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PRETRAINED INDIVIDUAL MANPOWER STUDY.(U)

FEB 81 J R LOOME, R E COTTLE, J I MCNIFF

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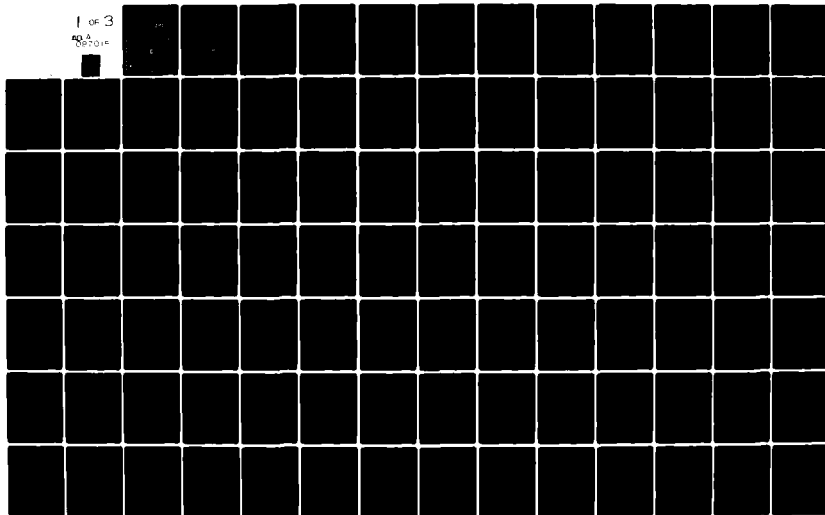
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Pretrained Individual Manpower Study

LEVEL II

By:

James R. Loome, Project Director
Robert E. Cottle
John J. McNiff

February 1981

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MANAGEMENT SYSTEMS DIVISION

GENERAL
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CORPORATION

A SUBSIDIARY OF FLOW GENERAL INC.

7655 Old Springhouse Road, McLean, Virginia 22102

Prepared For:

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ATTN: Mrs. Audrey Reeg

Contract No. MDA903-80-C-0664
Contract Expiration Date: 11 February 1981

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By:

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EXECUTIVE SUMMARY

This report presents the results of a study of the pretrained individual manpower (PIM) programs of the Military Services, conducted by General Research Corporation (GRC) under contract to the Office of the Deputy Assistant Secretary of Defense (Reserve Affairs). The purpose of the study is to review and report on the status of the various pretrained individual manpower programs and management improvement initiatives being undertaken by the Office of the Secretary of Defense (OSD) and the Military Services. In addition, the study recommends applicable policy changes and identifies areas requiring further management attention.

For the purposes of this study, pretrained individuals are defined as personnel not on active duty who are qualified in a required military occupation, are available for mobilization, and are cognizant of their military status. In the event of war, the available pretrained individuals will be recalled to fill urgent, time-sensitive positions that will bring military forces to wartime strength, expand the Continental United States (CONUS) support base, and replace early losses until other individuals can be inducted and trained.

Pretrained individuals are members of the Ready Reserve or Standby Reserve or the retired lists of the Military Services. Those in the Ready Reserve include members of the Individual Ready Reserve (IRR), Inactive National Guard (ING), and Individual Mobilization Augmentee (IMA) program.

Wartime manpower planning shows that, in the event of a major conflict requiring full mobilization, such as a war in Europe, there would

be insufficient pretrained individual manpower to meet the early needs of the Military Services. The situation in the Army is particularly critical. Thus, OSD and the Military Services have undertaken numerous management initiatives to improve the supply and availability of pretrained individuals.

Based on visits to members of the OSD and Service staffs and to the Service Reserve personnel centers, the GRC study team reached conclusions and made recommendations as summarized below:

- The initiatives undertaken by OSD and the Military Services have improved the availability of pretrained individual manpower for mobilization throughout the Services. Equally important is the management attention now focused on mobilization manpower requirements and processes as a result of these initiatives.
- Service compliance with OSD guidance relating to pretrained individual manpower is spotty and should be improved.
- Future OSD policy guidance should be tailored to Service wartime manpower requirements, organizations, and mobilization procedures. The guidance should be stated in relatively general terms to allow the Services to structure their programs in accordance with their unique operating characteristics.
- The current lack of precise wartime requirements by skill and grade inhibits the development of Service manpower mobilization plans and procedures.
- Initiatives undertaken to improve the strength and availability of the IRR have succeeded in stopping the decline in IRR strengths and should result in gradual strength improvements over time. However, under present policies, it is unlikely that IRR strengths in the Army, Navy, and Air Force will equal wartime demand under conditions of full mobilization.

- Programs designed to add personnel to the IRR who have low skill levels and limited experience should be undertaken with caution and tailored to the specific wartime manpower needs of each Service.
- The Services lack guidance on the amount and type of training that should be provided to members of the IRR. Enlisted members, who generally have a low propensity to participate in training, present special problems for the Services. Further analysis should be undertaken by OSD in this important area.
- The Inactive National Guard provides a valuable, but limited, additional source of pretrained individuals for the Army. However, the size of the ING should be constrained so that it does not cause an unacceptable administrative burden to be placed on Army National Guard units.
- Individual Mobilization Augmentees provide a source of well-trained mobilization assets who are immediately available for recall to active duty. However, Service plans to expand the IMA program to include large numbers of enlisted members may not be successful due to the low propensity of prior-service enlisted personnel to participate in Reserve training.
- Although many problems remain to be solved regarding the recall of retirees upon mobilization, retirees provide an important additional source of pretrained, experienced individuals. The Services' retiree recall programs are progressing and probably will meet OSD target dates.
- The Standby Reserve should be retained as a mobilization manpower pool for individuals who possess skills required upon mobilization but who are unable or unwilling to participate in the Ready Reserve.
- Compliance with OSD guidance to preassign members of the IRR and retirees is not consistent across the Services. Many

factors affect the Services' approach to preassignment. OSD should analyze the associated issues and provide further guidance to the Services.

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SECTION 1
INTRODUCTION

PURPOSE

It is the purpose of this study to review and report on the status of the pretrained individual manpower programs and management initiatives being undertaken by the Office of the Secretary of Defense (OSD) and the Military Services, to recommend applicable policy changes, and to determine areas requiring further management attention.

BACKGROUND

To maintain preparedness for fighting a major war, the United States depends upon a combination of sources of military manpower, including both active and Reserve force units, individuals of the Ready Reserve and Standby Reserve, and retirees. In addition, preparations are made in peacetime to induct and train individuals with no prior military experience in the event of a major war.

Active component forces provide the first line of defense for all contingencies. These consist of military personnel on full-time active duty who are immediately available for deployment to a theater of operations. In the event of a conflict that requires forces in excess of those available in the active component, the Ready Reserve of each Service provides a combination of units (Selected Reserve) and individuals [primarily Individual Ready Reserve (IRR)] to augment the active forces. A Standby Reserve is also available in each Service to provide individuals with prior military experience who are available for military duty under certain conditions.

In recent years, wartime manpower planning has shown that, in the event of a major conflict such as a war in Europe, there would be insufficient pretrained manpower to meet the early needs of the Military Services. Considering the need to fill out active and Reserve component units, expand the Continental United States (CONUS) support base, and replace early combat losses, all Services anticipate a shortfall of pretrained manpower. The situation in the Army is particularly critical because of the low peacetime strength of its Reserve components, the size of the expansion needed to fight a major war, and the size of the estimated early wartime losses.

Based on the estimated shortfall of pretrained manpower, the Services, under the direction and guidance of OSD, have undertaken numerous initiatives to increase the supply of pretrained individuals. These include management and legislative actions required to reduce losses of pretrained individuals, initiatives to increase the pool of mobilizable assets, and programs to tap the wealth of experience held by military retirees who previously were not considered as mobilization assets. Taken together, these initiatives have caused DoD and Service managers to focus substantial attention on the requirements for pretrained individuals and on methods to improve the supply of such individuals for mobilization.

METHODOLOGY

This study effort was undertaken in three separate, but related steps as follows:

- Preliminary research
- Data collection
- Evaluation

During the preliminary research step we collected and reviewed applicable literature to establish a body of knowledge relating to the management of pretrained individual manpower. During these early steps the Services were informed of the study and requested to provide full cooperation and support to the study team.

Based on the results of the preliminary research, the study team conducted a series of visits with members of OSD and Service headquarters staffs and Service field agencies. During these visits, individuals were requested to provide their candid opinions of the programs for which they were responsible and to provide appropriate supporting data. The visits are listed in Appendix A.

Following the completion of the data collection visits, the study team evaluated the information obtained and prepared this report. Follow-up visits and phone calls were made as necessary to update and clarify information previously obtained.

ORGANIZATION OF THIS REPORT

Following this brief introduction, Section 2 provides additional background relating to the role of pretrained individual manpower in mobilization and discusses the requirements, sources, and available supply of pretrained individuals for each Military Service. Section 3 describes the Individual Ready Reserve (IRR) program of each Service, discusses in considerable detail the initiatives being undertaken to improve the mobilization potential of the IRR, and provides conclusions and recommendations for future implementation.

Section 4 describes and evaluates the Army's Inactive National Guard (ING) program that allows individuals to remain in the National Guard as mobilization assets without being required to participate in frequent periods of unit training. Section 5 discusses the Individual Mobilization Augmentee (IMA) concept that is being established in the Services based on an existing Air Force program. IMAs are individual members of the Selected Reserve assigned against critical positions that must be filled immediately after mobilization.

Section 6 discusses the Standby Reserve which is comprised of individuals who possess mobilization potential but who are unable or unwilling to participate in the Ready Reserve. Section 7 discusses the

programs being undertaken for the peacetime management and mobilization of military retirees. Present planning shows that retirees have considerable potential to augment the supply of pretrained manpower upon mobilization.

Finally, Section 8 discusses briefly the issues identified in the study that require further analysis. Appendixes provide additional background and technical material as necessary. Acronyms are listed in Appendix B.

