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14. ABSTRACT The Department of Defense (DoD) has recognized that the future of the reserve force will include operational duties in addition to its historic strategic duties. With the future operational role in mind, the DoD commissioned a study to determine what future roles the reserve force is best suited to undertake. Among other conclusions, the study stated that the reserve force is best suited to undertake "recurring or predictable" missions. These missions allow the lead time necessary to plan and mobilize reservists. Among the recurring and predictable missions identified is building partner capacity, or "security cooperation." In addition to the steady-state nature of these missions, reservists can contribute enabling skillsets from the civilian government and private sector that make them eminently qualified to conduct such missions. The Marine Corps stated objective for the future is to have a worldwide, foreign deployed presence. The forces making up this presence will be capable throughout the range of military operations. This posture will require efficient use of all forces available, both active duty and reserve. Efficiency is even more critical in light of the fiscal austerity measures that the DoD currently faces. The reserve force can fill the role of the small forward presence, providing access for larger US forces while building host nation capacity. The reserve force, or at least a segment of it, should task organize and train for these "advisory" missions.					
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Reserve Force 21: How Can the Marine Corps Reserve Force Maximize its Effectiveness in Accomplishing Future Marine Corps Missions?

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OF THE REQUIREMENTS FOR THE DEGREE OF
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Preface

While a member of Marine Corps Reserve, I deployed with Special Purpose Marine Air-Ground Task Force 13.3 from June 2013 to January 2014. Prior to this deployment, I had very little experience in security cooperation, why it was conducted, and most importantly, how to conduct it effectively. During training and in the execution of my missions, I noticed several areas that needed improvement. While the Task Force leadership was highly operationally minded and facilitated training with that mindset, many commands outside the SPMAGTF were inclined to view security cooperation as simply a training mission, without paying much attention to the purpose or quality of the training.

Post-Iraq and Afghanistan security cooperation is gaining a lot of attention throughout all services. As the DoD realizes the value in conducting these missions, the execution of these missions is gaining far more support from commands at all levels. Therefore, efficient, purposeful execution is becoming a priority.

The reserve force faces significant challenges due to limited training time. However, in the case of security cooperation, the reserve force brings skillsets to the table that may not be as readily available in the active component.

The Table of Organization (T/O) for SPMAGTF Africa was Officer/SNCO/NCO-heavy. While a significant number of personnel for this deployment came from the battalion to which it was assigned (4th Combat Engineer Battalion), approximately half of the personnel were sourced from other units within MARFORRES. While the losing reserve units' readiness was certainly affected by the temporary loss of personnel, the reserve units can afford to do so with significantly less impact to readiness than an active duty unit.

Furthermore, personnel selected for the deployment were eminently qualified. SPMAGTF Africa 13.3 conducted training throughout Africa. The most enduring missions were logistics-related. All missions were in remote settings on the continent of Africa in small teams. The Marines selected held civilian qualifications such as Toyota-certified mechanics, law enforcement personnel for force protection planning roles, and various members of the interagency who understood the U.S. State Department and other governmental agencies. These skillsets are particularly valuable in conducting security cooperation missions.

While the reserve force will continue to provide strategic depth to the active duty force, the recent change to an operational force provides an opportunity to identify where the reserve force can be most effective. The role of the reserve force should be carefully considered as the Marine Corps moves away from combat in Iraq and Afghanistan and looks ahead to having a forward deployed presence and building partner capacity throughout the world and throughout the Realm of Military Operations (ROMO).

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Executive Summary:

Subject Area: Reserve Affairs

Title: Reserve Force 21: How Can the Marine Corps Reserve Force Maximize its Effectiveness in Accomplishing Future Marine Corps Missions?

Thesis: The Marine Corps Reserve has unique capabilities, inherently different from the active component, which can be used to the benefit of the Marine Corps as a whole.

Discussion: The Department of Defense (DoD) has recognized that the future of the reserve force will include operational duties in addition to its historic strategic duties. With the future operational role in mind, the DoD commissioned a study to determine what future roles the reserve force is best suited to undertake. Among other conclusions, the study stated that the reserve force is best suited to undertake “recurring or predictable” missions. These missions allow the lead time necessary to plan and mobilize reservists.

Among the recurring and predictable missions identified is building partner capacity, or “security cooperation.” In addition to the steady-state nature of these missions, reservists can contribute enabling skillsets from the civilian government and private sector that make them eminently qualified to conduct such missions.

The Marine Corps stated objective for the future is to have a worldwide, foreign deployed presence. The forces making up this presence will be capable throughout the range of military operations. This posture will require efficient use of all forces available, both active duty and reserve. Efficiency is even more critical in light of the fiscal austerity measures that the DoD currently faces.

The reserve force can fill the role of the small forward presence, providing access for larger US forces while building host nation capacity. The reserve force, or at least a segment of it, should task organize and train for these “advisory” missions.

Conclusion/Recommendations for MARFORRES:

- 1) Establish means to identify and track civilian skillsets of the reserve force as they pertain to security cooperation missions. These skills should be considered either in addition to, or in place of, military MOS to meet the needs of the Marine Corps operations. Screen and train reserve Marines in conducting security cooperation missions worldwide, throughout the ROMO.
- 2) Provide a pool of task-organized individuals and/or teams and units to operational units such as MEUs or MEBs. These units can be sourced from various units to cater to specific missions requiring non-standard skills. Another option for making these skillsets inherent throughout MARFORRES is to facilitate each unit within MARFORRES to stand up a set number of security cooperation teams.
- 3) Establish enduring relationships with Joint Center for International Security Force Assistance and the Marine Corps Security Cooperation Group. These relationships should not only assist in preparing reservists for security cooperation missions, but should also inform and guide MARFORRES actions in pursuing greater security cooperation capability.
- 4) Encourage and incentivize individuals identified for security cooperation roles to acquire long-lead time skills such as foreign language proficiency and the Marine Corps Security Cooperation Planner MOS

Part 1 – Introduction

"The world moves, and ideas that were good once are not always good."

