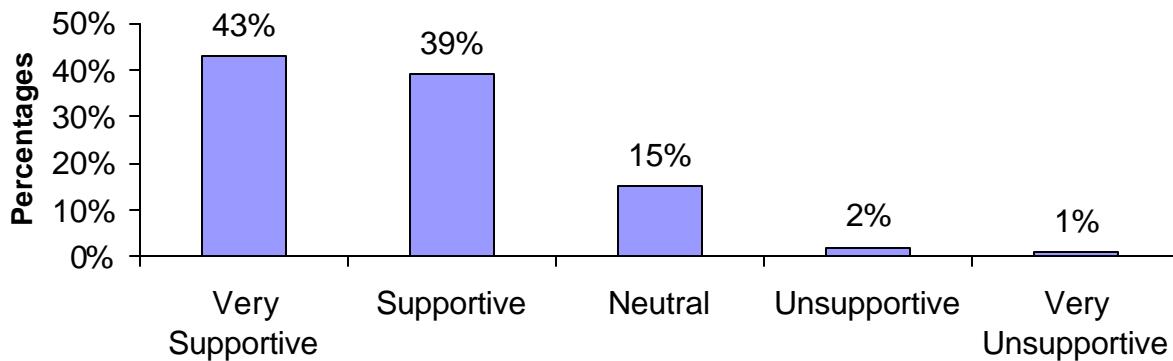
The DoD spouses study had similar results (only 10% of employers "unsupportive or "very unsupportive").

Unfortunately, though most reservists (79%) expect a smooth return to civilian work, a significant minority (21%) expects to have some problems with their employers upon their return from active duty.

"Do you expect to encounter any problems with your employer upon your return to civilian work?"	
No	79%
Yes	21%

Financial Impact. Marines were asked to quantify how their income had been affected by mobilization. The chart shows both overall results and the results for those Marine Reservists who were either full-time employed or self-employed (i.e., excluding the 28% of Marines who were either students, unemployed, or employed only part-time at the time of mobilization).

"How did your total annual income change from before you were mobilized to when you entered active duty (including all allowances, benefits, and any continuing civilian pay)?"

Category	Employed Reservists Only	All Reservists
Increased by more than 50%	6%	12%
Increased by 10% to 50%	27%	28%
No effect +/- 10%	30%	28%
Decreased pay by 10% to 50%	29%	23%
Decreased pay by more than 50%	8%	9%

(Y-axis: Percentage of respondents, 0% to 35%)

The graph above shows that 32% of all Marine reservists (37% of previously employed Marines) reported a financial loss in excess of 10% of their annual income. Since the "No Effect" category is +/- 10%, the data corresponds very closely to that reported by the USA Today in the article quoted at the beginning of this section. The overall results are also close to those obtained by the DoD spouses survey and those cited by the General Accounting Office (GAO) in their study.[33]

A concern for the future, however, is that 30% of reservists reported that their employer continued some pay or benefits, thus moderating the effect of activation on their financial situation. If that 30% did NOT have their employers' support for pay or benefits, the percentage of Marines whose loss of income exceeded 10% could have been as high as 67%.

Self-Employed. Eight percent of reserve Marines were self-employed.[34] Self-employed Marines took a potentially greater hit economically. Two-thirds, sixty-six percent, of all self-employed Marines reported that mobilization had "Somewhat Affected" to "Irreparably Damaged" their business.

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[33] Military Personnel: Preliminary Observations Related to Income, Benefits and Employer Support for Reservists During Mobilizations, GAO-03-573T, March 19, 2003

[34] According to survey data. Eight percent of all Marines, but eleven percent of employed Marines were self-employed.

"If you are self-employed, has your business been significantly affected?"	OIF
Yes, irreparably damaged	27%
Yes, somewhat affected	56%
No significant impact	17%

Related study efforts. The National Committee for ESGR is finishing a study on the employment and pay effects of mobilization.[35] This survey covers all services. Results will be available in late summer 2003.

The committee did a pilot study using 2/25 at the end of its first mobilization.[36] This study found that a minority, but a sizable minority, feels threatened by mobilization. Their results are consistent with those in this study:

- 18% believe their job security is threatened by mobilization; 22% were uncertain.
- 35% believe their economic security will be affected; 25% are uncertain.
- About half had been briefed on their USERRA rights.[37]
- About half were aware of ESGR and its programs.

The results of this ESGR survey combined with the EFCAT-R survey indicates that the longer the activation, the greater the problems with employers. EFCAT-R surveyed Marines who had generally been on active duty for a few months and found that 18% expected problems with their employers. ESGR surveyed 2/25 at the end of a year and found 18% expected problems and another 22% were uncertain.

RECOMMENDATIONS

- Continue to work with ESGR to ease the transition of reservists back into their civilian jobs.

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[35] The National Committee for ESGR is an agency within the Office of the Assistant Secretary of Defense for Reserve Affairs. It was established to promote cooperation and understanding between Reserve members and their civilian employers and to assist in the resolution of conflicts arising from an employee's military commitment. ESGR operates through a network of more than 4,500 volunteers and 54 committees located in each state, the District of Columbia, Guam, Puerto Rico and the Virgin Islands.

[36] Interim Report: The Attitudes, Experiences and Expectations of Guardsmen and Reservists Concerning Awareness of and Compliance with the USERRA, ESGR, May 16, 2003.

[37] Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA). USERRA, enacted in October 1994 (and significantly updated in 1996 and 1998), provides reemployment protection and other benefits for veterans and employees who perform military service. It clarifies the rights and responsibilities of National Guard and Reserve members, as well as their civilian employers. It applies almost universally to all employers - including the federal government-regardless of the size of their business.

- Ensure that all demobilizing reservists are briefed about USERRA, ESGR, and reemployment rights and are provided contact information.

Vehicle from H&S, 23d Marines – a regiment with two battalions mobilized and deployed overseas

4. Eligibility for Security clearances. Did Marines have the clearances they needed to do their jobs?

> *"We sometimes had to put a less qualified person into a billet solely because they had the right clearance."*
> -- MARCENT Senior Staff Officer

CONCLUSION. Wartime operations require many more, and higher, clearances than peacetime policies currently allow. The Marine Corps, therefore, needs to greatly expand the number and level of clearances held by reservists.

DISCUSSION

The Problem. The lack of eligibility for security clearances, especially TS and SCI clearances, was one of the most frequently heard complaints, both from Marines and from gaining commands. The survey asked individual augmentees whether they had problems with their clearances. **The results showed that 90% of all Individual Augmentees overseas (and most likely to be in warfighting billets) had problems with their clearance when they were mobilized.**

From the perspective of MARFORRES and the GFC, the challenge in filling staff augmentation billets was finding Marines with the appropriate ranks, MOS, AND clearance. Many clearances for reserve Marines, especially IRR Marines, had lapsed, and others allowed access only to the Secret level of information.

The table below compares the number of officers in the IRR holding a current clearance[38] with the number of augmentee billets MPP-60 was expected to fill. The difference between supply and wartime demand is the shortfall in meeting operational requirements. Nor is it enough to have the number of clearances match exactly the billet requirements. The number needs to be significantly higher to allow for MOS, grade, and availability mismatches.

	Supply—# of IRR Officers holding…	Demand—# of all augmentee billets requiring…	Shortfall
No clearance	2,821	886	0
Secret	305	418	113
Top Secret	71	152	81
SCI	80	231	151

Data source MPP-60 as of Jan 2003[39]

The pool of potential volunteers with clearances is actually smaller than the table would imply. MCRSC calls those Marines who do participate on a routine basis "Active Players." The active players only account for about one-third of the total number of officers in the IRR and much less for enlisted.

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[38] Technically, "current investigations that would make them eligible for a clearance upon activation."

[39] HQMC(Intel) is concerned that these numbers may not be up-to-date because MCTFS, MPP-60's data source, does not interface well with DONCAF's data.

It is important to note that this data only reflects the requirements for officer billets. The problem for enlisted is more severe. Of the 54,000 enlisted Marines in the IRR, only about 615 had current clearances.

The cause of the problem is the difference between peacetime and wartime requirements. In peacetime, most training requires at most a secret clearance. However, in wartime, operations centers require at least a Top Secret clearance. Additionally, most planning billets require a TS-SCI clearance. Forty-eight percent of all officer augmentation billets (CONUS and OCONUS) required a clearance, with 29% of those clearances being TS-SCI. An officer without at least a secret clearance can fill few warfighting billets.

TS/SCI clearances were a particular problem. During OIF, MPP-60 had to source up to 350 TS-SCI requirements, 231 of them officer billets. As shown above, the IRR had only 80 officers with current TS-SCI clearances. The shortfall had to be filled by active duty officers pulled from their primary duty station, IMAs not already activated or listed as "hands off," and by other means such as issuing temporary access and/or interim clearances to individuals without a completed personal security investigation. These methods helped to fill the shortfall, but were time consuming and administratively difficult for the Marines, the GFC, MPP-60 and MCRSC.

Interim clearances still require that an investigation be opened and on-going with nothing negative found to prohibit granting an interim clearance. Temporary access with an interim clearance may not be recognized if a Marine is sent TAD to the GFC (as most augmentees were).

Current policy. After a series of high-visibility espionage cases in the 1980s, the number of billets with clearances was reduced because the proliferation of clearances was seen as a contributing factor to espionage. In addition, requirements for periodic re-inspections were introduced. The effect has been to restrict clearances that reserve Marines hold.

In order to gain a TS or TS-SCI clearance, a Single Scope Background Investigation (SSBI) must be submitted. These SSBIs must be updated every five years with a Periodic Reinvestigation (PR). Secret clearances require only a valid NACLC, which is good for ten years. However, Marines with a 24-month break in service require a new investigation to be conducted, NACLC or SSBI depending upon level of clearance, in order to receive the appropriate clearance eligibility and access. For Marines in the IRR, a break in service is defined as 24 months without active duty participation or muster.

The problem is particularly acute for TS and higher clearances. According to the SecNavInst 5510.30A (par 6-1, 3), "The scope of the investigation conducted will be commensurate with the level of sensitivity of the access required or position occupied. Only the minimum investigation to satisfy a requirement may be requested. CNO (N09N2) must give prior approval to establish investigative requirements in addition to, or at variance with, those established here." In practice, this is generally interpreted to allow investigations only on those Marines who are filling a billet, or being assigned to a billet, that requires a TS or higher clearance. With the exception of intelligence officers, having had a TS or higher clearance in the past does not authorize a Marine to have a PR conducted to keep the SSBI current. The SSBI would be allowed to lapse under current policy. Since the vast majority of IMA and SMCR

billets do not require a TS clearance, the SSBI lapses, thus requiring IMA/SMCR Marines to submit new SSBI investigations upon activation. The same problem exists for IRR Marines.

Problems exist even for officers slated or selected to fill TS or TS-SCI billets. To receive interim Top Secret access a Marine must hold a valid Secret clearance, submit a request for a background investigation, and pass a local records check. Interim access to a TS-SCI program, however, can only be granted by DONCAF. Some commands do not accept an interim TS-SCI as eligibility to access their classified data. This policy has a significant impact in a mobilization environment.

It is not feasible to get completed TS/SCI clearances after mobilization begins. An SSBI and a PR can take on average 12 months to complete once the background investigation is opened by the investigating agency. The backlog on clearances at the time this report was written was 22 months. Although interim clearances are possible, as described above, they can be restrictive and are administratively cumbersome to acquire. DONCAF is currently not granting interim clearances after being overwhelmed with so many interim requests.[40] Reserve Marines are further hampered in this area because some commands assign priority to completing active duty Marine investigations over Reserve Component Marines.

Costs for investigations are relatively low. An SSBI costs the service component $2,500 to $3,000. A PR only costs $1,500 to 1,800.

RECOMMENDATIONS

- Change policy to allow more IMA and SMCR Marines to maintain their eligibility for the highest level of clearance they held during active or reserve duty. Allow investigations to be completed even a though Marine is within two years of EAS.

- The justification for reserve clearances should be based on wartime GFC needs—Marine Corps, joint, and combined—rather than peacetime Marine T/O structure.

- The Marine Corps should base its needs not only on T/O line numbers within the reserve structure, but on the estimated number of billets required to be filled by reserve Marines during major combat operations. The Marine Corps should budget adequate funds to support this level of investigations.[41]

- MARFORRES should review its T/O and upgrade appropriate billets that need greater access to classified data.

- MPP-60 should be given the additional mission of coordinating wartime GFC and joint needs beyond internal Marine Corps T/O structure.

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[40] Interview #164

[41] MPP-6O assesses current and future IA security clearance requirements for MARFORRES as follows: Secret (300), TS, (105), and TS/SCI (310).

- HQMC needs to review policy and make appropriate changes to procedures in order that the Marine Reserve establishment has the clearances needed to meet expected wartime demands.

An admonition from the MEF G-1 applies to security clearance policy as well.

TRAIN

5. *Training readiness. Were units and individuals adequately trained? Who should be responsible for training mobilized reserve units and individuals? Who should provide the resources?*

CONCLUSIONS

- Units, up to the company level, were well-trained to accomplish the missions assigned. Battalions also seem to have done better than in ODS. The emphasis on battalion level training since ODS seems to have had a positive effect. With the exception of 4th LAR, however, each of the combat battalions expressed the opinion that having at least some post mobilization training was necessary for the battalions to perform as well as they did. None of the FSSG battalions that were employed as battalions received any unit training while at their SIA/ILOC,[42] yet they accomplished their assigned missions in theater.

- Individuals.

  - Marines in units were sufficiently well-trained in their MOS to perform the missions assigned and were judged to be equivalently trained to active duty Marines.
  - IMAs were generally a success. They activated quickly, had familiarity and knowledge of the staff and billet requirements for which they were assigned, and generally performed well.
  - Globally sourced individual augmentees, particularly IRR officers being assigned to a high level staff, had preparation shortcomings that are described in Section (IV) 9, Individual Augmentees.

- Multiple command changes and unclear or unspecified responsibility for supporting the training of mobilized reserve units at the SIA/ILOC greatly constrained training at the SIA/ILOC.

DISCUSSION

Unit training. In ODS, contrary to many expectations, combat battalions and regiments, particularly infantry, were used as units. General Boomer, the MEF commander, judged their performance as follows: "Companies were great, battalions were marginal, regiments were useless."[43] The problem was that battalion and regimental HQ needed work on command and control. Their geographic dispersion prevented extensive training in peacetime, emphasis had been on company-level training, and the opportunity for battalion-level training was not present at the SIA/ILOC. As a result the reserve battalions were given missions such as EPW security

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[42] SIA (Station of Initial Activation) is the old term for the base where a unit staged and trained after mustering at its reserve center but before deploying overseas. ILOC (Intermediate Location) is the new term for such a base. To avoid confusion for readers unfamiliar with one term or the other, this report uses "SIA/ILOC".

[43] Marine Corps Reserve Forces in Southwest Asia, p. 10. General Boomer also made this comment at his post-war lecture at Quantico.

and force protection. The post-war lessons learned report noted that the problem was solvable, however, through more efficient training at the SIA/ILOC, earlier mobilization, greater training readiness in peacetime, and integrating I-I staff into the unit.[44]

In OIF, reserve unit performance at the company-level was again excellent. Active duty commanders noted their high level of training and used them just like an active duty unit.

"Training level from individual to company level was very strong"[45]
"Hungry and aggressive and did everything assigned"[46]
"Outstanding performance"[47]
"Hard pressed to find any weaknesses"[48]

BUT there was a big difference at the battalion level. The three reserve infantry battalions—2/25, 2/23, 3/23—were all given independent missions on the front line, 2/23 was the lead element for RCT 1 for several days during the attack north, and was involved in the operation to secure the UN Compound in Baghdad. The 4th LAR also operated as a battalion during OIF. Its individual companies were attached out during Phase III, but the battalion was consolidated for the Phase IV stabilization operations and was given the critical mission of screening the southern portion of Iraq's border with Iran. "Active duty officers raved about the performance of these battalions," said one senior reserve officer.[49]

One key difference between ODS and OIF was that the three reserve infantry battalions sent to I MEF all had extensive post-mobilization training before they arrived in theater. The 2/23 and 2/25 had been on active duty for almost all of 2002. The 3/23 had six weeks of intensive training at 29 Palms, CA, under the active duty establishment following its activation in February 2003. Pre-mobilization training had also improved with the re-emphasis on battalion staff training, and battalion level operations training, after a focus on company-level training before ODS.

A key consideration when discussing training is the appropriate comparison to use in deciding which battalion to deploy. **Fourteen active duty infantry battalions deployed into theater for OIF. The next deployable active duty battalion was under-strength, under-equipped, and under-trained. In the real world of hard tradeoffs, then, the relevant question is: Would a reserve battalion be better than the next available active duty battalion?**

In addition to the achievements of the combat arms units, 6th Engineer Support Battalion (ESB) and 6th Motor Transport (MT) Battalion were also deployed and used as battalions during OIF. 6th MT Battalion participated as the major part of the Transportation Support Group (TSG) established by 1st FSSG to support I MEF transportation needs in theater. The 6th ESB was given

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[44] Marine Corps Reserve Forces in Southwest Asia, p. 51
[45] Interview #104
[46] Interview #163
[47] Interview #100
[48] Interview #165
[49] Interview #29

responsibility for the bulk fuel mission for the MEF, was assigned active duty bulk fuel companies from both 7th and 8th ESBs, and performed that mission exceptionally well. In fact, 6th ESB and/or its organic companies set records for building the longest IRB bridge, longest Hose Reel System, and largest Fuel Storage Farm in Marine Corps history.

Nevertheless, like General Boomer in ODS, active duty commanders in OIF seem to believe that reserve units have weaknesses in command and control at the battalion level and need post-mobilization training[50] to attain the needed level of performance.

Flying squadrons performed well in both ODS and OIF—C-130 and CH-53E squadrons in OIF, C-130, CH-53, UH-1/AH-1 and CH-46 squadrons in ODS. The reason may be that these units are more dependent on individual skill where reservists, particularly aviators, are strong— and less dependent on unit skills—where reservists are weaker. Working out of relatively fixed and stable locations in theater may also help the flying squadrons maintain more consistent command and control.

Individual training. Because reservists go to the same schools as their active duty counterparts, they join their units with the same initial individual proficiency. For enlisted Marines, following the initial MOS training, differences in the individual training levels between active duty and reservists do develop, but this difference is not significant. In most technical skills/units, active duty commanders indicated that reserve Marines' MOS skills were good, but needed a couple days refresher to be brought "up to speed." Reserve Marines know how to load a crypto fill or set up a fuel farm or troubleshoot an engine problem, but since they don't do it every day, a few days of re-familiarization is needed. Active duty officers who either commanded them, or were familiar with their performance, said the same of combat arms Marines' individual skills.

Active duty commanders commented that, in some cases, reserve Marines could contribute more than their active duty counterparts due to the civilian training and experiences they bring to the unit.

- The Deputy G6 for 1st FSSG, a reserve officer, was a communications network engineer in his civilian occupation. This background was a major bonus as the 1st FSSG implemented its communications plan.[51]
- Police officers from the many reserve units were used to develop curricula and conduct training for Iraqi Police academies.[52]
- One Marine officer, an electrical engineer, assisted Iraqi engineers in evaluating and bringing on-line one of the electrical power plants.[53]
- The two reserve VMGR squadrons assigned to OIF represented approximately 66% of the personnel and assets, but provided roughly 90% of the crews for Assault Support missions during OIF. The reserve squadron crews had more current qualifications and had, on average, 800 more flight hours than the active duty crews. The active duty

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[50] Miscellaneous General officer interviews
[51] Interview #163
[52] Interview #104, #170, #50, and #39
[53] Interview #104, #99, #170, and #39

commander of the three squadrons stated that the reserve squadron crews were simply more qualified for those missions.[54]

- Almost all the medical personnel in the 4th Medical Battalion also work in the civilian medical/health care industry. All the surgeons for instance are surgeons in their civilian careers, providing years of additional experience not typically available in an active duty medical battalion.[55]

With regard to Marine officers, virtually all Marine reserve officers serve at least one tour on active duty, typically three or four years, with an average of over six years of active duty.[56] At the company level, this provides a very strong base of knowledge. Whereas active duty platoon commanders have one to two years experience, reserve platoon commanders have five to seven years. Where active duty company commanders have five to seven years of experience, reserve company commanders have twice that (though not all active duty). This is one of the reasons why companies were rated as outstanding. At the battalion level and above, the experience of the officers filling each billet provided a more varied performance ability. Those officers who had either served on a battalion, or high level staff on active duty had a leg up on those officers with no such staff experience.

In order for reserve staffs to gain the operational experience typical of active duty staffs, they need to remain together for much longer periods of time. Battalion level exercises in the reserves are also much more difficult to coordinate and execute, and many battalions are only able to conduct one field exercise (FEX) on a drill weekend during the year, with another longer FEX during their annual training. With these limited opportunities, it is difficult for the reserve battalion staff members and the staffs as a whole to reach the proficiency levels typical of active duty staffs without some post-mobilization training. **When asked whether they needed more training, most battalions expressed the need for more opportunities for the battalion to operate together either pre- or post-mobilization, in order to improve the staff's ability to control the battalion and plan its operations.[57]**

Staff experience was a particular issue for the individual augmentee officers, many of whom were assigned to division or higher level headquarters. Every active duty commander interviewed expressed the belief that experience on or with a division or higher level staff was extremely beneficial for IA's to be able to integrate effectively. Duty with an IMA, MACE, or other unit or detachment that provided a reservist with high level staff experience generally allowed for a more effective and efficient integration. As discussed in-depth in Section IV 9, Individual Augmentees, active duty commanders believed that the IA's were generally able to perform if given enough time to get up to speed on the requirements and expectations of the billets assigned. However, the pace of operations rarely allowed much time. Active duty commanders also indicated that success or failure in a billet was NOT due to whether a Marine was active duty or a reservist, but was a function of their background and experience.[58]

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[54] Interview #98

[55] Interview #68

[56] From survey data.

[57] Interviews #73 and #39

[58] Interview #111

<u>Training responsibility</u>. TECOM asked a series of questions that became "100 Weight Issues" for the EFCAT.   These issues were:

1. Who provides training for mobilized reservists by category—IRR, IMA, SMCR?
2. What are the roles for the MARFORs, MARFORRES, TECOM, I&L?
3. Who provides the resources (ammo, funding, facilities, instructors)?[59]

Who provides training for IRRs? What are the institutional roles? Who provides resources?

Pre-mobilization. MARFORRES is responsible for the pre-mobilization training and preparedness of all Marine Reserves. In the case of the IRR, this responsibility is exercised through MCRSC. It is MCRSC's responsibility to coordinate training opportunities for the IRR, manage the Reserve Counterpart Training Program, and conduct the annual IRR muster program (MPLAN PLN7 1999).

Post-mobilization. Post-mobilization training responsibility resides in several commands.

CG MCCDC is responsible for establishing theater-specific Individual Combat Refresher Training programs of instruction for mobilized Pre-trained Individual Marines (PIM) and for Combat Replacement Companies (CRC). PIM are pre-identified reserve/retired Marines planned for assignment to augment bases and stations in CONUS to support the overall mobilization process; retired drill instructors would be a good example.

The training of the PIM and CRC's is the responsibility of the Base/Station at which the Marines are mobilized. This responsibility is exercised through the RSU or MSB (when established).

The responsibility to train an IRR Marine activated to fill a specific billet at a requesting command is not specifically addressed in the MPLAN. These IRR Marines will still process/mobilize at the designated mobilization sites, but are not specifically required to go through any training such as that established for the CRC's. It can be inferred that, when these Marines complete the activation process, it is the GFC's responsibility to provide any necessary training.

What actually happened?

In the actual event, half (46%) of the IRR who activated to fill specific billets received no training in CONUS with the exception of required theater threat briefs or medical briefs. In general, these Marines were processed through medical/admin for mobilization, issued available gear, and forwarded to their GFC. Once joined to the GFC, there was little beyond OJT for these Marines. The table below reflects IRR ratings of their training in CONUS and in Theater. Refer to the section on individual augmentees for more details. Most of those who did receive training thought it only fair or poor.

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[59] EFCAT "100 Weight Issues"—the 45 key issues that the overall team focused on.

How Would you Rate Training after Mobilization?
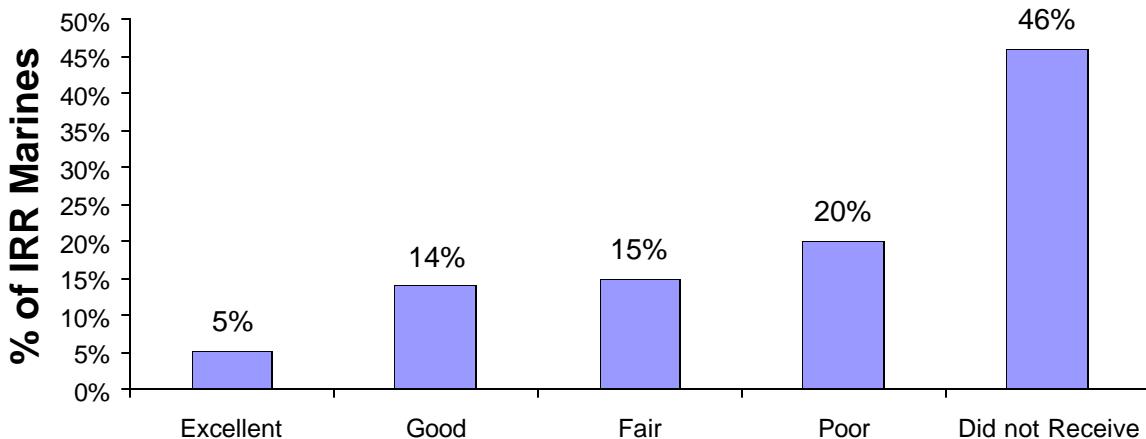
For the CRCs, the process was essentially executed as described in the MPLAN. The CRC's were trained at Camp Lejeune and Camp Pendleton where they were mobilized as planned. This training was executed through the Schools of Infantry. The results from interviews[60] were as follows:

- Most company grade officers and junior enlisted Marines felt the CRC training was good. The training included weapons familiarization, grenade throwing, NBC Defense, and other basic field skills.
- Some company grade officers, the field grade officers, and the senior SNCO's, however, were given exactly the same training and felt that it was too basic. These Marines stated it would have been more appropriate for them to have refresher staff planning classes, covering topics such as the MCPP.

Per the MPLAN, CRC training is not intended to build a combat company, but to prepare the individual Marines for the combat environment. The training each CRC goes through, and for each member of a specific CRC, may vary depending upon their MOS and rank makeup. For OIF, however, only a little tailoring of the generic training plan was done to meet specific MOS/rank needs of Marine in the CRC. No Marines deployed in CRCs received specific MOS training but some of the CRCs that remained in CONUS did have some MOS training. The short time period involved, typically only one week of training for the CRC, limited MOS-specific training. The decision was made to give everyone the basic skills training, as it was the most appropriate for everyone. In the future, a longer training period at the SIA/ILOC may allow for more specific training, especially since 48% of all IA's indicated that more PMOS training would have been helpful prior to employment/deployment.[61]

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[60] Unfortunately, survey data could not separate CRC Marines from other IRR Marines so it was not possible to get a numerical evaluation of their training.

[61] Marine Mobilization Survey (Individual) results.

MSBs were established, but they were processing and joining their own activated personnel at the same time that they were trying to activate and process members of the IRR for the CRCs and individual billets. Had the requirement for CRCs been higher, the difficulties of establishing the MSB may have interfered with the MSB's ability to perform its mission.

RECOMMENDATIONS

- Review training for CRCs for rank/MOS applicability. Basic NBC and T/O weapons familiarization firing is fine but, time allowing, additional MOS-specific and rank training should also be provided to specific MOS's CRC.

- Track civilian skills and experiences of Marine reserves in addition to the Marine Corps skills/experiences. Many of these skills may prove valuable in future operations. This information may be available on the Reserve Qualification Summary.

- Assign the Schools of Infantry responsibility for providing the CRC training packages.

Who provides training for IMAs? What are the institutional roles? Who provides resources?

Pre-mobilization. Per MCO P1001R.1J, the Operational Sponsor for each IMA detachment is responsible for the pre-mobilization training of the Marines in that detachment. In the survey IMA Marines rated their pre-mobilization training highly.[62]

How would you rate your training before mobilization?

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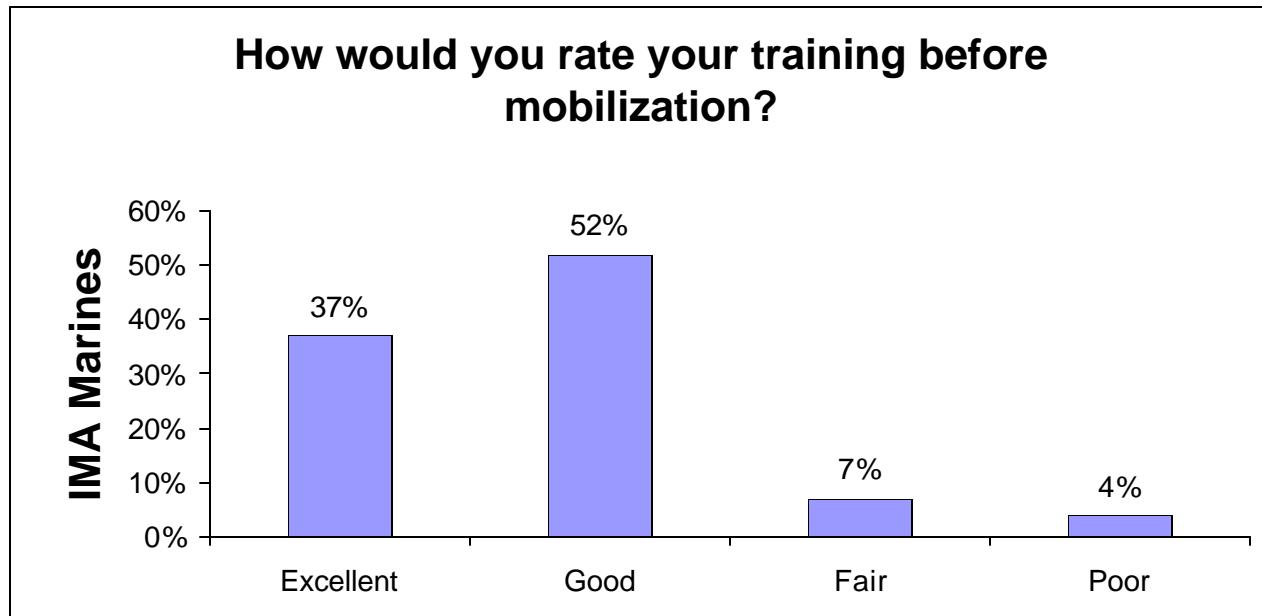
[62] In the survey, 31% of IMAs reported receiving no pre-mobilization training. It is not clear why there was such a large number because all should have been drilling before mobilization. They may have been new joins. It is also possible that some IRR Marines became confused and checked "IMA" instead of "IRR."