SECTION 2
THE ROLE OF PRETRAINED INDIVIDUAL
MANPOWER IN MOBILIZATION

THE MOBILIZATION PROCESS

In time of war, emergency, or mobilization, the Military Services must take some or all of the following actions to meet military needs:

- Bring the active force structure up to full strength and composition
- Bring the Selected Reserve to active federal service to fill the authorized force structure
- Bring the activated Selected Reserve force structure up to full strength and composition
- Activate additional units to meet changing force structure requirements
- Bring the activated additional units in the force structure up to full strength and composition
- "Top off" early deploying active and Reserve units as they are deployed
- Fill essential positions in the CONUS base
- Keep all units in the force structure at full operating strength by replacing manpower lost to both combat and non-combat causes and to other attrition

These several actions require large quantities of manpower that must be available almost without delay. Active units that are maintained below wartime strength will require both fillers and replacements, with a

heavy replacement demand in the theaters of operations and a heavy filler demand in the CONUS. Selected Reserve units will also require both fillers and replacements, with a heavy filler demand during mobilization and a heavy replacement demand after deployment.

The traditional source of additional manpower--the draft--cannot meet the large, urgent, time-sensitive demand of a rapid mobilization. Even with peacetime registration, the first trained inductees provided by the draft cannot reach a unit for assignment and employment until at least 120 days after M-day. Even then, the inductee will be a minimally trained, inexperienced resource. Thus, all the manpower requirements of the first days and months of a mobilization must be met with pretrained manpower assets.

PRETRAINED INDIVIDUAL MANPOWER

For the purposes of mobilization, pretrained manpower assets are obtained from four sources:

- Military members on active duty
- Military members in the Selected Reserve (including units, individuals, and full-time augmentation support)
- Pretrained individuals in the Ready Reserve and Standby Reserve with a military obligation or commitment and a mobilization capability
- Military retirees

The focus of this study is on pretrained individual members of the Selected Reserve and Ready Reserve and military retirees. The study excludes members on active duty, members of units of the Selected Reserve, and members who provide full-time augmentation support to units of the Selected Reserve.

Pretrained individual manpower consists of individuals with the following general characteristics:

- Trained or qualified in a required military occupation
- Physically, mentally, and legally available for mobilization
- Cognizant of his/her status

Individuals meeting these characteristics are available for early recall in the event of war or national emergency. Most are qualified for active duty with little or no refresher training. Thus, they can report for active duty and become effective members of a military organization immediately thereafter. These pretrained individuals permit the required early expansion of our military forces until a draft can be established to sustain the wartime manpower needs of the Military Services.

THE PRETRAINED MANPOWER PROBLEM

Over the past four or five years, the demand for pretrained manpower in the early days and months of a mobilization has been more clearly defined and described. As that definition has become more precise, the size of the demand has grown larger and become more difficult to meet.

Over the same four or five years and, in particular, since the start of the all-volunteer force, the size of the pretrained manpower pool has diminished markedly. The bottom was reached in 1978 but, even with the modest increases in 1979 and 1980, the pool remains inadequate to meet the demand. The causes are many, but the most significant are:

- With the dramatic decrease in the size of the active force since Vietnam, fewer individuals are being separated from active service and entering the Ready Reserve.
- With the increased length of enlistments in the all-volunteer force (from two to three or more years), those individuals that are being separated from active service and entering the Ready Reserve serve a much shorter period in the Ready Reserve.

To stem the decline in pretrained manpower assets and to meet the growing demand for pretrained individuals, OSD has directed and implemented a number of initiatives in the following areas:

- Initiatives to increase the size of Pretrained Individual Reservists, i.e., IRR, ING, and IMAs

- Management improvements for all categories of pretrained manpower
- Development of programs for the use of retirees and members of the Standby Reserve upon mobilization

A list of the specific initiatives considered in this study is provided in Appendix C.

The requirements for pretrained individual manpower are determined by the Services based on guidance received from OSD. Requirements are updated by the Services semi-annually and submitted to OSD with the Program Objective Memorandum (POM) and the President's budget.

Wartime manpower requirements are determined through the use of the Wartime Manpower Program System (WARMAPS) which estimates the manpower needed to increase from a peacetime to a wartime force structure, increase the CONUS base, and replace casualties in the early days of mobilization. In their mobilization planning, the Services make a variety of assumptions based on the scenario and build-up schedule. These assumptions are reflected in WARMAPS to determine time-phased manpower requirements. A comparison of the available supply of manpower permits calculation of the shortfall (if any). Manpower supply and demand vary widely across the Services due to differences in mobilization plans and assumptions underlying the Services' manpower programs.

Although the time-phased manpower requirements and supply have been determined for each Service, their presentation here would require this report to be classified, restricting its distribution and use. Therefore, the pretrained manpower problem is expressed simply in terms of shortfall by Service instead of a detailed presentation of time-phased manpower demand and supply.

Analysis of WARMAPS data show that all the Services except the Marine Corps project a shortfall in the supply of pretrained individuals

under conditions of full mobilization. The following displays the approximate peak shortfall of each Service which represents the maximum anticipated manpower shortage of the Service at any time during the mobilization process:

<u>Service</u>	<u>Wartime Manpower Peak Shortfall</u>
Army	240,000
Navy	90,000
Marine Corps	0
Air Force	70,000

It should be noted that the foregoing represents aggregate manpower figures without regard to skill or grade. When the status of skills and grades is known, the results could be far different than those shown above.

It can be seen that the Army projects the greatest shortfall in pretrained individuals of any of the Services. Thus, many of the initiatives described in this report are oriented toward increasing the availability of pretrained individuals in the Army. Many of these initiatives will also help the other Services to overcome shortfalls projected in their manpower programs. The applicability of each initiative to the Services is discussed in the following sections.

SECTION 3
INDIVIDUAL READY RESERVE

INTRODUCTION

The Individual Ready Reserve (IRR) is the primary source of pre-trained individual manpower available to augment the active force and Selected Reserve units in the event of mobilization. The IRR would be used to bring active and Selected Reserve units from peacetime to wartime strength, provide replacements for combat casualties during the early months of the conflict, and to increase the size of the support base in the Continental United States (CONUS). The IRR consists primarily of individuals who have recently completed the active duty portion of their enlistment contracts and have some remaining contractual period to be served in the Ready Reserve.

The strength of the IRR in each of the Services declined sharply from the early 1970s until 1978 for the reasons described previously. As a result of that decline, OSD and the Military Services undertook numerous initiatives to increase IRR strength. These initiatives will help each Service meet the long-range objective of the Department of Defense which is to maintain an IRR of adequate size to meet each Service's wartime manpower requirements.

This section describes the management initiatives being taken in the areas of IRR strength, personnel retention, and preassignment of the Individual Ready Reserve of each of the Services. However, before discussing these initiatives, it will be useful to provide background information including the legal authority, composition, and strength trends of the IRR.

BACKGROUND

Legal Authority

The IRR is established under Section 268, Title 10, US Code which states, "The Ready Reserve consists of units or Reserves, or both, liable for active duty as provided in Sections 672 and 673." Section 269 further prescribes that "Each person required under law to serve in a reserve component shall, upon becoming a member, be placed in the Ready Reserve of his armed force for the prescribed term of service, unless he is transferred to the Standby Reserve under..." Thus the IRR consists of groups of individuals who are members of the Ready Reserve but are not assigned to units. The units of the Ready Reserve comprise both National Guard and Reserve units and individuals of the various Services, which together constitute the Selected Reserve. This relationship is further described in Figure 3.1.

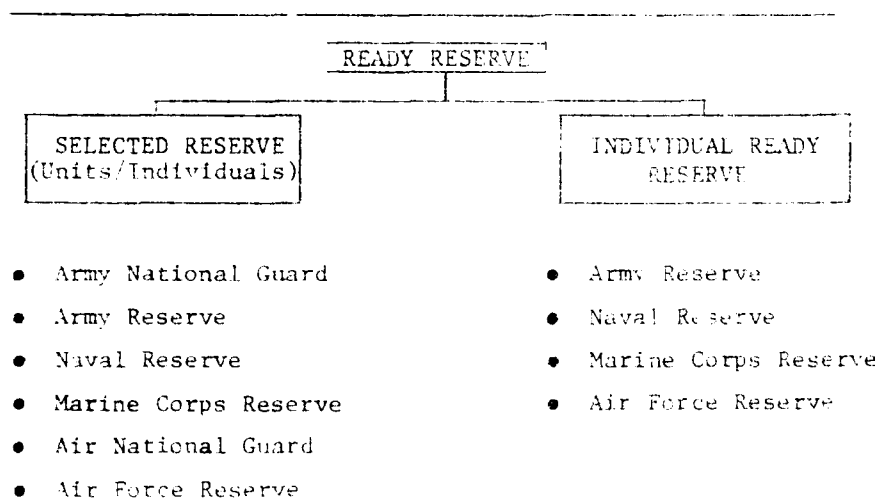


Figure 3.1 Ready Reserve Organization

Authority to recall members of the IRR is also found in Title 10, US Code. Section 672 prescribes that "an authority designated by the Secretary concerned may, without the consent of the person affected, order any unit, and any member not assigned to a unit, to active duty (other than for training) in time of war or national emergency declared by Congress, or when otherwise authorized by law, for the duration of the war or emergency and for six months after." In like manner, Section 673 addresses ordering the Ready Reserve to active duty in time of national emergency declared by the President. In this case, the active duty period will be for not more than 24 consecutive months.

Strength Trends

From its peak of 1,593,000 personnel in FY 1971, the IRR declined dramatically to a low point of 342,000 in June 1978 primarily as a result of active force manpower reductions after the Vietnam conflict. The active force inventories were reduced from over 3.5 million officer and enlisted personnel in FY 1968 to less than 2.1 million in FY 1977. The largest part of this reduction was in the Army, which had increased the most during the Vietnam conflict.

Equally important to the strength of the IRR was the transition to the all-volunteer force which eliminated the drafting of individuals for 2 years of service (primarily for the Army). This was followed a short time later by a change in enlistment policy that increased the minimum period of enlistment from 2 to 3 years, which reduced time spent in the IRR for most Army enlistees. The net impact was a decrease in the numbers of individuals entering the IRR from active duty. Annual accessions to the IRR dropped from a total of about 0.9 million to about 0.4 million over the period FY 1968 to FY 1977. Table 3.1 provides IRR strengths for each Service for the 10-year period FY 1971 to FY 1980.