-President Dwight D. Eisenhower

From the onset of the War on Terror in 2001, the Marine Corps Reserve has deployed to Iraq and Afghanistan in both units and as individual augmentees to active duty units and staffs. The wars in Iraq and Afghanistan have officially transformed the Marine Corps Reserve from a strategic reserve force to an operational reserve force. Marine Corps leaders' acknowledgement of this change from strategic to operational is significant because future missions must be planned through the lens of this operational status. The Reserve Force should no longer be viewed separately from the current mission of the Marine Corps. Distinct differences in capabilities and limitations exist between the Reserve Component (RC) and Active Component (AC) of the Marine Corps. Time available for training is one distinct limitation of the RC. However, some advantages inherent to the RC include civilian skillsets in addition to the reservists' military occupational specialties. Marine Corps Forces Reserve (MARFORRES) also has an advantage of sourcing personnel from throughout MARFORRES to task-organize for missions with non-standard skill, rank or number requirements. The Marine Corps has not fully recognized or used these advantages.

Marine Corps leadership is addressing future roles of an operational Marine Corps Reserve at an opportune time. The post-war Marine Corps faces budget and personnel cuts, despite expanding permanent missions being undertaken on all continents with emphasis in Africa, the Middle East and the Pacific Rim. *Expeditionary Force 21* outlines eight ways in which the Marine Corps will refine its organization to optimize its effectiveness. This document also directs a significant shift to forward deployment of the Marine Corps despite having fewer

ships, operating bases, and conventional means of supporting forces. In the face of expanding missions, this cyclical period of military financial and personnel austerity makes efficient use of the reserve a necessity, not an option.

In conjunction with the significant challenge of future Marine Corps missions, the change to operational reserve status demands an updated analysis of the best use of the Marine Corps Reserve. This paper examines three current topics of direct, immediate relevance the Marine Corps Reserve Force:

- 1) Department of Defense policies and initiatives with regard to the Reserve Force
- 2) Current and future Marine Corps challenges
- 3) History and outlook of the “Advisor Role” with regard to Marine Corps missions

This paper identifies areas in which the Marine Corps can utilize the RC to the maximum benefit of the entire Corps.

Part 2 – DoD and USMC’s Perspectives on the Operational Reserve

“Fully leveraging the talent and ability of every Marine is a critical component of our warfighting culture.”

*General Joe Dunford
36th Commandant of the U.S. Marine Corps
Planning Guidance 2015*

The idea of an Operational Reserve is relatively new. Most reservists do not examine the difference in status from strategic to operational or consider that the RC is unlikely to return to its pre-9/11 solely “strategic” position. The 2010 Quadrennial Defense Review (QDR) stated “Preventing and deterring conflict will likely necessitate the continued use of some elements of the Reserve Component—especially those that possess high demand skill sets—in an operational capacity well into the future.”¹ The 2010 QDR goes on to indicate that the DoD is comprehensively reviewing and examining the future role of the RC.

This review, titled *Comprehensive Review of the Future Role of the Reserve Component*, was published in 2011. This review’s most ironic recommendation is to cease using the terms “operational reserve” and “strategic reserve.”² The stated reason for this change is that the terms are arbitrarily used in various doctrinal contexts, creating confusion. In addition to these terms creating confusion, the document suggests that the idea of a solely “strategic reserve” is simply no longer feasible. Indeed, the reserve force has provided strategic depth in the past and will continue to do so in the future, but the reserve force must provide persistent capabilities and manpower to United States missions. The Defense Department review examined the option to “Put RC ‘on the Shelf’ as a Strategic Reserve” as a means to rebalance the force. The report concluded, however, that shelving the RC is not feasible because it did not provide acceptable

¹ US Department of Defense. “2010 Quadrennial Defense Review.” February 12 2010. http://www.defense.gov/QDR/images/QDR_as_of_12Feb10_1000.pdf. Page 53.

² US Department of Defense. “Comprehensive Review of the Future Role of the Reserve Component. Volume I, Executive Summary & Main Report.” DTIC Online: 2011. Page 11

benefits to two of the five evaluation criteria: enhancing total force capability, and preserving reserve component (RC) readiness gains.³ Furthermore, the suggestion of a solely strategic reserve is potentially counterproductive in two additional evaluation criteria: relieving stress on the active component (AC) and reducing total force cost.

One recommendation outlined in the *Comprehensive Review of the Future Role of the Reserve Component* review states,

“The Services should plan to use the Guard and Reserve for recurring or predictable missions within their capabilities. Using the Reserve Component in this way requires a fundamental shift in the way DoD currently envisions employing these forces. Up until now, many have viewed the Guard and Reserve as essentially a ‘force of last resort,’ to be used only when all other Active Component solutions have been attempted. Instead, DoD should envision the Guard and Reserve as a ‘force of first choice’ for such tasks...”⁴

Clearly, the Department of Defense is highly likely to continue using the reserve force for future operations. While the review clearly indicates that each branch of service will have responsibility for, and latitude on, employing its RC, several ideas for employment are examined. The review recognizes the reserve roles in large-scale conventional campaigns, large-scale stability operations, steady state engagement activities, humanitarian assistance/disaster relief, homeland defense and defense support to civilian authorities, and institutional support.⁵

Of these functions, steady state engagement activities have the most significance from a reserve force perspective for two reasons. First, such engagement activities are becoming routine as combat operations wind down in Afghanistan. Second, one of the review’s findings

³ Ibid, Page 63. The “RC readiness gains” refers to the review’s findings that the RC has made significant progress in enhancing readiness due to operations undertaken since 2001. The review makes clear throughout that this readiness enhancement must be preserved.