Post-mobilization. The MPLAN does not address post mobilization training of IMAs. MCO P1001 seems to assume that the IMA will be activated only in support of the OPSPONSOR they are assigned to and therefore additional training is not needed. The MPLAN does specify, however, that the GFC is responsible for providing weapons and equipment to the IMA upon activation. We can therefore infer that responsibility for post-mobilization training resides with the GFC, though it is not specified.

What actually happened?

In general, the IMA detachments activated and joined their OPSPONSOR as planned, though the exact manner in which the various IMA members were used may have differed from what was expected.

- Some IMAs were activated for their OPSPONSOR and then sent TAD to support I MEF. In one typical example, a Marine assigned to the HQMC intelligence IMA detachment was activated after 9/11 to support HQMC, but then was sent to I MEF on TAD as a G2 Watch Officer when HQMC was tasked with providing personnel to augment the MEF in preparation for war.
- The FSSG Fwd East IMA detachment was activated to augment 2nd FSSG, but was used to create the Marine Logistics Command (MLC) for MARCENT, the first time an MLC was actually used in a combat theater. This was a slightly different use than simply augmenting the FSSG staff.

Post-mobilization training for IMAs was the responsibility of the GFC, and the extent and duration of the training was dependent on the time and resources available. There are some cases where specific training was conducted. For instance, 2nd FSSG conducted a CPX with the FSSG Fwd East personnel to work them into the staff. In most cases, however, the training was simply OJT and Marines learned as they did the job. Such a training method is not usually a problem when the IMA Marine comes from the GFC's own IMA detachment, and has familiarity with the staff and mission.

RECOMMENDATIONS: Clarify and specify the role of the OPSPONSOR and/or the GFC with regard to post mobilization training for IMAs. The MPLAN, or its coming replacement, the MAID-P, should specify that the GFC is responsible for identifying, coordinating, and providing/supporting training for IMAs after their mobilization.

Who provides training for SMCR units? What are the institutional roles? Who provides resources?

Pre-mobilization. Training and readiness oversight for SMCR units lies with MARFORRES, which exercises this responsibility through its subordinate commands 4th MarDiv/MAW/FSSG and I & II MACE. MARFORRES is responsible for coordinating with MARFORLANT/PAC for the use of reservists in supporting active duty exercises[63]. Typical pre-mobilization training includes one weekend per month plus one two-week Annual Training

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[63] MPLAN (1999)

period each year. Additional paid drills and additional Annual Training periods are also available, if requested and justified by the requesting command.

Post-mobilization. Post mobilization training for SMCR units is not specifically addressed in the MPLAN. Based on the command structure outlined in the MPLAN, it can be inferred that responsibility for supporting/coordinating the training of the various activated reserve units belongs to the GFC. However, the MPLAN does not clearly differentiate between USJFCOM and the ultimate theater commander/MARFOR as being the GFC. Since activation orders typically specify the unit (i.e. I MEF), or the theater command (MARCENT), to which an SMCR unit is to be sent, we can ASSUME the GFC is the ultimate user. However, that differentiation is not specified. As currently written, USJFCOM/MARFORLANT may be the GFC for every activated SMCR unit upon activation. USJFCOM/MARFORLANT would remain as the GFC until the activated units are physically joined at the SIA/ILOC to the active duty unit it is intended to join, or until it is embarked on ship or plane to join its intended parent/theater command. The command relationships used during OIF are shown in the diagram below.

COMMAND RELATIONSHIPS
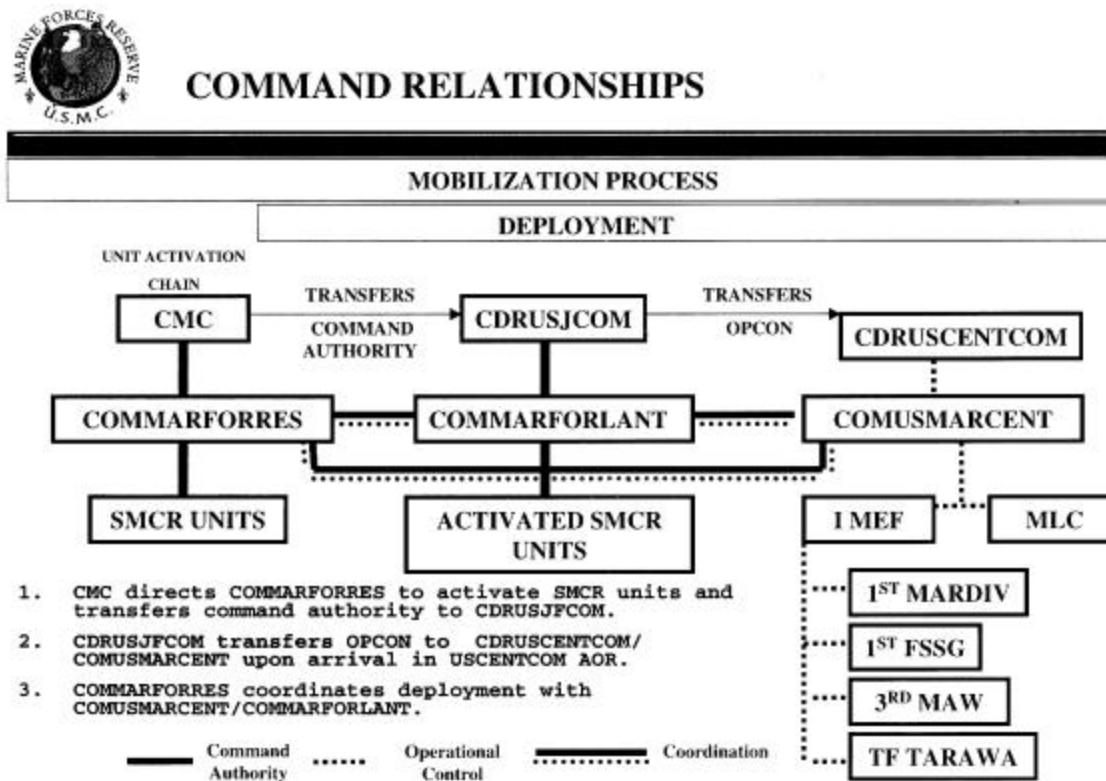
The MPLAN does not specifically task the GFC¾or anyone else¾with responsibility for identifying, coordinating, or supporting the SMCR units' training, or with providing any equipment to the SMCR unit while it is at the SIA/ILOC. The MPLAN does state the SIA/ILOC "is to serve as a marshaling point for SMCR units prior to their movement into theater…and/or to receive additional training/equipment from the gaining command." Furthermore, "the intent is for the SMCR unit to fall in on its active component gaining command to immediately begin pre-deployment training." This comment is included

under the Base/Station responsibilities section and identifies the SIA/ILOC as the location at which units will receive training and/or be brought up to T/E or their A/A for equipment. Unfortunately, it leaves to interpretation and inference who or what command is responsible. MSBs have no requirement to support SMCR units, only individuals.

PP&O at HQMC is currently revising the MPLAN and has a draft document, called the MAID-P, that is much clearer about who is responsible for what. In PP&O's draft, the GFC is the MEF, or Task Force, to which the SMCR unit is ultimately going to be assigned. Therefore it would be the MEF's responsibility to support the training of the SMCR units being activated in response to the MEF's requirements. It is not clear, however, how the GFC will execute these responsibilities if it has already deployed.

This concept of the GFC training mobilized reserve units may be a legacy of World War II and the Korean war, where the GFC had not yet deployed when reserve units mobilized. The reserve units joined the GFC when it was still in CONUS and the GFC could oversee and support training.

What actually happened?

Pre-mobilization. For the most part, pre-mobilization training was conducted in accordance with existing training plans and was adequate to allow the activated units to perform their assigned missions in theater. In fact, the chart below shows that SMCR Marines felt their pre-mobilization training was quite good. This was particularly important for units such as 6th ESB, and 6th MT, which deployed without any real training at the SIA/ILOC.

How would you rate your training before mobilization?
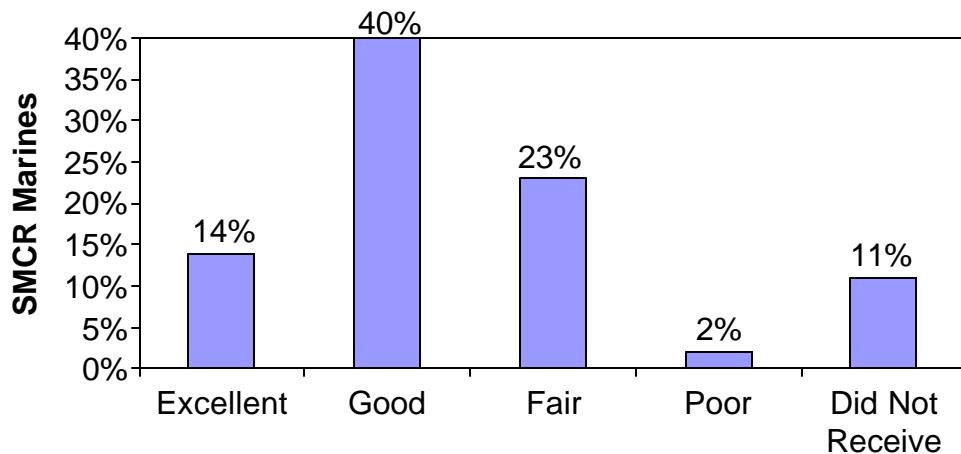
Survey data also showed, however, that 55% of Marines felt that pre-mobilization training could be improved with more training time, and more PME schools for reserve Marines.

The desire for more training time, however, does not mean more drills. Based on the interviews conducted with unit leaders, the concern reflects the need for more effective and efficient training and training plans, not more drills per month.

Many comments from the surveys indicated a need for additional training in basic skills. For example:

- "Many Marines could of used more training on equipment, mainly vehicles…"
- "Marksmanship and MOS training should be given more priority…"
- A typical comment: "…While officers and NCOs deal with admin and legal nonsense, most training suffers…"

This perception of a need for increased training focus or basic individual and unit skills is further reported by the survey results. Between 56 and 65% of Marines indicated that MORE training in marksmanship (61%), physical fitness (56%), with equipment (65%), and in their PMOS (61%) would have been helpful or very helpful.

Post-mobilization. **In the actual event during OIF, most SMCR units did little or no post mobilization training while at the SIA/ILOC, with the exception of 3/23, which had six weeks of intensive training at 29 Palms**. Most training, if it occurred, was limited to the gas chamber, BZO, and classes; and the training was essentially self-directed, coordinated, supported, and executed. This was true of 2/25 and 2/23 as well, although they did not need additional training since they had had a year of active duty previously. Training for SMCR units at the SIA/ILOC was hampered by a lack of corpsmen, transportation, equipment, and ammunition.

- Equipment. Generally, SMCR unit rolling stock and equipment were immediately shipped to points of embarkation, and were not available to train with at the SIA/ILOC. As one Marine observed, "SIA/ILOC was for admin only. Training was unsupported because all of the supporting units had already deployed. There were no assets or equipment to conduct training with."[64]

- Ammunition. The ammunition at the bases had been blocked for war use, or was unavailable to the reserve units because it had not previously been requested to be moved to, or allocated from, the base stocks. This is a major issue since typical lead times for moving ammo are 90 days. Even when the request is expedited, the process can take up to 45 days for ammo to be moved and/or reallocated. The question of whose ammunition to use was also a problem. Does an activated unit use ammunition allocated to the base, Division/FSSG, MEF, MARFORLant, or MARFORRES? What if the unit is activating at Camp Lejeune but the GFC is I MEF? Bases and the senior tenant commands (MarDivs/FSSG's) were reluctant to "give up" any of their own ammunition to a unit that did not belong to them. One exasperated Marine stated, "Marines need rounds for training. Twelve rounds to run a range in Camp Pendleton is a joke, especially for a squad attack."[62]

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[64] Marine Mobilization Survey (Unit) Comments

- Transportation. Vehicular transportation was minimal. With the exception of 4th LAR and the VMGR squadrons, all activated units indicated they had only one or two commercial vans and perhaps a handful of HMMWVs to support the transportation and training needs of the entire unit while at the SIA/ILOC. MSB's are tasked with supporting transportation needs of IRRs, but not of SMCR units. Independent companies being mobilized, such as the two tank companies and the MP companies, encountered the same problems. No unit, organization, or facility is specifically tasked with providing any training or equipment support for the activating SMCR units.

- Billeting. Every activated battalion, with the exception of 4th LAR and 3/23, complained of inadequate billeting at the SIA/ILOCs. The two main complaints were: (1) Facilities in poor condition or even condemned, and (2) No facilities large enough to support an activating battalion in one location, resulting in units being dispersed across entire bases. One Staff NCO commented, "Living quarters in Camp Pendleton were horrible. I know Marines make due with what they get handed, and we did. But if the Marines Corps can't support activating a unit then maybe the National Guard should be called."[65]

- Support. Bases remained on peacetime work schedules despite having multiple units mobilizing for war and deployment. This resulted in a certain amount of friction when the mobilizing units, working 12 to 20 hours a day, were essentially cut off from support when bases/commands finished their workday. Furthermore, many range personnel are FAPs[66] who during a mobilization/war are returned to their parent commands. This meant that the SIA/ILOCs were generally understaffed to support training on many ranges when mobilized units arrived.

- Corpsmen. Corpsmen were generally unavailable to support training because the Navy began their mobilization process 10 to 14 days after Marine Corps units began mobilizing. In every case this resulted in a delay of at least that long before Corpsmen began to join Marine units. This delay resulted in lost training opportunities both for the unit and the Corpsmen. See Section IV. 7, Mobilization Process, of this report for details on problems with mobilizing Navy Corpsmen.

- Everyone and no one is responsible. The command relationship for mobilized reserve units is very complex as the chart earlier in this chapter shows. Units belong to MARFORRES before mobilization, to MARFORLANT from mobilization until the unit joins its active duty parent command at the SIA/ILOC or embarks to join them in theater, and they then belonged to MARCENT/I MEF once they arrive in theater. For most units these command relationship changes were too difficult to work through, and they did not get much training.

The post mobilization training of 3/23 stands in contrast to the rest of the story. The 3/23 was activated and sent to 29 Palms where they conducted six weeks of intensive combat training.

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[65] Marine Mobilization Survey (Unit) Comments
[66] FAPs are Marines in units who are detached for service day-to-day with a base organization. When the unit deploys, these Marines leave the base organization and return to their parent unit.

The 3/23 still encountered problems with vehicles, ammo, and Corpsmen, but perhaps because they were the only training unit on the base at the time, they were able to work through these issues and get a high level of training accomplished.

This problem of post-mobilization training is not new. The same issue was identified after ODS and it has not improved. The lessons learned report following that operation[67] noted that:

- Equipment was limited.
- Facilities were limited.
- All ammunition was being reserved for SWA.
- Training plans were poorly designed.
- The base was still working five days a week and taking two-hour lunch/PT breaks.

Most Marines (81%) believed that they had not spent enough time at the SIA/ILOC. When asked how much time would have been sufficient, they gave a range of answers:

Measure	Days
Mean (average)	42
Mode (most common response)	30
Median (middle of range)	21

It is not clear how much post-mobilization training time the new strategy will allow. **The key insight is that, in the view of reserve Marines, mobilization planning should make use of whatever training time is available.**

The table below reflects how SMCR Marines felt about the quality of their in CONUS post-mobilization training, as well as the level of support they received from the SIA/ILOC.[68] Interestingly, although every unit commander felt post mobilization training in CONUS was inadequate, only 23% of Marines felt it was poor or that they did not receive any. The difference may be that Marines rated the training they received while the commanders were concerned about the training they wanted to conduct but couldn't. In most cases, the training that commanders wanted but could not get was basic unit and individual skills, such as marksmanship, patrolling, convoy ops, and equipment use/employment.

- "Needed more MCT training. Basic combat skills were weak..."[69]
- "Needed more MOUT and patrolling training"[70]

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[67] Marine Corps Reserve Forces in Southwest Asia, p. 15-17
[68] The training data reflects only non-infantry Marines due to the yearlong activation of both 2/25 and 2/23, which would have distorted the results. The SIA/ILOC support data, however, does include the data from those two units' activations.
[69] Interview #83
[70] Interview #39

SMCR Ratings of In CONUS Training & SIA/ILOC Support

Rating	In Conus Trng	SIA/ILOC Support
Excellent	6%	5%
Good	39%	41%
Fair	32%	33%
Poor	13%	16%
Did not Receive	10%	5%

Legend: ☐ In Conus Trng ☐ SIA/ILOC Support
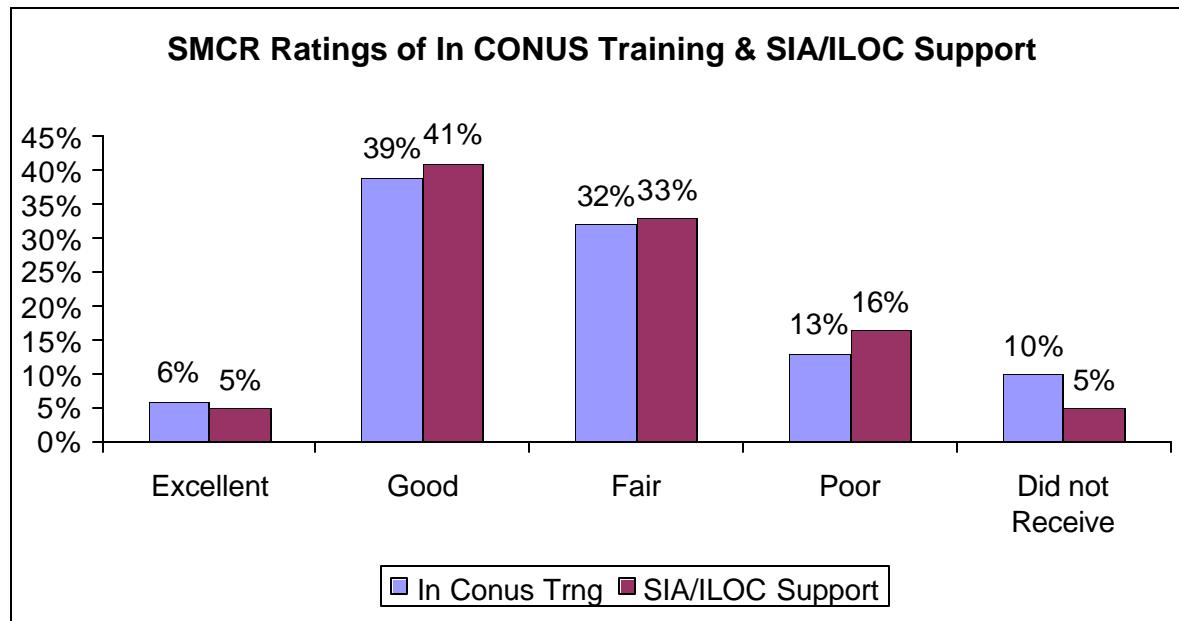
<u>Training in theater</u>.

According to reserve unit commanders, the key element for <u>training in theater</u> is not honing basic skills—time and resources are not available. Instead, it is linking with associated active duty units, synchronizing procedures, and understanding the specific mission. Several mobilized reserve units had not previously worked with the active duty unit to which they were attached, and this caused some difficulties developing working relationships and compatible standard operating procedures (SOPs).

All reserve unit commanders commented that they were able to conduct very little of the in-theater training they desired (especially after having been told at the ILOC that most unit and live fire training would have to wait until they were in theater). Lack of ammunition, training ranges, equipment, time, and a fear of equipment breakdown all contributed to the situation. Training conducted in theater was similar to that conducted at the SIA/ILOC: lots of classes, and practical application that did not require fire and maneuver. Below is a chart showing how SMCR Marines rated their in-theater training. Although 34% record the training as good, 25% rate it as only fair and 30% reported the training as either poor or that they did not conduct any training.

How would you rate your training in theater?

A bar chart titled "How would you rate your training in theater?" showing:
- Excellent: 11%
- Good: 34%
- Fair: 25%
- Poor: 13%
- Did Not Receive: 17%
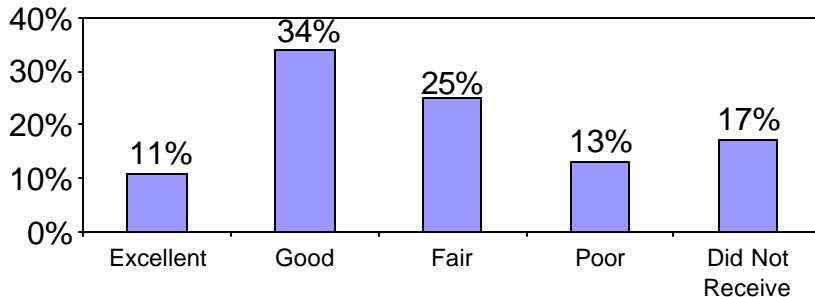
Almost every reserve unit complained that the shortage of training/ammunition also meant that few of the crew-served or vehicle mounted weapons were test fired prior to crossing the Line of Departure. For one of the reserve AAV units, this meant they did not know, until they were engaged with the enemy, that the up-gunned weapon system of several AAVs did not properly function.

The lack of training in theater also hindered the effective integration of reserve units into their active duty parent commands. Every active duty commander, with the exception of RCT 1, which had worked with 2/23 for the previous year, commented that having a couple weeks to train with and integrate the reserve units, would have made them feel more comfortable with those units prior to starting combat operations.

Training in future deployments. Future plans envision that many reserve units will deploy directly from the RTC without going to an SIA/ILOC. Their opportunities for post-mobilization training will be limited. Because of limitations on strategic mobility or RSOI capabilities, however, many other units will still likely spend time at an SIA/ILOC. This time should be used as intensively and effectively as possible. Even units rated C-1/C-2 deserve the best possible post-mobilization training if the opportunity presents itself.

RECOMMENDATIONS

- Continue battalion level training exercises/emphasis for reserve combat arms battalions to maintain the improved performance levels demonstrated during OIF.

- If possible, activate battalion staffs as early as possible before the mobilization of the battalion's main body to assist in the transition. This would provide the staffs time to conduct a mission analysis, verify mobilization preparations, and conduct any necessary coordination with the GFC not already accomplished. At a minimum, conduct extra drills for the staff when mobilization seems imminent.

- Give MARFORRES a role in supporting the training of mobilized reserve units at the SIA/ILOCs by facilitating provision of ammunition, transportation, supplies, and equipment, though the kind of training conducted should be dictated by the GFC. MARFORRES already has training and equipment oversight before mobilization and has a structure established to execute these functions. Ammunition to support MARFORRES units already exists at many SIA/ILOCs around the country and can be redistributed to support the training needs of activating units. The GFC can work with MARFORRES and the bases to identify priorities for training and which units should have priority on ranges in order to meet the GFC's requirements.

- Send "Report for Planning" notices to SMCR units and MARFORRES as soon as reserve augmentation/reinforcement is deemed necessary. This will allow the GFC to coordinate with the SMCR unit to identify tasks and missions that may affect unit training and equipment needs.

- Back to basics. Reserve units want more emphasis on basic individual and unit skills. Thus, an infantry unit may emphasize attack, defend, patrolling, and marksmanship, whereas a motor transport unit may emphasize convoy operation, route reconnaissance, and individual and crew served weapons proficiency. This implies a reduction in "adventure" training, i.e., training that, while exciting, does not relate to a unit's primary mission.

- Training on METLs beyond the basics could be accomplished through TEWTs and battalion staff planning exercises so that the concepts are familiar.

EQUIP

6. Equipment. Did reserve units have the equipment they needed?

CONCLUSIONS

- The short answer to this question is no, Marine reserve units did not have all the equipment their commanders believed they needed. Contributing factors included T/A versus T/E, and T/E versus A/A shortfalls, late arrival of CTAP, lack of communication equipment, and late arrival of sealifted equipment.

- Compatibility of equipment between active and reserve forces was much improved over ODS and virtually seamless, the exception being radios.

- IRBE did not provide the amount of equipment that had been expected.

DISCUSSION

T/A versus T/E versus A/A.

This is a perennial problem. To reduce the peacetime maintenance burden, some reserve units do not hold all their authorized equipment (T/E), but only a subset called a T/A. The concept is that on mobilization, the unit will receive the missing gear from external sources such as the MEF's remain behind equipment (RBE) or war reserves. However, this did not work well in practice. Most units that had only their T/A in peacetime ended up deploying with only their T/A. And units deploying with their T/A ended up operating with only their T/A. As one Staff NCO commented, "My unit was not given the equipment needed to do our mission…we went to war with training equipment and that was it"[71]. I MEF, MARFORRES, MarForLant and the reserve units themselves all agree that the process as executed did not get equipment to the deploying reserve units.

The same problem was noted in ODS.

> *All reserve commanders, without exception, were very critical of this process [of building up to a full TE]. "A Chinese fire drill", one battalion commander called it. Equipment came in slowly despite strenuous efforts. As a result the equipping process dominated the mobilization period and continued even in SWA. One active duty officer in charge of reserve units said, "Our focus was on T/E shortfalls, of which they had substantial numbers and identifying a source…to [remedy] those shortfalls…[We] also [had] to do the LTIs and supply accounting…That occupied 24 hours a day 7 days a week…The reserves did not bring their entire T/A and it was a tremendous problem because it increased the equipment shortfalls.*

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[71] Marine Mobilization Survey (Unit) Comments

These problems were so serious that many reserve commanders suggested that they be allowed to hold their full T/E at their drill centers despite the difficulties involved.[72]

Responsibility for filling a unit's T/E falls to the GFC, according to the MPLAN (Section IV. 5, Training, Command Relationship Chart). However, in both ODS and OIF the GFC was unable to bring reserve units up to full T/E[73]. For both conflicts the GFC was at the end of a 12,000-mile supply chain. Its assets were already spread thin among its active duty units. Its planners were consumed by immediate preparations for the upcoming conflict and had little time or attention left to focus on CONUS reserve equipment shortfalls. The GFC staff also reported that it struggled with the new RFF process that was superimposed onto their existing deliberate planning process. As a result of the slow RFF approval process, the GFC could not be sure whether, or when, reserve units would arrive. This was too late to adjust its planning. **It may be that the tasks assigned to the GFC for fixing reserve equipment shortfalls are beyond its ability to execute.**

Relying on the GFC to fix reserve equipment shortfalls may be a remnant of an earlier mobilization concept where the GFC was expected to still be at the SIA/ILOC when reserve units arrived there. In such a situation—as happened during Korea and World War II—the GFC could assess equipment needs on the spot, redistribute items locally, and oversee the equipment influx from external sources. This concept may not fit well with a GFC already deployed and with reserve units gathering at RTCs and ILOCs all over CONUS, not just at the GFC's home station.

The ability of the deployed GFC to make up this equipment shortfall was made difficult by other factors as well.

- The change from a TPFDD driven process to an RFF process negated much prior planning, including planning for making up reserve equipment shortfalls. With the RFFs, reserve units were often identified late, and the GFC could not be sure that requests would be approved.[74]

- The GFC's subordinate commands did not report what was IRBE[75] until February, too late for a number of reserve units already deployed or deploying.[76]

- Plans had counted on using IRBE extensively but there was very little IRBE for reserves to fall in on.[77] MEF units had apparently "gone heavy" both drawing MPF equipment

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[72] <u>Marine Corps Reserve Forces in South West Asia</u>, p. 37-38
[73] According to some planning documents the GFC should set an "Authorized Allowance" (A/A) of equipment for a particular operation. This level could be more or less that a unit's T/E. In practice, the A/As were usually the T/E.
[74] Interview #168
[75] IRBE is equipment left behind when units deploy, typically to fall in on MPF equipment, and this is to be redistributed within the GFC. RBE is equipment left over after any internal redistributions and that is then reported to Logistics Command as available for global war reserves.
[76] MARFORRES G-4 staff comments, with concurrence from I MEF G-4
[77] Interview #114

and bringing some of their own.[78]

- MPF provided a great deal of support to reserve units. Both reserve tank companies fell in on MPF equipment, and 6th ESB, 6th MT, and 4th MedBn all reported receiving some equipment and/or consumables from MPF stores. However, because reserve units were generally later arrivals, most MPF equipment went to earlier arriving active duty units. Thus, MPF equipment could not make up most reserve TE shortfalls.

- When the GFC asked for support from the War Reserves, the War Reserves Program was able to supply only a portion of 15 out of 53 mission critical TAMs identified[79].

- The notion of "war reserve equipment" maybe somewhat misleading. The term conjures up images of back lots at Albany, NY, or Barstow filled with equipment ready to be issued when conflict breaks out. In fact, for most categories of equipment, the items exist, not in long-term storage, but somewhere in the system—prepositioned stocks, RBE, depots, maintenance floats—but may not be easy to access.[80]

- The inaccurate reporting by SMCR units of on-hand quantities of various items combined with incompatible logistics systems used by the War Reserves Program and MARFORRES contributed to the problem. When MARFORRES tried to compare the various reporting mechanisms in November 2002, they could only reconcile 42% of the items reported. MARFORRES is investigating this issue in greater depth.

- The extent of equipment shortfall was a surprise to some elements of the MEF. According to one senior logistics officer, LM2 reports for reserve units show T/E numbers, which misled them into thinking that all reserve units had their full T/E. Although the MEF and MARCENT G-4s knew the actual status of reserve equipment, some GFC commanders and staff expected reserve units to show up with their full T/E. When reserve units arrived with only their T/A,[81] equipment had to be redistributed or employment plans changed.

- The GFC was unable to establish equipment requirements (Authorized Allowances) for most reserve units.[82]

The MARFORRES and MarForLant staffs believe that existing doctrine and planning processes are valid but that the deployed GFC did not execute properly. The staffs suggested that higher authorities "make the GFC do its job."[83]

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[78] Interview #175

[79] MARFORRES G4 Information Paper dated 6/25/03 "Issues Related to the Sourcing of Equipment deficiencies for Activated SMCR Units"

[80] Input from MARFORRES G-4 and others

[81] Interview #163

[82] Conference with MarForRes staff, 7 Aug 2003; interviews with MarForLant staff, 15 Aug 2003

[83] Conference with MarForRes staff, 7 Aug 2003; interviews with MarForLant staff, 15 Aug 2003

Non-deployed GFCs were able to identify requirements and remedy shortfalls more easily.

Equipment issues also arose when Authorized Equipment Allowances were either in excess of normal unit T/Es or contained equipment that was different from what was in the T/E. The GFC is expected to make up this shortfall as well. According to current policy, the shortfall is to be made up from GFC stocks and then from War Reserves.[84] Filling this A/A shortfall however, encountered the same problems and lack of success as bringing units up to T/E.