TABLE 3.1
INDIVIDUAL READY RESERVE STRENGTH
 (000s)

<u>Fiscal Year</u>	<u>Army</u>	<u>Navy</u>	<u>Marine Corps</u>	<u>Air Force</u>	<u>Total</u>
71	991.0	280.3	124.7	195.2	1591.2
72	1059.9	215.5	138.2	157.0	1570.6
73	757.7	217.3	116.0	136.8	1227.8
74	532.6	178.9	89.7	121.0	922.2
75	355.1	121.9	58.4	87.5	622.9
76	226.4	106.4	53.9	82.9	469.6
77	149.4	106.1	45.3	63.4	364.2
78	168.6	93.2	39.6	46.0	347.4
79	201.8	85.5	59.2	44.2	390.7
80	205.3	97.0	56.8	46.4	405.5

Composition of the IRR

The IRR is, for the most part, a mirror of the active force because the majority of IRR personnel originally entered the IRR following the completion of active military service. Although there are other sources of pretrained individuals, the IRR represents the Services' primary source of manpower to meet the requirements for pretrained individuals at the time of mobilization. There are several reasons for this:

- The IRR contains a greater number of available individuals who may be utilized upon mobilization.
- IRR members, for the most part, have been off active duty less than 3 years; therefore, they are young and their military and technical skills are relatively current.
- Provisions of law make IRR members available for recall upon declaration of national emergency by the President.

Tables 3.2 and 3.3 provide an overview of the officer and enlisted composition of the IRR of each Service as of 30 September 1980.

TABLE 3.2
IRR OFFICER FORCE COMPOSITION
(30 September 1980)

<u>Service</u>	<u>% Junior Grade (01-03)</u>	<u>% Senior Grade (04-06)</u>	<u>Average Age</u>	<u>Average Months of Active Duty</u>	<u>Average Years of Service*</u>
Army	70.7	29.3	34.5	45.1	8.5
Navy	54.8	45.2	35.1	26.6	12.5
Marine Corps	61.6	38.4	34.0	53.6	†
Air Force	81.1	18.9	30.3	50.3	4.7
DoD	67.0	33.0	33.6	43.9	8.6

* Creditable for purposes of retirement.

† Marine Corps data unavailable from Defense Manpower Data Center records.

TABLE 3.3
IRR ENLISTED FORCE COMPOSITION
(30 September 1980)

<u>Service</u>	<u>% Junior Grade (E1-E5)</u>	<u>% Senior Grade (E6-E9)</u>	<u>Average Age</u>	<u>Average Months of Active Duty</u>	<u>Average Years of Service*</u>
Army	97.1	2.9	24.1	35.7	2.7
Navy	94.9	5.1	25.5	42.7	9.0
Marine Corps	96.6	3.4	23.5	38.3	†
Air Force	99.4	0.6	24.1	43.3	3.6
DoD	97.0	3.0	24.3	40.0	5.1

* Creditable for purposes of retirement.

† Marine Corps data unavailable from Defense Manpower Data Center records.

The foregoing tables show that the IRR officer force is relatively more senior, is older, and has more service than the enlisted force. This is to be expected because many officers remain in the IRR for extended periods between tours in the Selected Reserve. This difference is also reflected in the grade structure with two-thirds of the officers in junior grades (O-1 through O-3) while 97% of the enlisted force is in pay grade E-5 and below.

MANAGEMENT OF THE IRR

The IRR of each of the Services is managed by the respective Service Reserve Personnel Centers as listed below.

- Army. The US Army Reserve Components Personnel and Administrative Center (RCPAC), St. Louis, MO.
- Navy. The US Naval Reserve Personnel Center (NRPC), New Orleans, LA.
- Air Force. The Air Reserve Personnel Center (ARPC), Lowry AFB, Denver, CO.
- Marine Corps. The US Marine Corps Reserve Forces Administrative Center (MCRFAC), Kansas City, MO.

The functions performed by these Reserve Personnel Centers vary widely. All of the centers perform records management and administrative functions; however, they differ as to the number and category of records maintained and the level of personnel management and mobilization planning conducted for the IRR. Authorized manpower levels at the centers vary from 120 at MCRFAC to 1904 at RCPAC. Moreover, RCPAC is commanded by a Brigadier General, where each of the others is commanded by a Colonel or a Captain. The similarities and differences in their operations will become evident in subsequent sections of this report.

The reporting chain for the Reserve personnel center commanders also varies widely across the Services as shown below.

<u>Service</u>	<u>Reserve Personnel Center</u>	<u>Reports To</u>
Army	RCPAC	The Adjutant General, Headquarters, Department of the Army
Navy	NRPC	Naval Military Personnel Command
Marine Corps	MCRFAC	DCS Reserve Affairs, Headquarters, Marine Corps
Air Force	ARPC	Chief, Air Force Reserve, Headquarters, Department of the Air Force

MANAGEMENT INITIATIVES

The Department of Defense and the Military Services have initiated a number of programs to increase the size of the IRR and to improve the management and mobilization capability of this important resource. For purposes of this study, we have grouped these initiatives into three categories--strength initiatives, personnel management initiatives, and preassignment initiatives. The specific programs and initiatives that have been evaluated during this study are listed below.

Strength Initiatives

- Extending the 6-year Military Service Obligation (MSO) to all members regardless of age and sex
- Eliminating credit for time spent in the Delayed Entry Program (DEP) in fulfillment of the 6-year MSO
- Alternative enlistment options
- Screening of enlisted personnel for transfer to the ING/IRR in lieu of discharge
- Establishing an IRR Direct Enlistment Program
- Eliminating transfer of individuals from IRR to Standby Reserve for the sixth (final) year of MSO
- Improving administrative transfer procedures from active and Selected Reserve units to the IRR

Personnel Retention Initiatives

- Establishing IRR officer and enlisted personnel management programs
- IRR reenlistment bonus program

Preassignment Initiatives

- Service programs for preassigning in peacetime members of the IRR to mobilization positions

STRENGTH INITIATIVES

This section evaluates each of the programs undertaken by the Services to increase the strength of the IRR. Although all management initiatives indirectly affect IRR strength, the programs discussed in this section have a direct impact on the reportable strength of the IRR.

Extending the Military Service Obligation to All Members

Prior to 1977, Title 10, US Code required persons entering military service to serve a total of 6 years and prescribed that any part of such service not served on active duty shall be served in a Reserve component. However, the law did not apply to women or to those men who were over the age of 26 at the time they entered the armed forces. The impact of these "loopholes" was a reduction in strength of the IRR because these two groups were not required to serve beyond their contractual period of active duty.

In order to stop this loss of IRR manpower, OSD submitted legislative proposals that resulted in the following changes to Title 10, US Code:

- PL 95-79, July 30, 1977. This law extended the 6-year MSO to females who entered the military after 1 February 1978.
- PL 96-107, November 9, 1979. This law extended the 6-year MSO to persons entering the armed forces, regardless of age, effective on the date of enactment.
- The resulting Section 601 of Title 10 USC is as follows:

§ 651. Members: required service

(a) Each person who becomes a member of an armed force, other than a person deferred under the next to the last sentence of section 456(d)(1) of Title 50, appendix, shall serve in the armed forces for a total of six years, unless he is sooner discharged because of personal hardship under regulations prescribed by the Secretary of Defense or, if he is a member of the Coast Guard while it is not operating as a service in the Navy, by the Secretary of the Treasury. Any part of such service that is not active duty or is active duty for training shall be performed in a reserve component.

(b) Each person covered by subsection (a) who is not a Reserve, and who is qualified, shall, upon his release from active duty, be transferred to a reserve component of his armed force to complete the service required by subsection (a).

Discussions with the Services indicated that each complied with the new laws immediately after passage. This was accomplished initially by overprinting the current DD Form 4, *Enlistment/Reenlistement Document - Armed Forces of the United States*. Subsequent changes to DD Form 4 incorporated the new provisions permanently.

The first effects of these changes on the strength of the IRR will be seen in the fourth year after enactment--FY 1981 for women, FY 1983 for men over the age of 26. The study team has not attempted to make detailed projections of the impact on IRR strength of these changes. Earlier estimates by ODASD (RA) estimated a net increase of about 35,000 by FY 1985.

Service points of contact were asked whether the change in MSO had any perceptible change in the propensity of these two groups to join the Armed Forces. Although none had statistics relating to men over the age of 26, the Navy, Marine Corps, and Air Force believed that the impact on females could not be measured because those Services currently have more female volunteers than they are able to accept.

In summation, the Military Services have implemented the changes in MSO as directed by OSD and will realize some increase in IRR strength during FY 1981. Further work will be required to make precise estimates of the impact of these changes on IRR strength.

Delayed Entry Program (DEP)

Introduction

One of the initiatives undertaken by OSD to increase the strength of the IRR was to eliminate credit toward the 6-year military service obligation for time spent in the DEP while awaiting entry to active military service. This section explains the DEP concept and discusses Service implementation of the OSD guidance.

DEP Concept

DEP is a program that was begun by the Marine Corps in 1963 to stimulate enlistments by providing variable active duty reporting dates for enlistees. Under the program a person could enlist and specify a future reporting date that would coincide with personal plans such as high school graduation. Under the agreement the individual enlists in the Reserve of his or her Service pending entry on active duty, at which time the Reserve enlistment is terminated and replaced by a regular enlistment contract. The individual begins to accrue longevity for the purposes of pay upon entry into the DEP, a point used by recruiters to sell enlistees on the program. Prior to October 1979, the time spent in the DEP also counted toward completion of the 6-year military service obligation incurred by all personnel entering military service.

The impact of granting credit toward completion of the 6-year military service obligation, however, was to reduce the effective strength of the IRR. With the advent of the all-volunteer force, most enlistees (70% to 90%) enter through the DEP and spend some 2 to 3 months in it before entering on active duty. This caused the loss of some 15,000 to 30,000 person-years of service in the IRR.

In order to stop this loss of manpower in the IRRs, which were critically short of meeting wartime requirements, OSD issued guidance to the Services in September 1979 directing that the enlistment contract (DD Form 4) be amended by adding the following statement in Section 10b (Remarks):

I understand that my pay date begins upon enlistment in the Delayed Entry Program, with actual payments beginning after enlistment on active duty. I also understand that upon enlistment on active duty, my combined period of active duty and subsequent reserve component service will equal six years.