⁴ Ibid, Page 41.

⁵ US Department of Defense. “Comprehensive Review of the Future Role of the Reserve Component. Volume I, Executive Summary & Main Report.” DTIC Online: 2011, Page 32

states that “In the absence of major conflict, the Reserve Component is best employed for missions and tasks that are predictable, relatively consistent over time, and whose success can be substantially enabled by long-term personal and geographic relationships.” Another finding regarding unique skills and capabilities indicates “Guardsmen and Reservists bring valuable professional, technical and managerial skills from the private sector that match well with many current and anticipated DoD requirements, including those related to the Combatant Commander’s Building Partner Capacity and Theater Security Cooperation activities.”⁶

The Department of Defense has recognized the need to maximize the use and the effectiveness of the reserve force. In addition, many of the review’s recommendations that address the manner in which the reserve force is employed reflect stark differences from the “force of last resort” paradigm.

The distinct differences between the AC and RC outlined in DoD’s 2011 *Comprehensive Review of the Future Role of the Reserve Component* are recognized in the Marine Corps as well. Special Purpose Marine Air-Ground Task Force (SPMAGTF) Africa was a Theater Security Cooperation mission undertaken by RC units and the predecessor to the current SPMAGTF Crisis Response units in Africa and Europe. SPMAGTF rotation 13.3 was conducted from June 2013 to January 2014. While the table of organization SPMAGTF Africa 13.3 was being sourced, special civilian skillsets were among the criteria for volunteer joining the deployment were.⁷ This particular deployment was a logistics-heavy training mission to be conducted throughout Africa. Therefore, some of the skillsets sought were commercial automobile and truck mechanics and drivers, French language speakers, and various African language speakers. These skills beyond military MOS gave the training team specific advantages when training non-

⁶ Ibid. Page 87.

⁷ The author was involved in the SPMAGTF Africa 13.3 deployment and has knowledge of the personnel sourcing procedures.

English speaking personnel on various non-US vehicles and equipment. While the SPMAGTF staff did its best to identify these eminently qualified personnel, no official mechanism existed for identifying personnel with these requisite civilian skillsets throughout Marine Corps Reserve.

The Marine Corps Center for Lessons Learned (MCCLL) documented some of these differences in its report titled *Reserve Component (RC) Sourcing of Operation Enduring Freedom Security Force*, published in May of 2011. 3rd Battalion, 25th Marine Regiment (3/25) and 1st Battalion, 23rd Marine Regiment (1/23), both reserve battalions, were mobilized for Afghanistan rotations 10.2 and 11.1, respectively. Their role was to take the Security Force (SECFOR) mission from the active duty units. This SECFOR mission included providing security for Camp Leatherneck and two other nearby bases, as well as security for a 900 square kilometer area of operations (AO) surrounding these bases. This AO included several small population centers and Afghan markets. In addition to this anticipated mission, some companies were tasked to augment infantry regiments conducting Counter-Insurgency Operations (COIN). Other elements were tasked to augment the countrywide NATO mission to train Afghan police and military.⁸

The MCCLL report that documented the sourcing for these missions highlighted several observations. The broadest observation was the acknowledgement of the SECFOR mission as an example of the RC being integrated into the active component as an operational reserve. The primary reason for this change was to allow the AC to achieve the proper deployment-to-dwell ratio, as also recognized by the DoD and outlined in previous paragraphs.

⁸ Marine Corps Center for Lessons Learned. Reserve Component (RC) Sourcing of Operation Enduring Freedom Security Force. 18 May 2011, page 10

Another observation documented in the MCCLL report is that the RC was especially suited for the conduct of the diverse tasks, especially COIN, associated with the SECFOR mission. “Reserve Marines are members of local neighborhoods across the U.S., go to school, work with, and interact daily with the civilian population at home. Additionally, the unit typically consists of police officers, tradesmen, salesmen, marketers, and customer service representatives; many skill sets that lend themselves to civil engagement.”⁹

A third observation in the MCCLL report is the acknowledgement of the SECFOR mission as requiring a Table of Organization (T/O) different than that of a standard infantry battalion. The staffing for this mission was dictated by a manning document. This manning document reflected a force cap of 633 Marines. In addition to the numbers not matching an infantry battalion T/O, the MOSs were also different. Over half of the billets on the manning document were MOS 8006 for officers and 8014 for enlisted Marines. These are “free” MOSs meaning any qualified officer can fill the 8006, and any qualified enlisted can fill the 8014. Marines to fill these billets were sourced MARFORRES-wide, with the deploying battalion filling most of the key leader billets.

The tone of the MCCLL report indicated that this non-standard manning document was a disadvantage to the deploying battalion. The manning document placed 3/25 at a disadvantage because it limited the number of personnel in the Operations and Headquarters and Service Sections in a manner inconsistent with the battalion commander’s priorities. First Battalion, twenty-third Marines feedback to MCCLL indicated, “The mismatch between the T/O and the manning document caused difficulties in identifying personnel shortfalls, billet vacancies or even deciding what the battalion rates in terms of personnel. The manning document should be

⁹ Ibid page 7

modified to more closely mirror the T/O of an infantry battalion, assuming that the mission will continue to be tasked to a battalion.”¹⁰ The short timelines each of these units had to prepare for mobilization made the staffing of this manning document even more challenging.

In lieu of a standard infantry battalion T/O, this manning document was not recognized as an advantage. The challenges associated with sourcing personnel to a non-standard manning document are duly noted. However, the ability of a reserve battalion to staff to a non-standard T/O should not be overlooked. The 633 personnel, with which both 3/25 and 1/23 were able to deploy, were staffed MARFORRES-wide. Sourcing in this fashion by the AC would cause significant problems with the readiness of many other AC units. Another advantage to the RC sourcing is that the non-specific MOS requirements allow personnel to be hand-selected based on not only MOS, but also civilian, competencies. The MCCLL report indicates that the challenge is easier fixed by simply making the manning document match an infantry T/O. In the cases of 3/25 and 1/23 conducting a SECFOR mission, this solution may indeed have been the best solution. However, some missions may not lend themselves to a standard T/O. Both MARFORRES and the AC can realize significant advantages from the ability to provide a non-standard unit if the timeline for staffing these manning documents, and the quality of the manning documents themselves, can be fixed. This ability certainly helped field a properly task-organized unit in the case of SPMAGTF Africa 13.3.