Some missions were affected by lack of equipment.

- Because Marine Corps MPs did not have all their T/E, especially vehicles, they were assigned to EPW operations, while the Army MP battalion was assigned convoy security. The training focus of these units would have reversed the roles.[85]

- Company D, 4th Recon Battalion, which was attached to 1st Recon Battalion, could perform only a limited number of its missions due to its lack of equipment. 1st Recon battalion's A/A had been heavily reinforced with vehicles and heavy weapons to accommodate the theater conditions and expected mission. Company D, 4th Recon was only partially reinforced by 4th MarDiv and/or MARFORRES, and received only marginally more equipment from 1st Recon upon its arrival in theater.

- The 3/23 and 2/25, both being utilized in stabilization operations, were initially severely short of mobility assets to support the dispersed nature of the operations. Initially, they had only one HMMWV for a company operating across an entire town/city. This was inadequate for the task assigned.

Flow of Equipment versus Flow of Personnel.

Many of the complaints regarding not having enough gear stem from the fact that the equipment earmarked for many of the reserve units just did not arrive in theater in time. This was primarily a problem for rolling stock but also affected other equipment and consumables.

- The 6th ESB never received the consumable supplies shipped for its use by 7th ESB.
- Many of the HMMWVs provided to D Co, 4th Recon, did not arrive in theater until after combat operations had begun.
- Mobility assets for 2/25 and 3/23 were to be supplied from I MEF assets coming into theater, but were not available when combat operations began.

A quick review would seem to indicate that some of the equipment shortfalls noted by reserve units were really related to inadequate time for the strategic lift to get the equipment to theater.

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[84] Interview #114
[85] Interview #114

Comments on equipment issues in specific units.

4th Medical Bn. The AMAL for 4th Medical Bn, which they were supposed to receive upon arrival in-theater, was reported to have been taken by another unit before the battalion's arrival. The battalion had only its training AMAL during the initial weeks in theater, and had to scrounge for supplies from what was left in the MedLog. Additionally, many last minute joins from Navy REDCOM did not come with any field uniforms or 782 gear and were unprepared for field duty. This exacerbated the existing problem where not enough field/desert gear was available to equip the Marines and sailors already with the battalion.

D Company, 4th Recon Bn. Deployed to the desert without much of the increased equipment allowance being supplied to 1st Recon battalion to whom D, 4th Recon was attached. 1st Recon had been developing a new T/E and tactics in response to its assigned mission for five months prior to combat operations. Upon mobilization, D Company received some HMMWVs from 14th Marines to augment its T/E, and some more from 1st MarDiv when it arrived in theater, but the amount was insufficient for the unit to be fully mission capable according to the 1st Recon battalion commander.

4th LAR Bn. The Battalion complained that it did not have the new EPLARs or Blue Force Trackers that its active duty counterparts had. Not having these communications assets meant not having complete compatibility with the adjacent and higher commands. According to 4th LAR, the EPLARs were available within the 4th MarDiv as early as September 2002. However, the existing distribution plan, which was equipping other units first, was not changed because HHQ believed the GFC would provide the equipment to LAR. Unfortunately, as discussed earlier, the GFC did not have the equipment available in sufficient quantities to adequately equip the reserve forces joining its ranks.

Compatibility of equipment.

Although this has been another perennial problem with reserve units—having older equipment than the active duty forces—it was not a big problem in OIF. With a few exceptions—notably new communications gear—reserve units had the same equipment as the active duty forces. This is a tribute to an acquisition policy that equips active duty and reserve units at the same time; reserve units no longer simply receive cast off equipment from the active forces. Reserve units have excellent equipment and, importantly, the equipment was almost completely interoperable with that of the active forces.

Communications Equipment.

Communications gear was a major issue for every reserve unit interviewed, with the exception of the C-130 squadrons. The complaints were not having enough radios and, to a smaller extent, not having the latest communications gear.

- The 6ESB, 6MT, 4th MedBn, 2/23, 3/23,and 2/25 all complained about not having enough radios to support their widely dispersed operations, especially the many convoy

operations conducted. Convoys as large as 100-150 vehicles had only two or three military radios for long-range communications and virtually no capability for intra-convoy communications. Intra-convoy communications is needed because a 100-vehicle convoy can cover 2 to 3 miles from head to tail. These units also did not have any of the new PIR radios designed for small unit squad/platoon level communications and recently fielded to many of the active duty units. As a result, these reserve units had bought civilian Motorola, or similar style short-range, hand-held radios for intra-unit and intra-convoy communications.

- Iridium phones were a point of contention. Reserve units did not have Iridium phones as part of their T/A prior to activation and, once in theater, stated that they did not receive an equitable allotment of Iridiums in relation to the number of phones the active duty units had been issued.

CTAP Gear.

Every reserve unit complained of not having enough CTAP desert gear/clothing to issue to Marines before deploying overseas. The most common sizes of boots, camies, and covers were what the units complained of not getting enough: size medium uniforms and covers, and size 9-11 boots. Other items such as helmet covers, pack covers, flak covers, and flak vest SAPI plates were also reported as being in short supply prior to deployment.

Every unit reported they had to borrow or obtain gear from other services and/or from non-deploying Marine units, in order to make up for the shortage. Even with that assistance, all units reported that at least some Marines, as many as 75% in one unit, ended up purchasing at least one item of CTAP gear from a civilian source in order to properly outfit themselves for operations in theater.

All units eventually received sufficient CTAP gear to provide the basic requirements for the Marines, though sometimes the gear arrived just before the war began.

The inaccurate reporting of on-hand quantities of some items of equipment held by SMCR units may have contributed to this problem, as it appears to have contributed to the difficulties in closing the T/E and T/A gap. MARFORRES believed that the system for providing CTAP issue "worked reasonably well for the vast majority of deployed reservists. Safety nets were in place on both coasts and in theater to catch 'leakers'." Problems may have been "self-inflicted … by units 'by-passing' required deployment stages in their movement."[86]

RECOMMENDATIONS

- Review and improve the process for bringing activated SMCR units up to their T/Es and A/As. Given MARFORRES' familiarity with SMCR T/Es and T/As and its considerable work thus far on what happened and why,[87] it may be more effective for MARFORRES to

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[86] MARFORRES G-3 Staff input, e-mail, October 03, 2003
[87] MARFORRES G-4 Information Paper, dated 6/25/03, "Issues related to the Sourcing of Equipment from Deficiencies for Activated SMCR Units."

have a role post-mobilization, rather than putting the entire burden on the GFC, which may be located half a world away. Although the GFC will always have to specify the requirement, MARFORRES may be able to help with the CONUS coordination involved in identifying shortfalls, locating equipment, and shipping equipment to the unit.

- Clarify command responsibilities—MARFORRES, MFLant, Marine Component Command (when different), GFC—especially in situations where the GFC has already deployed.

- Exercise Force FDP&E procedures more extensively in peacetime so all organizations and personnel are familiar with their roles.

- Begin filling—not just planning to fill—the shortfall between T/A and T/E or A/A as soon as Report for Planning notices are published.

- Review unit after action reports, with specific attention to communications gear, to determine the appropriate T/E for all units.

- Increase the amount of gear held in CTAP, and review the table of standard sizes to determine whether it fits the Marine Corps profile.

- Revisit the idea of career issue, where a Marine would be issued his entire allowance for the duration of his career. This could minimize the problems associated with CTAP, particularly with the USMC's move to the new digital camouflage utilities.

- Encourage liaison between reserve units and GFCs during the "report for planning" period.

PROVIDE

7. Mobilization process. Was the process effective and efficient?

CONCLUSION. The Marine Corps Reserve is getting good at mobilization. For those institutions that pay attention, practice makes them, if not perfect, at least better.

In OIF, units rapidly passed through the mobilization process. Pay administration, general administrative matters, and I-I integration were success stories, and were great improvements over ODS. However, the processes for issuing orders and active duty ID cards to SMCR Marines need improvement. Additionally, there were significant problems related to the mobilization of Navy personnel.

DISCUSSION. The Marine Corps Reserve mobilized 48% of its SMCR/IMA forces.[88] This mobilization confirmed the improvement since ODS in many mobilization areas, and also identified certain weaknesses that only a large-scale event can trigger (e.g., taxing the administrative and logistical systems required to in-process thousands of Marines and then get these Marines and their equipment from their RTCs to where they were needed in support of combat operations). This section describes the results of how the Marine Corps Reserve performed in mobilizing for OIF.

Pre-Mobilization issues. From the interviews, it was evident that in the months before mobilization almost every unit shifted its emphasis from administrative/garrison training to mission related training and rehearsals in the areas of NBC, personal admin, medical, legal, and continued MOS proficiency. While there was a migration in training emphasis, training tempo was generally not increased due to uncertainty about mobilization. In general, units did not want to use up all their fiscal year training days (i.e., drill days) in case there was no mobilization.

Notification. The surveys and interviews indicate that most units used and relied upon informal "Warning Orders" or unofficial "heads up" calls regarding the unit's impending mobilization. This informal notification was very important; official notifications came much later. The most common type of informal notification was a phone call from higher headquarters approximately seven to ten days before formal notification. A few units said that they had no idea that they were going to be mobilized until formal notification came down.[89]

Formal notification came via naval messages, and was generally received by units three to five days prior to the mobilization date. Those units that had less than three days of formal notification indicated they needed more time.

Of the Marines surveyed, 67% said they had enough time before they had to report for mobilization in which to get their personal affairs in order. For those stating a need for more time, the average time they believed they needed was nine days; the most common response was

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[88] See table in Section II, Background.

[89] There is no statutory requirement for notification. 10 USC 12301(e) says reporting "shall be determined by the Secretary concerned based upon mobility requirements at that time." DoD policy was to give reservists 30 days notice, later reduced to 15 days, but even this could be waived.

six days. The General Accounting Office has proposed that "the Secretary of Defense take the necessary corrective actions towards fuller compliance with the goal [of giving 30 days notice]."[90] For the Marine Corps reserve this is clearly unnecessary and would greatly slow down the mobilization process.

Additionally, units stated that <u>week</u> days were most valuable in addressing personal business; <u>weekend</u> days were of much less assistance.

Not all units received timely Warning Orders. This caused those units significant difficulties. One unit noted that from watching world events it recognized the numerous signs that it would likely be mobilized. When the round of Warning Orders went out, it was not among those alerted. Two weeks later, however, this unit was informed that it too would be mobilized on the same day as the other units who had received earlier notice. As a result, this unit, a very equipment intensive one, was forced to report in and have its gear packed in just five days, two of which were weekend days. As the CO of that unit stated, "That there was to be a mobilization was a secret to no one but the units to be mobilized."[91]

That said, it is imperative that units pay attention to the world situation and increase their preparedness for deployment. Doing so can mean the difference between a unit that is prepared to mobilize on very short notice, and one that is not. As one I-I noted, "You must lean forward. As soon as the war drums start beating, the I-I has to start preparing for mobilization. [Higher headquarters] helped us lean forward but [the I-I] is the one on the spot."[92]

Leaning forward does entail some risk. For example, three units took what they believed was a significant gamble on mobilization following an informal waring; in response to that call, they spent most of their staffs' drills and a good portion of their operating funds by mid-January to accomplish critical tasks.[93] Additionally, one of those units also "front loaded" several Marines' annual training to provide even more pre-mobilization assistance to the unit.[94] The gamble paid off because these units were mobilized.

If these units had not later been mobilized, they would have had difficulty maintaining a drill schedule for the remaining nine months of the fiscal year. To address this issue, they recommended a contingency budget of funds and drills that a unit would receive after a mobilization Warning Order was issued. The unit would then know what it could "spend" to prepare for the mobilization without risking its future if mobilization did not occur.[95] Alternatively, MARFORRES should be ready to provide some help to units that "lean forward" but are never activated.

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[90] <u>DoD Action Needed to Improve the Efficiency of Mobilizations for Reserve Forces</u>, General Accounting Office, August 2003, p.18
[91] Interview #74
[92] Interviews #113 and #112
[93] Interviews #61; #169, and #90
[94] Interview #90
[95] Interview #46
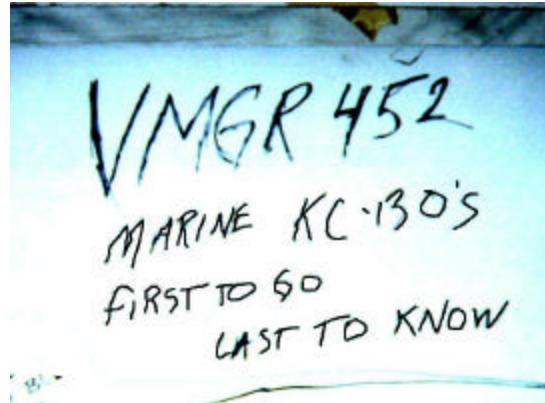
VMGR-452 (Reserve C-130s out of Stewart Air National Guard Base in Newburgh, New York) leaves a message at Al Udeid AFB, Qatar.

Pay. Pay administration for mobilized Marines improved significantly. In ODS, active duty and reserve Marines had separate pay systems (JUMPS and REMMPS, respectively).

> *The transition from REMMPS (the reserve manpower and pay system) to JUMPS (the active duty manpower and pay system) was almost a universal complaint among reservists. One reserve commander observed, "There are some real, absolute, horror stories." Pay problems were a major distraction and source of dissatisfaction for many reservists.[96]*

Since ODS, the Active Duty and Reserve pay systems have been unified. Now all Marines use JUMPS. As a result, pay related complaints were cut in half; the number of Marines reporting a pay related complaint dropped from 42% in ODS to 20% in OIF.

Marines Reporting Pay Problems

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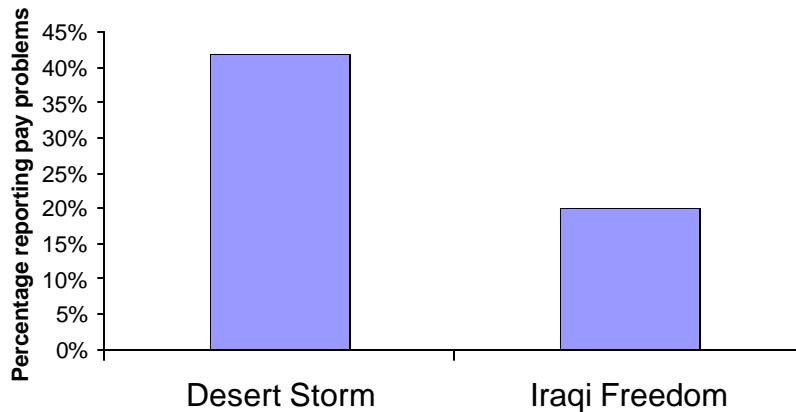
[96] Marine Corps Reserve Forces in Southwest Asia, Battle Assessment Team, LtCol Mark F. Cancian, 1991, p.26.

Mobilized Marines still had pay problems. According to those units interviewed, the most prevalent pay problems related to receiving appropriate entitlements such as per diem or BAH. The surveys showed that it took an average of seven weeks to rectify pay problems—an unacceptably long time.

Fortunately, units rarely experienced difficulties getting their Marines into JUMPS. The great majority of the 20% of Marines reporting pay problems, therefore, were at least receiving their base pay. In fact, only one Marine surveyed reported a pay problem in which it took longer than four weeks to receive any Marine Corps pay. [97]

Still, for those Marines not receiving the pay they rated, this situation could present a considerable challenge. Marines who had carefully planned how they could transition to life on military pay had counted on receiving their full pay and allowances. Since entitlements make up a large percentage of total pay (especially for junior enlisted Marines), problems receiving entitlements created significant difficulties for some Marines. [98]

Because pay related issues are such important ones, more commanders should be aware that there is a method to "force" the system to pay a Marine. If the commanding officer submits a NAVMC 11116 (otherwise known as a "Quad 6"), payment to the Marine can generally be issued within three days. No Marine should have to wait a month or more to receive all the pay he or she is entitled to.

An additional pay related problem was the billeting and messing arrangements at the RTCs during the mobilization. Due to the lack of contracts between many RTCs and local hotels, the burden usually fell on the individual Marine to pay for billeting and to then submit a travel claim. Any delays in the liquidation of these travel claims meant that Marines were left to carry significant charges on their own credit cards. Most Marines who had experienced this problem reported that they would have preferred a system whereby the hotel would directly bill the Marine Corps.

Administrative Support in Theater.   Because mobilization is administratively intensive, administrative structures and processes are particularly important to reserve units. Having administrative personnel attempt to support remotely from Camp Pendleton or Camp Lejeune did not provide the level of support needed by mobilized Marines.

When units passed through Camp Pendleton or Camp Lejeune, many were instructed to leave their admin Marines at the local Division Personnel Admin Center (DPAC). The DPACs took the mobilized units' admin Marines and divided them among their sections to work as admin Marines in general support of the division; thus, the admin Marines from a particular battalion were not kept together as a cell to work on the admin issues of their battalion. [99] Units

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[97] "After six weeks I finally began receiving base pay. My per diem was not resolved for two more months." Survey comment.

[98] One illustrative story was that of one Marine's wife who had to move in with her parents because his Marine Corps pay problems made their New York City apartment unaffordable. Since her parents' home was not in New York City, and her job with the city required her to reside within the city limits, her husband's pay problems resulted in her losing her job as well as their home.

[99] Interview #129

in theater then had to rely on "long distance" admin support; 1stSgt's had to call, fax, or email their admin requests to their respective DPAC in CONUS. The units complained that there was no specific POC at the DPACs regarding the problems for their unit. Problems were allowed to linger for weeks with no observable progress,[100] and with the 1st Sgt's having no idea who was responsible for taking action. As noted earlier, pay problems took an average of seven weeks to resolve. Units believed 1stSgt's would demand and receive better admin support from their own battalion admin chiefs.

One unit proposed, as a possible alternative, assigning the unit's admin personnel to the battalion/squadron RTC instead of to the DPAC. They believed that it would be just as easy for 1stSgt's to phone, email, and/or fax admin concerns to their RTC, as it was to phone, email or fax them to the DPAC. This would ensure the unit's admin problems were sent to Marines who all knew reserve admin, who knew the Marines involved, and who were also in the same battalion as the 1stSgt requesting the admin assistance.

Further, reserve administrative personnel believed that since most GFC's do not understand reserve admin very well, a reserve admin shop/detachment should be established in theater so that reserve Marines would have a local and responsive place to have their particular admin issues addressed.

Medical. Fewer than 2% had disqualifying medical problems (including temporary conditions)[101]. This is in sharp contrast to the experience during the Korean mobilization where medical problems were a significant source of attrition. In that conflict, about 12% of all reservists were sent home for physical reasons.[102]

Of the units surveyed, approx 90% did lose at least one Marine during medical screening. Even though many experienced a loss, the losses were usually not significant in number. The average loss was approximately three Marines per company-sized unit. The highest reported loss was fifty at a battalion size unit, but the great majority of those were Marines already pending a medical board before the mobilization. According to that unit, the decision was made by its HHQ to mobilize every Marine and take them to the ILOC. Not only would that improve the unit's numbers reporting for mobilization, these personnel could perform administrative functions and free up other Marines to train.[103]

A key problem identified by almost every unit reporting a medical loss was that Marines who were deemed non-deployable during the medical screening but who later became fit for deployment rarely rejoined the unit.

The surveys noted that there was confusion relating to documentation in medical records such as shots a Marine had received (especially anthrax and smallpox). Marines reported that

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[100] An appropriate example is contained in the previous section on pay; it took an average of seven weeks to rectify a pay related complaint.
[101] Input from MarForRes/MMAT.
[102] Mobilization of the Marine Corps Reserve In the Korean Conflict 1950-1951, Historical Branch, HQMC, 1967, p.38
[103] Interview #46

due to inadequate documentation (or documentation that was not forwarded with the unit), they received the same injections at Camp Pendleton that they had received only days before at their RTCs.

Medical personnel report there is an on line records system that could be used to track such records as immunizations. The system, SAMS, has fields for information such as physical examination dates, immunizations, audiology, optometry (exam dates as well as eyeglass prescriptions), allergies, laboratory data, various monitoring programs, etc. SAMS appears to provide an excellent source of medical information on each Marine that should prevent problems such as duplicate shots. While it does not have specific medical information or notes from each visit, it can provide the basis for a Marine's skeleton record when deployed. Unfortunately, because SAMS is not widely used within the Navy, the information on each Marine is not deemed complete or reliable.[104]

Another medical issue during mobilization was the lack of access to physicians at many RTCs. Many units had to improvise in this area to address medical issues. One unit had no physician available at the RTC. When it arrived at the ILOC and conducted a medical screening, two Marines were found unfit for duty and sent back to the RTC to be demobilized.[105]

Dental. As part of mobilization SMCR units need to screen Marines for dental condition. However, lack of access to dental facilities and services (not the quality of care) has been consistently criticized. Unlike with medical doctors, battalions do not rate dentists on their T/Os and so rarely receive dental support at the RTCs.

In order to improve the dental readiness of reservists, the Tri-Care Selected Reserve Dental Program was launched several years ago. This program provides low cost (through a government subsidy of the premium) dental coverage for all SMCR Marines. With this low cost (less than $8.00 per month) coverage available, there is no reason for an SMCR Marine not to have the annual examinations and the occasional dental work mandated by the Navy to maintain a high state of dental readiness. Unfortunately many Marines remain unaware of this coverage, and participation in this plan is not a requirement. As a result, some Marines need substantial dental work at the ILOC in order for them to be deployable.

Waiver policy. The waiver process continues to improve and was a success in OIF. The policy was not subject to manipulation, few reservists were lost to their units, and most actions were resolved very quickly. Only .4% of Marines in SMCR units requested a DD&E from mobilization.[106] Even including the IRR, the number requesting a DD&E was only 1.8%.[107] MARFORRES granted about one half of the DD&E's requested.[108] In comparison, during the

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[104] The information on SAMS was provided by the medical records department at the Naval Medical Clinic, Quantico, VA.
[105] Interview #67
[106] Numbers provided by the MARFORRES G-7
[107] Numbers provided by the MARFORRES G-7
[108] Numbers provided by the MARFORRES G-7

mobilization for the Korean War, 13 ½% of Marines requested waivers and 94% of those were approved.[109]

The majority of units interviewed had at least one Marine inquire about a DD&E. In many cases, a Marine would ask about his particular case, and when it was explained what types of requests were valid, the inquiry stopped right there.

As for formal DD&E requests, the highest reported number of requests for any battalion-sized unit was 20.[110] Many units had no requests. Units identified the following as reasons given for DD&E's: a personal or familial medical condition, pregnancy, school, EAS, family hardship, financial hardship, or that a Marine was declaring himself a conscientious objector.

On the negative side, some units were confused regarding the precise procedure to follow once a Marine initiated a DD&E request. At the unit level, there appeared to be some confusion and conflicting word regarding exactly where the Marine and his or her package were to go, and who was to have what discretion regarding the granting of a DD&E.

According to the MARFORRES G-7, the force order on DD&Es is currently being rewritten to make it clear that when a Marine requests a DD&E, the first commander in that Marine's chain of command with NJP authority is to forward the request *directly* to MARFORRES. MARFORRES will then immediately act on that request and provide a response to the unit within 24 to 48 hours. MARFORRES has structured the process in this manner (i.e. cutting out the intervening levels of command) to better enable the rapid reply so important to a mobilizing unit.[111]

Related to waivers was the Key Employee Program whereby employers may request to exempt key employees from mobilization. By policy, such exemptions are only allowed before mobilization, but the OSD allowed packages to be submitted after mobilization for OIF. Of the 17 requests pursuant to this program, 16 of them were granted. While this may appear to be a small number, it included half the identified Arabic speakers (i.e. three of six) in the IRR.[112]

Issues relating to reservists mobilized as part of a unit.

Selecting Detachments.   For the most part, entire units were mobilized. Only seven of the units interviewed reported that less than the entire unit was mobilized. In those cases, they universally sought volunteers (who were then screened and approved by the unit) to fill out the requirement. None of the involved units had difficulty filling all requirements from volunteers. Commanders believed that this approach produced a more motivated force, and reduced the administrative burden of addressing waiver/deferment requests, dealing with "problem" Marines in theater, etc.

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[109] Mobilization of the Marine Corps Reserve In the Korean Conflict 1950-1951, Historical Branch, HQMC, 1967, p.52-67

[110] Interview #82

[111] The MARFORRES G-7 reports that MARFORRES is aware of the need to keep the intermediate levels of command informed about DD&E requests and MARFORRES's decisions. When the new order is completed, it will outline the method for units to use to keep their HHQ informed of DD&E requests and MARFORRES's responses.

[112] Figures supplied by the MARFORRES G-7.

<u>Misc. Administrative in-processing</u>.

- Units spent an average of 10.7 days at the RTC,[113] although commanders reported that they were ready to move in four to five days. Eighty-two percent of Marines believed that their stay at the RTC was long enough.
- Units spent an average of 14 days at the SIA/ILOC. Most Marines (82%) believed this was <u>not</u> enough time.[114] See Section IV. 5, training section for additional discussion.
- Legal support/assistance during the mobilization has consistently received praise as being "excellent."

<u>Line 10s</u>. These are Marines pending discharge for failure to satisfactorily perform their monthly drill requirement. When the unit is mobilized, the unit attempts to contact these Marines to inform them of their obligation to report for mobilization. Typically, a number of these Marines actually do report for mobilization. They do so either because the letter they receive informs them that they can be considered UA or a deserter if they fail to report, or because they decide they want to mobilize with their unit and do their part for the war effort.[115]

The issue then becomes what to do with these "line 10" Marines. Some are "good" Marines who stopped drilling due to problems related to family, job, school, or personality conflicts with personnel at the RTC. Others are simply "bad apples" that a unit would do well to leave behind.

In OIF, many units took at least one "line 10" Marine. The overall performance of these Marines was good. In fact, units interviewed reported only two "line 10" Marines committed any actions resulting in non-judicial punishment.

Units taking "line 10" Marines stated that a screening process or interview was crucial before deciding to take particular "line 10" Marine. Units did not deploy with those Marines they believed would be a drain on the unit; they simply left those Marines at the RTC and permitted their discharge packages to proceed. With an appropriate case-by-case review, units believed they were able to "weed out" the truly poor performers from those that could still contribute to the unit.

In contrast, the one unit that had a poor experience with its "line 10s" had taken them all without screening. That unit had been informed by its HHQ that its numbers needed to be as high as possible. It was told, in effect, to mobilize and take everyone it could, including <u>all</u> "line 10s." Certain "line 10" Marines proved to be an administrative burden on the unit. The commander stated that up to 50% of some of his days was occupied by these Marines and their problems. They were involved in disciplinary problems, caused congressional inquiries, and

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[113] According to survey data.

[114] According to survey data.

[115] Because these Marines do not count in the total number expected to report in, when any "line 10" Marines do report in, it is actually a "bonus" for that unit; thus, a unit can report that more than 100% of its compliment were mobilized.

overall drained far more from the unit than they contributed. As a result, that unit concluded that "line 10s" were generally not worth the effort.[116]

When comparing the overall results achieved by those units that could select which "line 10s" to take, and what happened to the unit that could not do so, the answer appears to be that "line 10s" can be successfully mobilized with their units. In order for this to work, however, the command must be given the latitude to consider the case of each "line 10" individually, and to decide whether or not to deploy that Marine.

Pay Group F Marines. These are Marines who have not completed MCT and their initial MOS school, otherwise known as their IADT. Current and longstanding policy is that a Marine cannot deploy for war until he or she has been basically trained. **Virtually every unit interviewed stated that upon completion of their IADT, Marines should be sent forward to join/rejoin their units. This did not happen.**

Of all the units interviewed, there were only two that had mobilized Marines complete their IADT, and then rejoin the unit. The units that did, 1st Bn, 25th Mar, and 2d Bn, 25th Mar, were both mobilized and deployed to Camp Lejeune.   When 2d Bn, 25th Mar mobilized in January 2002, it sent any Marines needing to complete MCT or their MOS schools to attend those schools. Upon completion of the requisite schools, those Marines rejoined the battalion. The following January, when 1st Bn, 25th Mar was mobilized, it spent almost five months at Camp Lejeune before being deployed to Okinawa. In that time, it was able to send two groups of Marines through their required IADT, and have them rejoin the unit.

Interestingly, 2d Bn, 23d Mar, which had been mobilized and deployed to Camp Pendleton for most of 2002, did not have the same experience. When it mobilized in January 2002, Marines needing to complete IADT were sent to the appropriate school. Without concurrence from the battalion, upon graduation, those Marines were given the option of staying on active duty and rejoining their units, or returning to their RTCs as a drilling reservist. They all chose to return to their RTCs and drill. It was only when the unit was extended on active duty in January 2003 that those Marines were mobilized to rejoin their companies.[117]

The interviewed units universally stated that the Pay Group F Marines were needed by their units more than they were needed at their RTCs on a drilling status. The units also believed that a new Marine would be far better off with his unit and serving full time in his MOS than in a drilling status with the handful of remain behind Marines and other new joins found at the RTC (especially since the RTC would also be operating with a reduced staff and training opportunities would likely be limited).

While there may be situations where Marines should not be sent forward to join their units (e.g. the unit has already been scheduled to demobilize), the presumption should be that all of these Pay Group F Marines will move forward to join/rejoin their units upon completion of their initial training. It should require some positive action by the unit or HHQ to keep Marines from moving forward to rejoin their units. Because no one knows how long a

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[116] Interview #46. See also "The Mobilization of 2d Battalion, 25th Marines", <u>Marine Corps Gazette</u>, April, 2003.
[117] Interview #38

war may last or what other contingencies may arise, the mechanism to move these Marines forward should be in place as soon as the first reserve unit is mobilized. In OIF, there was no such mechanism in place and it required significant action for any Marine to move forward to join a unit already in theater.

I-I integration. This was another success story. In ODS, regulations prevented members of the I-I staff from deploying with their units. This deprived reserve units of a pool of trained Marines familiar with the unit. After ODS it was clear that integrating members of the I-I staff into SMCR units during future mobilizations would be a key element in enhancing reserve unit performance.

The great majority of units reported that the system worked as intended? i.e. previously identified I-I staff members filled their pre-designated line numbers. Units stated unequivocally that the process went smoothly. On a few occasions, additional I-I staff members were mobilized to fill certain critical (but non-integrated) billets. Flexibility in the system allowed for such actions.

Only two units noted problems they considered significant regarding I-I staff integration.