All of the Services complied with the guidance on 1 October 1979 as directed. The impact of this change, however, will not be reflected in IRR strength until almost six years after 1 October 1979 or in FY 1985.

The study team attempted to collect data on DEP enlistments as a basis for calculating the future impact on the IRR strength of the Services. No data were obtained, although the Navy said it could retrieve the data, given a formal request and a 3-month lead time. In the discussions with the Services, however, it was discovered that each operates the DEP according to its own rules. For example, the Army and the Marine Corps place all persons in the DEP whose entry date is more than 24 hours after they initially sign an enlistment contract. The Navy uses a 3-day criteria and the Air Force allows up to 2 weeks delay before the person enters the DEP. Thus, any DEP statistics obtained from the Services would have to be analyzed carefully before being used to project IRR strength impacts. The study team did not pursue the subject beyond the initial discussions with Service action officers.

Enlistment Alternatives

The strength of the IRR is directly related to the length of active or Selected Reserve service obligation incurred at the time of enlistment. All personnel entering the armed forces incur a 6-year military service obligation which may be served on active military duty, in the Selected Reserve, in the IRR, or in a combination of the three. Thus a person enlisting for 3 years of active duty will serve 3 years active and 3 years in the IRR (unless he or she joins the Selected Reserve). Of course the longer the individual spends on active duty or in the Selected Reserve, the shorter the time that remains to be spent in the IRR.

The period of enlistment is established by OSD/Service policy. Longer enlistments reduce personnel turbulence, recruiting costs, and training costs. But they also reduce the strength of the IRR. Shorter enlistments have the opposite effect. Thus there is a trade-off between the two.

Part of the decline in Service IRR strengths in the mid-1970s was due to the 1975 OSD policy that raised the minimum period of enlistment from 2 to 3 years. This policy affected all the Services except the Air Force which required 4-year minimum enlistments. The change reduced turbulence and training costs (both dollars and manpower) and, at the same time, reduced future IRR strengths. However, increased emphasis on mobilization planning in the mid-1970s showed that the IRR strengths were declining to levels far below the minimum required to meet wartime requirements. Thus, the policy that assisted the active military and Selected Reserve forces simultaneously reduced the capability of the armed forces to expand quickly in time of war.

The extent to which the enlistment policy affects IRR strength can be shown by the following example. During FY 1979 the active Army enlisted non-prior service personnel as follows:

<u>Length of Enlistment (Years)</u>	<u>Number</u> ¹
2	986
3	85,519
4	42,734
5	30
6	<u>15</u>
TOTAL	129,284

Assuming that 65% of the enlistees complete their active duty enlistments, this group of enlistees would provide the following person-years of service in the IRR:

<u>Term of Enlistment</u>	<u>Enlistees</u>	<u>Number Entering IRR (65%)</u>	<u>Expected Years in IRR</u>	<u>IRR Person-Years</u>
2	986	641	4	2,564
3	85,519	55,587	3	166,761
4	42,734	27,777	2	55,554
5	30	20	1	20
6	<u>15</u>	<u>9</u>	0	<u>0</u>
TOTAL	129,284	84,034		224,899

However, if half of the 3-year and 4-year enlistees had instead enlisted for 2 years of active duty, the following IRR person-years of service would have been realized from the same group:

<u>Term of Enlistment</u>	<u>Enlistees</u>	<u>Number Entering IRR (65%)</u>	<u>Expected Years in IRR</u>	<u>IRR Person-Years</u>
2	65,112	42,323	4	169,292
3	42,760	27,794	3	83,382
4	21,367	13,889	2	27,778
5	30	20	1	20
6	<u>15</u>	<u>9</u>	0	<u>0</u>
TOTAL	129,284	84,034		280,472

¹Source: OASD(MRA&L), MPP (Accessions)

Thus, the impact of the change in enlistment policy assumed above would be an increase of about 56,000 person-years of service in the IRR over that obtained with the longer enlistment policy. This represents an increase of about 25% in person-years of IRR service obtained from non-prior service personnel enlisted in the Army in a period of one year.

In FY 1979 OSD authorized the Services to undertake a test program of 2-year enlistments designed to improve the supply of potential enlistees, attract increased numbers of high school graduates, and increase the strength of the IRR. The program also offered \$2000 education assistance in addition to the standard Veterans Education Assistance Program (VEAP). The Army, Navy, and Marine Corps tested the concept and succeeded in attracting some volunteers through the program. OASD (MRA&L) is evaluating the results of the test and will soon publish a report of findings. Our discussions with Service personnel, however, indicate the following:

- Army would like to continue 2-year enlistments with improved incentive packages.
- Navy, Marine Corps, and Air Force do not see the need for 2-year enlistments. They are meeting recruiting goals with the longer enlistments which save manpower and dollars and reduce personnel turbulence.

On balance if the Army continues 2-year enlistments there will be a positive effect on its IRR strength. However, the impact on IRR strength probably will be only a secondary factor in the decision whether or not to continue the program.

The Services also permit variations in the length of enlistments in the Selected Reserve. In addition to the normal 6-year enlistments in which the individual is not obligated to spend time in the IRR (6 x 0), the Services accept some alternative enlistment periods as shown in Table 3.4.

TABLE 3.4
NON-PRIOR SERVICE SELECTED RESERVE ENLISTMENTS
BY OPTION FY 1980

	<u>6 × 0</u>	<u>5 × 1</u>	<u>4 × 2</u>	<u>3 × 3</u>	<u>3 × 0</u>	<u>Total</u>
Army Reserve	19,976	12	1,269	4,128	255*	25,640
Army National Guard	43,697	--	2,006	4,611	--	50,314
Naval Reserve	1,673 [†]	--	--	--	--	1,673
Marine Corps Reserve	7,125	--	936	6	--	8,067
Air National Guard	5,428	--	421	637	--	6,486
Air Force Reserve	2,650	--	--	--	--	2,650

* Program ended in October 1979

[†] READY MARINER program

As can be seen there was a substantial number of enlistments under the 4 × 2 and 3 × 3 programs which will have a positive future effect on the strengths of the IRR in the Services that use these options.

The study team believes that, while shorter active duty and Selected Reserve enlistment options will increase the strength of the IRR, the costs in terms of personnel turbulence and training resources quickly offset the benefits of increased numbers of people in the IRR. Thus, the decisions regarding shorter enlistments should continue to be based primarily on the impact on active and Selected Reserve programs and the associated recruiting and training costs rather than the contribution to IRR strengths.

Screening of Enlisted Personnel for Transfer to the ING/IRR in Lieu of Discharge

Introduction

With the advent of the all-volunteer force (AVF), the Services adopted a more lenient attitude toward discharging personnel for reasons

of poor performance or unsuitability for military service. During the period of the draft, poor performance, poor attitude, and misconduct generally resulted in discharge under less than honorable conditions, an adverse personnel action requiring a significant administrative workload. Under the AVF, however, new programs were established to allow the Services to discharge poor performers more quickly and without prejudice. During the period of an individual's initial training, discharges were made under the "Trainee Discharge Program." If the individual performed poorly in his or her unit, the discharge was made under the "Expeditious Discharge Program." When added to the normal discharges for pregnancy, hardship, etc., the Services were discharging some 100,000 persons per year prior to completion of a normal tour of active duty. A similar situation existed in the Selected Reserve where many were discharged for lack of satisfactory participation.

Each person discharged (except females and males over the age of 26) was obligated to spend a total of 6 years on active duty or in the Reserve. Yet there was little or no effort to transfer these individuals to the IRR for the remainder of their obligated service so that they would be available in the event of mobilization.

OSD guidance to the Services in 1978 to 1980 addressed this subject and directed that the Services "screen those persons leaving active duty or the Selected Reserve prior to the end of their commitment to ensure that those with mobilization potential are transferred to the IRR rather than being discharged." This section discusses the Service programs being undertaken in response to the guidance. As will be seen, the degree of response varies considerably across the Services.

The Army Screening Program

The Army, which has the most serious shortages in IRR strength, has moved in 1981 to implement the screening program in order to build up the strength of its Selected Reserve. The Army's initial plan for members being considered for transfer to the IRR is to screen them for mobilization potential.

completed basic training and have potential for useful service upon mobilization. The potential for useful service is determined by the discharge authority; however, personnel being discharged for the following reasons are not considered for transfer to the IRR:

- Alcohol or other drug abuse
- Concealment of arrest record
- Conscientious objector
- Failure to meet medical standards
- Discharged for the good of the service
- Erroneous enlistment
- Minority - under 18 years of age
- Misconduct
- Security
- Unsuitability (all reasons other than apathy, homosexuality, inaptitude, personality disorders).

Table 3.5 shows that in FY 1980 only 10% of the personnel released under the Trainee Discharge Program and 22.3% of those released under the Expeditious Discharge Program were transferred to the IRR. The figures imply that local commanders are making rather strict judgments as to the mobilization potential of these individuals. Although the numbers appear to be low, they may well reflect an attitude on the part of commanders that if a soldier who volunteered for service cannot perform at a minimum acceptable level in peacetime, he or she would be more hindrance than help during a mobilization. The study team did not attempt to evaluate the program beyond this cursory analysis.

The Marine Corps Screening Program

The Marine Corps has not established a program to transfer individuals to the IRR who do not complete their first tour of active duty. The Marine Corps, which does not have a shortfall in its IRR, does not want to recall marginal performers during a mobilization. The Marine Corps believes that if an individual cannot complete satisfactorily a normal peacetime tour of active duty, then he or she is unlikely to

perform well upon mobilization. Marines released for other reasons such as hardship or pregnancy are also considered not to be mobilization assets and are not retained in the IRR.

TABLE 3.5
DISPOSITION OF ARMY ENLISTED PERSONNEL
RELEASED FROM ACTIVE DUTY FY 1980*

<u>REASON FOR RELEASE</u>	<u>TOTAL RELEASED FROM AD</u>	<u>TRANSFER TO IRR</u>	<u>%</u>
Trainee Discharge Program	11,720	1,172	10.0
Expeditionary Discharge Program	10,108	2,254	22.3
Physical Disqualification	5,795	423	7.3
Secretarial Authority	214	55	25.7
Parenthood	1,213	490	40.4
Unsuitability	3,355	406	12.1
Hardship	1,541	786	51.0
Dependency	756	372	49.2
Pregnancy	3,293	2,012	61.1
Sole Survivor	6	5	83.3

*Source: DCSPER 495 Report.