MCCLL documented similar RC advantages in *Reserve Component (RC) Security Force Assistance Training Teams (SFA-TT)* published in January 2014. This report analyzes two reserve units conducting Security Force Assistance (SFA). One conducted SFA with the Mexican Marine Corps in support of NORTHCOM. The other conducted SFA for the Jordanian

¹⁰ Marine Corps Center for Lessons Learned. Reserve Component (RC) Sourcing of Operation Enduring Freedom Security Force. 18 May 2011, Page 16

Operational Deployment Program (JODP) in support of MARCENT. As with the reserve SECFOR missions, the SFA mission in Jordan was sourced MARFORRES-wide due to the wide range of MOSs necessary to meet the requirements of this SFA mission. Again, the report notes the advantages of the RC. The introduction to this MCCLL report states, “This report highlights MARFORRES’s agility in meeting the specific personnel requirements necessary for supporting a GCC’s TSC campaign plans. The RC provides a unique sourcing solution in that it can task organize small detachments with the senior and experienced personnel ideally suited to the cultural demands of the security cooperation (SC) mission.”

As with the SECFOR missions discussed in previous paragraphs, these mobilizations were not without problems. Due to administrative funding issues, Marines supporting one of these missions did not receive orders until 30 days prior to the activation. Equipment, training and Standard Operating Procedures specific to SFA missions were not ideal. This report examines these issues in-depth later.

Part 3 - Evolving Needs of the Marine Corps

Like war itself, our approach to warfighting must evolve. If we cease to refine, expand, and improve our profession, we risk being outdated, stagnant, and defeated.”

*-General AM Gray
29th Commandant of the U.S. Marine Corps*

Expeditionary Force 21 provides a broad forward-looking plan for the Marine Corps. This document outlines the future operating environment, Marine Corps lines of effort and an implementation plan for developing capabilities in thirteen focus areas. Many of the goals outlined in *Expeditionary Force 21* would be difficult to achieve even during periods of high funding and increasing personnel. They are especially difficult to address during a period of budget and personnel cuts. *Expeditionary Force 21* suggests the Marine Corps should have one-third of its force forward deployed at all times. This approach will require deployment to dwell times of 1:2 for the active duty and 1:4 for the reserves.¹¹

While *Expeditionary Force 21* suggests using a high degree of creativity in seabasing platforms to get more Marines forward, Marines will still require a significant land-based presence. Additionally, the land-based presence builds partner nation capacity through security cooperation. If done correctly, it can provide access to key terrain, intelligence and host nation government and commercial support in case a need for a larger crisis response force arises in that country or region. These forward-deployed forces will be strategically spread, requiring deployments to numerous partner nations worldwide.

The Marine Corps could realize significant advantage in personnel and mission management if it conducted its own analysis of reserve force utilization best-practices. Many of the recommendations in the DoD’s *Comprehensive Review of the Future Role of the Reserve Component* are directly applicable to the challenges that the Marine Corps will face in future

¹¹ US Marine Corps. “Expeditionary Force 21.” March 4, 2014, Page15-16

operations. *Expeditionary Force 21* proposes that MARFORRES orient on the SOUTHCOM AOR.¹² This narrow regional focus does not capitalize on all that the RC can provide to the Marine Corps worldwide.

Comprehensive review of the Future Role of the Reserve Component included opinions of geographic combatant commanders regarding their opinions on employment of the reserve component. The opinion of these commanders was not only to continue the use of the reserve force at its current level, but to aggressively expand the use of the reserve to deal with high operational tempo and region/function-specific missions for which the reserve force is suited.¹³ Combatant commanders recommended that they have control of activations and mobilizations. This control of the RC that the combatant commanders endorsed caused the writers of the review to not endorse the combatant commanders' opinions. The combatant commanders clearly recognize the value of an operationally engaged reserve force.

¹² US Marine Corps. "Expeditionary Force 21." March 4, 2014, Page 17

¹³ US Department of Defense. "Comprehensive Review of the Future Role of the Reserve Component. Volume I, Executive Summary & Main Report." DTIC Online: 2011. Page 11