- One unit stated it was pressured by its HHQ to take additional Marines that it did not believe it needed, while being denied permission to take several Marines who occupied HHQ billets that were site lined to this unit. The commander said he was therefore faced with taking several Marines he did not know and did not want or need, while leaving several Marines he did know and whose services he believed he needed.[118]

- The other unit reported that certain active duty I-I staff officers volunteered to mobilize to fill critical billets within the unit. Immediately upon the unit's arrival in theater, these officers left to work with other active duty units at the request of the GFC. Upon the completion of major operations, these officers did not return to assist with the redeployment; the GFC permitted those officers to return to CONUS. The unit did not believe that the manner in which these officers were mobilized and used by the GFC was in keeping with MARFORRES' intent when it instituted I-I integration. [119]

PWST. The PWST program was also generally a success. The majority of active duty site commanders were pleased with the PWST's ability to backfill behind the active duty staff as it deployed. Additionally, the mobilized PWST staff was able to assist with or take charge of many vital functions such as Family Readiness/Support, CACO support, and administration.

Another benefit of the PWST program is its ability to free-up additional assets to the active duty Corps. In the words of one reserve general officer, " the ability of the PWST's to be mobilized and take over site duties at the RTC allowed the active duty site staffs to be globally sourced and reassigned in critical MOSs and units."

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[118] Interview #69
[119] Interview #67

Seventy-seven percent of the mobilized PWST staffs reported that previous training was beneficial and relevant to their ability to accomplish their responsibilities. However, the PWSTs thought that more training in some key areas such as supply, administration, family support/readiness, and especially facilities management would have been useful.

To assist with the transfer of certain key areas of responsibility, the PWSTs were generally able to conduct a turnover with the I-I staff prior the their deployment. The turnover time on average was five days. According to 90% of surveyed PWST staffs, the amount of time they had for a turnover was considered sufficient. The 10% that believed they did not have a sufficient turnover had turnover times less than three days.

Problem areas identified during turnover were CMR account reconciliation, clearances, and administration experience. Only those units that experienced short turnover times recorded problem areas.

One important element that was managed by the PWSTs was the KVP. PWST's would assist the KVP with getting information out to family members about the unit and its Marines. The PWSTs would also provide educational material on military benefits to assist in integrating families into the Marine Corps community. In association with the KVP, the PWSTs developed newsletters and family days.

Having a sufficient number of Marines to assist in the PWST mission was not a problem. In addition to the PWST staff, there were often I-I staff and/or SMCR Marines remaining behind. The average number of Marines in total that were available to run RTCs was 10.

From the perspective of deployed units, the PWSTs also helped in the family support role by passing reliable information to family members. In fact, units interviewed that claimed to have had the best success in getting word to family members stated that the unit's Key Volunteer Coordinator and PWST had worked together to pass information and squelch rumors.

Those units that had the most successful relationships with their PWSTs had PWST staffs that were at the RTC from 0700 to 1700 during all workdays, and had a duty representative available by telephone at all other times. Furthermore, these PWSTs were proactive in ensuring that word from the unit was being promptly and accurately disseminated through the KVP, and that only official word from the command was passed as "gospel."

It was suggested that, because the PWSTs were also in the family support role, the PWST's should have evening hours one or two days per week and have weekend hours as well to provide support for family members who cannot get to the RTC during the normal working day.

Only eight units interviewed complained about the effectiveness of and/or an inability to make consistent contact with the PWST staff at their RTC.[120] These units recommended that MARFORRES require someone from the PWST/SMCR/I-I staff at each RTC be available by

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[120] Interviews #46; #58, #106, #72, #73, and #71

telephone at all times. The deployed units were located many time zones from their RTCs and could not predict when they might be able to telephone. They added that while availability by cell phone might be acceptable, pagers were not. The units stated they might not be able to wait for a call back from a duty NCO, especially one not well versed in making an international call.

One unit was quite pointed in its criticism about the availability and support provided by its PWST staff:

> *The PWST is incompetent. There are five I-I staff and 5 PWST staff left at the HTC. They pass bum scoop, violate OpSec, and don't follow up. No one watches them; they aren't there 40 hrs/wk. They seem to be there 1000 to 1200 and 1400 to 1600, generally, but sometimes they are there at other times.[121]*

Usefulness of mobilization plans. According to the units interviewed, mobilization plans were useful to the extent they provided specific information regarding the embarkation of the unit's gear and the makeup of the unit's mobilization stations for the administrative in-processing at the RTC. Additional items that were often useful were various checklists particular to loading out the unit's Marines and equipment.

Beyond providing specifics regarding those topics, the remainder of the unit MPLAN simply needed to be a framework for the process necessary to address the "who," "how," and "when" aspect of the mobilization. This was because of the uncertain nature of the contents and specifics of mobilization orders. For example, in almost all cases, the MPLAN, operation plan, and TPFDD were conflicting. When inconsistent orders from HHQ were added to the mix, it produced not only a lot of frustration, but in "tossing out" large portions of the unit's MPLAN.

Orders. The process for providing orders to Marines in SMCR units had serious deficiencies. While some units had no difficulty with orders,[122] many others did not have orders ready prior to the report date, or even available on the report date. Marines surveyed reported that only 55% had received their orders before the date they were to report for mobilization. By contrast, 91% of individual augmentees had orders before reporting for activation.[123]

In the words of one commanding officer, "The orders system is messed up. . . . Some Marines went to Camp Lejeune without orders and waited several weeks for them."[124] One unit estimated that up to 40% of its Marines arrived in SWA without any orders.[125]

It should be noted that 45% of those reporting for mobilization did not receive orders prior to the day they were instructed to report. With a reporting rate of 99% for those in SMCR units,[126] it is clear that a lack of orders did not prevent Marines from reporting as directed. Indeed, it is a tribute to reserve Marines that they were willing to report aboard based only on a

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[121] Interview #47
[122] Interview #51 and #58
[123] From survey data. Survey asked whether Marine had received orders. Orders may have been cut in some cases, but not delivered to the Marine.
[124] Interview #46
[125] Interview #37
[126] According to MRF G-7.

phone call. The lack of orders did, however, prevent Marines from taking care of some of their personal affairs; many persons and institutions require official copies of orders before taking action (e.g. banks or other creditors for interest rate reductions, landlords when a Marine wants to terminate a lease, employers regarding reemployment rights, schools regarding withdrawals and tuition rebates, etc.)

Two units commented that their orders writing was interrupted more than once during their mobilization because the ROWS had inadequate funding attributed to the unit. As orders were cut, ROWS monitored the funding, so when that money ran out, no more orders could be written until more money was allocated. Such a delay caused inconvenience and frustration at a time when few had patience for either.[127] One observer noted that "ROWS is designed to ensure fiscal accountability in peacetime . . . and may require some modification to support the mobilization process more effectively."[128]

ID cards. Producing ID cards created a mobilization bottleneck for SMCR units. Each ID card can take between 10 and 30 minutes to produce due to the way in which the ID card machine must first send the data to and then receive approval from the Defense Enrollment Eligibility Reporting System/ Real-Time Automated Personnel Identification System (DEERS/RAPIDS) server in Auburn Hills, MI before it will print an ID card.[129] ID cards are also expensive to produce (reportedly more than $6.50 each).

Units found that the computer system was often overwhelmed by the process of producing their ID cards. For a 200 Marine unit it could take 35 to 70 hours of continuous work. Many units do not have the ability to produce ID cards on site so they lose even more time sending their Marines to a location that can produce them. An influx of so many Marines often overwhelms those sites and wastes more time. For any Marines getting extended beyond or recalled after the date on their original orders (e.g., 2d Bn, 23d Mar, and 2d Bn, 25th Mar), the Marines and their family members had to go through the process a second time because their active duty ID cards expired at the end of their initial period of active duty. **Something needs to be done to keep ID card bottlenecks from slowing mobilization and to reduce the burden on Marines and their families.**

There are several options for dealing with this problem:

1. Buy more ID card machines. This will require a significant expenditure to produce ID cards,[130] but it will likely assist in producing ID cards more rapidly. It must be remembered, however, that the DEERS/RAPIDS server's response time depends on the number of sites accessing it at any time, and the ID card machine must receive approval from DEERS/RAPIDS before it will print an ID card. Therefore, because of network limitations, simply doubling the

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[127] Interviews #46 and #74
[128] Comment from HQMC (Reserve Affairs)
[129] According to the Marine Corps liaison to the DMDC, the time involved in approval depends on the number of sites accessing the DEERS/RAPIDS server at a particular time.
[130] Based on a unit cost of $6.50, that equates to a total cost of more than $136,000 to produce one ID card for each of the approximately 21,000 Marines mobilized for Operation Iraqi Freedom.

number of ID card machines will not necessarily halve the time it takes to produce a unit's ID cards.

2. Wait until technology catches up. DMDC personnel believe that, by approximately 2005, the technology included in the Common Access Cards should obviate the need to issue a new ID card when a Marine's status changes. In this case a DEERS/RAPIDS site will be able to enter that a Marine has been mobilized without the Marine having to be present.

3. Do not issue new ID cards or issue them later. When asked, virtually every unit stated that they had never really needed an active duty ID card; their reserve ID card and their orders were sufficient to address every situation they had encountered.[131] These Marines commented that they believed they had wasted many hours producing ID cards that no one had ever asked to actually see. The units interviewed believed the Marine Corps should consider the possibility of not issuing active duty ID cards in situations where it was difficult or burdensome to do so.

Entering information into DEERS/RAPIDS that a Marine is on active duty can be done independently of the Marine receiving a new ID card during mobilization.[132] Conceivably, a unit could provide a list of Marines to DEERS/RAPIDS personnel, and those Marines could all be "activated" remotely within DEERS/RAPIDS. This would permit a unit's Marines to perform other tasks related to mobilization instead of standing in a line for a new ID card. ID cards could be issued later, at the SIA/ILOC if necessary.[133]

Mobilization of attached Navy medical personnel. The good news was that units always got Corpsmen, eventually. Often, they even got their own Corpsmen. However, there was also a lot of bad news stemming from the fact that the Navy and Marine Corps have separate and incompatible mobilization systems. Virtually every unit with attached Navy personnel reported serious problems with their sailors' mobilization. Some descriptions of the Navy mobilization system are as follows:

- "Catastrophic"[134]
- "It was a nightmare mobilizing the corpsmen."[135]
- "…makes the French customs bureaucracy look like a well oiled machine…"[136]
- "I needed to fire red star clusters to get a Corpsman"[137]

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[131] Interview #75

[132] According to [Ms Mary Stroz], the DEERS program administrator for the Marine Corps.

[133] As far as DEERS is concerned, it is the DEERS database that proves the entitlement, not whether the Marine's or family member's ID card says "active duty" or "reserve." For medical benefits, patient information is crosschecked against DEERS; DEERS will verify whether the patient is eligible for services. Presently, reserve Marines mobilized in excess of 30 days are eligible to pay a fee to retain Tri-Care medical coverage for themselves and their families. This creates a situation where a Marine or family member has a reserve ID card yet rates military medical care. DEERS would confirm eligibility despite an ID card that would seem to indicate otherwise.

[134] Interview #171

[135] Interview #61

[136] Interview #118

[137] Interview #54

The Navy's mobilization system was incompatible with the Marine Corps'. Their information systems, for example, could not share information.[138] This incompatibility had three adverse effects on the Marine Corps for Corpsmen who drilled with SMCR units:

First, a Corpsman's mobilization generally began 10 to 14 days after that of his or her SMCR unit. Thus, Corpsmen were almost always late joining their units, sometimes racing to catch the plane, sometimes missing the movement. When Corpsmen were not able to travel into theater with their SMCR unit, their unit was usually assigned different Corpsmen, and the unit's Corpsmen would generally be reassigned elsewhere. This broke the bond between the Corpsmen and their SMCR units.

Second, without Corpsmen activated at the same time as or earlier than their SMCR unit, units had few Corpsmen available to assist with their mobilization. Units tried to solve this problem by bringing their Corpsmen in on drills (when available), having Corpsmen assist on their own time, or using volunteer retired Corpsmen. Some units had to manage their mobilizations with only the I-I Corpsmen. Regardless, when units did not have their Corpsmen, the entire mobilization process slowed down.[139]

Third, due to the later mobilizations and the extra time required for Corpsmen in-processing, Corpsmen were rarely available to support their unit while at the RTC or at the ILOC. This often made key elements of pre-deployment training (e.g., live fire training, conditioning hikes, unit PT, etc.) difficult or impossible to conduct.[140]

The system for controlling Corpsmen assignments was redesigned following ODS to better provide support to the SMCR. While the intent is there to preserve the bond between the Corpsmen and their SMCR units as much as possible, in practice, there were many instances where this did not occur. One of the main reasons is the Navy's focus on Naval Enlisted Classification (NEC) qualification more than unit integrity.

The perception of virtually every unit interviewed was that the Navy's mobilization process treated Corpsmen as if they were interchangeable. Every Marine unit interviewed that had Corpsmen wanted their Corpsmen with them when they went to combat. They stated that since their Corpsmen was eventually activated, and since the unit would eventually get Corpsmen, didn't it make sense to ensure that the Corpsmen deployed with the same SMCR units they drilled with?

- Two units interviewed noted that by the time their Corpsmen were mobilized and had completed their in-processing, the units had already departed for SWA. Before their departure, the units were assigned other Corpsmen who had completed their in-processing and were ready to deploy. One of these two units' original Corpsmen eventually arrived in theater but had been assigned to another unit in a nearby camp.

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[138] DoD Action Needed to Improve the Efficiency of Mobilizations for Reserve Forces, General Accounting Office, August 2003, p.29
[139] Interviews #67 and #74
[140] Interview #67

Their efforts to obtain their usual Corpsmen were all unsuccessful. This resulted in two units instead of one going to war with unfamiliar Corpsmen.[141]

- Another unit's Corpsmen were not mobilized until 2 ½ weeks after it left its RTC. The unit had to deploy to SWA without any of its Corpsmen. Its only medical support when it arrived in theater was a Marine who was a paramedic in civilian life. This unit eventually did get three of the nine Corpsmen who usually drilled with it. Unbeknownst to the unit, the other six Corpsmen arrived in theater and sat out the war in Camp Commando, Kuwait. The unit stated that when they found this out, they asked why their Corpsmen were not sent forward to rejoin them. Naval personnel told them that they did not send those Corpsmen forward because the Corpsmen did not have weapons. The unit stated that they had the Corpsmen's weapons and certainly would have taken the weapons to the rear and picked up the Corpsmen if that was all it took to get them.[142]

Discussions with Naval medical personnel indicate that the cause for many Corpsmen transfers is not having enough trained Corpsmen living and drilling in the right geographic areas. Many Corpsmen drill with Marine units they are not qualified to mobilize with, and other Corpsmen drill in billets that they know they will likely not fill upon mobilization.

In order to mobilize with many Marine Corps units, a Corpsman must have attended Field Medical Service School and obtained an 8404 NEC. Because there is often a shortage of qualified Corpsmen who live close enough to or are willing to drill with certain Marine units (e.g. infantry, recon, and artillery units), the Navy will permit a Corpsman who has not graduated from Field Medical Service School (i.e. a non-8404 Corpsman) to drill with those units. Such a measure is necessary to provide those units a Corpsman in peacetime to enable it to conduct field training. Additionally, certain Corpsmen with an 8404 NEC prefer to drill in a non-8404 billet, or with a Wing or FSSG unit that is already at 100% T/O for 8404s. Those Corpsmen who drill in a unit that is already at 100% T/O for 8404's are considered "In Assignment Processing" (IAPs). The Navy permits these IAPs because it enables them to retain an 8404 it will need upon mobilization and that it might otherwise lose.

Upon mobilization, Corpsmen who are not 8404s will be stripped from billets requiring that NEC. Furthermore, due to the overall shortage of 8404s, any 8404s filling other billets or who are IAPs will be transferred to fill 8404 billets. With this predictable shuffling of Corpsmen upon mobilization, many units will receive new Corpsmen "at the last minute." This is an unfortunate result of an attempt to ensure that only qualified Corpsmen fill each billet.

Because it is known that there will be a sizeable number of Corpsmen transfers upon mobilization simply due to preexisting NEC mismatches, every effort should be made to minimize avoidable Corpsmen transfers for other reasons, like delays in calling up Naval reservists, or allowing their in-processing to take longer than that of their SMCR unit.

All of these problems were magnified in a unit such as 4th Medical Battalion, which arguably had the worst experience because it had so many Navy Reservists. The Navy mobilization system proved much slower than the Marine Corps system. Because of the delays,

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[141] Interview #71
[142] Interview #62

4th Med Bn was not able to integrate effectively with the active duty forces or to participate fully in operations when it finally arrived in theater.

	Marine Reservists	Naval Reservists
Activation Order	5 March	14 March
Report to RTC	9 March	19-26 March
Arrive at ILOC	12 March	21-28 March, a few as late as mid-April

The 4th Med Bn had a number of 8404s who were IAPs. When the mobilization order came, those 8404 IAPs were stripped out and replaced with Program 32 (Fleet Hospital) Corpsmen and Program 46 (Naval Hospital) Corpsmen from elsewhere in the system (such as those stripped out from 8404 billets). Unfortunately, 4th Med Bn found that because these personnel had drilled with various non-field units, in almost every case these Program 32 and 46 Corpsmen had no field gear or understanding of field hospital operations. The result for 4th Med Bn (and every other similarly situated unit) was having numerous Corpsmen assigned to a unit they had never worked with before, in environments that were alien to them, and using field gear that was unfamiliar to them.

The Navy Reserve's inability to fill all the necessary 8404 drilling billets is beyond the control of the Marine Corps Reserve, so MARFORRES will have to accept that a certain amount of "last minute" personnel shifts are going to occur to get 8404s into those billets requiring them. Probably the best the Marine Corps Reserve can hope for is to eliminate as many non-NEC mismatch transfers as possible. Units found that if their Corpsmen did not deploy with them, they were unlikely to have their Corpsmen rejoin them in theater. Therefore, probably the best way to ensure the Corpsmen/SMCR unit bond is maintained is to synchronize the mobilizations of Corpsmen and their SMCR unit. This can be accomplished several ways:

- Obtain an agreement from the Navy Reserve that it will mobilize Corpsmen on the same time line as their SMCR unit, and deploy them into theater with their SMCR unit.
- Link up Corpsmen with their units in theater if some emergent situation during the mobilization delays them; or
- Use the active forces model whereby the Corpsmen "belong" to the Marine unit with which they serve (i.e., they are on the unit's T/O, and are under the authority of a Marine Corps Commanding Officer).

Either of these methods can produce the desired effect: that an SMCR unit's Corpsmen will go where their Marines go, and at the same time their Marines go.

RECOMMENDATIONS

- Mobilization Notification. Provide Warning Orders as early as possible to allow Marines at least six days to address their personal affairs. Continue to resist proposals that require 30 days notice without allowing the service some flexibility in implementation.
- Pay. Work to improve the pay system's ability to provide correct entitlements to all mobilized Marines. Ensure that all COs know about NAVMC 1116 payments.

- <u>Admin</u>. Allow reserve units to perform their own administration at the battalion/squadron RTC, with a small detachment brought forward into theater to assist as a unit cell at a consolidated reserve admin section. Because mobilization is so administration intensive, consider augmenting admin sections on mobilization.
- <u>Medical</u>. Provide better and more available documentation through use of SAMS or an equivalent system to track immunizations, physicals, prescriptions, etc. When mobilized Marines are held back because of medical reasons, send them forward to their units when they become fit for duty.
- <u>Dental</u>. Encourage greater use of dental insurance, such as the Tri-Care Selected Reserve Dental Program.
- <u>Waiver Policy</u>. Clarify the process regarding who has authority to decide what, and where the Marine goes once a DD&E request has been submitted.
- <u>Line 10s</u>. Grant the authority down to the company level to screen and determine which line 10 Marines to take and which to leave at the RTC.
- <u>Pay Group Fs</u>. Push them forward to join/rejoin their units immediately upon completing their IADT.
- <u>I-I Integration</u>. Continue the current policy.
- <u>PWSTs</u>. Ensure they are available by phone at all times when the unit is deployed, and that they have a continuous presence in the RTC during normal work hours with additional after hours availability as required to assist with family support.
- <u>Orders</u>. Improve ROWS' ability to generate orders for a large unit in a timely fashion.
- <u>ID Cards</u>. Change procedures so that ID card production is not a mobilization bottleneck.
- <u>Corpsmen</u>. Mobilize them on the same schedule as their SMCR unit. Keep them with their unit as much as possible. Develop mobilization information systems that can exchange information.

8. *Mobilization Processing Centers (MPCs) and Mobilization Support Battalions (MSBs). How effective was the mobilization process for individuals?*

CONCLUSION. The Marine Corps' three MPCs and two MSBs worked through many challenges to process the flow of individuals. The MSBs were able to quickly process hundreds of reservists for active duty on an average of only 4.5 days. However, this task was made more difficult by incompatible and inaccurate data systems and late execution. Organizational structure may have been excessive for the tasks actually assigned.

DISCUSSION

Individual reservists—Individual Ready Reservists (IRR) and IMAs—were processed for active duty at five MPCs located at Camp Pendleton, Camp Lejeune, Cherry Point and Miramar Marine Corps Air Bases, and Quantico.

The MPCs are embedded in the Reserve Support Unit (RSU) T/O and manned as needed depending on the level of mobilization directed by command authority. Anticipating mobilization after 9/11, the RSUs used their IMA Detachment personnel on drills to prepare the processing centers for mobilization, then their personnel reported under ADSW orders, and eventually a larger staff was formed with mobilization orders to bring adequate numbers of staff (enablers) aboard to operate these centers. In addition, certain Marine Corps Base IMA staff were activated to support base mobilization functions. HQMC mobilized enough enablers to process individual augmentees and an anticipated need for 10,000 combat replacements. The combat replacement estimate was later revised downwards. Between January and March, the MPCs processed about 3,800 mobilized Marines and sailors, including 600 combat replacements. Of the combat replacements, 400 were sent to theater, arriving just after major combat operations were declared at an end.

The MSBs East and West, at Camp Lejeune and Camp Pendleton respectively, were formed out of Reserve Support Units in February 2003 to handle combat replacements. MPC functions continued at both bases.

MPCs handle only mobilized individuals—IMAs and IRRs. IMAs were given orders by MCRSC on the request of the Operational Sponsor. MCRSC also cut orders for IRR Marines who volunteered for particular active duty assignments.

For Marines who were involuntarily recalled from the IRR, orders were generated via mailgrams. Initial mailgrams were issued on January 17th, 2003, with a report date of February 4th. Follow-on mailgrams were issued on February 13th and 14th with a report date of February 28th and third batch was sent out on February 25th with a March 12th report date. Out of 2,658 mailgrams that were sent, 2,211 Marines reported for duty, 299 mailgrams were either returned to MPP-60 or cancelled, 88 were exempted through the delay, deferment, and exemption program, 39 did not show up for duty and 21 had bad codes. Out of the 2,211 who did report,

estimates from the MPCs are that 50 to 90 percent of all records had incorrect addresses or other basic information. (MCRSC's data indicated that the number of incorrect addresses was only 12% to 20%.) These inaccurate records caused delays in finding individuals, and greatly increased the processing time, that is, the time it took to transfer from the IRR to the gaining force commander. A very lengthy process that included mailgrams, ROWS and naval message traffic had to be used to correct each set of orders. In the early stages of the mobilization, making one address change to one set of orders took several weeks.

IRRs and IMAs were initially ordered to one of thirty Initial Mobilization Processing Center (IMPCs), generally the one nearest their home. IMPCs were operated by Reserve personnel activated by MCRSC in January 2003. IMPCs screened reporting Marines for their ability to perform active duty and entered the reporting Marines into the MCMPS. Mobilized Marines were then sent forward to the MPCs/MSBs designated on their orders, usually within one or two days of reporting to the IMPC. The IMPCs provided them with airlines tickets or allowed transportation by private auto (POV).

MPCs/MSBs all complained of their inability to modify orders of reporting Marines and Sailors. Almost all orders had to be changed to reflect accurate reporting dates and current home addresses. Both of these changes affected pay. The MPCs had to request changes through the originator of the orders, so that even a simple change could take up to three weeks to accomplish. Finally they noted that orders were not uniformly written.

MPCs/MSB also complained that they never knew which Marines were supposed to report to their processing centers until the Marines actually arrived. This was due partially to the poor results of mobilizing the IRR through use of mailgrams. Once contacted, some IRRs requested a delay and were granted up to 28 days by MCRSC. The average delay was 7 to 14 days. These delays were not communicated to the MPCs/MSBs. On one occasion an MPC sent three buses to the airport, but no one arrived to use them. MPCs/MSB monitored Marine Corps Total Force System (MCTFS), MCMPS, and ROWS to determine who had been ordered to report to their processing station. Since none of these three systems communicate with one another, all three had to be accessed separately. The MPC/MSBs also contacted the IMPCs daily to confirm whom they had received and were forwarding to the MPCs/MSBs.

MPCs/MSBs observed that IMPCs forwarded almost all Marines despite obvious disqualifying issues such as medical problems and DD&E hardships. They further received some Marines who were mobilized on one coast and sent to the other coast, sometimes causing hardships on two working spouse families with dependents and on single spouse families.

MPCs/MSBs universally observed that, if they had had to process more than the 3,800 that came thru their centers, they would have been challenged to get larger numbers through their centers and forward them to their gaining commands within their four and a half day average. They are currently required to do so in seven to ten days.

They further observed that combat replacements should have been called up in time to be ready to move forward as soon as the line of departure was crossed instead of after the campaign was underway.

MSB East and West drew extensive resources from base facilities. Both Camp Pendleton and Camp Lejeune bases provided physical facilities for the MSB, transportation, medical, and dental screening facilities and personnel, and ranges for refresher training. Fiscal resources such as would purchase individual equipment for mobilizing Marines and sailors came from both MARFORRES and the local base. Camp Pendleton, for example, opted to buy more than $5.5 million worth of 782 gear and NBC equipment. This became especially important for Navy Corpsmen because they relied heavily on the MSBs to provide this gear once they mobilized and reported for duty.

RECOMMENDATIONS

- Activate the MPCs early enough so that they are up and running before the flow of mobilized reservists becomes heavy.

- Create one unified administrative system to mobilize Marines as recommended in Section IV. 9, Individual Augmentees, of this report.

- If combat replacements (now called "combat augmentees") will continue to be used in future conflicts, then continue to muster and communicate with IRR Marines to update personal data.

- Revise the MPLAN (now called the MAID-P) to fix the current shortcomings of the mobilization process described in this section. Provide MPCs/MSBs with increased funding during major combat operations so they are not a burden on their bases.

- Mobilization models used by HQMC should be reviewed in light of the limited numbers of combat replacements/augmentees called up for OIF. If combat replacements/augmentees are to be used, mobilize them in time to be processed, trained, and forwarded to affect operations.

- Consider reducing the number of MPCs. Miramar and Cherry Point processed very few Marines (about 360 and 190 respectively) and numbers for similar operations in the future are unlikely to be any larger. Both MCASs are only an hour drive from the Camp Pendleton and Camp Lejeune MSBs/MPCs. The structure of the IMA Detachments associated with these MPCs could be better served elsewhere. The authorized T/O of the RSUs at Camp Pendleton and Camp Lejeune should be adjusted to meet the anticipated flow through at their locations.

- Align the number of IMPCs with a better estimate of the number of IRR Marines to be mobilized. Give the IMPCs more authority to screen out unqualified reservists.
  - IMPCs are of little value except in times of large IRR mobilizations. They provided little support that the MPCs/MSBs could not provide. They were given no authority or medical capability to screen for Marines who were not qualified for active duty. Their input to MCMPS took 24 hours to effect. Many Marines were already at the MPCs/MSBs by the time they were noted in MCMPS as reporting to the IMPC.

9. *Individual Augmentees (IAs). Is the current process effective in matching individuals with requirements? Would it be better to use reservists only to backfill billets and to send active duty personnel forward? Is the process too slow for the new National Security Strategy?*

CONCLUSION. The process for matching reservists with augmentation requirements was uneven. Where reservists trained with active duty units for duty in specific billets, performance was excellent. Where reservists were globally sourced for service in unfamiliar organizations (especially on high level staffs where many reservists had little experience), their active duty leaders believed that the results were uneven. This led some observers to question whether reserve augmentees should be used for warfighting at all. While the main problem was training and experience in joint and high-level staff procedures, timeliness was also a problem.

      The three keys to success were:

          4. Individual skills matched to the type of billet and level of command
          5. Linkage between reservist and gaining command before the conflict
          6. Time to learn the specific job.

      The problem was not with the officers running the assignment system or with the officers being assigned. The problem was systemic – too many constraints.

      If the Marine Corps Reserve wants to continue to supply individuals to warfighting headquarters during combat operations, it must make significant changes to its global sourcing process for matching individuals with requirements.

DISCUSSION

      <u>The large and increasing demand for Individual Augmentees</u>. Individual augmentees (IAs) are defined as any temporarily attached member, deployed as an individual (vice as part of a unit or detachment) in a unit or organization that is not a part of their parent command."[143] OIF produced a great demand for augmentees. About 20% of the Marine Corps Reserve manpower contribution was individual augmentees.

      The first requirement for augmentees was to increase the manning level of active duty units. This included 500 augmentees to the MEF command element, mostly officers.

      Further, as the US warfighting approach has become more joint, new joint organizations, joint coordination cells and liaison elements must be staffed. At the time of OIF the Marine Corps was providing staffing for approximately 36 JTF-like organizations. This is a change from

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[143] This report uses the broad definition of "augmentee" described here. In other, more technical usages, an augmentee is distinguished from a liaison officer. An augmentee is an individual attached to another organization and becoming part of that organization—for example, a Marine working on the CFLCC staff. A liaison officer is someone sent from one organization to represent its interests at another organization, for example, a liaison officer from I MEF to CFLCC.

ODS where many OIF joint HQ did not exist – CFLCC and JTF Consequence Management, for example.

The Marine Corps lessons learned effort after the Afghanistan conflict noted a number of trends that will increase the need for individual augmentees:[144]

- "Joint warfare is…staff intensive."
- "More demanding liaison officer requirements should be anticipated for the future as coalition command structures become more complex."
- The Marine Corps was underrepresented on joint staffs.[145]

Finally, these demands for joint augmentation will continue to grow in the future as decision makers endeavor to make warfighting even more joint. The new national security strategy envisions that future operations will increasingly become based on shared information, on rapidly established joint organizations, on networked systems, and on widely distributed operations. The JCLL team from JFCOM cited joint integration and joint warfighting concepts as key factors in coalition successes, so the trend towards "jointness" and the resulting proliferation of coordination organizations will continue.

As jointness and joint organizations come to define US warfighting operations, then providing individual augmentees to these organizations and their service counterparts becomes a primary service activity in executing Title 10 responsibilities, on par with providing trained and equipped units.

The success. Commanders spoke highly of reservists who came from their own reserve units—IMA detachments or MACEs.