The Reserve Fourth Marine Division and the Fourth Marine Aircraft Wing implemented the OSD guidance related to screening members of the Selected Reserve in March 1980. Until this date, personnel were discharged rather than retained in the IRR. Under the new program, however, the only category being retained in the IRR are those not satisfactorily attending training. The Marine Reserve continues to discharge persons for the following reasons:

- Hardship
- Unsuitability
- Civilian conviction
- Misconduct (formerly included unsatisfactory participants)
- Pregnancy (unless individual requests to remain in the USMCR)
- Fraudulent enlistment
- Drug abuse

Although the Marine Corps is screening members into the IRR who fail to participate satisfactorily in training (nine or more unexcused absences), they prefer to order these members to involuntary active duty. Their reason is to motivate other USMCR members to participate satisfactorily. The Marine Corps is the only service still using involuntary active duty. During FY 1980, 376 marines were ordered to active duty involuntarily. Approximately 700 individuals were identified for transfer to the IRR during the same period.

The Navy Screening Program

Members of the active Navy and Naval Reserve who are unable to complete their first enlistment are screened into two categories--favorable and unfavorable. The favorable category includes persons being released for pregnancy, hardship, parenthood, etc., while those being released for misconduct and unsuitability are categorized as unfavorable. Those members in the favorable category are transferred to the IRR if they possess mobilization potential. Members in the unfavorable category are considered not to have mobilization potential and are discharged. Table 3.6 shows that few are transferred to the IRR.

TABLE 3.6
DISPOSITION OF NAVY ENLISTED PERSONNEL RELEASED FROM ACTIVE DUTY
(FIRST-HALF FY 1980)

<u>REASON FOR RELEASE</u>	<u>TOTAL RELEASED FROM AD</u>	<u>TRANSFER TO IRR</u>	<u>%</u>
Trainee Discharge Program	N/A	N/A	-
Expeditious Discharge Program	1,899	0	0
Physical Disqualification	1,283	0	0
Secretarial Authority	355	0	0
Parenthood	1	1	100
Unsuitability	1,816	0	0
Hardship	74	0	0
Dependency	167	5	3
Pregnancy	298	55	18
Sole Survivor	2	0	0

The Air Force Screening Program

The Air Force has not established a program to screen members leaving active duty or the Selected Reserve prior to expiration of their first enlistment. Under Air Force policy those members being separated for pregnancy may request discharge in lieu of transfer to the IRR. Members leaving to attend school, accept public office, etc., are automatically transferred to the IRR if they have a remaining contractual obligation. All other members being separated prior to the completion of their first enlistment are discharged and not transferred to the IRR.

Evaluation

Of all the Services, only the Army has established a Service-wide program to screen all members leaving active duty and the Selected Reserve prior to the completion of their first enlistment for possible transfer to the IRR. The Marine Corps has initiated a screening program in its Selected Reserve but not in the active component. The Navy screens members leaving under favorable conditions but does not consider retention of members who are leaving under unfavorable conditions. The Air Force does not screen its members for retention in the IRR.

The study team believes that the IRR should not have members whose potential for productive service upon mobilization is marginal. However, the Services need additional manpower in their IRRs and those that are not screening all departing members for mobilization potential are losing a source of readily available, junior enlisted personnel who could make a significant contribution during the early days of a mobilization.

IRR Direct Enlistment Program

Introduction

The decline of IRR strength in the 1970s, particularly in the Army, generated a search for new ideas for programs that would increase IRR strength. One of the ideas developed by OSD and the Army was to allow personnel to enlist directly into the IRR and, after receiving initial

skill training, to remain in the IRR for the remainder of their 6 year military service obligation (MSO). This idea was supported by Congress, resulting in direction that DoD conduct a test of the concept. This section describes the IRR direct enlistment program as tested by the Army and assesses the mobilization potential of direct enlistees.

Description of Army IRR Direct Enlistment Test

House Report 65-194, April 1977, directed that DoD conduct a test of direct enlistment into the IRR and observed: "This concept may well have merit in assisting the IRR deficiencies as well as be potentially beneficial to Active and Reserve recruiting." OSD addressed the subject in its 1978, 1979, and 1980 guidance to the Services and in Program Decision Memoranda (PDM) in those years. Specifically, the Army was directed to initiate a test of the concept in FY 1979.

To conduct the test, four District Recruiting Commands (DRCs) were selected and directed to test their ability to recruit personnel into the IRR during the period 1 April to 30 September 1979. Enlistments were permitted only in combat skills--infantry, armor, field artillery, and combat engineers. Upon successful completion of initial active duty training, individuals were given the option to remain in the IRR or to transfer to the active Army or the Selected Reserve. Each individual was counseled at the training center as to the available service options and the selection was made while the individual was still in training.

In the conduct of the test, the US Army Recruiting Command (USAREC) was given an enlistment goal rather than a quota in order to determine the attractiveness of the program rather than to test the recruiter's ability to meet a quota. The results of the test are shown in Table 3.7.

TABLE 3.7
RESULTS OF ARMY IRR DIRECT
ENLISTMENT TEST

<u>RECRUITING DISTRICT</u>	<u>IRR TEST GOAL</u>	<u>IRR ENLISTMENTS</u>	<u>PERCENT OF GOAL</u>
Raleigh, NC	380	111	29
Houston, TX	324	169	52
Portland, OR	312	139	45
Omaha, NB	<u>484</u>	<u>10</u>	<u>2</u>
TOTAL	1,500	429	

Although the Army has not published a formal test report, some data are available that provide insights into the results of the test.¹ Table 3.8 provides details.

Table 3.8 shows that the average IRR direct enlistee was young (age 18.4), had less than a high school education, and was a mental category III. Infantry and field artillery were the overwhelming choices of the enlistees. Following completion of their 12 weeks of initial training, some 43% of the enlistees chose to complete their service in either the active Army or the Selected Reserve. However, the extent to which the program expanded the supply of potential Army enlistees has not been determined. The Army plans to expand the program beginning in FY 1982 to achieve about 3,000 enlistments per year. However, the status of funds is uncertain and the program may not be continued.

Mobilization Potential

There seems to be a reluctance on the part of the Army to commit itself to an all-out IRR Direct Enlistment program, this despite a major

¹For additional analyses see "Army Individual Ready Reserve Direct Enlistment Test, Final Report," unpublished, prepared by OASD (Reserve Affairs), January 1980.

TABLE 3.8
PROFILE OF IRR DIRECT ENLISTEES

AGE AT ENLISTMENT	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21-27</u>	<u>TOTAL</u>
NUMBER	183	106	60	28	52	429
YEARS OF EDUCATION COMPLETED	<u>9</u>	<u>10</u>	<u>11</u> [†]	<u>12</u>	<u>GED*</u>	<u>TOTAL</u>
NUMBER	215	125	43	30	16	429
MENTAL CATEGORY	<u>I</u>	<u>II</u>	<u>III</u>	<u>IV</u>	<u>TOTAL</u>	
NUMBER	2	31	289	107	429	
SKILL	<u>INFANTRY</u>	<u>ARMOR</u>	<u>FIELD ARTILLERY</u>	<u>ENGINEER</u>	<u>TOTAL</u>	
NUMBER	180	42	160	47	429	
SERVICE OPTION SELECTED	<u>CONTINUE IN IRR</u>	<u>TRANSFER TO ACTIVE ARMY</u>	<u>TRANSFER TO SEL RESERVE</u>	<u>TOTAL</u>		
NUMBER	252	114	60	426 [§]		

* General Education Development diploma

† Includes 3 high school seniors

§ Selections are unknown for 3 members.

shortfall in meeting wartime manpower requirements. Discussions with members of the Army Staff indicate that the perception is that IRR direct enlistees are of questionable value as mobilization assets, primarily because they have received only minimal training and have little experience.

This perception may have considerable merit. Although the IRR direct enlistee is supposed to attend refresher training in the 2nd and 5th years of IRR service, the training received is minimal by any standard. The member leaving the active force has received that portion of training imparted through unit training activities, but the direct enlistee has not. In addition, the direct enlistee lacks knowledge of unit operations, team work, and other knowledge that only unit experience can give. Thus many in the Army question whether the direct enlistee is truly a viable mobilization asset.

The other side of the argument is that the direct enlistee is younger and may be in better physical condition than the average IRR member who has completed 3 or 4 years of active duty. More importantly the IRR direct enlistee is very junior in grade, most likely at the E-2 level, whereas the member who has completed active duty usually has progressed to the E-4 or E-5 level. It would appear that the availability of junior direct enlistees as casualty replacements and filler personnel would fulfill an important M-Day need for the Army.

In a broader sense, the real question is whether it is better to recall a marginally trained person shortly after M-Day or to wait until a draftee can be inducted and trained. The supply of fully-trained manpower in the IRR is limited by the size of the active Army. Based on the peacetime strength of the Army and current enlistment policies, the Army cannot achieve IRR strengths equal to its mobilization requirements. This fact, coupled with the Army's need for filler personnel, indicates that the IRR direct enlistee can make an important, if less than perfect, contribution to the Army's mobilization capability.

Discussions with representatives of the other Services have indicated that they believe the IRR Direct Enlistment program is not a viable concept and none of them plans to establish a similar program. Their views may be summarized as follows:

- IRR direct enlistees are poorly trained junior personnel who would not be useful early in the mobilization process. More highly skilled experienced personnel are the critical wartime manpower required to be available quickly after mobilization.
- Inductees will be available to meet the mobilization requirements for lower skilled personnel.
- IRR direct enlistees are intended to solve the Army's "numbers" problem.

The study team believes that the Services other than the Army may not have examined in sufficient detail their time-phased wartime manpower requirements by grade and skill. Although the higher skills represent the greatest problem because of training lead time, there may be a need to be able to obtain lesser skilled personnel rapidly to fill such jobs as guard or truck driver.