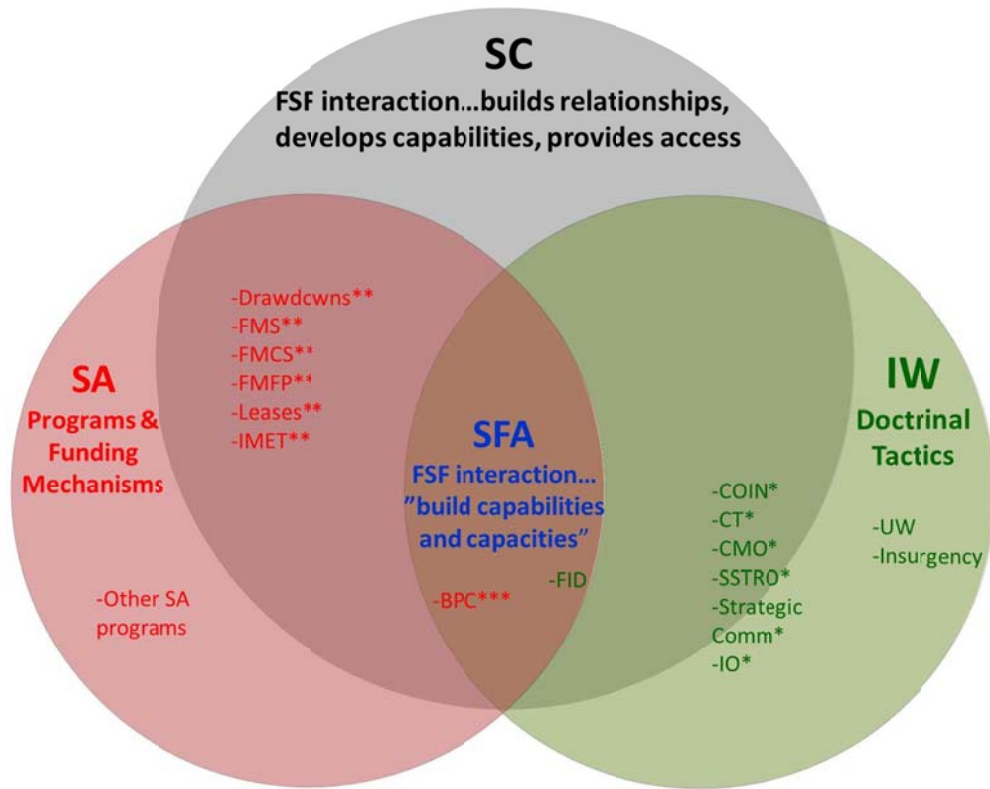
Part 4 – Terminology and History of the Advisory Role

“The only thing I remember about CAP School in Da Nang was they taught us how to play Chinese Checkers. I guess they figured it would help us get along with the Vietnamese”

-U.S. Marine Tony Vieira, speaking of his 1967 training in Vietnam in preparation for service in the Combined Action Program

The role of the RC has transitioned to operational. DoD and Marine Corps studies have documented the flexibility of the RC. The DoD and the Marine Corps have identified roles such as “Security Cooperation” (SC) and Building Partner Capacity as both critical to future operations, and activities for which the RC is well suited. So what are these missions? The tasks known since the early 1900s simply as “advisory missions” have evolved into a series of tasks and concepts with similar meanings. Security Cooperation (SC), Security Assistance (SA), Security Force Assistance (SFA) and “Building Partner Capacity” are the most relevant terms to the conventional force in use today. DoD’s *Security Force Assistance Lexicon Framework* document, published in 2011, specifically describes these terms as relational rather than hierarchical. Figure 1 graphically depicts the relationship of some of the more common terms associated with advisory missions. DoD’s SFA Lexicon document also provides a glossary with specific definitions of these and other terms relevant to this discussion.

The terms “Irregular Warfare (IW)” and “Foreign Internal Defense (FID)” are related to this discussion. These terms are almost universally accepted as squarely in the Special Operations Forces (SOF) world. To suggest that conventional forces should undertake such missions almost instantly invokes the response that these missions are outside the scope of conventional forces. Such a response would be correct in cases of high complexity, risk, or strategic importance.



* May be classified as SC if achieving one of the SC objectives for FSF. May be classified as SFA if used to achieve the sole SFA objective of building FSF capability and capacity

** May be classified as SFA if used to build capability and/or capacity of FSF

*** "Build Partner Capacity (BPC)" has three connotations:

1. The literal connotation of increasing the capability or capacity of the foreign security force of a partner nation
2. In diagram above, BPC represents a subset of programs under the Title 22 FMS program
3. BPC as stated in Tier 3, Joint Capabilities Area, "build the capabilities and capacities of partners and institutions"

BPC – Build Partner Capacity
 CMO – Civil Military Operations
 COIN – Counter Insurgency
 CT – Counter-Terror
 FID – Foreign Internal Defense
 FMCS - Foreign Military Construction Services
 FMFP – Foreign Military Finance Program
 FMS - Foreign Military Sales

FSF – Foreign Security Force
 IMET – International Military Education and Training
 IO – Information Operations
 IW – Irregular Warfare
 PSYOP – Psychological Operations

SA – Security Assistance
 SC – Security Cooperation
 SFA – Security Force Assistance
 SSTRO – Security, Stability, Transition, Reconstruction Operations
 UW – Unconventional Warfare

Figure 1 – Relationship between Security Cooperation (SC), Security Force Assistance (SFA), Security Assistance (SA), Irregular Warfare (IW) and other related terms

Sources:

DoD IW Joint Operating Concept 11 September 2007
DISAM Green Book – 33 rd Edition Apr 2014
DoD Security Force Assistance Lexicon Framework 1 Nov 2011

However, understanding the similarities in these terms is required in order to clearly articulate what role is being proposed for the conventional reserve force. Acknowledging that these terms inherently overlap is also important. From the perspective of a force provider, SC, SA, SFA, and FID missions are similar in execution. The forces conducting operations under any of these labels are essentially conducting “advisory missions” since the beginning of the 20th century. The authorities, complexity, risk and endstate vary depending on the mission. The specific definitions and etymology of each of these specific terms highlights these differences. However, the skillsets and training required to carry out these missions are the same.

The Center for Naval Analysis conducted a study in 2013 on capabilities, organization and training required to conduct advisory missions. This study was commissioned by the 1st Marine Expeditionary Unit in the context of how to conduct advisory missions in the post-Afghanistan timeframe. The intent was to capture lessons learned during previous advisory missions in order to inform the training and organization efforts in future missions.

The study began by analyzing previous Marine Corps advisory missions conducted from the early 1900s through the Vietnam War to examine what has worked and what has not. Figure 2 succinctly summarizes the most common problems encountered during advisory missions in “The Banana Wars,” Viet Nam, Iraq, and Afghanistan. In addition to the problems indicated in Figure 2, analysis of each of these historical advisory missions provides specific insights into the nature of these missions and recurring themes.