- I MEF, for example, called up its MACE and relied on them to fill most of the MEF CE augmentation billets. The MEF staff had the highest praise for the performance of these reservists. "We could not have done it without them."[146]
- The 3d MAW used a detachment of Marines from 4th MAW HQ as their liaison to the CAOC (Coalition Air Operations Center). This detachment was created to do this specific mission. Everyone was trained through schools and detachment classes, and then operated in this capacity during exercise Millennium Challenge. As a result they were well prepared for OIF. They had briefed the aviation generals in April 2002 on the concept for a JFACC liaison cell from 4th MAW. Then, as OIF developed, they sold this idea to CG 3d MAW, especially as a way to avoid having to identify augmentees from the Wing's own staff.
- FSSG/MLC. Two 4th FSSG Forward detachments successfully integrated into the FSSG and MLC overseas. The FSSG had included 4th FSSG Forward West in its

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[144] Bullets that follow are from Operation Enduring Freedom – Summary Report, Enduring Freedom Combat Assessment Team, 2002, p.70-75.

[145] MPP-60 disagrees with the assertion that the Marine Corps was underrepresented on joint staffs. MPP-60 stated that commonly, the percentage of billets for Marines on a joint staff exceeds the percentage of the joint command's forces that are Marines, thereby creating an overrepresentation of Marines on the staff.

[146] Interview #118. Also LtGen Conway's brief at Quantico.

planning for many months so the reserve detachment was able to step right into its wartime role. CG MLC interviewed each reservist to fit his military and civilian background to a job at the MLC.

- First Marine Division received many augmentees from the 4th Marine Division augmentation detachment west and put several into key staff positions.
- Many key staff officers were reservists: I MEF (Rear) Chief of Staff, CFLCC Deep Fires Chief (Fire Support Coordinator), I MEF (Rear) G-4A, II MEF G-4, MARFORPAC G-4, 1st FSSG Chief of Staff, 3d MAW Future Operations, I MEF Future Operations, virtually the entire senior MEF staff remaining behind at Camp Pendleton.
- Marine reservists comprised 40% of JTF Consequence Management, including the CG and key staff officers.
- The senior staffs had become so accustomed to having a large number of experienced reserve officers available to handle the myriad details, taskings, and inquiries that come into a deployed HQ that one of the greatest concerns was, "What are we going to do without them?"

Personnel officers and liaison officers noted that the Marine Corps was able to identify, activate, and deploy large numbers of augmentees, thereby allowing warfighting HQ to reach a wartime tempo of operations.

The problem. Augmentees to warfighting HQ were typically field grade officers and not all had the experience and training needed for their billets. This problem was particularly evident with globally sourced reserve augmentees. The majority of senior active duty staff officers and commanders who observed these reserve augmentees commented that their quality was uneven. The shortfall was knowledge of joint operations and experience with high-level staff processes.

Senior active duty staff officers and commanders who understood the difference distinguished between IMAs and IRRs and noted that officers from the IRR had the greatest difficulties. These Marines had not been drilling; some had been inactive for extended periods. Further, many had never been above the battalion level. Virtually all augmentation billets were above regimental level, generally at the MEF, MARFOR or even COCOM level. These billets required familiarity with message traffic, staffing procedures, chains of command, componency, joint and coalition operations, NIPR/SIPR nets, the Marine Corps and joint planning processes.

The JCLL Team noted this same problem—reserve officers not properly trained or experienced in joint operations. As they briefed the Secretary of Defense: "An experienced joint manpower pool [of reservists] was lacking."

In their written report they explain as follows: "The reservists required to augment joint headquarters have varying training, background, and experience. Usually they need a few weeks to learn the specific technology and procedures of the position and unit they augment. But they usually do not have the formal training background of their active counterparts, such as joint professional military education. … almost no reservists currently receive … joint staff officer training. Another problem related to filling augmentee positions is that many reservists have accumulated considerable experience in joint assignments, both in the military and in their

civilian occupations, but are not identifiable as joint-experienced because the Services do not track reservist assignments in joint positions or credit it toward fulfillment of Goldwater-Nichols requirements for Joint Specialty Officer designation."[147]

Some comments from commanders and senior staff officers about reserve augmentees were as follows:

- "IRRs have no business being at the MEF level. They were good officers but not ready."[148]
- "Some company grade officers at CFLCC are in over their heads."[149]
- "The ones who were current were very good. The ones who were not current were an embarrassment."[150]
- "To be useful at HQ-level an augmentee must be familiar with the plan and must have the relevant skill sets."[151]
- "IRR officers brought enthusiasm but some brought no judgment."[152]
- "Many lacked the career progression of the ops business…"[153]
- "A few [augmentees to the FSSG] could not even spell FSSG."[154]
- An anecdote made the rounds, perhaps true, that indicated a concern that clearly resonated: A general officer directed three reserve colonels to form an OPT to study a particularly complex problem. The reserve colonels are alleged to have said: "What's an OPT?"[155]
- MARCENT commented that they had to create a staff school, conducted every Saturday, for inadequately prepared staff officers, primarily reservists.[156]

A few of these officers were turned away. A few were spectacular failures, resulting in relief for cause. More often augmentees who were not current were accepted but shunted to less demanding jobs.

As a result, organizations in the personnel assignment business—G-1s, Marine liaison offices to other HQ—saw this process as much more successful than the senior staff officers and commanders who received the augmentees. For personnel organizations the measure of success was number of augmentees forwarded. Every Marine not relieved or turned away was considered a success. For senior staff officers and commanders the measure of success was whether the augmentees could perform in the planned billet. **Thus an augmentee who was accepted but sent to a secondary assignment because of limitations in training or experience would be considered a "success" by the personnel system but a "failure" by his bosses.**

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[147] JCLL Team "Quick Look Report", 18 June 2003
[148] Interview #110
[149] Interview #173
[150] Interview #14
[151] Interview #102
[152] Interview #29
[153] Interview #25
[154] Interview #1
[155] Interviews #14, #25, #26
[156] According to MPLAN 1999, the GFC is responsible for training its augmentees.

This problem is not new, having been noted in every recent conflict.

- The Marine Corps' lessons learned report on Operation Enduring Freedom noted "a wide variance in the quality of [reserve augmentee] staff experience and ability"[157] and recommended changes to the way reservists were selected and trained.
- The Marine Corps' lessons learned report on ODS noted: "Regular commanders spoke highly about the motivation and enthusiasm of reserve field grade officers and SNCOs…However, a number of commanders and key staff officers expressed concerns that…[reserve field grade officers] did not have the full and current set of professional knowledge and background that an active duty contemporary would have."[158]

The remedy for many problems was time. With enough time augmentees could learn their job. Every augmentee, active or reserve, needed some time to get up to speed. As one senior officer noted, "We hold school on everyone." The problem was that there was not enough time, both because of the rapid progression of events and because of the slowness of the system to get augmentees forward. For example, just before the war began, the FSSG received two reserve officers to be liaisons with MEF and division. But it was too late to get the officers familiar with the plan, with the FSSG, and with the geography. Other officers had to be substituted and less demanding jobs found for the late arriving reserve officers.

Reserve Marines themselves felt the need for a better way of matching skills to billets. IMA, IRR, and to a much less extent, SMCR Marines recommended revamping the "manpower/skills" tracking system and improving its ability to identify, track, and then mobilize a Marine for a billet suited truly by experience/results/jobs held. "The emphasis of the system is on quantity instead of being on the quality of Marines mobilized," one augmentee noted. Over half (52%) of IAs felt more training on operations and the theater would be helpful, while 48% felt more MOS training would be helpful.

The key point is that this problem is not caused by a few "bad apples" who tarnished an otherwise sound system. Although senior active duty staff officers and commanders could not put percentages on qualified versus unqualified, they considered the problem of inadequately prepared augmentees to be widespread and systemic.

Could the GFC identify its personnel needs with sufficient accuracy that it could judge the kind of augmentees it needed?

A key question is whether the system could even identify its billet needs, given the rushed and ad hoc nature of the build up. If most augmentees would be assigned to a billet only after arriving in theater, maybe the personnel system should just send a lot of people irrespective of qualifications and let the local HQ sort them out?

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[157] Operation Enduring Freedom – Summary Report, Enduring Freedom Combat Assessment Team, 2002, p.73

[158] Marine Corps Reserve Forces in Southwest Asia, Battle Assessment Team, LtCol Mark F. Cancian, 1991, p.46

Personnel officers clearly thought that potential augmentees could be matched to specific billets. All the G-1s referred to T/Os and Joint Manning Documents (JMDs) as their templates and said that they made their plans and requests based on these documents. TOs contain full billet descriptions. JMDs contain rank, MOS, organization, and billet title. The JMDs do not provide all the information of a full billet description but do contain a lot of information. For example, just knowing that a billet was in deep fires at CFLCC suggests what skills would be useful—familiarity with component-level decision processes and joint operations. An artillery major might meet an MOS/rank/clearance staffing requirement for the CFLCC deep fires cell, but if previously he had only served at a battery-level he would be lost. Thus, personnel officers believed that both TOs and JMDs provided enough information to match experience and skills to billets beyond just rank and MOS.

Other senior staff officers acknowledged improvisations, where Marines originally slated for one billet were detoured to another. Many augmentees—active and reservists, especially late arrivals—complained that gaining commands had no idea they were coming. In these situations there was frequently, though not always, an interview or vetting process whereby experiences were matched to billet.

The bottom line: there is enough information to do a better job of matching reservists to augmentee billets, though the assignment system will always reflect the rushed, ad hoc nature of these contingencies.

Was the assignment process itself a source of the mismatch between background and billet?

The answer must be "yes, in part" but <u>mostly because of the constraints put on the process</u> rather than the process itself. As one officer noted, "the process is not broken, but it is made very difficult by the numerous constraints."

The augmentation process was handicapped from the beginning because the established MPLAN was put aside and replaced by a much slower and more complex manual process. The established MPLAN, based on the Joint Operation Planning and Execution System (JOPES) and including pre-established Time Phased Force Deployment Lists (TPFDL), provided a pre-determined schedule that would identify, activate, and deploy reserve forces in a systematic manner. In place of this MPLAN, a process known as "Request for Forces" (RFF) was used. With the RFF process, every need for a unit or an individual had to be identified by the combatant commander or by a subordinate commander, and a specific request had to be made via that commander's chain of command. Each request had to provide justification for the particular billet and be validated at one and, often times, several levels. Once the billet was approved through a DepOrd signed by the Secretary of Defense, an individual could then be sourced and mobilized. **Many GFC complaints about the augmentation system—multiple drills to identify the "real" augmentee requirement, not enough augmentees being authorized, augmentees arriving too late, billets listed on approved T/Os having to be re-validated—can be traced to this process.**

MPP-60 within M&RA, HQMC, was responsible for managing all individual contingency requirements, active and reserve. Their role was to find and provide individuals who met the qualifications requested by the operating forces. Initial constraints on MPP-60 such as not being allowed to involuntarily activate reservists and not being allowed to source individuals from the SMCR, limited their pool of individuals to three sources: active duty personnel, IMA personnel, and volunteers from the IRR. Moreover, many IMA personnel were off limits, as some of the IMA detachment commanders and operational sponsors would not release their Marines for assignment outside their organizations.   Finally, reserve Marines with more that 16 years of active duty were excluded lest they reach retirement "sanctuary" during mobilization.

In general, requirements that were extremely time sensitive were passed to the Personnel Management Division in order to be globally sourced from active duty forces. Requirements that needed to be filled by reservists were forwarded to MARFORRES and on to MCRSC if an IRR Marine needed to be solicited. Requirements were either generic requests that contained a particular set of qualifications or by-name requests. For a limited time, involuntary recalls were also allowed.

By-name requests were generated when the requesting unit had knowledge of an individual, which was the case with many IMA Marines and some IRR Marines. This greatly simplified the assignment process when requests were formally made through MPP-60. There were occasions, however, when the GFC would make arrangements with the individual, and the individual would request orders directly through MCRSC. This backdoor method added additional tracking challenges to both MPP-60 and MCRSC without any real savings in reporting time.

Involuntary recalls were largely used to provide bases and stations with antiterrorism/force protection detachments and for combat replacement companies. This process was the most time consuming of all and might have become overwhelming if the number of "invols" reached the predicted levels of 1,000 per week.

To source the generic requirements, MPP-60 had to match volunteers with billets. Since MPP-60 did not have access to Officer Qualification Records or Service Record Books, Marine Corps Total Force System (MCTFS) was the only means they had to match billets to individuals. Although MCTFS is an extensive database with numerous fields and tools to manage information, much of the data for reservists was not up-to-date or inputted at all. Also, there was no integration between MCTFS and the billet requests. This meant that there was not a standardized way of matching billets to potential augmentees, which limited MPP-60 to matching personnel to billets by using minimum standards such as rank and MOS.

The Reserve Duty On-Line System (RDOLS) is a recent web site innovation that allowed individuals to view available billets and volunteer on-line. The web site was extremely successful as a mechanism for advertising opportunities and identifying volunteers. One problem, however, was that the Career Management Team, not MPP-60, provided the input to the website. Thus, the billets that were advertised were not necessarily up-to-date or were disconnected from the assignment process. Because of this disconnect, some of those who did

volunteer on the web site for a particular billet were "highlighted" and then involuntarily recalled for a billet that they did not request. Some volunteered and never received any further communication from MCRSC. In one case, a Staff NCO volunteered on the web site only to have the billet filled by a different individual.

There was little alternative to this system of advertising billets and awaiting volunteers. At one point MCRSC tried to get volunteers through direct phone calls. The 8,000 calls yielded 50 volunteers with the right qualifications (and another 377 potential volunteers whose qualifications did not match the billets then available).

There was no mechanism to provide common visibility of the original request or its status (e.g., current, filled, cancelled, etc.). As a result, keeping track of the status of individuals became a cumbersome exercise of reconciling spreadsheets with MCRSC and the five MPC. Sometimes billets were being simultaneously sourced by MPP-60, MCRSC and MARFORRES. At other times, when billets were cancelled or changed, one organization would continue to source the billet only to find out after the fact, that the effort was unneeded.

There was also no mechanism to track an individual from the time he or she received orders, processed through the IMPC, then moved to the MPC and finally to the GFC. Thus, there was no certainty as to which individuals would be reporting, when they would report or at what stage in the process an individual was. Periodic VTCs between GFCs and personnel suppliers helped reconcile requirements with assignments, but these were labor intensive and at relatively long intervals (weekly).

For Marines who volunteered, the ROWS was used to produce written orders for the individual. This system was fairly effective in producing timely orders and responsive in making modifications to the orders once a decision had been made about the personnel action to be taken. Because ROWS is a reserve system, however, active duty GFCs could not access it, thereby forcing all modifications to be sent back to MCRSC. It was also a stand-alone system— i.e., no integration with MCTFS, mailgrams, or MCMPS.

Indeed, software compatibility was a general problem. Procedures had to be developed between MPP-60, MCRSC and the MPCs to coordinate the various systems. Most felt that MCMPS presented more difficulties than usefulness. The database was satisfactory for reporting information about involuntarily activated IRR Marines, but it did not provide real time information (data entries made on one day would not be visible until the next day) and from time to time entire files would go blank. Further, there was no standard way for the various IMPCs to input data. Some IMPCs used MCMPS extensively and others, minimally. Most of the MPCs felt that MCMPS did not help them manage the process or track individuals.

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                    ┌──────┐          ┌──────────┐        ┌───────────┐
                    │  MM  │          │  SMCR    │        │ From IRR  │
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                       ▲                  ▲                    ▲
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│Data input│   │        │   │          │──┘   │      │   │          │
│from GFC, │──▶│ MPP-60 │──▶│Validation│─────▶│ MFR  │──▶│  MCRC    │
│through   │   │        │   │          │Reserve│      │IRR│          │
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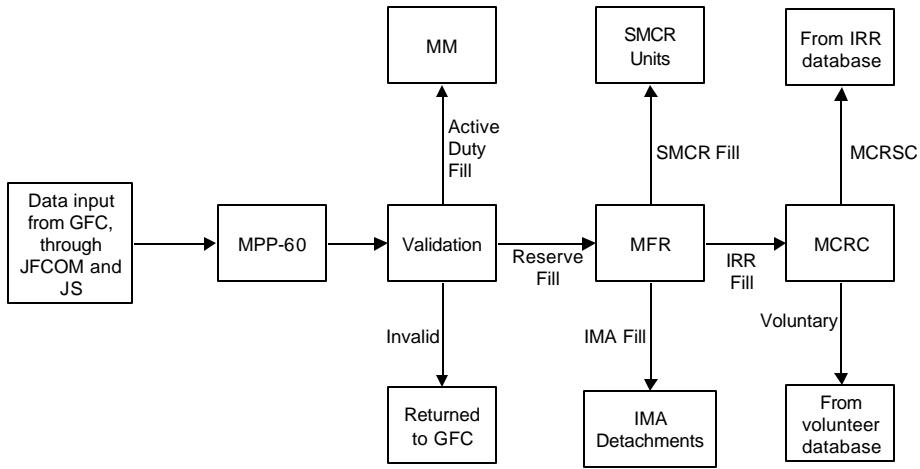
In the end, constraints on the process made MOS matching difficult. Only a little over half the augmentees had the desired MOS when a specific MOS was identified,[159] although by working with the GFC G-1s, MPP-60 was able to fill the most critical billets with the right MOS and the G-1s were willing to work with the rest.

MOS Match	
Officer	49%
Enlisted	59%
Overall	56%

Source: MPP-60 Augmentee Database

Would it be more "cost effective" to use reservists as backfill and to send only active duty Marines overseas for warfighting?

One way of coping with the uneven quality of some reserve augmentees would be to use reservists only as backfill. In fact, the Marine Corps already assigns many reserve augmentees as backfills. As the table indicates, about one-half of reserve augmentees served as backfill or for new missions outside the warfighting theater.

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[159] Count excludes billets where no MOS or any MOS (99xx) was specified.

	Number	%
Warfighting Theater —MARFORPAC / CENTCOM	1,851	50.2%
Backfill/New requirements	1,837	49.8%
—MARFORLANT / EUR / SOUTH	*990*	*26.8%*
—JOINT Support	*111*	*3.0%*
—HQMC / MCSYSCOM	*295*	*8.0%*
—MCCDC / TECOM	*331*	*9.0%*
—MARFORRES	*110*	*3.0%*
Total reserve augmentees	3,688	100.0%

As of 16 May 03. Source: MPP-60

Further, hundreds of the augmentees to the warfighting theater, about one-fourth of the total, were active duty Marines.

	Where did MARCENT's augmentees come from?	
	Number	Percentage
Active	733	28%
Reserve	1851	72%
Total	2584	100%

As of 24 April 2003. Source: MPP-60.

Finally, OSD policy was to prohibit backfilling billets. Presumably, the purpose was to reduce the number of reservists mobilized and encourage efficiencies in the support establishment. A policy of using reservists only for backfill would conflict with this policy if it were extended to future conflicts.

Adopting a policy of using reservists only for backfills has both advantages and disadvantages.

Advantages	Disadvantages
• To the extent that active duty officers are more qualified or more current, HQs will have better qualified staff members. • No mobilization time required. • Keeps warfighting experience in the active force where it is more likely to be used. • Helps career progression of active duty Marines.	• Two people getting up to speed on new jobs, not just one. Many CONUS jobs harder to get up-to-speed on than newly created OCONUS jobs. • Greatly limits pool of potential warfighting augmentees. • Some reserve Marines are as well, or more, qualified for particular billets as active duty Marines. • Mobilization time for individuals relatively short. Longest delays arise from identification and approval process, which affects active and reserve equally, not from mobilization. • Very discouraging for reservists to be considered support only and not warfighters. • Conflicts with current OSD policy prohibiting backfills.

Because of these significant disadvantages to using reservists only as backfill, it is likely the Marine Corps will continue using reservists as warfighting augmentees.

In theory the Marine Corps could avoid using individual reservists entirely by reducing peacetime activities and thus freeing more active duty personnel for deployment. It did curtail some activities such as MAWTS and SAW. It could do more. For example, the Marine Corps could close Command and Staff College, Expeditionary Warfare School, MSTP, the Mountain Warfare Training Center, the Coalition and Special Warfare Center, the Advanced Logistic Course, and the Expeditionary Warfare Training Groups. It could curtail base services. It could stop developing doctrine and warfighting concepts for the duration. However, taking these actions entails making difficult tradeoffs, acting early perhaps before conflict is certain, and planning for a short conflict. As a result the Marine Corps has been unwilling to stop these activities in the past and is unlikely to do so in the future.

A related concept is battle rostering. Under this concept augmentees from the active duty supporting establishment would be identified beforehand and trained to fill their wartime billet. On execution of the operational plan the augmentees would leave their peacetime billets and take up their wartime duties in the FMF. Battle rostering offers the possibility of rapidly filling augmentee billets with pretrained personnel. In practice battle rostering has been very hard to do. The available pool of augmentees is relatively small and organizations are not very enthusiastic about losing personnel. The concept only works if the plan is exercised regularly and personnel get trained. Otherwise the program becomes just a paperwork drill. Finally, getting proficient at two jobs puts a lot of pressure on individuals and causes some tension between peacetime and wartime responsibilities.

Is the process for assigning IAs too slow for the new National Security Strategy?

The new National Security Strategy emphasizes speed. Yet, both the MEF and the MARFOR heavily criticized the slowness of the augmentation process, for active and reserve augmentees, because it produced too few augmentees, too late. "A miserably lousy way to do business" said one senior staff officer. Augmentees were still arriving in May. Late arrivals, active or reserve, were not helpful because there was not enough time to get them ready. This latest was mostly because of decision making delays. The MEF expected to go to full T/O immediately. HQMC—severely constrained by OSD guidance—required justification for each augmentee billet in order to gain all the necessary approvals. (Each individual package went to the ASN (M&RA) or even to the Secretary of Defense.) Joint organizations were slow in levying requirements onto the Marine Corps.

Discovering ground truth on this process and the reasons for its perceived slowness go beyond the scope of this paper. What is true, however, is that these delays hit reservists especially hard because some reservists, particularly those that were globally sourced, needed the extra time in their new billets to fill gaps in knowledge and experience.

That said, the Marine Corps still moved faster than other services. The JCLL team from JFCOM cited 45 days to fill a billet with a unit's own IMA and 90 days to fill with a reservist from outside the unit. They argued that this was too slow and recommended changes to the active/reserve mix as a result. The Marine Corps process, while still slower than many would have liked, performed better than the figures cited by the JCLL team. For some categories of augmentees the Marine reserves were able to fill requirements on timelines comparable with active duty fills. The key drivers for longer timelines were giving reservists up to 30 days notice and relying on volunteers from a relatively limited pool (IRR, some IMAs, no SMCR).

Category of Augmentee	Time Required* (days)	Comments
IMA (from unit's own IMA detachment)	7 (1-14)	Generally, IMAs were immediately available when requested. However, the unit usually gave the individual at least a few days for coordination purposes.
Outside active duty Marine (local)	1-2	If the active duty Marine was available locally.
Outside active duty Marine (globally sourced)	~21	When volume was heavy, administrative processing might stretch another week. In the event a particular fill was "hot" or immediate, requests were generally hand walked and the process could be squeezed down to a few days plus travel time (maybe a week in all).
Outside reservist —By name requests	19-35	Initially OSD required 30 days notice to reservists; later reduced to 15 days, thus the range in times. The reservist could waive the notice. When commands identified a Marine by name this sped up the process; however, that did make it harder to optimally distribute the most qualified Marines.

Category of Augmentee	Time Required* (days)	Comments
		Like "hot" active duty requests, if the reservist waived the minimum notice time, total time could be reduced to a week.
Outside reservist —Voluntary	21-64+	21 days achievable if reservist given 15 days notice (which could be waived) and a volunteer was immediately available. 64+ days required if volunteer given 30 days notice and if the full 30-day search were taken to find the volunteer. If there was no match after 30 days and requirement was hot enough, it was passed to MMOA/EA to fill with an active duty person or, in the case of skills (02XXs, linguists, etc.), be filled with an involuntarily activated reservist from the IRR/IMA. If not hot enough, requirement maintained on file until a volunteer was found, in which case it could take an extended time to fill, if ever.
Outside reservist —Involuntary	29-44	Only used for specific skill sets (02XXs, linguists, etc.). Range depends on whether 15 or 30 days notice given (which the Marine could waive).

Source: MPP-60

* From receipt of message requesting augmentation to Marine reporting aboard. It does not include any time required for the gaining command to get approval of an augmentee billet or for joint organizations to task the services.

CONCLUSIONS

- In the future, major combat operations will require large numbers of reserve augmentees. Deploying Marine units need to get up to their full T/O and the expansion of joint HQs creates large additional demands. Limitations on reassigning active duty Marines mean that they cannot cover all the requirements. Further, the strong qualifications of many reserve Marines makes their assignment to wartime augmentation billets desirable.

- Use of MACE and IMA detachments was very successful. They did what they were intended to do.

- GFCs found that conducting interviews of on-coming officers was very helpful in matching officers to specific billets. Viewing assignments as a job placement process and not as an externally driven slating process yielded better results.

- Augmentation assignments to joint and high level billets need to be based on more than rank, MOS, and security clearance but should consider the whole person. The OEF lessons learned report reached the same conclusion, that the staffing process "was not capable of finding the best-qualified Marine, only one who met the minimum criteria."[160]

- Some training can be very helpful. Even one week of post-mobilization formal training in CONUS can get Marines over initial hurdles. However, there may be little opportunity for post-mobilization training to make up for lack of pre-mobilization training or experience.

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[160] Operation Enduring Freedom—Summary Report, Enduring Freedom Combat Assessment Team, 2002, p.70-75

The NSS calls for "rapid decisive operations" which will allow little training time. Currently, the Marine Corps has no mechanism for training IAs, generally because units need their augmentees as soon as possible. In this conflict IAs were truly "come as you are."

- Even a little OJT is helpful. The more, the better. No one argued that reserve officers were poor officers. With enough time they could get up to speed. But they needed the time. Commanders estimated anywhere from "a few weeks" to 90 days.

- Duties on high level staffs put a strong emphasis on paperwork abilities. Many active duty officers regarded proficiency in PowerPoint as a litmus test of staff officer ability. At MARCENT proficiency in writing naval messages was considered the sine qua non. But these skills alone will not be enough in the future. In the automated and digitized COC that the Marine Corps and joint organizations are evolving, officers need to be familiar with NIPR/SIPR connectivity, C2PC, ADOCS, AFATDS, BFT and GCCS. Without this familiarity an officer has no business being in a high-level COC.[161]

- The reserve community filled many augmentee billets from non-mobilized HQ—division, wing, FSSG, and IMA detachments. This greatly expanded the pool of potential augmentees.

- The most qualified reserve Marines are not always the easiest to assign. Bureaucratically, the easiest solution for filling augmentation requirements (after using a unit's associated MACE or IMA detachment) was to go to the IRR, because with these Marines no organization has to give up a body. However, these are often the least current Marines. The reserve Marines generally most qualified for assignment to joint and higher-level HQ are those in drilling units, especially those in IMA detachments, and in higher-level SMCR HQ—regiment and above. The system tried to maintain some flexibility for future requirements by limiting use of these units and detachments, so that any unforeseen demands, beyond OIF, could be covered. As a result the system could not get at many highly qualified Marines and had to send many less qualified Marines.

- The decision to only use IRR volunteers to fill these augmentation requests, although it minimized the inconvenience of individuals, greatly limited the ability to match qualified Marines with billets.

- The time needed to match a reservist to a specific augmentation requirement could be shortened with continued improvements in information systems and database management. Particularly needed are mechanisms to track GFC requests, the billets that have been approved for assignment, advertisements for volunteers, assignments of personnel, and augmentee locations as they move from home to final destination.

- The fault is not with the Marines trying to execute this process. They did the best they could with a decision process that was over-constrained: trying to minimize effects on other IMA detachments and on SMCR units, allowing only volunteers, driven by vague and changing requirements, and requiring multiple justifications for any action. In fact, they showed considerable creativity in accomplishing their mission within these constraints.

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[161] Interview #28

- The fault is not with the augmentees. They were fine Marines but too often were round pegs being pushed into square holes. Gaining commands thought that with more time all these Marines could get fully up to speed, but the timelines were so short and the assignment system so slow that OJT time was not available.

RECOMMENDATIONS: The IMA detachment/MACE system works well and will continue to provide highly trained reservists for senior staffs. However, the IA global sourcing system needs to consistently fill joint and service requirements with the highest quality augmentees on a timeline that meets the rapid pace of future warfighting. The current system does not always do that. Unless the Marine Corps Reserve wants to get out of the business of globally sourcing individuals to warfighting HQ, it needs to consider a variety of changes:

- Assign the best-qualified Marines to these augmentee requirements, not the most available Marines. As one senior officer observed: "We need to set these reserve officers up for success, not failure."[162]
  - One way to due this would be to task organizations – MSTP, MCU, MCIA, HQMC staff organizations – with providing IAs and to give them the latitude to choose how this is done. The organization could send an active duty Marine, activate a reservist and send him, or send an active duty Marine and activate a reservist for backfill. This way decision makers closest to the Marines involved would make the hard tradeoffs.[163]

- Treat IA assignments as monitors would, looking at the whole person, particularly their experience and education—both military and civilian—to make the best match to a requirement. Give the people making these assignments information equivalent to what a monitor has. Include information on civilian experiences and qualifications, for example by making the Reserve Qualification Summary available on line.[164]

- Expand use of information systems to identify and to track both billets and individuals.

  - Use a centralized database to match requirements to qualified individuals.
  - Develop an in-transit visibility system that tracks individuals from one reporting site to another.
  - Ensure that this information is visible to all appropriate commands in order to show the status of a request for a billet as well as where an individual is in the reporting process.
  - Keep individuals informed of their status.
  - Keep all the above up-to-date in real time.

- To the extent possible, identify and validate GFC augmentation requirements as early as possible in the process, thus allowing more time to identify and to assign the best-qualified individuals and giving augmentees more time for OJT. GFC should provide as much

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[162] Interview #110
[163] Interview #13
[164] This same recommendation was made by the Enduring Freedom Combat Assessment Team in its' report following operations Afghanistan. Operation Enduring Freedom – Summary Report, p.73

information as possible about its expectations for the billet.

- Broaden the pool of reserve Marines trained in joint operations and high-level staff processes.
  - Aggressively implement the RC Joint Officer Management Program (DODI 1215.20), signed in January 2003.
  - Take advantage of emerging JPME courses that will be available, for example, the Naval Reserve Distance Learning Course and the Advance JPME course that will be taught at the Joint Forces Staff College in Norfolk (3 weeks to complete in residence and 29 weeks via distance learning).
  - Develop a way to track these officers in the personnel system.