The study team reviewed one formulation of the Navy's time-phased wartime manpower requirement that projected a significant shortfall in junior, entry level skills such as seaman, fireman, and airman. The total requirement for these and other entry level skills in the first 90 days is about 165,000 and the supply available is about 115,000 (101,000 active, 5000 Selected Reserve, 9000 IRR). Thus if mobilization occurred, the Navy would face an immediate deficit of about 50,000 unskilled, junior enlisted personnel. Analysis of Marine Corps and Air Force time-phased requirements might show similar shortfalls. The study team believes that such an analysis should be conducted to determine if the Navy, Marine Corps, and Air Force should consider the establishment of an IRR direct enlistment program.

Eliminating Automatic Transfer to the Standby Reserve

Under the provisions of 10 US Code 269, members of the IRR could be transferred from the IRR to the Standby Reserve for their final (sixth) year of military service. Although the transfer was not mandatory under law, the Army and Marine Corps had interpreted the law to mean that the person should be automatically transferred for the final year of service with the individual being notified after the transfer had taken place.

In order to stop this drain on IRR strength, OSD sponsored remedial legislation that was passed in Public Law 95-485, 20 October 1978. The new legislation provides that members with Ready Reserve obligations may be transferred to the Standby Reserve under regulations prescribed by the Secretary of Defense. Although the new provisions were not made retro-active to cover persons in the Ready Reserve on the date of enactment, the Army and Marine Corps stopped the automatic transfer and individuals must now request transfer. The result has been that very few persons have requested transfer even though they are eligible if they served on active duty before 20 October 1978.

The impact on Army and Marine Corps strengths was seen the following year, as shown below:

	END-FY STRENGTHS			
	<u>Individual Ready Reserve</u>		<u>Standby Reserve (Active)</u>	
	<u>FY 78</u>	<u>FY 79</u>	<u>FY 78</u>	<u>FY 79</u>
Army	168,607	201,803	69,176	16,422
Marine Corps	39,614	59,207	20,703	2,650

Although other factors also affected the change in IRR strengths from FY 1978 to FY 1979, a significant component of the change was undoubtedly due to the new law regarding transfer to the Standby Reserve.

Improving IRR Administrative Transfer Procedures

As discussed previously, the primary category of manpower in the IRR consists of personnel who were released from active duty or the Selected Reserve at the end of their contractual term of active service. Previous studies have found that in some Services there may be considerable delay between the date the individual is released from active duty and the date that he or she becomes a mobilization asset in the IRR. This section reports on the status of each Service's ability to transfer individuals from active duty and the Selected Reserve to the IRR.

Army

In the past, RCPAC waited for the hard copy personnel record to arrive before accessing an individual to the IRR from active duty, a period of some two to four months. During that period RCPAC had no capability to mobilize the individual and IRR strength was understated.

The Army has changed its procedures, however, and now accesses the individual upon receipt of an automated partial record from the active Army personnel system. This occurs within a day or two after the individual has been released from active duty. This partial record is completed later when the hard-copy personnel record arrives. While this has resolved the understrength problem, another major problem prohibits the use of the partial record for mobilization, which is the lack of a home address for notification of recall. Home address is not a part of the active Army automated personnel file and RCPAC does not receive the address until the hard-copy record arrives. In most cases address information is made available to RCPAC by the US Army Recruiting Command before it is available in the hard-copy personnel record. The individual is considered to be a mobilization asset as soon as the address is entered into the automated record at RCPAC.

Accession to the IRR of members leaving the Selected Reserve is less reliable than for the active Army. In the USAR, accession depends on timely reporting by the units to the Reserve Personnel Information Reporting System (RPIRS) operated at the Continental US Army (CONUSA)

headquarters. Although RPIRS is automated, in many cases the paper record arrives at RCPAC before the partial RPIRS record. RCPAC estimates that it generally has about 2000 cases like this at any time, although many of these have no remaining contractual obligation and will be discharged rather than retained in the IRR. The Army is trying to streamline this procedure so that the automated record transfer takes place more quickly and reliably than is presently the case.

RCPAC reported that it has no automated interface with the Army National Guard Bureau personnel system and that it receives relatively few records for accession to the IRR from the National Guard.

Army figures show that about 4000 people were transferred from the National Guard to the IRR in FY 1979 while about 29,000 individuals were discharged by the National Guard for various other reasons (e.g., occupation conflict, moved beyond commuting distance, civil conviction). It appears that in the future many of the approximate 29,000 should be transferred either to the ING or the IRR in lieu of discharge.

Navy

The Naval Military Personnel Command (NMPC) located in the Washington, D.C. area, maintains both active and inactive automated personnel records for the Navy. Transfer from active duty to the IRR is accomplished by a monthly transfer of automated data from the active to the inactive file.

Although this process takes place expeditiously, the Navy has problems similar to those described for the Army. The automated record that is transferred lacks home address information with the result that the Naval Reserve Personnel Center (NRPC) must wait for the hard copy record to arrive to obtain address information. The partial record/full record process is practically identical to that described for the Army.

The enlisted record is usually received and the person is accessed to the IRR as a mobilization asset between 30 and 90 days after release from active duty. For officers, the maximum period may be 120 days depending on local personnel processing time required for officer efficiency reports, etc. Updates to the IRR file are made on a monthly basis with about 6400 people in the pipeline at any time. However, under a period of tension or premobilization, the file would be updated more frequently than monthly and the number would be reduced by about 25%. It does not appear that the Navy is undertaking any initiatives to reduce the time lag in accessing members to the IRR.

Marine Corps

The Marine Corps appears to have no appreciable delay in accessing individuals released from the active component or Selected Reserve into the IRR. Personnel records are mailed by the unit directly to the Marine Corps Reserve Forces Administrative Center (MCRFAC) in Kansas City where they are processed and accessed to the IRR file. The records include a copy of the DD Form 214 which contains a home address. MCRFAC personnel stated that it seldom takes longer than 30 days to access personnel to the IRR following their release from active duty or the Selected Reserve. The Marine Corps does not have an automated partial record to access personnel more quickly. If they did, however, they would also face the problem of a lack of home address.

Air Force

The Air Force Advanced Personnel Data System (APDS) automatically transfers personnel data (including home address) for obligated individuals to the IRR on the effective date of release from active duty or the Selected Reserve. Thus, the individual becomes a mobilization asset in the IRR immediately upon release from active duty or the Selected Reserve.

PERSONNEL RETENTION INITIATIVES

• 2. Inflation

[illegible]

The second program is a reenlistment bonus recently authorized by the Congress to be paid to unobligated enlisted personnel for IRR service. The bonus is expected to attract unobligated personnel who are being released from active duty or the Selected Reserve and persons in the IRR whose contractual obligations are expiring. This section provides details on both programs.

Establishing Personnel Management Programs

In the past the IRR has consisted of a very large pool of individuals whose Reserve personnel records were managed by their Service Reserve personnel centers. Because of the size of the group there was little attempt by any of the Services to provide personalized management to members of the IRR. However, the dwindling size of the IRR has more recently made the concept a more attainable goal. Further, personnel management of these individuals has become a necessity if losses of IRR members are to be reduced.

The Army first started the concept in 1917 by establishing an officer management program. Building on this idea, OSD subsequently

directed all Services to establish IRR management programs along the lines of the Army's Reserve officer personnel management system. Although the guidance was first given in 1978, specific goals were not established until 1979. The Services were directed to establish management programs that encourage Individual Ready Reserve participation by providing training opportunities, school attendance, and transfer to Selected Reserve positions. The Services were directed to bring officers and enlisted IRR members under management programs in accordance with the following schedule.

PERCENT IN MANAGEMENT PROGRAMS

	<u>FY 81</u>	<u>FY 83</u>	<u>FY 85</u>
All officers	50%	75%	100%
Enlisted, E-6 to E-9	50%	75%	100%
Enlisted, below E-6	50%	100%	100%

In addition, the guidance prescribed that each of the Services, based on improved personnel management, should achieve cumulative IRR time-phased mobilization manpower yields no lower than the following:

PERCENT OF IDENTIFIED ASSETS

	<u>FY 81</u>	<u>FY 83</u>	<u>FY 85</u>
Cumulative IRR Yield Goal	80%	85%	90%

This guidance was repeated in 1980.

Army Personnel Management Programs

As previously mentioned, the Army IRR is managed by the US Army Reserve Components Personnel and Administration Center (RCPAC) in St. Louis, MO, a field activity under The Adjutant General (TAG). RCPAC formerly handled only record keeping and administrative functions and at that time was called the US Army Administration Center. When personnel management functions were added, the name of the center was changed to its present title.

The missions of RCPAC pertaining to the IRR include the following:

- Administer and control individual members of the US Army Reserve
- Coordinate and prepare Reserve component personnel management and related administrative procedures
- Develop and administer IRR recruiting and retention plans and programs
- Maintain a readiness posture for mobilization of the IRR and Standby Reserve
- Plan, coordinate, direct, and supervise the officer and enlisted personnel management system for members of the USAR
- Maintain and provide information from official military personnel files
- Provide finance and accounting support to designated Army activities

In the personnel management area, RCPAC has established an officer and enlisted personnel management program that has the following objectives:

- Develop and train USAR personnel in the right numbers, and with the right skills, to meet the "Total Army" mobilization requirements
- Assign USAR personnel in accordance with a personalized professional development plan through a variety of training experiences
- Provide additional opportunities for all USAR personnel to participate in a Selected Reserve unit
- Improve motivation and professional satisfaction as a means for retaining quality personnel in the USAR

- Achieve reasonable compatibility with active component personnel management systems

To implement the program, RCPAC has established a personnel management directorate staffed by full-time personnel management officers and NCOs. The managers are supported by interactive terminals connected to the RCPAC personnel data base and a toll-free telephone system. The annual telephone bill is approximately \$1 million.

The Officer Personnel Management System-US Army Reserve, which was first established in October 1977, covers all USAR officers (93,000). OPMS-USAR is a centralized management system designed to provide a trained USAR officer corps prepared for mobilization. Under OPMS-USAR, each officer is considered as a mobilization asset and is managed as an individual. Training opportunities are provided that are applicable to the officer's mobilization specialty.

To provide for more and varied assignments, OPMS-USAR established a 3-year maximum time limit in a troop program position. In the past, officers could occupy a position indefinitely, which caused discouragement for officers looking for positions and, at the same time, stymied the officer in the position.