“The Banana Wars” were undertaken by the United States from 1901 to 1935, with the most persistent missions being undertaken in the nations of Haiti, Dominican Republic, and Nicaragua. The United States openly conducted not only advisory missions supporting governments that it deemed pro-American, but also combat missions. The Marines exercised

	Poor Quality Local Re-recruits	Inadequate Advisor Screening/Selection	Inadequate Pre-Deployment Training	Language and culture barriers	C2/Support Issues
Banana Wars	X		X	X	X
Vietnam (VNMC)			X	X	
Vietnam (CAP)		X	X	X	
Iraq		X	X	X	X
Afghanistan	X	X	X	X	X

Figure 2 – CNA’s summary of the most significant issues faced during past Marine Corps advisory missions

great authority over civilian populations in the more ungoverned areas. Much of their efforts were to establish police and military forces. They undertook additional roles in establishing, supporting, and even running local governments within the countries in which they operated throughout the Caribbean and Latin America. At that time in American history, the United States and the world were much less sensitive to the politics of conducting unilateral operations upon another country’s sovereign soil.

During this era, the execution of advisory missions was also less politically sensitive. Once security was established in an area, standard operating procedure was to disband the existing police and military forces. The Marines would stand up new “constabularies” from scratch, train them, and put US Marine officers in command of them. These techniques contributed to the issue of poor quality recruits. Another unintended consequence was the problem of turning the organization back over to the indigenous populations. As the US

redeployed from these areas, it faced problems with turnover to the overly American civil and military authority. Much of this turnover was conducted hastily and without forethought¹⁴.

Unfortunately, the post-Banana Wars history suggests that US efforts in Haiti, Dominican Republic, and Nicaragua were less than successful. All three nations experienced decades of governmental instability after the United States left. Despite overall questionable results of advising missions during the Banana Wars, the Marine Corps captured lessons learned in *The Small Wars Manual* published in 1940. This doctrine was the first to address proper conduct of advisory missions. This publication reflects the lessons of the success of certain tactics and the failure of others. Interestingly, the first page of Chapter 15, “Withdrawal,” states, “Local governmental functions should be returned to the control of the local authorities as early as possible in the campaign as conditions warrant, in order that it may not be necessary to turn over all such functions at one time.”¹⁵

Advisory missions were conducted in Viet Nam under two programs. The initial advisory program started in 1955 as a means to build capabilities of South Viet Nam forces. By 1967, the mission had become not only to build capacity, but also “operational liaison,”¹⁶ or combat advisory roles, in which US Marine advisors coordinated logistics and fire support for the South Vietnamese while working alongside South Vietnamese maneuver units in combat. No distinction existed between the previous training roles with which the Marine advisors were

¹⁴ Rosenau, William G ; McAdam, Melissa L ; Katt, Megan ; Lee, L G ; Meyerle, Gerald M ; Schroden, Jonathan J ; Randazzo-Matsel, Annmarie ; Hiatt, Catherine M ; Hoar, Margaux E “United States Marine Corps Advisors: Past, Present, and Future.” Center for Naval Analysis, Alexandria Virginia. August 2013
<https://www.dtic.mil/DTICOnline/downloadPdf.search?collectionId=tr&docId=ADB392595>, Pages 9-24

¹⁵ US Marine Corps. “Small Wars Manual.” Washington, DC, 1940
<https://www.dtic.mil/DTICOnline/downloadPdf.search?collectionId=tr&docId=ADA421035>, Chapter 15, Section 1, Page 1

¹⁶ Rosenau, William G ; McAdam, Melissa L ; Katt, Megan ; Lee, L G ; Meyerle, Gerald M ; Schroden, Jonathan J ; Randazzo-Matsel, Annmarie ; Hiatt, Catherine M ; Hoar, Margaux E “United States Marine Corps Advisors: Past, Present, and Future.” Center for Naval Analysis, Alexandria Virginia. August 2013
<https://www.dtic.mil/DTICOnline/downloadPdf.search?collectionId=tr&docId=ADB392595>, Page 27

originally tasked and the operational liaison role that their mission ended up being. This distinction was not emphasized probably because by 1967, the United States was engaged in conventional war in Viet Nam. The larger conflict overshadowed the change in the scope of the advisory mission.

Emphasis on advisor training was increased for the advisory mission in Vietnam. The original advisors received careful screening and training, particularly in Vietnamese language and cultural orientation. Advisors were trained in one of three ways. One was a three-month advisor course in Quantico, set up specifically for the advisor missions in Viet Nam. The second was at the Department of Defense Military Assistance Institute (MAI). The third was the advisor training course at the US Army's Special Warfare School. Both the MAI and Quantico advisor course were not continued past the Viet Nam War¹⁷.

The second advisory mission in Vietnam, the "Combined Action Program (CAP)," started as a combat advisory mission in 1966. Today it would be considered a FID mission. US Marines partnered with Vietnamese "Popular Forces (PF)" units to conduct combat operations against Viet Cong guerrillas in the remote areas of South Viet Nam.

The PF were known for being ineffective prior to their partnership with the Marines. The Viet Cong enjoyed freedom of movement throughout remote villages, due to the lack of capability of the PF. They depended on the villages, primarily for food, with which they could sustain their numbers to conduct operations. The training, equipment and combat advising that the CAP provided did achieve success in the areas in which it was used. The combined Marine

¹⁷ Rosenau, William G ; McAdam, Melissa L ; Katt, Megan ; Lee, L G ; Meyerle, Gerald M ; Schroden, Jonathan J ; Randazzo-Matsel, Annmarie ; Hiatt, Catherine M ; Hoar, Margaux E "United States Marine Corps Advisors: Past, Present, and Future." Center for Naval Analysis, Alexandria Virginia. August 2013
<https://www.dtic.mil/DTICOnline/downloadPdf.search?collectionId=tr&docId=ADB392595>, Pages 25-34

units and their PF counterparts were effective in denying Viet Cong Guerillas freedom of movement, food and intelligence.