- Increase MSTPs MTT visits to high-level reserve staffs—MACEs, MSCs, IMA detachments. Focus such training on knowledge that augmentees would need—Marine Corps Planning Process (MCPP), componency, augmentation/liaison doctrine, battle rhythm.

- Consider expanding the IMA program to produce more Marines experienced in joint and higher HQ operations. Consider redistributing IMA billets from the supporting establishment to warfighting organizations, especially from IMA detachments not heavily used in ODS and OIF.

- Consider creating a general support MEF Staff IMA unit. This would require fewer billets than providing additional IMA billets to each MEF; Marines from this unit would be mobilized and sent to the staff where the need for an augmentee was greatest.

- Make IMAs available for global sourcing unless their detachment is specifically excluded by CMC.

- If higher-echelon policies allow, permit manpower planners to involuntarily mobilize IRRs to fill an augmentation request.

- Expand the pool of potential IAs by including Marines from designated SMCR HQ. MARFORRES took many of the listed actions during OIF. The proposed change would make this a matter of policy, so these Marines are available earlier in an operation. These actions will add about 500 officers to the existing pool of 1,500 in IMA detachments and MACEs.

  - Make all personnel at 4th Division and 4th MAW HQ available for global sourcing since these HQ will not be used as complete entities.
  - Make all personnel at FSSG HQ available if the plan does not call for it to be used as an entity.
  - Make personnel in two of the three infantry regimental HQ available.
  - Make personnel at 14th Marines available for sourcing as soon as it is clear that plans do not include it as a force fires HQ. This regiment is a particularly rich source of Marines who are comfortable operating at the force level and have relevant operational experience.

- Make personnel in two of the three aircraft group HQ available.
- Make personnel in Maintenance Battalion and Supply Battalion HQ available since these units have never been used as entities and, given FSSG organization, are unlikely to be used.
- Make non-integrating I-I staff of mobilizing units available; backfill with PWST.

- Work to get more flexibility from OSD. One possibility would be to get authorization for the service to call up whatever reservists it thought appropriate as long as it stayed within a total reserve manpower cap. Thus, OSD would still control the size of the mobilization, but the process could speed up.

- To the extent that Marines in IMA detachments or in MACEs had shortcomings, both active duty organizations and reserves need to take action. Active duty organizations need to take ownership of their detachments—invest the time to train them, hire the right people, and know what their capabilities are. This will pay great dividends when those Marines are needed. Reserve commanders need to purge the program of individuals who are not measuring up.

A sign at the weight room, Camp Doha, gym…but applicable to the Individual Augmentee process.

10. The Total Force. How well did the Total Force integrate?[165]

> *"The attitude of the regular toward the reserve—and the reserve toward the regular – is our greatest blessing, our greatest strength; and when fighting side-by-side, the labels regular—and reserve melt away."*
>
> **— LtGen J. P. Riseley, reflecting on his experience in WWII**

CONCLUSION. Units integrated well. However, at the individual level, most reservists felt that active duty Marines did not accept them initially but did accept them eventually. Like all outsiders, reserve units had to prove themselves. However, tensions sometimes went deeper, and reservists recounted many stories of put downs and condescension by active duty Marines.

Although some degree of active/reserve tension is probably inevitable, all Marines should be treated with respect.

DISCUSSION

The good news: seamless integration. Active duty and reserve units integrated seamlessly. They have the same individual training, the same equipment, the same doctrine, the same SOPs. I-I staffs are invaluable in ensuring that there is a unified culture. As a result, all active duty commanders believed that integration had been smooth and that reservists had been fully accepted. As one general officer said, "They were regarded fully as members of the team from the beginning."[166] Reservists also believed that integration had gone well, as the survey results below show. Sixty-three percent of reservists thought that integration had been "Excellent" or "Good":

"Of those reserve Marines working with regulars, how well did you integrate for operations?"

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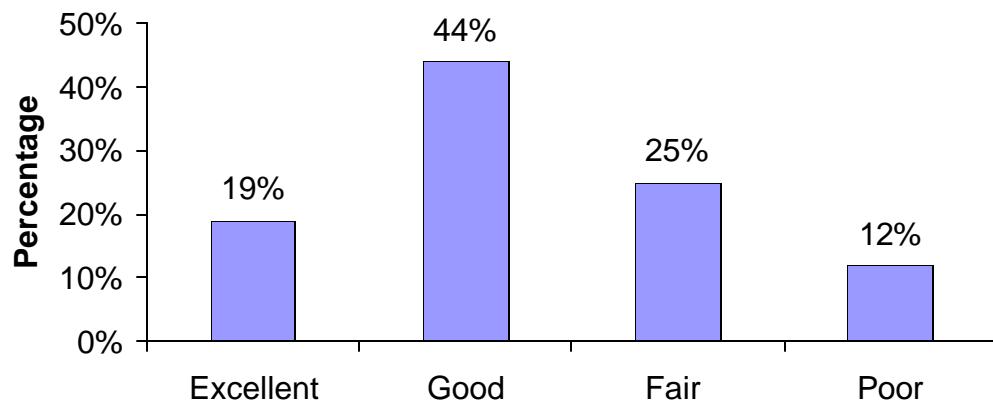
[165] Quotation from The Marine Corps Reserve—A History, HQMC Historical Division, Col. Wm McCahill, 1966, p.99
[166] Interview #108

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The bad news: put downs and condescension. However, many reservists felt that the active duty Marines they served with did not treat them as a member of the team. In interviews reservists cited many instances of put downs and condescension by active duty Marines:

- "You shouldn't send boys to do a man's job." (Active duty CO about a supporting reserve unit.)
- "Well, you're at least as well-trained as the Iraqis."
- A general officer greeting a reserve unit upon their arrival at a base camp: "All of you are a bunch of eaters and defecators. I don't know where you came from or why you are here. Get out of my camp."
- "Why are you here? We don't need you."
- "You're just dumb reservists," said one active duty field grade officer.
- At Camp Coyote, Kuwait, after major operations had ceased, one group told of their active duty Sergeant Major singling out junior reservists, saying "you don't deserve to be called Marines," and then making them go to the rear of what had been a four hour line for morale calls and PX goods.

In survey comments Marines elaborated. A sample of these comments follows:

- "I was amazed at how unprofessional our active duty counterparts were towards us. I almost expected it from younger enlisted Marines, but the high level of disrespect and disdain towards reservists was felt up to the battalion level. Both staff and officers acted like jealous children that were not willing to let us play with their toys."
- "Reservists are treated as sub-par Marines by active duty counterparts. Reservists of equal rank with active Marines are not treated as such."
- "For the most part, active duty personnel, through snide comments and discriminative actions, have kept an insurmountable barrier between active and reserve forces. Reservists' rank, specifically at the NCO level, has been treated as inferior and in some cases has been completely disregarded by active duty personnel. Many active duty Marines have a snobbish sense of superiority towards reservists that has impaired active/reserve relations."
- "We were always treated as inferior Marines by the active duty Marines, no matter how well we fought. Even the higher ranks treated us differently than their own."
- "Regular Marines believed we were useless because we are reservists and therefore gave reserve units the "BS" assignments."
- "Active duty Marines never gave Reserve Marines any respect. Many have stated they don't like Reservists and feel it is a disgrace for us to have Marine name tapes."
- "Regular Marines hated us. We stayed across from [an active duty battalion] and they taunted us every chance they could."
- "There was strong blanket opinion on the part of the active duty Marines that our company was inferior and worthless to have around."

Active duty commanders appeared to be unaware that these problems existed in their commands.

The ODS lessons learned report noted the same phenomenon.

Many reservists felt that the regulars did not treat them as a member of the team. Survey results back up the findings of the interviews. The problem, as perceived by the reservists, got much better as time went on. Most reservists believed that eventually they were accepted as a member of the team. However, a third of the enlisted troops believed that the regulars never accepted them.

This is a very hard problem to analyze. Regulars and reservists were often thrown together in the same platoon, company or battalion. On the one hand many reservists complained that the regulars did not treat them as one of the team. On the other hand every attachment thinks it is getting a bad deal—more of the lousy work details, less of the recognition. Indeed, compositing among regular units was very difficult, with many hurt feelings and divided loyalties. It is no surprise that this should happen with reservists. There is no doubt, however, that many reservists, particularly enlisted, felt they were ill-treated.[167]

The chart below shows the survey results from both ODS and OIF asking reservists about acceptance by active duty Marines. The measure is the percentage saying that they were accepted.

"Do you believe that the regulars accepted you as a member of the team, initially? Eventually?"
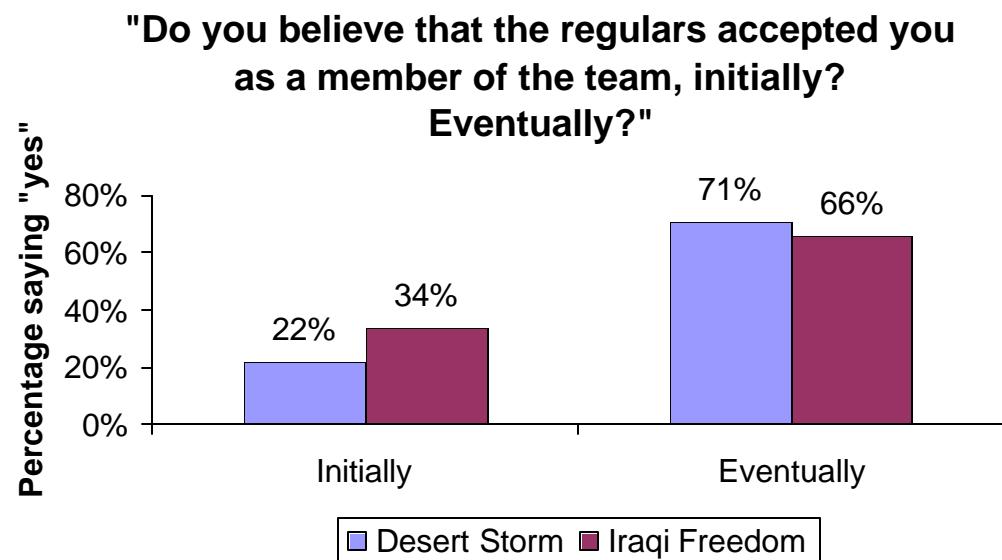
Clearly reserves did not feel accepted initially. However, the problem got much better as time went on with 66% reporting that eventually they were accepted as a member of the team. The results from OIF are very similar to those from ODS. It is significant to note, however, that one-third of ALL reservists believed that the active duty Marines never accepted them.

In general, reservists felt they had to prove themselves. This is probably a fact of life that reservists must deal with in every mobilization. Familiarization time helps. As units and

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[167] <u>Marine Corps Reserve Forces in Southwest Asia</u>, Battle Assessment Team, LtCol Mark F. Cancian, 1991, p.45

individuals work together, they learn to trust each other. Every commander, active and reserve, emphasized the value of arriving early and linking active and reserve units. Units that arrived late—e.g., 4th Medical Bn—never really had a chance to become part of the team and therefore were not used to their full potential.

The ODS report hypothesized why this occurred, and those reasons remain valid.

- *"No doubt some of the difference arises from the feelings of all attachments, as noted above. Active duty augmentees made many of the same comments about not being accepted initially, feeling like an outsider, being lost, being ignored in the rush of activity, etc. One estimated that it took about four weeks to become part of the team.*

- *Some was probably operationally driven. Reserve units arrived late in the build up. Therefore they tended to be assigned to rear areas while units that had been in theater for months went forward.*

- *Probably also some arose from training differences. Particularly in technical MOSs, some reservists did not have the same edge that regulars had and as a result were given less demanding tasks.*

- *Some came from the natural skepticism about what reserve units could do, that they were an unknown quantity to be proven. Virtually all reserve commanders said that there was an awkward period initially until they proved their abilities.*

- *However, a significant cause was insensitivity by some regulars. Reservists repeatedly told stories about being called "those f***ing reservists" and other, equally unprintable, epithets. The stories were far too wide spread to be the result of a few reserve malcontents. Some Marines may believe that this was good-natured give-and-take. But group-derived put-downs—whether driven by race, gender or duty status—are taken very personally. They denote blanket inferiority. No Marine today would allow some Marines to call others racial epithets. Why allow some to call others "f***ing reservists?"*

This can be changed, and should be."[168]

Different perspectives among reservists. Though all groups of reservists shared the same general experience of not being accepted initially but of being accepted eventually, there were some differences between groups.

The greatest differential was between officers and enlisted. Officers clearly felt more accepted, both initially and eventually. The reason may be that, as a group, officers had much more active duty time than enlisted reservists (6.4 years versus 2.3 years) and were therefore better known to their active duty counterparts.

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[168] Marine Corps Reserve Forces in Southwest Asia, Battle Assessment Team, LtCol Mark F. Cancian, 1991, p.44-45

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"Do you believe that the regulars accepted you as a member of the team, initially? Eventually?"
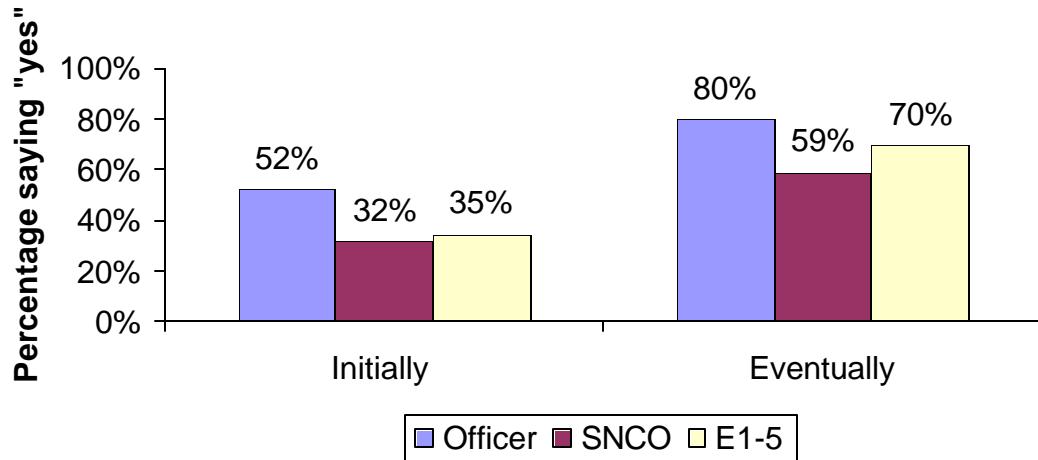
Among enlisted reservists, SNCOs (and sergeants) had the lowest perceptions of acceptance.

Between Marines in units and individual augmentees there was a small difference. Augmentees felt a little more accepted initially but that difference washed out over time. Half of the augmentees believed they were accepted initially while only a third of the reservists in units believed they were accepted initially. The chart below shows the results.

"Do you believe that the regulars accepted you as a member of the team, initially? Eventually?"
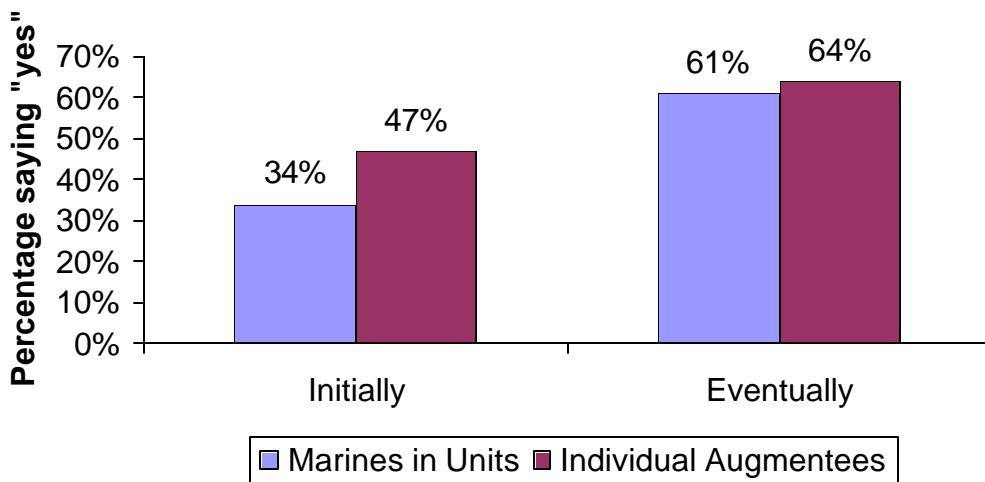
Between males and females there was no significant difference. They felt equally accepted or rejected. If anything, women felt more accepted, though the small female sample size makes such a finding tentative. This lack of gender difference is significant only because it shows that gender integration is further along than active/reserve integration.

"Do you believe that the regulars accepted you as a member of the team, initially? Eventually?"
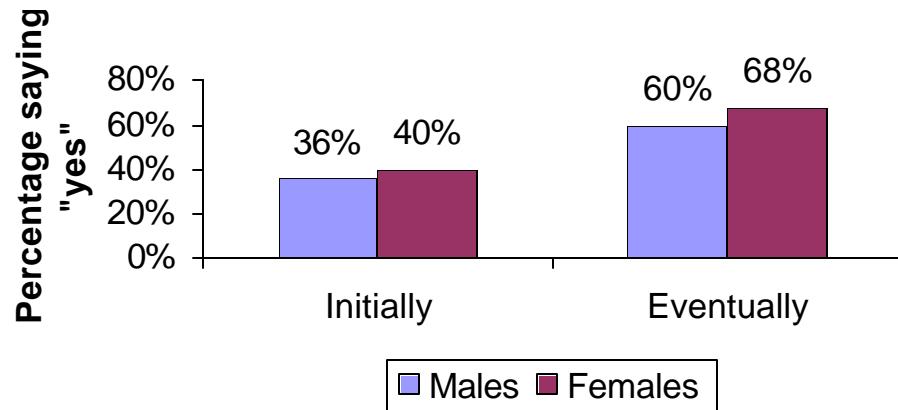
Differences in approach. Although active duty and reserve Marines share a common tradition and training experience, there are differences in their outlook and general circumstances.

Marines in reserve units typically have served side-by-side longer than more fluid active duty units. For example, in one combat support unit with high retention, half of its members had served together for more than a decade.

The level of education achieved by members of the various components is different. Where enlisted active duty Marines typically have a high school diploma, approximately 45% to 50%[169] of enlisted reserve Marines have completed some college or have a college degree. Several reserve infantry units had squad leaders with college degrees and SNCOs with masters degrees.

One reserve SNCO jokingly remarked on the difference: "I have a Lance Corporal that works selling bonds and holds a college degree. The active duty NCOs any given day could be found talking about clubs they hit the night before and the reserve NCOs would be discussing the implications of NAFTA. It's a head-scratcher sometimes to reconcile that contrast."

Active duty Marines typically had a greater awareness and sensitivity toward standard operating procedures, generally accepted processes and practices, and military doctrine. Commanders observed that reservists were more goal oriented and less process oriented—i.e., they focused on getting the job done and not on how it was done, and were more willing to

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[169] According to research done by USMC Prior Service Recruiting using data from HQMC Reserve Affairs.

adapt. Sometimes this caused chafe for not doing things the doctrinal way.[170]

- " We had an engine repair in the middle of a fight near Al Kut, but it was beyond our authorized echelon of repair and were told to ship it to the rear. Most of our unit's crews have been working together for 14 to 15 years; we would not leave our folks short of gear for the sake of an SOP. We fixed the vehicle ourselves overnight."[171]
- When water buffalo trailers moving into Iraq lost tires due to wear and road conditions, a reserve SNCO noticed that the Iraqi Army's Soviet-style mobile anti-aircraft guns had suitable rims and tire mounts and swapped them out. Previously, the active duty support SNCO recommended under standard operating procedures that the equipment be sent to the rear.

Reserve Marines in general seem to be more accustomed to a "participative" leadership style where input, ideas and observations are more welcome. Active duty commanders complained that reserves wouldn't just do what they were told, but would ask why or suggest alternatives. This was exasperating for both sides with active duty complaining the reserves did not know the bigger picture and reserves complaining that the orders/directions did not make sense.

RECOMMENDATIONS

> "Here lie officers and enlisted. Black and white, rich men and poor— together. Here are Protestants, Catholics and Jews—together. No prejudices…theirs is the highest and purest democracy."
>
> — Chaplain Gittelsohn Eulogizing Marines at the Iwo Jima Cemetery

- **Circulate report results.** Publish and circulate these results widely so that all Marines are aware of these issues.
- **Establish a zero-tolerance policy**. Treat all Marines alike. Establish and enforce a zero-tolerance policy against discriminatory or abusive words and actions.
- **Increase education on the reserves**. Incorporate into OCS, TBS, recruit training, and PME training sessions that describe the role and contributions of reserve forces to Marine warfighting efforts. This training should be candid in discussing both strengths and weaknesses of all components, and their mutual reliance as part of the Marine Total Force.
- **Everyone a Marine**. Where possible, eliminate use of the terms "reserve," "reservists" and "USMCR" and instead use the unit designation, such as "4th Marine Division/Wing/FSSG," or "augmentee." This was done in World War II and did much to erase the distinction between regular and reserve after mobilization.[172] After all, if

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[170] Interview #3
[171] Interview #172
[172] "When General Vandergrift gave the order that all Marines would be designated as 'USMC' in all administrative matters, except those cases where specific identification was essential, he did more by this one action to remove whatever distinctions still persisted at that time…" The Marine Corps Reserve – A History, HQMC Historical Division, Col. Wm McCahill, 1966, p.96

large portions of a component are fighting on the frontlines, taking fire on convoys, and flying air support into hot zones, they are no longer "in reserve."

- **Exercises.** Develop more exercises with both reserve and active forces involved.

11. Deployment timeline. Did the call up of reserve forces delay the launching of the operation?

There's no question but we simply have got to be able to move in hours and days and weeks rather than months and years. We need to be swift. We need to have deployment capabilities that enable us to move [rapidly].

—SECDEF 4 May 2003

"Speed kills."
GENERAL TOMMY FRANKS
CG CENTCOM

CONCLUSION. Marine reserve units mobilized quickly and arrived in theater when needed. After strategic mobility constraints, the primary cause of delay, for all forces, active and reserve, was the ponderous RFF/DepOrd process, a process that will probably continue in some form. However, there are some things the Marine Corps Reserve can do to accommodate itself to this new process.

DISCUSSION. Some observers, the JCLLT for example, have suggested that because reserve units were slow in arriving, the active/reserve mix should be changed. However, Marine Corps planners did not believe that Marine Corps Reserve units slowed the deployment. Analysis of the deployment process supports this opinion.

Days from RFF to DepOrd	8-17 days [173]
Days from DepOrd signing to activation date	8 days average
Days from activation date to arrival in theater	10-35 days
% of units (or Marines) arriving in theater within six days of LAD	90%

- Mobilization, from DepOrd to activation date, was only eight days on average. Proposals to require 30 days notice would greatly lengthen Marine Corps reserve timelines.
- The largest element of delay arose from strategic mobility constraints—the physical ability to move the units into theater. After that, the need to approve each DepOrd separately caused delay.
- Reserve units were ready to move to their gaining command within 4 days of their activation date. Units then typically waited two to three weeks for orders to actually deploy overseas.
- All reserve units met target load dates (except one unit, due to a scheduling error).
- Reserve units could be in theater as quickly as ten days after DepOrd if shipping and reception capability were available (e.g., 2/25, 6th ESB, 6th MT). Few reserve units in other services could meet this timeline.
- **The average time from DepOrd to the unit's actual arrival in theater was 34 days. In other words, units went from civilian life to being on the ground half way around the world in about a month. This is half the 63 days cited by the JCLLT for reserve units overall.**

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[173] Data for this table comes from analysis of Marine Corps databases. Additional details are in Appendix E. GAO cites 19 days average for RFF-to-DepOrd times overall (all services). <u>DoD Action Needed to Improve the Efficiency of Mobilizations for Reserve Forces</u>, General Accounting Office, August 2003, p.123

- First MarDiv took about 45 days to close, so reserve unit activation fits easily within this timeframe.

Marine Corps planners believed that the Army was slow in supplying logistics support to the Marine Corps because of delays getting Army reserve CSS units into theater. The reasons for this are beyond the scope of this paper. However, problems with deployment timelines can be caused by factors unrelated to reserve mobilization such as the decision process and strategic mobility constraints. Therefore, It is not enough to say that because reserve units were late in arriving, the active/reserve mix should be changed. It might have been that strategic mobility assets were limited and that units could not have arrived any earlier even if they had been active duty units.

Arriving when needed was a particular challenge in this operation because CENTCOM did not execute the existing TPFDD but instead used a RFF/DepOrd process. Executing a TPFDD entails a single decision at the beginning of the process, and then forces flow automatically according to the plan. The advantage is that all forces are identified up front and their movements synchronized. Reserve units can be alerted in time to have them ready to deploy when lift is available. The RFF/DepOrd process entailed requesting packages of forces (the RFF), each of which had to be approved by the SecDef (resulting in a DepOrd). The Secretary of Defense used the process to shape the plan and test assumptions. The difficulty for the services was that units could not be definitely alerted until the DepOrd was signed. Approval of a DepOrd took about two dozen separate concurrences. Further, executing OIF entailed 246 separate DepOrds and each DepOrd generated a mini-TPFDD. Sometimes the flow of forces from these many DepOrds conflicted with each other. For the reserves the process meant that decisions sometimes came very late.[174]

Although this process was non-standard and caused many difficulties for the services, the basic structure is likely to continue. The JCLLT recommends that this new process be institutionalized as a way to meet the uncertainties of military planning in the post-Cold War world. Because locations, circumstances, and opponents in future contingencies are so uncertain, they argue deliberate plans with their pre-existing TPFDDs are unlikely to be available.

The Marine Corps Reserve did a lot to improve performance within this challenging process. The ready availability of ADSW monies was most helpful in giving units the man-days to prepare for activation and to assist I&I staffs with equipment/processing.

Nevertheless, there was sometimes a tendency to wait until given specific authorization before taking action. In one instance the reluctance to act quickly delayed the process enough that the unit's mission was aborted. Under the RFF/DepOrd process, waiting for a signed DepOrd puts units "behind the power curve" because the decision process will have used up time that reserve units need for mobilization and training. Reserve organizations might argue that these externally driven delays are not their fault. The SecDef's response is, in effect, "If you can't meet my timelines, you don't belong in my force. The strategy has changed. Adapt or die."

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[174] For a more extensive discussion of the RFF/DepOrd process, see <u>DoD Actions Needed to Improve the Efficiency of Mobilizations for Reserve Forces</u>, General Accounting Office, August, 2003, p. 9-14, 23-24

"Leaning forward" can have adverse effects on individual reservists if the command is continually saying, "mobilization is imminent" but nothing happens. Many reservists complained that their personal and professional lives were on hold for a long time during the alert period. Then clearly, warning orders need to be used judiciously. But prudent pre-mobilization preparations relating to administrative records, medical testing, equipment availability need not be accompanied by announcements of imminent mobilization if such an announcement would be premature.

RECOMMENDATIONS. Decisions about the RFF/DepOrd process lie at a much higher level than the Marine Corps Reserve. However, the Marine Corps Reserve can adapt itself to this challenging process. Leaning forward in future conflicts, <u>even when requirements are uncertain</u>, and taking some preparatory actions as guidance is evolving, will speed reaction and improve unit performance. These actions are hard because they entail some bureaucratic risk. Inaction is bureaucratically safer. The key, however, is to do what is right for the warfighters. Potential actions include the following:

- Extra drills/ADSW for key leaders. The Marine Corps Reserve did this preparing for OIF, and it was very successful.

- Administrative drill for all. Before ODS the entire Marine Corps Reserve held an extra weekend drill dedicated to mobilization preparation. This allowed units to spot and correct problems early and not in the rush of activation. By doing some administrative processing before mobilization, instead of after, this action sped up the deployment process by two days. Many units did this on their own before OIF.

- Double drills. Instead of one drill weekend per month, conduct two.

- Acceleration of AT. Very difficult to do but it provides the highest level of training. If a unit is going to war, why not do it?

12. Sustainability of reserve PERSTEMPO: Are reserves being used too much?

CONCLUSION

- Whether the Marine Corps Reserve can sustain the high pace of PERSTEMPO is ultimately a recruiting and retention question. Therefore, these need to be tracked closely to detect early any signs of weakness. Data are inconclusive at this time. On the one hand, many Marines expressed negative opinions about continuing in the reserves as a result of their mobilization. On the other hand, survey data suggest that attitudes are more positive than after ODS where, despite very negative attitudes expressed in post-war surveys, there was no retention drop.

- Many reservists are available as individuals for voluntary duty but using volunteers is not a viable substitute for mobilizing units.

DISCUSSION

Reserve PERSTEMPO has increased. During the 1990s usage of reserves increased greatly, a trend accelerated by 9/11 and subsequent events. Many observers and reservists worry that the usage may be too great. This issue has received a lot of attention because of vocal complaints by individual reservists, and concerns expressed by reserve associations and interested members of Congress. For example, the Reserve Officers Association has expressed its concerns that current missions "will lead to serious retention problems."[175] The JCLLT also raised this concern to the Secretary of Defense.

Without question, reserves are being used much more during the post-Cold War period than previously. During the Cold War, reserves were seen as "for emergency use only," to be mobilized in the unlikely but perilous event of a global war with the Warsaw Pact. After the Cold War, usage increased greatly as the United States became involved in many small-scale contingencies and two major conflicts. Reserves have been called upon routinely to fill requirements that active duty forces could not cover. The chart on the next page shows operational support[176] provided to the active duty forces by Marine Corps reserves, through involuntary activation, voluntary orders (ADSW), and regular drills/AT.

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[175] The Officer, ROA, Jan/Feb 2003, p.10
[176] "Operational Support" is defined as 1. DOMESTIC EMERGENCIES (Response to forest fires, floods, hurricanes, tornadoes, riots, bombings, etc., federal or state funded). 2. COUNTER-DRUG OPERATIONS (Support to the counter-drug effort.) 3. EXERCISE SUPPORT (All Service or CINC exercises, both CONUS and OCONUS- Excludes RC unique exercises.) 4. CINC / SERVICE SUPPORT (All support provided to assist the AC accomplish a mission, or reduce AC PERSTEMPO / OPTEMPO.) 5. MOBILIZATIONS (PSRC or mobilization actions.) Data provided by the OSD, Reserve Affairs.