The overall management concept calls for the USAR officer to have a balance between Selected Reserve unit assignments, professional development through USAR schools and Service Schools, MOBDES assignments (and soon Individual Mobilization Augmentee assignments), counterpart training and other developmental assignments. Under OPMS-USAR a policy has been established that limits assignments in Selected Reserve units to 3 years in order to create more opportunities for unit experience.

Each Reserve officer is assigned to an individual personnel manager and is provided a toll-free telephone number to contact the manager. The toll-free telephone is the key to the operation of the system. It provides the capability to render on-the-spot administrative assistance, career guidance, and assignment information.

The primary mission of the Personnel Management Officer (PMO) is to plan and recommend assignments based on the requirements of the Service, career needs of the individual, and the desires of the USAR officer. Although the primary emphasis is on assisting IRR members, the PMO also handles requests for assistance from officers in the Selected Reserve. Thus, the PMO is able to assist in transfers into and out of the Selected Reserve. Depending on the specialty involved, each PMO is assigned responsibility for the management of some 1000 to 1700 USAR officers.

The PMO has considerable latitude in offering training opportunities to the USAR officer. The range of options extends from counterpart training with active units to attendance at Service schools or USAR schools, and enrollment in skill-related correspondence courses. The training budget for FY 1981 is about \$39 million which will provide about 30,000 individual training tours or courses.

RCPAC believes that the OPMS-USAR system is sound and that it has been instrumental in retaining significant numbers of officers who otherwise would have been lost to the program. During a six-week period in 1979, PMOs were credited with retaining 1923 of 5700 officers who were pending discharge. This equates to a saved replacement cost of \$37,425,000 (based on \$26,000 per officer and \$120,000 per aviator). It is estimated that the PMOs are now saving 20% of the potential officer losses annually.

Based on the success of the officer management program, the Army has begun to structure a similar approach for enlisted personnel. The enlisted program, entitled Enlisted Mobilization Training and Management System - US Army Reserve (EMTMS-USAR), is being established by RCPAC within the same directorate as the officer management.

EMTMS-USAR is intended to provide personnel services similar to those provided for officers. Personal counseling and training are among the services that will be provided by Personnel Management Noncommissioned Officers (PMNCOs). The primary mission of the PMNCO is to ensure that individuals in the IRR maintain appropriate skill qualifications.

Each PMNCO manages approximately 1000 IRR members, grouped by career field. Unlike their counterparts in the officer personnel management program, PMNCOs do not manage enlisted members in Selected Reserve units. The PMNCOs encourage the members to take advantage of counterpart training, the Mobilization Designee (MOBDES) Program, or the Individual Mobilization Augmentee (IMA) Program (both discussed in Section 5, below), USAR schools and correspondence courses. The PMNCOs also arrange for participation in exercises, special projects and support of USAR training sites.

At present RCPAC is managing approximately 20,000 of the 167,000 enlisted personnel. Others are being phased in by grade and MOS. Moreover, any member of the IRR, whether formally under the management program or not, can call in for and be provided the same assistance. As of late 1980, the following IRR members were being managed:

- All E-5s and above
- All enlisted medical personnel
- All enlisted aviation mechanics
- All enlisted members residing outside CONUS

RCPAC plans to bring other IRR enlisted members under central management in accordance with the following schedule:

<u>GROUP</u>	<u>NUMBER TO BE MANAGED</u>	<u>TARGET FISCAL YEAR</u>
All E-4 through E-9 infantry personnel; all Standby Reservists	40,000	1981
All E-1 through E-3 personnel; remaining E-4s in combat skills	80,000	1982
All E-4s in combat support skills	120,000	1983
All E-4s in combat service support skills	160,000	1984
All others in the IRR not under management	200,000	1985

Table 3.9 shows the projected staffing requirements to implement the enlisted management plan.

TABLE 3.9
EMTMS-USAR PROJECTED STAFFING

	<u>Managed</u>	<u>Officer</u>	<u>Enlisted</u>	<u>Civilian</u>	<u>Total</u>
FY 80	20,000	3	31	17	51
FY 81	40,000	5	65	33	103
FY 82	80,000	8	124	62	194
FY 83	120,000	10	187	93	290
FY 84	160,000	12	249	124	385
FY 85	200,000	15	312	156	483

Funding requirements for the same period are as shown in Table 3.10.

TABLE 3.10
EMTMS-USAR FUNDING REQUIREMENTS
(\$ Millions)

	<u>TRAINING COST</u>	<u>STAFFING COST</u>	<u>TOTAL</u>
FY 80	1.2	0.8	2.0
FY 81	3.7	1.6	5.3
FY 82	7.3	3.2	10.5
FY 83	11.0	4.6	15.6
FY 84	14.6	6.0	20.6
FY 85	18.3	7.6	25.9

Under the current method of operation, the PMNCOs attempt to establish direct contact with each member of the managed group by writing an introductory letter that explains the program. Quarterly information letters keep the members updated as the program progresses. Each communication discusses the services available and encourages the member to call the PMNCO on the toll-free lines.

The Army is finding that enlisted personnel in the IRR have limited interest in personnel management services and there are few volunteers to participate in training programs. Several reasons may be postulated:

- Most enlisted IRR members recently (within about 2 years) completed active duty and they do not want to participate in any further training with the Army.
- Most have taken jobs in recent months and would find it difficult to take military leave (even if they wanted to).
- Enlisted pay is not sufficient to attract people to go on active duty for training.

Beyond this problem of a lack of interest in further participation, the Army has not established a detailed training policy for the IRR. Little work has been done in the area of military skill decay factors and there is really no other basis for establishing IRR training policy. Given that 97% of the enlisted members of the Army IRR are in pay grades E-1 to E-5 and that 96% have been in the IRR for less than 3 years, it is not clear how much or what type of training should be provided for the average enlisted member of the IRR. Several questions pertain:

- Should the Army provide skill refresher training? If so, for what types of skills?
- Should the Army provide general military training?
- Should the Army depend on the IRR to supply fully qualified personnel with highly technical skills (e.g., avionics repair)?

- Should all training be contingent upon reenlisting in the IRR?

The answers to these and other questions require considerable further research before a coherent IRR training policy can be established. Regardless of the outcome of the training issues, the Army ought to proceed with its plans to manage enlisted members of the IRR.

Navy IRR Career Management Program

The Navy has only recently begun to establish an IRR personnel management program and, as of late 1980, the initial group of personnel managers were in place at the Naval Reserve Personnel Center (NRPC) in New Orleans. The managers are members of the Navy's Training and Administration of the Reserve (TAR) program.

The Navy career management program initially will be limited to enlisted members of the IRR. The reasoning is that management of enlisted personnel presents the greater challenge because officers are far more likely to participate in a Reserve program than enlisted personnel. The reasons are the same as discussed previously about the Army's enlisted career management program.

Under current planning the Navy program will operate as follows:

- Shortly after an enlisted person is released from active duty, a letter will be sent reminding the individual of the remaining contractual obligation and informing the individual that he or she will be contacted by the assigned counselor from NRPC. The letter will include a form to be returned to verify the current address and to add a telephone number.
- Later the manager will contact the individual to:
 - Determine interest
 - Offer training
 - Encourage participation

- Toward the end of the individual's MSO the manager will encourage reenlistment in the IRR.

In order to implement the program for the entire enlisted force in the IRR, the Navy identified a total requirement for manpower which has been adjusted over time as follows:

	<u>OFFICERS</u>		<u>ENLISTED</u>		<u>CIVILIAN</u>	
Original Requirement	20		30		165	
	<u>FY 82</u>	<u>FY 83</u>	<u>FY 82</u>	<u>FY 83</u>	<u>FY 82</u>	<u>FY 83</u>
POM-82 Approved	7	20	28	30	26	26
FY 82 Budget	+7	+13	+16*	+2	0	0

* Ten positions were substituted military for civilian.

In addition to the above, the FY 1982 budget authorized 22 enlisted spaces to be added in FY 1981 which means that a total of 7 officers and 38 enlisted personnel will be authorized for personnel management at NRPC by end-FY 1982. NRPC is also procuring a minicomputer to provide ADP support for the personnel managers. The expected delivery date of the hardware is March 1981.

NRPC estimates that its enlisted personnel managers will be able to handle about half the workload experienced by Army IRR officer managers (1500-1600). This means one manager per 800 enlisted members, or a total of 98 managers when the entire enlisted force is in the program. NRPC planning is based on the belief that more work will be required to manage enlisted persons than officers. Although the study team has no empirical data, it appears that, given the limited rate of participation by IRR enlisted personnel, the enlisted personnel manager might handle more individuals than the officer personnel manager. This assumes that the managers will not continue to contact enlisted individuals who show no interest in further participation in the Navy. Workload data should

be collected as the program matures so that an accurate level of manning can be established.

The Navy has not yet established plans to expand the IRR personnel management program to its officers. Planning for this will not begin until the enlisted personnel management system is fully operational--probably FY 1983 or later.

Marine Corps Personnel Management Program

At the time of the interviews conducted by the study team at Headquarters, Marine Corps, planning for an IRR personnel management program was in its very early stages. It was indicated that a working group would be formed at Headquarters, Marine Corps in FY 1981 to establish the concepts of a personnel management program modeled after that of the Army. Following completion of this effort, the IRR management program would be established at the Marine Corps Reserve Forces Administrative Center (MCRFAC) in Kansas City. This will have the effect of adding a major function to MCRFAC's mission which, heretofore, has been limited primarily to record keeping functions. The source of funding and manpower spaces to support this new function is to be determined in the future.

Air Force Career Management Program

Discussions with Air Force personnel during this study effort have indicated that the Air Force does not now plan to establish an IRR personnel management program beyond its present record keeping and telephone advisory service. One of the reasons cited is that the strength of the Air Force Selected Reserve is close to its peacetime manpower authorization. Therefore, the major incentive (used by the Army) of offering assignments to positions in the Selected Reserve is absent.