The CAP started at a time in the Viet Nam war in which pressure was being put on Marine forces to conduct search and destroy missions against larger units of North Vietnamese forces rather than continue their CAP efforts. Due to this lack of emphasis on the CAP or any other similar program at the theater level, forces in sufficient numbers to deny sanctuary to the Viet Cong in large areas of South Viet Nam were simply not available.¹⁸

Two items are noteworthy regarding the Marines advisory experience in Viet Nam in the context of future advisory missions. First, the original training mission and the CAP either started out as, or ended up being, combat advisory roles. The line between a “training mission” and combat advisor mission was simply not there. Second, despite the Marine Corps efforts toward the CAP, the value of advisory missions as a tactic against the Viet Cong insurgency was not recognized by US political, or theater-level military leaders. Indications are that they viewed small advisory missions directed toward the local population as inconsistent with conventional combat operations.

From 2003 to present, the wars in Iraq and Afghanistan have created a renewed interest in advisory missions, or SFA, among conventional forces.¹⁹ While the conduct of these wars was very different, conventional forces faced some similar issues as they began to undertake SFA.

US efforts to conduct SFA in Iraq began in 2003. Since the insurgency had caught US forces by surprise, countering it by partnering with Iraqi forces was not well planned. Some of the challenges faced were similar to those of in Vietnam and The Banana Wars. Initially, advisors in both the Marine Corps and Army faced challenges of no SFA pre-deployment

¹⁸ Krulak, Victor H. *First to Fight*. Annapolis, Maryland: Naval Institute Press, 1984, Pages 188-191

¹⁹ The term Security Force Assistance or SFA is used with regard to the Iraq and Afghanistan advisory efforts due to the fact that it was coined in 2006 to provide definitions and doctrine specifically as a result of those efforts.

preparation. The combatant commander identified the mission, and the service components sent personnel to fill billets. The first problems these personnel faced were language barriers and limited understanding of cultural matters.

As these missions evolved from a training role to a combat advisor role, the theater commander tasked units with accompanying Iraqi Army (IA) units on combat missions. Some of the incoming forces, expecting to conduct “training missions,” were surprised and unprepared for their combat role. Regardless of the challenges faced early in the advisory missions in Iraq, by 2007, US efforts to build capability and capacity of the Iraqi Army were paying off. Iraqi units were taking more initiative and operating more effectively in combat.

SFA efforts in Afghanistan had the advantage of US Special Forces conducting these types of missions from the very start. The Special Operations Forces conducting UW in the battle for Mazar-e Sharif set the tone for partnering with Afghan forces. SOF’s presence certainly helped conventional forces conduct their SFA missions when they began in 2003. The earliest conventional forces operated under the guidance of Army Special Forces (SF) units, each conducting their own SFA missions. The Marines’ presence provided additional capacity to the limited numbers of SF Forces.

Despite the assistance SF provided to incoming Marine advisors, the conventional forces faced challenges in conducting their advising mission. As in Iraq, some of the incoming advisors were expecting to conduct a “training mission,” rather than the SFA missions under the guidance of SF. Regarding command and control, the Marine advisors in Afghanistan actually worked under Security Transition Command – Afghanistan (CSTC-A). This organization had no ability to support or command the conventional advisor teams. The issue of basic support was fixed at the tactical level between SF and the conventional advisors. The command relationship caused

significant failures in certain cases. The CNA study references an incident in 2009 where an Afghan National Army (ANA) patrol with Marine advisors was ambushed by a large insurgent force. Heavy US and Afghan casualties ensued. The QRF support that US forces were to provide arrived late. As a result, that ANA unit lost confidence in the Marine advisors.

Drawing definitive, generalized conclusions from this one incident is not wise. However, it does beg the question of whether the lower priority and the lack of understanding of the advisory mission (compared to the missions of conventional maneuver units) caused a seam in the ability to support the advisor team and its ANA counterparts.

MCCLL's *Reserve Component (RC) Security Force Assistance Training Teams (SFA-TT)* is an analysis of a reserve unit conducting advisory missions in 2013 and 2014 in non-combat zones. The advantages of using the RC in this mission were outlined on page 11 of this report. Like the historical accounts of previous advisory missions, this mission experienced some significant successes in building relationships and capacities of partner nations while highlighting some significant problems with preparation and execution of these missions. Most of the problems encountered relate to sufficient lead time for, and understanding of, the mission. As stated previously, one of the detachments did not have orders until 30 days prior to activation. Both detachments experienced problems in procuring personal equipment and secure communications. Pre-deployment training was not specific to the detachments' specific missions in Mexico and Jordan. Last-minute preparations, resulting in training, personal equipment and secure communications shortfalls, are hard to imagine on a combat deployment, where commanders at all levels place adequate priority on its execution. Such shortfalls are certainly not conducive to the guidance in *Expeditionary Force 21*, which states, "A forward-deployed force that can immediately shift from security cooperation activities to crisis response and

combat operations is a Marine Corps specific resource both diplomatically and militarily, providing assurance to partners and insurance for our Nation.”²⁰

Common challenges faced by Marine advisors from the Banana Wars through Iraq and Afghanistan and in non-combat advisory roles thereafter, include lack of adequate pre-deployment and language training for an advisor role. More importantly, in Iraq and Afghanistan, in some cases advisors were surprised at their combat, rather than training, roles. Some of this misunderstanding can be attributed to a challenging and ever-changing battlespace. However, the indications that individuals and commands at all levels tend to categorize advisory missions as inherently safe should not be ignored. Also in these historical examples, indications exist that commands at all levels assume that advisory missions are inherently less effective than conventional combat at defeating an adversary. Rather than thinking of building partner capacity as simply an inherently “safe” training mission occurring outside of combat operations, the context of building partner capacity must be considered as an activity that may take place throughout the Range of Military Operations (ROMO). Commanders can use this activity in conjunction with, or instead of, conventional combat.