USMCR
(DUTY DAYS IN THOUSANDS)
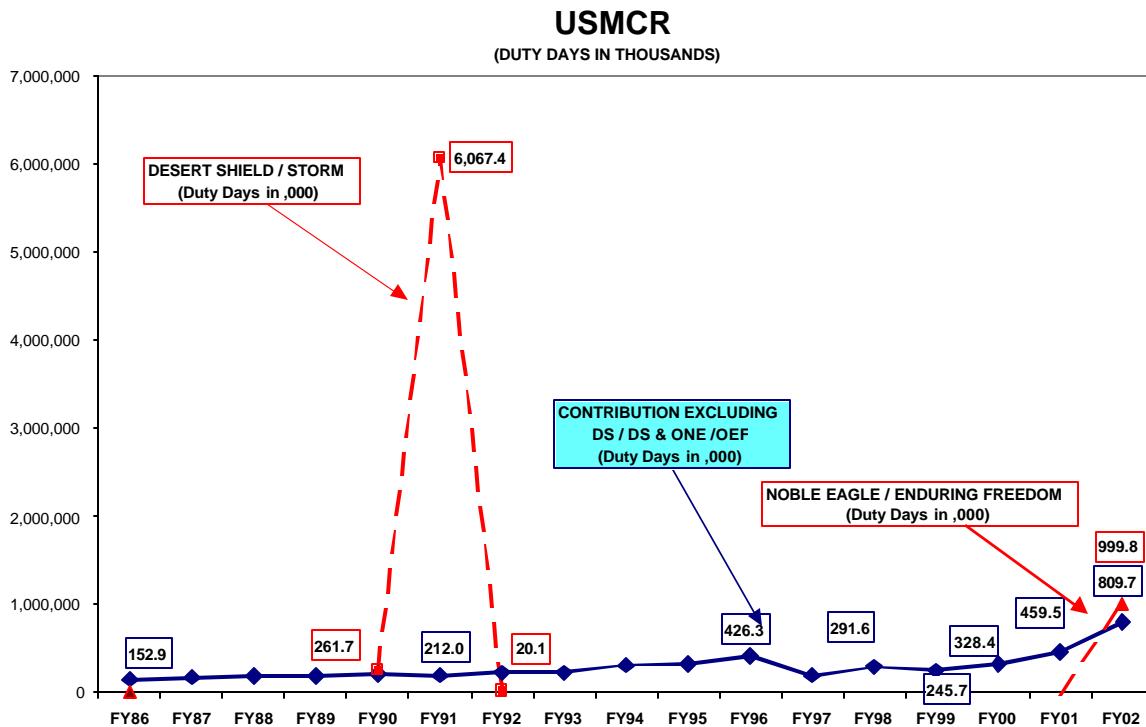
The change since 9/11. The JCLLT expressed concerns that "extended use since 9/11 has exhausted key [reserve] resources." Since 9/11, demands on the Marine Corps Reserve have, indeed, increased. Nevertheless, this concern appears to relate more to the Army than to the Marine Corps. As the chart on the next page shows, the Army, driven by the need to support operations in Bosnia, Kosovo, and elsewhere, has had a much higher level of mobilization than the Marine Corps. For example, about ¾ of the Army reserve civil affairs community has been activated for operations at some time since the end of the Cold War. Both services have had a large increase in involuntary mobilizations since the beginning of OIF.

Mobilized Days per Reservist

Year	97	98	99	00	01
USMCR	0.00	0.51	0.53	0.88	0.46
Army RC	2.50	1.30	0.77	1.46	2.20
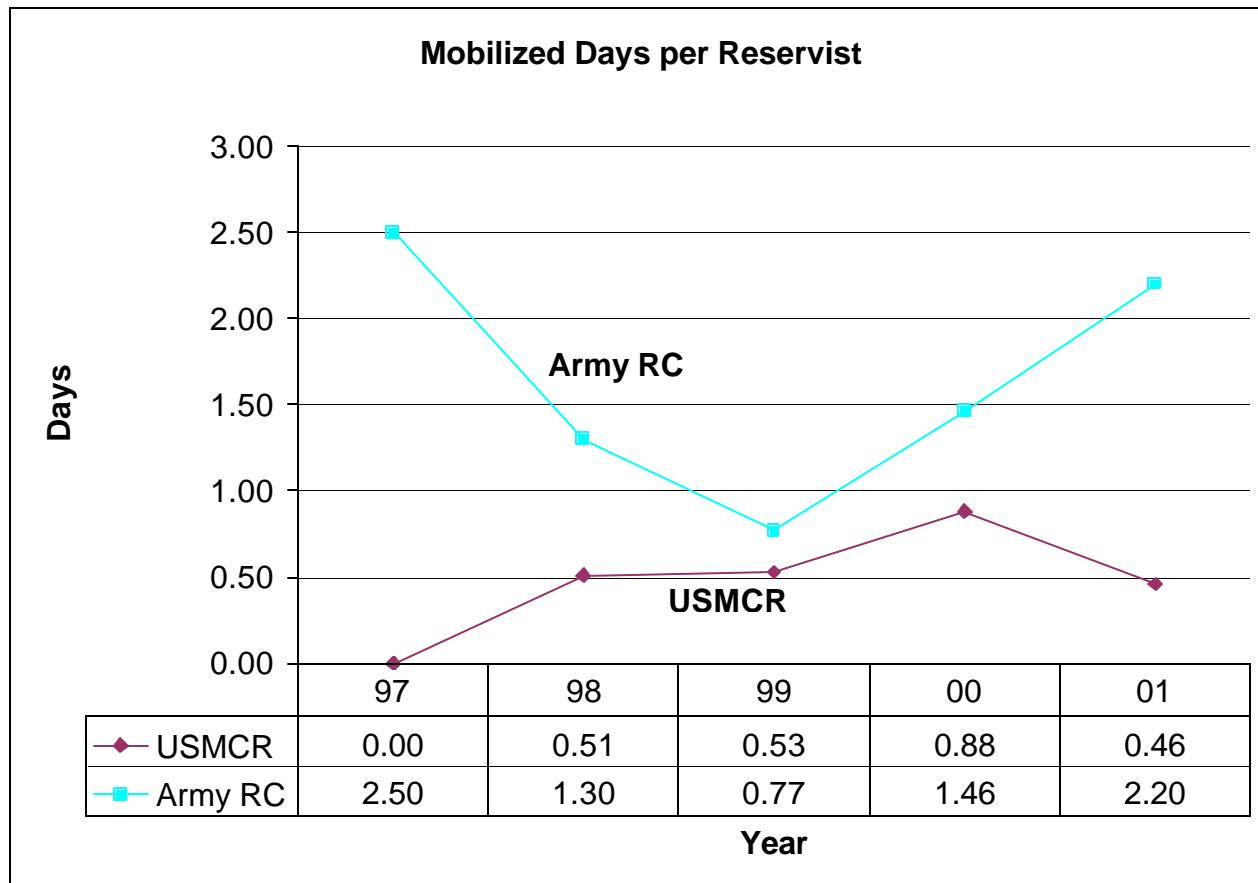
How much is too much? Ultimately this is a recruiting and retention question. As with active duty forces, the test of whether PERSTEMPO is too high is whether troops vote with their feet by leaving or whether prospective new recruits are deterred from joining. For some reservists even the 38 days a year becomes too onerous. Others would stay on active duty indefinitely if offered the chance. No policy, therefore, will make everyone happy. **The issue for decision makers is to cover as many operational requirements as possible without getting PERSTEMPO so high that recruiting and retention decline below what will sustain manpower levels.**

So far reserve forces have been able to sustain much higher levels of PERSTEMPO than observers expected. In part, this is because they have often been able to rely on volunteers (even if orders say "involuntary") except during major combat operations.[177] In part this may be because reservists migrate between units depending on whether they want to be mobilized or not. For example, reservists joining a civil affairs unit know they are likely to be mobilized. If that's not what they want, they join a different unit. In part, also, many reservists like some level of real world operational involvement.[178]

[177] Many reservists volunteered to receive "involuntary" orders.

[178] As Thomas Longstreth, a former deputy undersecretary of defense for readiness, noted about the active duty forces: "You find troops actually like to deploy. People like to go to Bosnia. They like to go to Iraq. This is what they signed up for…So re-enlistments tend to go up if somebody has done at least one overseas deployment in their

It may be that reserve forces can sustain even higher levels of activity. It may also be that this most recent mobilization is the proverbial straw that breaks the camel's back and that reserve recruiting and retention will begin a downward spiral. The Marine Corps will need to track recruiting and retention closely to detect any problems early.

In particular, the Marine Corps will need to watch 2/23, 2/25, and VMGRs 234 and 452. These were called up involuntarily, in whole, or in part, after 9/11 and served on active duty for a year. Each of these units was either extended or reactivated for OIF since they were the most experienced and trained reserve units available. The 3^d and 4th CAGs have also had a high level of mobilization over the last few years.

This study also asked the question, "Overall, has your experience of being mobilized made you more or less likely to stay with the Marine Corps Reserve program?"

"Overall, has your experience of being mobilized made you more or less likely to stay with the Marine Corps reserve program?"
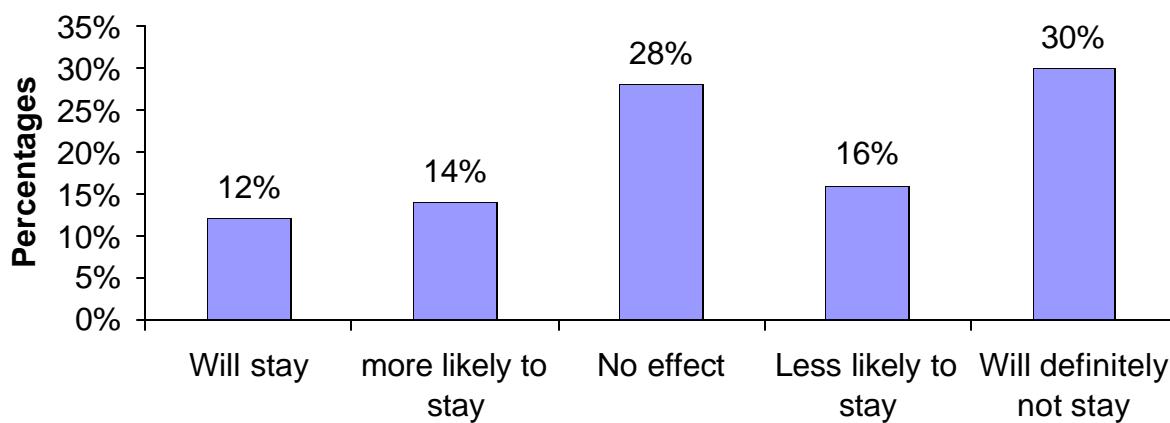
Forty six percent of all Marines indicated they were less likely to stay as a result of their experience. The large size of this negative response is disturbing. These results must be kept in perspective, however, because they were obtained after major combat operations were completed and units were anxious to go home. The Reserve forces study after ODS also received quite negative responses, yet there was no recruiting and retention crisis after that mobilization, which was larger than for OIF. Indeed, the OIF responses seem to be less negative than those from ODS, though direct comparisons are difficult.

An important point for Marine planners is that reserve Marines do not mind being on active duty as long as they feel they are being used effectively and meaningfully. When that is not the case, negative attitudes begin to develop. A recurring theme in our surveys and interviews has been: "the war is over, it is time for the reserves to go home". That preconception will be a major factor as operations in Iraq and around the world continue.

first term." They tend to go down when . . . a majority of their time is spent overseas, and they're not getting that downtime to spend with their family and be home."

Volunteers. There is a lot of interest at the highest levels of the Department in using reserve volunteers more extensively. Volunteers do not entail the political and personal costs of involuntary activation. The study results do suggest that for major contingencies there is a large pool of potential volunteers available.

The survey asked the question: "If you were offered the opportunity to stay on active duty, would you take it?" Results are shown below. Clearly this is a crude question because such personal decisions are driven by a host of considerations—where would I be stationed? What would I be doing? How long would I have to stay? Nevertheless, the results indicate that there is a pool of potential volunteers willing to stay on duty under ADSW orders. Although the percentage of "definitely yes" and "probably yes" is not large (18%), it does potentially represent 7,400 reserve Marines (if applied to the entire SMCR and IMA population).

"If you were offered the opportunity to stay on active duty, would you take it?"
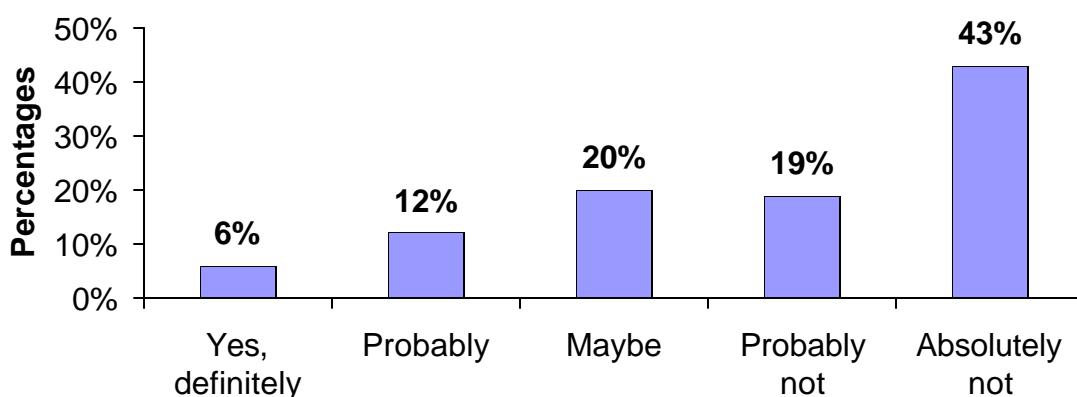
Results were about the same for individuals as for Marines in units.

Finally, the survey asked the question, "Would you have been willing to do this period of service with voluntary orders instead of involuntary orders?" Results are shown in the table below:

"Would you have been willing to do this period of service with voluntary orders instead of involuntary orders?"	
Yes	53%
No	47%

The "yes" percentage for a large-scale contingency is relatively large. As a way of getting individuals, therefore, volunteers can be excellent (subject to the cautions in Section IV.

9, Individual Augmentees, of this report). As a way of getting units, however, volunteering has severe limitations. The number of willing volunteers is not large enough to mobilize any single unit, thus requiring the merging of volunteers from multiple units. Such volunteer units have been used in the past for operations such as Army civil affairs in Panama, Army rotational battalions in Sinai, Marine Corps Reserve companies in UNITAS, JTF 5 and 6, and Guantanamo Bay. These experiences have shown that using volunteers ends up producing an essentially new, composite unit of individual volunteers that, although individual skills may be strong, must be trained as a unit from the beginning. A further limitation is whether the Marine Corps is willing to take significant numbers of volunteers out of units. Such action can result in a reserve unit becoming combat ineffective due to loss of key personnel.

The IRR has also been a major source of volunteers to support day-to-day operations, at least for officers and senior enlisted. According to MCRSC, approximately 30% of IRR officers are "active players," or Marines who volunteer for some amount of active duty on a routine basis. In terms of numbers of personnel, this 30% means that 973 of the 2,949 officers currently in the IRR are potential volunteers. The question is how much active duty can this pool of volunteers support? Currently approximately 864 of these officers are already serving on active duty.

RECOMMENDATIONS
- Closely track recruiting and retention across the entire Marine Corps Reserve.
- In particular, monitor recruiting and retention in units with extensive activations—2/25, 2/23, VMGRs 234/452, and 3d and 4th CAG.
- Use reserve volunteers for augmentation of active duty units and organizations, but not as a substitute for entire units.
- Re-survey units that have been activated for OIF 6 and 12 months after they are deactivated to compare attitudes and beliefs.

A reservist in Iraq sends a message about OPTEMPO.

V. SUMMARY—COMPARISON OF RESERVE SYSTEM PERFORMANCE IN OPERATIONS IRAQI FREEDOM AND DESERT SHIELD

After ODS, the Marine Corps, through the Battle Assessment Team, analyzed its Title 10 areas of responsibility to determine what had gone well and what needed improvement in its reserve system. Now, having fought the same enemy in the same geographical area 12 years later, the Marine Corps has an opportunity to compare performance, and especially to identify those areas where changes in the last 12 years have produced improvements and those areas that still need work.

Reserve successes in both operations:

- Unit performance at company level and below. A strong reserve training program, aggressive oversight, and an integrated total force personnel system produced excellent unit performance at the company level and below in both operations.
- Mobilization process. Although not without problems, the process in both operations got reservists onto active duty rapidly.
- Deployment and RSOI. In both operations reserve units got into theater as fast as mobility assets and RSOI capabilities would allow.

Improvements from ODS performance:

- Family support. After unsatisfactory performance in ODS, a series of reforms—clear lines of responsibility, KVP, PWSTs—produced a great improvement in family support during OIF.
- Pay administration. The incompatible active and reserve pay systems during ODS had been unified by the time of OIF.
- I-I staff integration. Left behind during ODS, I-I staffs were integrated during OIF.
- Unit performance at battalion level. In ODS infantry battalions had been considered "marginal" because of weaknesses in command and control. In OIF reserve infantry battalions received front line missions, though perhaps because of unique circumstances. Reserve FSSG battalions were also used more.
- Equipment compatibility. A problem during ODS where many reserve units had older equipment, equipment incompatibility has been reduced through horizontal fielding policies.
- Reserve support during the first 60 days of conflict. Before ODS the Marine Corps believed that reserves were unneeded until 60 days into a conflict. ODS showed that the Marine Corps, while not nearly as dependent on its reserve component as the Army, was stretched too thinly in peacetime to completely avoid using reserves early in a major conflict. By the time of OIF the Marine Corps had accepted the notion that it needed early reserve augmentation for a conflict of this size.

Areas that still need work:

- Quality of individual augmentees. The motivation and enthusiasm of augmentees was unquestioned, but many staff augmentation billets required a high level of training and experience. As a result the ability of reserve officers, particularly globally sourced reserve officers, to work on high-level staffs was uneven.
- T/A versus T/E. In both operations, bringing units up to full T/E proved much more difficult than peacetime plans had foreseen.
- Post mobilization unit training. Lack of equipment, ammunition stocks, base support, and an engaged HQ still hamper effective post mobilization training by units.
- Mission flexibility. Reserve units frequently get non-standard missions. This should be regarded as normal and not as an aberration.
- Active/reserve relationships. In both operations the relationship was difficult in the beginning with reservists believing that they were not accepted. In both operations the relationship got better with time, but many reservists still felt they were not treated with respect. Active duty commanders still seem to be unaware of these problems.

New problem areas:

- Security clearances. The clamp down on clearances after the high visibility espionage cases of the 1980s and early 1990s has limited the number of reservists with clearances, thus creating a problem for placing the most qualified reservists onto higher level staffs.
- Mobilization of Navy personnel. This may have been a problem in ODS but the longer timelines in that operation allowed problems to be worked out. The rapid timelines of OIF exposed the problems of incompatible mobilization systems.
- Rumor control. The ability of personnel in theater to communicate home quickly and for families to share news, has allowed rumors to spread rapidly.

Unresolved questions:

- PERSTEMPO sustainability. After ODS, negative survey and interview results indicated that the mobilization might have adverse affects on post-war recruiting and retention. However, this did not happen. Now reserve PERSTEMPO is even higher. Is it too high or can reserves adapt as they have in the past?
- Force structure. Marine Corps Reserve structure is essentially unchanged from the Cold War. The structure fit well, but not perfectly, with the needs of ODS and OIF. The Marine Corps Reserve is still grappling with what a post-Cold War structure should look like.
- CSS organization. For both active and reserve CSS units, the question of whether a functional organization or an integrated (CSSD/CSSG) organization works better is still unresolved.

VI. EPILOGUE.

The experience of OIF has increased the capability of the Marine Corps tremendously. Thousands of reservists are now combat veterans. Thousands more, through work in CONUS and in support billets, possess current and relevant military skills. Further, active duty Marines are now accustomed to working with reservists and know that they can count on reserve forces when the going gets tough. We are truly one Corps, combat ready, and leaning forward.

A message on the door of the 3d
MAW G-5

APPENDICES

Appendix A: Interview Questions

Appendix B: Reserve Survey Questionnaires

Appendix C: Survey Background Data

Appendix D: Units Visited—CONUS and OCONUS

Appendix E: Deployment Data

Appendix F: Acronyms

Appendix A: Interview Questions

- Questions for reservists

- Questions for active duty commanders of reserve units

- Questions for SIA/ILOC/Mobilization centers

- Questions for I-I/PWST staffs of mobilized reserve units

INTERVIEW QUESTIONS FOR RESERVISTS

[These questions are intended primarily for reserve leaders but can be asked of anyone. Session can be conducted with individuals or small groups. Explain that these questions are not meant to limit answers but only to highlight areas of interest. Also, the questions are organized chronologically, to take the experience from the beginning, from pre-mobilization to the present.]

"The date today is _____. The interviewer is _____. The topic is reserve forces _____. The unit is _____. I am talking with _____."

I. BACKGROUND

1. What kind of unit? [If not otherwise apparent]
2. About how many Marines do you have?
3. What kind of billet do you hold? [If not otherwise apparent]

II. MOBILIZATION

1. Did your training change as your unit approached mobilization? If so, how? Did training time increase?
2. How were you notified about mobilization? Was this enough time?
3. After mobilization, were there many requests for waivers? On what grounds?
4. Did you lose any Marines to medical screening? Of these, how many were able to join you?
5. Did you take any "line 10s"? How did this work out?
6. Did you take to the SIA/ILOC any Pay Group F Marines – i.e., Marines who had not completed IADT and could not deploy? How did this work out?
7. Were there significant delays in administrative processing? By significant we mean not just irritations but that actually affected the deployment schedule. [If so, where and why?]
8. How many I-I were integrated into the unit? Was this planned ahead of time? Did it work smoothly?
9. How was support provided to your families? Was the key spouse network effective? Were there any problems transitioning from civilian to military health care?
10. Any serious problems getting the equipment ready to go? Individual equipment or unit equipment?
11. Were there any difficulties with mobilization of the attached Navy medical personnel? How did you cope?
12. [Senior officers and I-I only] Were the MPLANs helpful? Did you use them? How could they be improved?

III. TRAINING/PREPARATION

1. How long were you at the SIA/ILOC? What kind of training did you do? Was the training schedule full? Was the training what you needed? If not, what were the constraints? Who set the training requirement?
2. Did you do any training in theater?
3. How would you assess your training level?
   -- at the individual/MOS level?
   -- at the platoon level?
   -- at the company/battery level?
   -- at the battalion level?
4. Do you need any more training? Of what kind?
5. Did you have enough people and equipment to do your job?

IV. EXECUTION

1. Were you used as a unit? If not used as a unit, did it make a difference?
2. What mission adaptations did you have to make (for example, in organization, equipment and attitude?) [Ask if the unit did not do the kind of mission it was designed for.]
3. Do you think you had a worthwhile job to do?
4. Do you feel the regulars accepted you as a member of the team? Initially? Eventually?
5. How do you think your unit performed overall?

V. AFTERMATH

1. How long will you be on active duty? When was the last time this unit was activated? How long before this unit could be called up again without severe adverse effects?
2. Will this experience have an effect on retention?
3. What long-term effects, good and bad, will this experience have on the unit?

Is there anything else about this experience that you would like to share?

INTERVIEW QUESTIONS FOR ACTIVE DUTY COMMANDERS
OF RESERVE UNITS

[Explain that these questions are not meant to limit answers but only to highlight areas of interest.

"The date today is _____. The interviewer is _____. The topic is reserve forces _____. The unit is _____. I am talking with _____."

I. BACKGROUND

1. What kind of unit? [If not otherwise apparent]
2. About how many reservists worked for you?
3. Had you worked with reservists before?
4. When in the deployment cycle did they join you?
        a. Was this enough time to integrate them?
5. How did you use the reservists you had?

II. PREPARATION

1. Do you think the reservists were sufficiently trained
    -- at the individual/MOS level?
    -- at the platoon level?
    -- at the company/battery level?
    -- at the battalion level?

        a. Could they have used more training? If so, in what areas?

2. Did they have enough equipment? Of the right kind? If not, were the shortages serious?

3. Were they familiar with the equipment? [Note: Often this is answered with the training question above. If so, skip.]

4. Did having I-I staff attached make a difference?

III. PERFORMANCE

1. How did they do?
2. Were there any differences in performance from regulars? If so, how?
3. Did they integrate well with the unit?

Is there anything else on this subject you would like to share?

INTERVIEW QUESTIONS FOR ILOC/SIA/ILOC/MOBILIZATION CENTERS

[These questions are for ILOCs/SIAs/mobilization stations. Explain that these questions are not meant to limit answers but only to highlight areas of interest.]

Date: _____

Interviewer: _____

Center: _____

Person interviewed:_____

I. Background

1. How long has this center been operational?
2. What were the center's responsibilities?

II. Establishing the Center

1. How was the center established? Was this process smooth?
2. Was there any training to prepare the center for its mission? Was the training effective? What might be done better next time?
3. Did you have enough people and equipment to execute your mission?
4. How many did you have? How many would you have needed?

III. Operations

1. Did you handle requests for waivers? How?

2. How long were units at the SIA/ILOC? _____days
        Was this enough time to accomplish all mobilization tasks? Y   N
    If not how much total time would have been needed? _____days

3. Was there enough time, supplies and equipment to train units at the SIA/ILOC?

4. Were there substantial delays or problems in processing units in any of the following areas? Please describe.

	Y N	*Armory*	*Y N*	*Messing*	*Y N*	
Medical -- Inoculations						
Medical – all other	*Y N*	*Personal equipment/supplies*	*Y N*	*Lodging*	*Y N*	
Dental	*Y N*	*Admin*	*Y N*	*Other (explain?*	*Y N*	

Comments:

5. Were there substantial delays or problems in processing individuals in any of these areas above? Please describe.

6. Were there any difficulties with mobilization of the attached Navy medical personnel? How did you cope?

7. Any serious problems getting individual equipment or unit equipment ready to go?

8. Were the existing MPLANs helpful? Did you use them? How could they be improved?

9. What would you do differently next time?

IV. Family Support Programs: Did you get involved in family support programs? If so, how and how successful was this effort?

V. Demobilization. Do you anticipate any significant problems with demobilization?

Is there anything you would like to add that we have not already covered?

QUESTIONS FOR I-I/PWST OF MOBILIZED SMCR UNITS

[These questions are for I-I/PWST staffs of mobilized SMCR units. Explain that these questions are not meant to limit answers but only to highlight areas of interest. One interview per site; preferably one interview per unit if more than one unit per site.]

Date: _____

Interviewer: _____

Unit: _____

Reserve Training Center (RTC): _____

Person interviewed: _____

I. Background

      1. What kind of unit? [If not otherwise apparent]
      2. About how many Marines do you have? How many were mobilized?
      3. What kind of billet do you hold? [If not otherwise apparent]

II. Mobilization

1. Did your unit's training change as mobilization approached? If so, how? Did training time increase?
2. How was notification handled? How much informal (_____days) and formal warning (_____days)? [Informal warning is notification of pending mobilization before written orders arrive.]
          Was this enough time? Y   N
           If not, how many total days would have been sufficient? _____days
3. After mobilization, were there many requests for waivers? On what grounds?
4. Any problems with "no shows"?
5.   Did you send any "line 10s"?
6. If only part of the unit was mobilized, how was the detachment selected? Did this approach work well?
7. Did you lose any Marines to medical screening? Of these, how many were able to join you?
8. How long was the unit at the RTC? _____days
        Was this enough time to accomplish all mobilization tasks? Y   N
         If not how much total time would have been needed? _____days

9. Were there substantial delays or problems in processing at the RTC center in any of the following areas? Please describe.

Medical — *Inoculations*	*Y*	*N*	*Armory*	*Y*	*N*	*Messing*	*Y*	*N*
Medical — *all other*	*Y*	*N*	*Personal* *equipment/supplies*	*Y*	*N*	*Lodging*	*Y*	*N*
Dental	*Y*	*N*	*Admin*	*Y*	*N*	*Other (explain)*	*Y*	*N*

Comments:

9. Were there any difficulties with mobilization of the attached Navy medical personnel? How did you cope?
10. How many I-I were integrated into the unit? Was this planned ahead of time? Did it work smoothly?
11. Any serious problems getting individual equipment or unit equipment ready to go?
12. Were the existing MPLANs helpful? Did you use them? How could they be improved?
13. What would you do differently next time?

III. Peacetime Wartime Support Teams (PWST)

1. On a scale of 1 to 5, 5 being outstanding, and 1 being unsatisfactory, how well did your prior training assist in execution of duties as PWST?

Outstanding	Good	Fair	Poor	Unsatisfactory
5	4	3	2	1

2. Were there any areas where your training was seriously deficient (circle all that apply)?

Equipment handling and reporting	Administrative Procedures	Family support	CACO/Funerals	Facility Mgmt

Other_____

3. How much turnover time did you have with the unit? _____days
    a. Was this sufficient? Y N
    b. If not, how many total days would have been sufficient? _____days
4. Were there any significant but unexpected problems in the turnover?
5. Did you have enough people to execute your mission?
    a. How many did you have? How many would you have needed?

IV. Family Support Programs (KVP):

1. How are you providing support to your families?

2. Is the key spouse network effective?
3. How are you communicating with families? Newsletter, Email, Phone, Other
   a. How often? Weekly, Monthly, Intermittently as needed

4. Are you aware of any problems transitioning from civilian to military health care?
5. What is the greatest problem that families are encountering?

V. Demobilization. Do you anticipate any significant problems with demobilization?

Is there anything you would like to add that we have not already covered?

Appendix B: Reserve Survey Questionnaires

There were two surveys:

- A survey for Marines in SMCR units

- A survey for Marines mobilized as individuals

The reason for having two different instruments was that the experiences were different enough that many questions relevant to one group were not relevant to the other.

Marine Mobilization Survey (UNIT)

Operation Iraqi Freedom

This survey is for reservists mobilized as part of a unit. It is being used to gather information on your mobilization experience, the operations in which you participated, and the impact on your family and civilian career. The results will be used to evaluate the mobilization process, improve the training for Marines, develop new warfighting doctrine and structure, improve care for the families of those deployed, and enhance personnel policies.	Your candid feedback and comments are invaluable to the Marine Corps. **THE INFORMATION YOU SHARE IS STRICTLY CONFIDENTIAL.** • Check what you consider to be the appropriate responses. • Estimates are fine. Give the best answer you can give. • Make written suggestions or comments on the last page. **Estimated time to complete: 15-20 minutes**

BACKGROUND

1. Component: ☐ SMCR ☐ IRR ☐ IMA ☐ FMCR *2. Gender:* ☐ Male ☐ Female *3. Age:* ____

4. Grade: ☐ E-1 ☐ E-2 ☐ E-3 ☐ E-4 ☐ E-5 ☐ SNCO ☐ WO ☐ O-1 ☐ O-2 ☐ O-3 ☐ ____

5. What type of unit did you serve with during your mobilization?
☐ Infantry/Armor ☐ Combat Support ☐ Combat Service Support ☐ Aviation ☐ HQ/Staff ☐ Div/Wing/FSSG

6. Total Time in Service: _____ Years Active Duty: _____ Years Reserve Duty: _____ Years	*7. Prior to this mobilization, did you have any campaign ribbons or combat experience?* ☐ Yes ☐ No If "Yes," where? _____	*8. Have you been deployed overseas during this mobilization?* ☐ Yes ☐ No If "Yes," where? _____

MOBILIZATION

9. How many days (if any) were there between a "heads up" warning about pending mobilization and when you received your written orders? _____ Days

10. How many days were there between when you received your written orders and when you reported in to the drill center? ___ Days

11. Did you have enough time to prepare your personal affairs before reporting to active duty? ☐ Yes ☐ No
If "No" --- how much time from a "heads up" call to having to report would have been sufficient? ___ Days

12. When you reported to your local Drill Center, how long did you stay there? ____ Days	Was this sufficient time? ☐ Yes ☐ No

13. Overall, how would you describe the effectiveness of the mobilization process at the drill center in getting you onto active duty and to your next destination? ☐ Excellent ☐ Good ☐ Fair ☐ Poor

14. Mobilized Marines are typically sent from their Drill Center to a "Station of Initial Assignment" (SIA) such as Camp Pendleton or Lejeune. *How long were you there?* _____ Days ☐ N/A

15. Was this sufficient time at the "SIA" to prepare your equipment, take care of administrative matters, train, etc?
☐ Yes ☐ No ☐ N/A
If "No" --- how much total time would have been sufficient? _____ Days

16. While at your "Station of Initial Assignment", how effective was the support your unit received?
☐ Excellent ☐ Good ☐ Fair ☐ Poor

17. Overall, how would you rate the information and preparation you received prior to mobilization in the following areas?

a. Legal Issues	☐ Excellent	☐ Good	☐ Fair	☐ Poor
b. Admin/Records Issues	☐ Excellent	☐ Good	☐ Fair	☐ Poor
c. Family Support	☐ Excellent	☐ Good	☐ Fair	☐ Poor
d. Personal Finances Impact	☐ Excellent	☐ Good	☐ Fair	☐ Poor
e. Medical	☐ Excellent	☐ Good	☐ Fair	☐ Poor

TRAINING

18. Please take a moment and think back over your training experiences. How would you rate your training at the various stages of your mobilization and active duty operations?

a. Training at Drill Station Before Mobilization	☐ Excellent	☐ Good	☐ Fair	☐ Poor	☐ I did not receive any training	☐ N/A
b. Training in CONUS after mobilization but before your deployment	☐ Excellent	☐ Good	☐ Fair	☐ Poor	☐ I did not receive any training	☐ N/A
c. Training Received Overseas (if applicable)	☐ Excellent	☐ Good	☐ Fair	☐ Poor	☐ I did not receive any training	☐ N/A
d. Training about this specific theater and operation	☐ Excellent	☐ Good	☐ Fair	☐ Poor	☐ I did not receive any training	☐ N/A

19. Looking back on your experience, in which areas do you believe MORE training would have been helpful?

a. Primary MOS	☐ Very Helpful	☐ Helpful	☐ Sufficient	f. Swimming	☐ Very Helpful	☐ Helpful	☐ Sufficient
b. Secondary MOS (if you have one)	☐ Very Helpful	☐ Helpful	☐ Sufficient	g. Equipment Use	☐ Very Helpful	☐ Helpful	☐ Sufficient
c. Marksmanship	☐ Very Helpful	☐ Helpful	☐ Sufficient	h. First Aid	☐ Very Helpful	☐ Helpful	☐ Sufficient
d. Physical Fitness	☐ Very Helpful	☐ Helpful	☐ Sufficient	i. Martial Arts	☐ Very Helpful	☐ Helpful	☐ Sufficient
e. Theater/ Operation Specific	☐ Very Helpful	☐ Helpful	☐ Sufficient	j. PME	☐ Very Helpful	☐ Helpful	☐ Sufficient

20. What could be done to improve the training you received? (Check ALL of the relevant reasons below)

a. Better Instructors?	☐ Yes	☐ No	d. More Training Time?	☐ Yes	☐ No
b. More Equipment?	☐ Yes	☐ No	e. More Formal Schools?	☐ Yes	☐ No
c. Better Equipment?	☐ Yes	☐ No	f. Other _____		

ACTIVE DUTY OPERATIONS

21. Do you think the regular active duty Marines accepted you as a member of the team initially?
☐ Yes ☐ No ☐ I Rarely Dealt With Regular Active Duty Marines

22. Do you think the regular active duty Marines accepted you as a member of the team eventually?
☐ Yes ☐ No ☐ I Rarely Dealt With Regular Active Duty Marines

23. If you served with active duty Marines during operations, how would you rate the degree to which you were "integrated;" that is, how well you and your unit worked with them?
☐ Excellent ☐ Good ☐ Fair ☐ Poor ☐ My Unit Did Not Integrate With Regulars

24. Please rate your overall performance during this operation:

a. How well do you feel you did personally?	☐ Excellent	☐ Good	☐ Fair	☐ Poor
b. How do you rate your unit?	☐ Excellent	☐ Good	☐ Fair	☐ Poor

SUPPORT FOR YOUR FAMILY

25. Overall, what was your family's attitude about your mobilization?
☐ Very Supportive ☐ Supportive ☐ Neutral ☐ Unsupportive ☐ Very Unsupportive ☐ N/A

26. Overall, how did mobilization affect your family's situation?
☐ Very Positive ☐ Positive ☐ Little Effect ☐ Negative ☐ Very Negative

27. Did you receive a "Family Information" package at the time of your mobilization?
☐ Yes ☐ No ☐ N/A

28. If you did receive a Family Information packet, was the information helpful to easing the burden of this mobilization?
☐ Yes ☐ No ☐ N/A If "No" --- please explain on last page, under "Comments."

29. Did your family receive information or contact from the "Key Volunteer Program" prior to your mobilization?
☐ Yes ☐ No ☐ I Don't Know ☐ N/A

30. Is your family receiving "Key Volunteer Program" information during your deployment?
☐ Yes ☐ No ☐ I Don't Know ☐ N/A

31. How effective has your unit's "Key Volunteer Program" or other family support programs been in keeping your family informed?
☐ Outstanding ☐ Good ☐ Fair ☐ Poor ☐ I Don't Know ☐ N/A

32. What sort of health care plan, if any, does your family have during your mobilization?
☐ Civilian Health Plan ☐ Tri-Care Health Plan ☐ No Health Coverage ☐ I Don't Have Family Dependents

33. Overall, how has your mobilization affected your family's health care?
☐ Greatly Improved ☐ Somewhat Improved ☐ No Change ☐ Somewhat Negative ☐ Very Negative ☐ I Don't Have Family Dependents

34. If you changed to the military health care system, did you have any serious problems doing so? Y N   If yes, check ALL that apply below.
☐ Health Care Locations Too Far From Home ☐ Difficulty Enrolling for Tri-Care Health Care ☐ Inconvenient to Change From Civilian Plan ☐ Care Under Plan is Poor ☐ Other: _____

35. Overall, how would you rate the degree of support your family has received from the Marine Corps?
☐ Excellent ☐ Good ☐ Fair ☐ Poor ☐ N/A

OTHER ISSUES

36. What was your employment situation before you were mobilized?
☐ Working Full-Time ☐ Working Part-Time ☐ Unemployed ☐ Student, Volunteer or Homemaker

37. If you were employed full time or part time, what was your employer's attitude about your mobilization?
☐ Very Supportive ☐ Supportive ☐ Neutral ☐ Unsupportive ☐ Very Unsupportive ☐ N/A

38. As a civilian before you were mobilized, approximately what was your monthly income before taxes?
$ _____ Per Month

39. How did your total annual income change from before your were mobilized to when you entered active duty (including all allowances, benefits and any continuing civilian pay)?
☐ Decreased My Pay More Than 50% ☐ Decreased My Pay About 11% - 50% ☐ My Pay Stayed Just About The Same (+/- 10%) ☐ Increased My Pay By 11% - 50% ☐ Increased My Pay By More Than 50%

40. Did your employer continue any benefits or cover any salary differential after your were mobilized?
☐ Yes ☐ No ☐ N/A

41. If you were self-employed, has your business been significantly affected?
☐ N/A ☐ No Significant Impact ☐ Yes, Somewhat Affected ☐ Yes, Irreparably Damaged

42. Do you expect to encounter any problems with your employer upon your return to civilian work?
☐ Yes ☐ No ☐ N/A

43. *While on active duty, did you experience any significant problems getting your Marine Corps pay?*
☐ Yes   ☐ No   If "Yes" --- how long did it take to resolve these pay problems? _____ Weeks

44. *Would you have been willing to do this period of service with voluntary orders instead of involuntary orders?*
☐ Yes   ☐ No   ☐ N/A

45. *If you were offered the opportunity to stay on active duty, would you take it?*
☐ Yes, Definitely   ☐ Probably   ☐ Possible   ☐ Probably not   ☐ Definitely no

46. *Overall, has your experience of being mobilized made you more or less likely to stay with the Marine Corps reserve program?*
☐ I Will Definitely Stay   ☐ I'm More Likely to Stay   ☐ No Effect   ☐ I'm Less Likely to Stay   ☐ I Will Definitely Not Stay

COMMENTS

Question #	--- ALL COMMENTS AND SUGGESTIONS ARE STRICTLY CONFIDENTIAL

Individual Survey

<table>
<tr><td colspan="2">M a r i n e   M o b i l i z a t i o n   S u r v e y   (A u g m e n t e e s)
Operation Iraqi Freedom</td></tr>
<tr><td>This survey is for reservists mobilized as part of a unit. It is being used to gather information on your mobilization experience, the operations in which you participated, and the impact on your family and civilian career. The results will be used to evaluate the mobilization process, improve the training for Marines, develop new warfighting doctrine and structure, improve care for the families of those deployed, and enhance personnel policies.</td><td>Your candid feedback and comments are invaluable to the Marine Corps. THE INFORMATION YOU SHARE IS STRICTLY CONFIDENTIAL.
• Check what you consider to be the appropriate responses.
• Estimates are fine. Give the best answer you can give.
• Make written suggestions or comments on the last page.

Estimated time to complete:
15-20 minutes</td></tr>
</table>

BACKGROUND

1. Component: ☐ SMCR ☐ IRR ☐ IMA ☐ FMCR   *2. Gender:* ☐ Male ☐ Female   *3. Age:* ____

4. Grade: ☐ E-1 ☐ E-2 ☐ E-3 ☐ E-4 ☐ E-5 ☐ SNCO ☐ WO ☐ O-1 ☐ O-2 ☐ O-3 ☐ ____

5. Education:
☐ High School Grad ☐ Some College ☐ College Grad ☐ Some Graduate Studies ☐ Graduate Degree

6. What type of unit did you serve with during your mobilization?
☐ Infantry/Armor ☐ Combat Support ☐ Combat Service Support ☐ Aviation ☐ HQ/Staff ☐ Div/Wing/FSSG

7. Total Time in Service: _____ Years Active Duty: _____ Years Reserve Duty: _____ Years	*8. Prior to this mobilization, did you have any campaign ribbons or combat experience?* ☐ Yes ☐ No If "Yes," where? _____	*9. Have you been deployed overseas during this mobilization?* ☐ Yes ☐ No If "Yes," where? _____

MOBILIZATION

10. How many days (if any) were there between a "heads up" warning about pending mobilization and when you received your written orders? _____ Days

11. How many days were there between when you received your written orders and when you reported in to the drill center? ___ Days

12. Did you have enough time to prepare your personal affairs before reporting to active duty? ☐ Yes   ☐ No

    If "No" --- how much time from a "heads up" call to having to report would have been sufficient? ___ Days

13. When you reported to the Mobilization Center, how long did you stay there? ____ Days	Was this sufficient time? ☐ Yes ☐ No

14. Overall, how would you describe the effectiveness of the mobilization process at the Mobilization Center in getting you onto active duty and to your next destination? ☐ Excellent   ☐ Good   ☐ Fair   ☐ Poor

15. Did your orders arrive when you needed them in order to report on the planned date? ☐ Yes   ☐ No

16. Did you have any problems with your security clearances during and after your mobilization?
☐ Yes ☐ No ☐ N/A

16. While at your "Station of Initial Assignment", how effective was the support your unit received?
☐ Excellent ☐ Good ☐ Fair ☐ Poor

17. Overall, how would you rate the information and preparation you received prior to mobilization in the following areas?

a. Legal Issues	☐ Excellent	☐ Good	☐ Fair	☐ Poor
b. Admin/Records Issues	☐ Excellent	☐ Good	☐ Fair	☐ Poor
c. Family Support	☐ Excellent	☐ Good	☐ Fair	☐ Poor
d. Personal Finances Impact	☐ Excellent	☐ Good	☐ Fair	☐ Poor
e. Medical	☐ Excellent	☐ Good	☐ Fair	☐ Poor

TRAINING

18. Please take a moment and think back over your training experiences. How would you rate your training at the various stages of your mobilization and active duty operations?

a. Training at Drill Station Before Mobilization	☐ Excellent	☐ Good	☐ Fair	☐ Poor	☐ I did not receive any training	☐ N/A
b. Training in CONUS after mobilization but before your deployment	☐ Excellent	☐ Good	☐ Fair	☐ Poor	☐ I did not receive any training	☐ N/A
c. Training Received Overseas (if applicable)	☐ Excellent	☐ Good	☐ Fair	☐ Poor	☐ I did not receive any training	☐ N/A
d. Training about this specific theater and operation	☐ Excellent	☐ Good	☐ Fair	☐ Poor	☐ I did not receive any training	☐ N/A

19. Looking back on your experience, in which areas do you believe MORE training would have been helpful?

a. Primary MOS	☐ Very Helpful	☐ Helpful	☐ Sufficient	f. Swimming	☐ Very Helpful	☐ Helpful	☐ Sufficient
b. Secondary MOS (if you have one)	☐ Very Helpful	☐ Helpful	☐ Sufficient	g. Equipment Use	☐ Very Helpful	☐ Helpful	☐ Sufficient
c. Marksmanship	☐ Very Helpful	☐ Helpful	☐ Sufficient	h. First Aid	☐ Very Helpful	☐ Helpful	☐ Sufficient
d. Physical Fitness	☐ Very Helpful	☐ Helpful	☐ Sufficient	i. Martial Arts	☐ Very Helpful	☐ Helpful	☐ Sufficient
e. Theater/ Operation Specific	☐ Very Helpful	☐ Helpful	☐ Sufficient	j. PME	☐ Very Helpful	☐ Helpful	☐ Sufficient

20. What could be done to improve the training you received?   (Check ALL of the relevant reasons below)

a. Better Instructors?	☐ Yes	☐ No	d. More Training Time?	☐ Yes	☐ No
b. More Equipment?	☐ Yes	☐ No	e. More Formal Schools?	☐ Yes	☐ No
c. Better Equipment?	☐ Yes	☐ No	f. Other		

ACTIVE DUTY OPERATIONS

21. Do you think the regular active duty Marines accepted you as a member of the team initially?
☐ Yes ☐ No ☐ I Rarely Dealt With Regular Active Duty Marines

22. Do you think the regular active duty Marines accepted you as a member of the team eventually?
☐ Yes ☐ No ☐ I Rarely Dealt With Regular Active Duty Marines

23. If you served with active duty Marines during operations, how would you rate the degree to which you were "integrated;" that is, how well you and your unit worked with them?
☐ Excellent ☐ Good ☐ Fair ☐ Poor ☐ My Unit Did Not Integrate With Regulars

24. Were you mobilized and employed on active duty in accordance with your qualifications—e.g., your MOS if your billet prescribed an MOS? ☐ Yes ☐ No ☐ N/A	

24. Were you mobilized and employed on active duty in accordance with your qualifications—e.g., your MOS if your billet prescribed an MOS?
☐ Yes ☐ No ☐ N/A

25. Were you mobilized to a billet for which you had been designated before mobilization—e.g., an IMA mobilizing to his sponsoring organization?
☐ Yes ☐ No ☐ N/A

26. Please rate your overall performance during this operation:
a. How well do you feel you did personally? ☐ Excellent ☐ Good ☐ Fair ☐ Poor

b. How do you rate your unit? ☐ Excellent ☐ Good ☐ Fair ☐ Poor

SUPPORT FOR YOUR FAMILY

27. Overall, what was your family's attitude about your mobilization?
☐ Very Supportive ☐ Supportive ☐ Neutral ☐ Unsupportive ☐ Very Unsupportive ☐ N/A

28. Overall, how did mobilization affect your family's situation?
☐ Very Positive ☐ Positive ☐ Little Effect ☐ Negative ☐ Very Negative

29. Did you receive a "Family Information" package at the time of your mobilization?
☐ Yes ☐ No ☐ N/A

30. If you did receive a Family Information packet, was the information helpful to easing the burden of this mobilization?
☐ Yes ☐ No ☐ N/A   If "No" --- please explain on last page, under "Comments."

31. Did your family receive information or contact from the "Key Volunteer Program" prior to your mobilization?
☐ Yes ☐ No ☐ I Don't Know ☐ N/A

32. Is your family receiving "Key Volunteer Program" information during your deployment?
☐ Yes ☐ No ☐ I Don't Know ☐ N/A

33. How effective has your unit's "Key Volunteer Program" or other family support programs been in keeping your family informed?
☐ Outstanding ☐ Good ☐ Fair ☐ Poor ☐ I Don't Know ☐ N/A

34. What sort of health care plan, if any, does your family have during your mobilization?
☐ Civilian Health Plan ☐ Tri-Care Health Plan ☐ No Health Coverage ☐ I Don't Have Family Dependents

35. Overall, how has your mobilization affected your family's health care?
☐ Greatly Improved ☐ Somewhat Improved ☐ No Change ☐ Somewhat Negative ☐ Very Negative ☐ I Don't Have Family Dependents

36. If you changed to the military health care system, did you have any serious problems doing so? Y N   If yes, check ALL that apply below.
☐ Health Care Locations Too Far From Home ☐ Difficulty Enrolling for Tri-Care Health Care ☐ Inconvenient to Change From Civilian Plan ☐ Care Under Plan is Poor ☐ Other: _____

37. Overall, how would you rate the degree of support your family has received from the Marine Corps?
☐ Excellent ☐ Good ☐ Fair ☐ Poor ☐ N/A

OTHER ISSUES

38. What was your employment situation before you were mobilized?
☐ Working Full-Time ☐ Working Part-Time ☐ Unemployed ☐ Student, Volunteer or Homemaker

39. If you were employed full time or part time, what was your employer's attitude about your mobilization?
☐ Very Supportive ☐ Supportive ☐ Neutral ☐ Unsupportive ☐ Very Unsupportive ☐ N/A

40. As a civilian before you were mobilized, approximately what was your monthly income before taxes?
$ _____ Per Month

41. How did your total annual income change from before your were mobilized to when you entered active duty (including all allowances, benefits and any continuing civilian pay)?

☐ Decreased My Pay More Than 50%　　☐ Decreased My Pay About 11% - 50%　　☐ My Pay Stayed Just About The Same (+/- 10%)　　☐ Increased My Pay By 11% - 50%　　☐ Increased My Pay By More Than 50%

42. Did your employer continue any benefits or cover any salary differential after your were mobilized?

☐ Yes　　☐ No　　☐ N/A

43. If you were self-employed, has your business been significantly affected?

☐ N/A　　☐ No Significant Impact　　☐ Yes, Somewhat Affected　　☐ Yes, Irreparably Damaged

44. Do you expect to encounter any problems with your employer upon your return to civilian work?

☐ Yes　　☐ No　　☐ N/A

45. While on active duty, did you experience any significant problems getting your Marine Corps pay?

☐ Yes　　☐ No　　If "Yes" --- how long did it take to resolve these pay problems? _____ Weeks

46. Would you have been willing to do this period of service with voluntary orders instead of involuntary orders?

☐ Yes　　☐ No　　☐ N/A

47. If you were offered the opportunity to stay on active duty, would you take it?

☐ Yes, Definitely　　☐ Probably　　☐ Possible　　☐ Probably not　　☐ Definitely no

48. Overall, has your experience of being mobilized made you more or less likely to stay with the Marine Corps reserve program?

☐ I Will Definitely Stay　　☐ I'm More Likely to Stay　　☐ No Effect　　☐ I'm Less Likely to Stay　　☐ I Will Definitely Not Stay

COMMENTS
Question #　--- ALL COMMENTS AND SUGGESTIONS ARE STRICTLY CONFIDENTIAL

Appendix C: Survey Background Data

1. Total number of surveys completed: 5,050

2. Component

SMCR	*78%*
IRR	*18%*
IMA	*3%*
Retired	*1%*

3. Unit Type

Infantry/Armor	*46%*
Combat Support	*6%*
Combat Service Support	*24%*
Aviation	*4%*
HQ/Staff	*5%*
Div/Wing/FSSG	*15%*

4. Officer/SNCO/Enlisted

Officer (including WO)	*8.3%*
SNCO	*7.8%*
Enlisted (E1-E5)	*83.9%*

5. Male/Female

IN UNITS		**INDIVIDUAL AUGMENTEES**	
Male	*94.7%*	*Male*	*89.6%*
Female	*5.3%*	*Female*	*10.4%*

6a. Prior Combat Experience?

Yes	*12%*
No	*78%*

6b. Of those with previous combat experience, what campaigns or operations? (Numbers add up to more than 100% because many veterans served in multiple campaigns.)

Desert Storm	*54%*
Kosovo	*14%*
Somalia	*10%*

East Timor	*3%*
Afghanistan	*3%*
Panama	*2%*
Haiti	*2%*
Bosnia	*2%*
Vietnam	*Under 2%*
Lebanon	*Under 2%*
Albania	*Under 2%*

7. Deployed overseas during this mobilization?

Yes	*87%*
No	*13%*

8. Average Time in Service for reservists:

	Years Active Duty	*Years Reserve*
Officer	*6.4*	*9.2*
Enlisted	*2.3*	*3.9*

Average respondent:

> *Age: 23*
> *Rank: Lance Corporal (E3)*
> *Component: SMCR*
> *No prior campaign/first deployment*
> *Active duty time in service: 1.4 years*
> *Unit type: Infantry/armor*

Appendix D: Units Visited: CONUS and OCONUS

MARINE FORCES RESERVE
1ST Battalion 25th Marines
2nd Battalion, 25th Marines
2nd Battalion, 23rd Marines
3rd Battalion, 23rd Marines
4th Light Armored Reconnaissance Battalion
4th Assault Amphibian Battalion
4th Landing Support Battalion (-)
4th Medical Battalion (-)
6th Communications Battalion
6th Motor Transport Battalion
6th Engineer Support Battalion
VMGR 452 (-)

VMGR 234 (-)

Ammo Company, 4th Supply Battalion
Co D, 4th Tank Battalion
Co B, 8th Tank Battalion
Co A, 1st Battalion, 24th Marines
Co B, 1st Battalion, 24th Marines
Co C, 1st Battalion, 24th Marines
Co D, 4th Reconnaissance Battalion

MP Co A, HQSVC Bn, 4th FSSG
MP Co B, HQSVC Bn, 4th FSSG
MP Co C, HQSVC Bn, 4th FSSG
Communications Co, 4th FSSG
Communications Co, 4th MarDiv
Truck Co, 4th MarDiv
4th Force Reconnaissance Co.
4th ANGLICO
3d CAG
4th CAG

HQ Detachment, 4th Marine Aircraft Wing
HQ Detachment, 4th Marine Division
HQ Detachment, 4th Combat Engineer Battalion
FSSG Fwd (East)
FSSG Fwd (West)
Detachment MWCS-48
Detachment MTACS-48

1ST MARINE EXPEDITIONARY FORCE/MARCENT

CO, 1st Force Reconnaissance Company
CO, 1st Reconnaissance Battalion
CO, 4th Marine Regiment
S3, 1st Regimental Combat Team
CG, 1st Force Service Support Group
CG, 3d Marine Aircraft Wing
CO, Truck Co, 1st Marine Division
CO, Communication Co, 1st Marine Division
G6, 1st Force Service Support Group
Chief of Staff, 1st Force Service Support Group
Deputy CG, 1st Force Service Support Group
CO, Ammo Co, 1st Supply Battalion, 1st FSSG
CO, Composite Squadron, VMGR 234/452/352
Deputy G3, Marine Logistics Command
ACS, G3, 1st Marine Expeditionary Force
G3, 1st Marine Expeditionary Force
G1, 1st Marine Expeditionary Force
CoS, MARCENT
G1, MARCENT
G6, MARCENT
CoS, MARFORLANT
G1, MARFORLANT
J1, JFCOM

Appendix E: Deployment Data

ANALYSIS OF RESERVE DEPLOYMENT IN OPERATION IRAQI FREEDOM

Unit[1]	# of Marines	RFF Released by CENTCOM	DepOrd Signed by SecDef	Report date	RDD	Actual Arrival Date

In order to analyze deployment times the EFCAT R developed a matrix with the data above. However, some of the data appears to be still classified. The matrix is therefore maintained on the SIPR Net in the EFCAT server at MCCDC.

Appendix F: Acronyms

A/A   Authorized Allowance
AAV   Amphibious Assault Vehicle
ADSW   Active Duty Special Work
ANGLICO   Air/Naval Gunfire Liaison Company
AO   Area of Operations
Bn   Battalion
BST   Basing Skills Training
CAG   Civil Affairs Group
CAOC   Coalition Air Operations Center
CASEVAC   Casualty Evacuation
CAX   Combined Arms Exercise
CBIRF   Chemical-Biological Incident Response Force
CE   Command Element
CENTCOM   Central Command
CFLCC   Coalition Forces Land Component Commander
CMC   Commandant of the Marine Corps
CMCLLS   Center for Marine Corps Lessons Learned System
CG   Commanding General
CO   Commanding Officer
CONUS   Continental United States
CRC   Combat Replacement Company
CSS   Combat Service Support
CSSD   Combat Service Support Detachment
CSSE   Combat Service Support Element
CSSG   Combat Service Support Group
CTAP   Contingency ---- (?)
DD&E   Delay, Deferment, and Exemption
DepOrd   Deployment Order
Det   Detachment
DODI   Department of Defense Instruction
EAS   End of Active Service
EFCAT   Enduring Freedom Combat Assessment Team
EFCAT-R   Enduring Freedom Combat Assessment Team - Reserve
EPW   Enemy Prisoner of War
ESB   Engineer Support Battalion

ESGR	Employer Support of the Guard and Reserve
FDP&E	Force Deployment Planning, and Execution
FEX	Field Exercise
FSSG	Force Service Support Group
GFC	Gaining Force Command
HET	Heavy Equipment Transporter
HMH	Marine Heavy Helicopter Squadron
HQ	Headquarters
HQMC	Headquarters, Marine Corps
IA	Individual Augmentee
IADT	Initial Active Duty Training
ID	Identification
I-I	Inspector-Instructor
ILOC	Intermediate Location
IMA	Individual Mobilization Augmentee
IMPC	Initial Mobilization Processing Center (?)
IRB	Improved Ribbon Bridge
IRBE	Initial Remain Behind Equipment
IRR	Individual Ready Reserve
JCLLT	Joint Center for Lessons Learned Team
JCS	Joint Chiefs of Staff
JFCOM	Joint Forces Command
JPME	Joint Professional Military Education
KVP	Key Volunteer Program
LAR	Light Armored Reconnaissance
LAV	Light Armored Vehicle
LSB	Landing Support Battalion
M&RA	Manpower and Reserve Affairs
MACE	Mobilization Augmentation Command Element
MACS	Marine Air Control Squadron
MAG	Marine Aircraft Group
MAGTF	Marine Air-Ground Task Force
MAID-P	Mobilization, Activation, Integration, and Deactivation Plan
MARCENT	Marine Forces Central Command
MARDIV	Marine Division
MARFOR	Marine Forces
MARFORRES	Marine Forces Reserve
MAW	Marine Air Wing

MCAS	Marine Corps Air Station
MCCDC	Marine Corps Combat Development Center
MCMPS	Marine Corps Mobilization Processing Software (?)
MCPP	Marine Corps Planning Process
MCRSC	Marine Corps Reserve Support Center
MEB	Marine Expeditionary Battalion
MEF	Marine Expeditionary Force
METL	Mission Essential Task List
MEU(SOC)	Marine Expeditionary Unit (Special Operations Capable)
MFLant	Marine Forces Atlantic
MILPERS	Military Personnel
MLC	Marine Logistics Command
MORDT	Mobilization and Operational Readiness Deployment Test
MOS	Military Occupational Specialty
MP	Military Police
MPC	Mobilization Processing Center
MPF	Maritime Prepositioning Force
MPLAN	Mobilization Plan
MPP	Manpower Plans and Policy
MRAOG	Marine Rear Area Operations Group
MSB	Mobilization Support Battalion
MSC	Military Sealift Command
MSTP	MAGTF Staff Training Program
MT	Motor Transport
MTT	Mobile Training Team
MTW	Major Theater War
MWCS	Marine Wing Support Squadron
NAVMC	Navy -- Marine Corps [Publication]
NBC	Nuclear, Biological, and Chemical
NCO	Non-Commissioned Officer
O&M	Operation and Maintenance
OCONUS	Outside Continental United States (?)
OCS	Officer Candidate School
ODS	Operation Desert Storm
OIF	Operation Iraqi Freedom
OJT	On-the-Job Training
OPTEMPO	Operational TEMPO
OSD	Office of the Secretary of Defense

PERSTEMPO	Personnel TEMPO
Plt	Platoon
PME	Professional Military Education
POL	Petroleum, Oil and Lubricants
PSYOPS	Psychological Operations
PFT	Physical Fitness Test
PWST	Peacetime Wartime Support Team
RA	Reserve Affairs
RC	Reserve Component
RCT	Regimental Combat Team
Recon	Reconnaissance
REIN	Reinforced
RFF	Request for Forces
ROWS	Reserve Order Writing System
RSU	Reserve Support Unit
RTC	Reserve Training Center
SAMS	SNAP-Automated Medical Systems
SIA	Station of Initial Assignment
SMCR	Selected Marine Corps Reserve
SNCO	Staff Non-Commissioned Officers
SOCOM	Southern Command
SOI	School of Infantry
SOP	Standard Operating Procedure
SWA	Southwest Asia
T/A	Table of Allowance
T/E	Table of Equipment
T/O	Table of Organization
TAD	Temporary Attached Duty
TBS	The Basic School
TEWT	Training Exercise Without Troops
Tri-Care	
UN	United Nations
USCENTAF	US Central Command Air Forces
USERRA	Uniformed Services Employment and Reemployment Rights Act
USMC	United States Marine Corps
USMCR	United States Marine Corps Reserve
VMGR	Marine Aerial Refueler/Transport Squadron