Dedicated training toward advisory roles can minimize the challenges, outlined in the previous paragraph, that Marines have historically faced during advisory missions. Clearly understanding the independent nature of these missions will enable planners to foresee command and control, support, and other unique requirements associated with SC, SFA or other advisory missions.

As a result of the wars in Iraq and Afghanistan, and to a lesser extent, worldwide advisory requirements, Department of Defense commands at the joint and service levels have addressed the historic shortfalls of advisory doctrine and training by establishing organizations to

²⁰ US Marine Corps. *Expeditionary Force 21*. March 4, 2014, Page 11

fill the gap. Specifically, the Joint Center for International Security Force Assistance (JCISFA) was established at the Chairman of the Joint Chiefs of Staff level. The Marine Corps Security Cooperation Group (MCSCG) was established in 2011 at the service level for the Marine Corps. The existence of both of these organizations indicates the priority that DoD and the Marine Corps place on future advisory missions. MCSCG will play a critical role in maximizing the future effectiveness of such missions, while fixing some of the common problems encountered in past missions.

In 2006, the term “Security Force Assistance” was coined in 2006 to describe the Organize, Train, Rebuild/Build, and Advise (OTERA)²¹ missions being conducted in Iraq and Afghanistan.²² As per JCISFA mission statement, the JCISFA supports the integration of Security Force Assistance (SFA) capabilities into the current and future Joint Force. In essence, the JCISFA is creating security force assistance doctrine in order to formalize the capability within the joint force. “SFA was coined to fix this problem [of overlap and gaps in terms] by including all the activities done to support FSF development yet avoiding a complete rewrite of existing doctrine. It does this by focusing on the developmental activity rather than tie the term to a single purpose like FID, a single funding source like SA, or a single agency like SC.”²³ This purpose, and thus SFA, is especially relevant when considering the standards to which a force should be trained to build partner capacity of an FSF.

In 2011, MCSCG was formed to address the service’s advisory requirements. Its mission statement begins with its purpose to “Coordinate, manage, execute, and evaluate USMC Security

²¹ This acronym is used by the JCISFA to describe the activities conducted during SFA missions.

²² Joint Center for International Security Force Assistance Website. Accessed 15 March 2015. <https://jcisfa.jcs.mil/Public/about/jointtext.aspx>, historical context section.

²³ Ibid, brackets added by author of this paper.

Cooperation (SC) programs and activities...”²⁴ MCSCG is the result of a merger between Marine Corps Training Advisory Group (MCTAG) and the Marine Corps Security Cooperation Education Training Center. MCSCG is now the sole authority within the Marine Corps for all security cooperation-related matters. The command has established a training pipeline and secondary Military Occupational Specialty (MOS) for Security Cooperation planner.

²⁴ Marine Corps Security Cooperation Group website. Accessed 15 March 2015. <http://www.mcscg.marines.mil/>

Part 5 – Conclusion

“Success occurs when opportunity meets preparation”

-Zig Ziglar

The Marine Corps has been conducting advisory missions since the early 20th century. These advisory missions have been effective at assisting host nation forces achieve military objectives beneficial to both the United States and that host nation. Despite significant history in conducting these missions throughout the ROMO, the Marine Corps seems to experience periods in time in which advisory missions fall in and out of favor, as compared to full combat operations. Recent SFA activities in Iraq and Afghanistan have reinforced the value of building partner capacity during combat operations. Numerous terms related to security cooperation activities have been coined in the last fourteen years to specify authorities, endstates and funding sources. While the specific definitions of these terms have meaning with regard to planning security cooperation missions, execution of any of these missions throughout the ROMO requires the same personnel qualities and training.

While the United States de-escalates its combat role in Afghanistan, the Marine Corps is committed to maintaining conventional combat power while simultaneously embracing Phase 0 operations throughout the world via security cooperation activities. This expanding mission, in conjunction with shrinking budgets, compels efficient use of the now operational reserve force.

The operational Marine Corps Reserve has an opportunity to prepare for missions in which it is ideally suited. Organizations such as the Joint Center for International Security Force Assistance and the Marine Corps Security Cooperation Group can act as invaluable partners in training for and executing security cooperation missions, while minimizing the common and persistent issues faced in conducting these missions historically. These organizations can also

provide a valuable link to combatant commanders and worldwide US country teams to identify security cooperation priorities and facilitate communication of requirements and force capabilities. This communication can be helpful in establishing timelines for activation, notice of missions and coordination with combatant commanders. All of these activities can alleviate much of the friction associated with reserve mobilizations.

After considering past advisory missions, current operational outlook, and lessons learned from previous United States operations, the following recommendations are offered to Marine Forces Reserve with regard to future advisory missions:

- 1) Establish means to identify and track civilian skillsets of the reserve force as they pertain to security cooperation missions. These skills should be considered either in addition to, or in place of, military MOS to meet the needs of the Marine Corps operations. Screen and train reserve Marines in conducting security cooperation missions worldwide, throughout the ROMO.
- 2) Provide a pool of task-organized individuals and/or teams and units to operational units such as MEUs or MEBs. These units can be sourced from various units to cater to specific missions requiring non-standard skills. Another option for making these skillsets inherent throughout MARFORRES is to facilitate each unit within MARFORRES to stand up a set number of security cooperation teams.
- 3) Establish enduring relationships with Joint Center for International Security Force Assistance and the Marine Corps Security Cooperation Group. These relationships should not only assist in preparing reservists for security cooperation missions, but should also inform and guide MARFORRES actions in pursuing greater security cooperation capability.

4. Encourage and incentivize individuals identified for security cooperation roles to acquire long-lead time skills such as foreign language proficiency and the Marine Corps Security Cooperation Planner MOS.

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