The Air Force could offer skill refresher training to members of the IRR. However, the need for refresher training for members recently released from active duty is uncertain. In addition, the Air Force

seems to believe that longer-term members of the IRR are not viable mobilization assets because of a lack of current qualifications. This is especially true of pilots, aircraft maintenance personnel, and others with high technology jobs who must participate frequently to remain proficient in their skills. Individuals such as those who are recalled to active duty will have to undergo an extensive period of retraining in order to regain adequate proficiency. For these reasons, the Air Force appears to resist applying any significant resources to peacetime management or training of the IRR.

The study team believes that the Air Force approach should be reevaluated. It appears likely that significant numbers of IRR personnel will be recalled to fill CONUS units and headquarters staffs in other than high technology jobs. The Air Force should identify the grades, skills, and degree of proficiency required to fill these positions and take appropriate steps to manage the individual members of the IRR who are likely to be recalled to fill those jobs.

Reenlistment Bonus Program

In addition to the establishment of personnel management programs to help retain individuals in the IRR, OSD and the Military Services have also established a reenlistment bonus program. This bonus program, which was authorized by Public Law 96-342, 8 September 1980, applies both to the IRR and the ING. Implementation of the ING bonus is discussed in Section 4 of this report.

The purpose of the bonus is to encourage enlistment, reenlistment, or extension in the IRR/ING by members who have no remaining contractual obligation. The following definitions apply:¹

- Enlistment. A voluntary enrollment in the IRR as an enlisted member. This applies only to members leaving the active component and prior service personnel.

¹Source: OASD(MRA&L) Memorandum, Bonus Program for the Inactive National Guard/Individual Ready Reserve, 1 October 1980.

- Reenlistment. A second or subsequent enrollment in the Ready Reserve by members who agree to serve in the IRR. This applies to personnel who are members of the Selected Reserve, IRR and Standby Reserve. Also prior service National Guard personnel may reenlist in the IRR with the same state or territory.
- Extension. The continuation of service by a member of the National Guard who agrees to serve in the IRR within the same state or territory without a break in service.

To be eligible for the bonus the enlisted person must be qualified in and possess a primary or secondary skill designated as critical to mobilization needs, have completed his or her military service obligations and sign a three year contract. The amount of the bonus is \$600, with \$300 paid upon enlistment, reenlistment, or extension and \$100 paid upon satisfactory completion of each of the succeeding 3 years.

At the time the enlistment, reenlistment or extension contract is signed, the member must also sign a written agreement that specifies the terms of the bonus. If the individual fails to satisfactorily complete the designated terms of the agreement, he must refund a percentage of the payment for the unserved period. This also pertains when the individual leaves the IRR to join the Selected Reserve or the active forces.

Planning for the bonus has been under way for a considerable period of time. During 1978 and 1979 OSD issued guidance to the Services to establish IRR reenlistment programs with a goal of achieving the following continuation/reenlistment rates:

PERCENTAGE OF TOTAL IRR STRENGTH REACHING 6 YEARS OF SERVICE			
	BY 80	BY 85	BY 90
Officers and Enlisted	75	70	60

The Services were to program for an enlisted reenlistment test of \$200 per year for IRR reenlistment. The 1979 PDM directed the Army to "extend the IRR critical skills reenlistment bonus to unobligated separatees from the active force and the Selected Reserve....(and to) offer an IRR noncritical skills reenlistment bonus for a three-year commitment with the goal of acquiring 19,000 individuals per year beginning in FY 81...." In addition, the Navy and Air Force were directed to develop and fund...an IRR reenlistment program without incentives.

Despite the advanced planning, the Services had to await enactment of the bonus legislation before finalizing their programs. This effort began in early October 1980, at about the time the study team visited the Services. Thus, the Service programs discussed with the study team were very tentative and were changing rapidly during the course of this study effort. Highlights of the Service programs are discussed below.

Army IRR Bonus Program

The Army has selected skills that will be eligible for the bonus. All skills except band will be eligible until the IRR strength has increased to a point at which the Army can be selective.

The bonus program is being implemented in the Army in FY 1981 with a goal of 18,700 enlistments/reenlistments in the IRR at a cost of about \$5.8 million. The program will expand over the FY 1982 to FY 1986 period, reaching a level of about 27,000 new enlistees and 40,000 continuation payments during FY 1986 at a cost of about \$21 million.

The US Army Reserve Components Personnel and Administration Center (RCPAC) will administer the IRR bonus program. Bonus management personnel are programmed to increase from 30 in FY 1982 to 60 in FY 1986. They will perform the following functions: enlistment, reenlistment processing, bonus management, records administration and management, and ADP support.

The Army is offering these bonuses to persons leaving active duty who have no remaining obligation. The individual leaving the service may not have a job to go to and the prospect of receiving an immediate payment of \$300 without a participation requirement could be attractive. As a parallel, the Army has had a prior-service recruiting program since February 1978 whereby nonobligated persons leaving active duty are recruited into either the Selected Reserve or the IRR. Current figures show that approximately 75 persons per month join the IRR. However, with the bonus incentive the number is expected to increase.

RCPAC is in the process of automating the procedures for paying and administering the IRR bonus. A management information system is being developed that will not only pay the initial bonus and the subsequent anniversary payments, but will also satisfy OSD reporting requirements.

The Navy Bonus Program

The Navy policies and procedures for the bonus program basically follow the OSD Guidance. The administration of the bonus will be accomplished by the Naval Reserve Personnel Center (NRPC) in New Orleans.

NRPC envisions that its enlisted counselors will contact individuals by telephone and through mailings to determine their interest in reenlisting in the IRR. Upon show of interest, the NRPC counselors will screen them for eligibility and will then contact the Selected Reserve recruiter serving the candidate's home town. The recruiter will contact the individual IRR member and process the paperwork for reenlistment in the IRR.

OPNAV has provided guidance to NRPC on the skills/ratings for the bonus program.

Marine Corps Bonus Program

The IRR bonus program will be implemented by the Marine Corps in FY 1981 for selected skills that are projected to have a wartime short-fall. About 1000 enlistments/reenlistments are planned during FY 1981 at a cost of some \$300,000 plus any administration and support costs.

The bonus program will be executed by the Marine Corps Reserve Forces Administrative Center (MCRFAC) in Kansas City. Reserve personnel will be added to administer the program, probably under 10 USC 678, but the extent of the increase has not yet been determined. A toll-free telephone number has been installed to support the bonus program.

Present planning calls for MCRFAC to contact members of the IRR who have critical skills about 3 months prior to the end of their contractual obligation. A letter will explain the bonus program and ask the individual to reenlist. Upon a show of interest, an active duty member will visit the individual to ensure that he or she meets Marine Corps standards for mobilization. MCRFAC will then process the reenlistment for qualified individuals.

Air Force Bonus Program

The Air Force is establishing a bonus program in accordance with OSD guidance. The program will be administered by the Air Reserve Personnel Center (ARPC) in Denver which will accomplish the reenlistments by mail.

The Air force has developed a list of skills to which the bonus will be paid. The program will begin 1 March 1981 with a target of 2895 accessions at a cost of about \$1.0 million. By FY 1986 about 10,000 individuals will be receiving initial or continuing bonuses at an annual cost of about \$2 million.

Evaluation

Some members of the Services question whether \$200 in a one-time payment and 3 anniversary payments of \$100 will attract sufficient numbers of individuals. The answer will not be known for some months after the programs have been fully implemented.

PREASSIGNMENT INITIATIVES

Introduction

The preassignment of individuals during peacetime to positions that they will fill in wartime is designed to accomplish two primary goals:

- Expedite the mobilization process by eliminating the time required to identify and assign personnel to active duty positions following M-Day.
- Allow key people to begin reporting for duty after M-Day under the worst case situation of a complete breakdown in the communications (mail and Western Union) normally used to recall large numbers of individuals.

OSD guidance to the Services in 1979 and 1980 required the Services to identify wartime positions requiring filling on M-Day and to pre-assign IRR members to those positions by end-FY 1981. Individuals are to be notified in peacetime of a reporting time (referred to M-Day), location, and initial assignment.

Although the OSD guidance applies equally to all Services, it will be seen that each Service tailors its preassignment policy and program according to its particular needs. This section discusses the individual Service preassignment programs (or lack thereof) and addresses the procedures and systems used by each in the assignment process.

It should be noted that the preassignment issues raised in this section are equally applicable to the reserve preassignment programs

described in Section 7 of this report. Further the IMA program, which is discussed in Section 5, constitutes a special case of preassignment of pretrained individuals who are members of the Selected Reserve rather than the IRR.

Assignment Priorities

Before discussing details of the Military Services' IRR preassignment programs, it will be useful to consider the priorities used by each Service to assign pretrained individuals to wartime positions. These priorities reflect the vulnerability to recall contained in law and the Service perceptions of the utility of each group of individuals. The following table provides information on the availability of individuals for recall in time of emergency.

TABLE 3.11
CRITERIA FOR RECALL

<u>CATEGORY OF PRE- TRAINED INDIVIDUALS</u>	<u>CRITERIA</u>	<u>LEGAL AUTHORITY</u>
READY RESERVE (IRR, IMA)*	National Emergency - President	10 USC 673
INACTIVE NATIONAL GUARD (ING) [†]	National Emergency - President	10 USC 673
RETIRED REGULARS [§]	Any Time - President	10 USC 3504,
STANDBY RESERVE	War/National Emergency - Congress	10 USC 6481 10 USC 672
RETIRED RESERVISTS	War/National Emergency - Congress	10 USC 675

* IMAs, as members of the Selected Reserve, may also be recalled by the President in the exercise of the 100,000 call-up authority.

[†] National Guard units must be ordered to active duty to recall the ING.

[§] Retired regular enlisted members of the Fleet Reserve and Fleet Marine Corps Reserve may be recalled only with declaration of national emergency by the President or Congress.

Under current planning all of the Services consider the Ready Reserve to be the primary source of pretrained individuals in the event of mobilization. Likewise the Retired Reserve is considered to be the lowest priority for recall upon mobilization. The order in which the various groups of pretrained individuals would be recalled would, of course, depend on the mobilization scenario. Under a no-notice, full mobilization with declaration of war by Congress, all groups would be equally available and would be recalled according to the needs of the individual Service. A more likely situation is a gradual increase in international tensions followed by declaration of national emergency by the President and, later, by declaration of war by the Congress. In this situation, IMAS might be called first in a partial (up to 100,000) call-up of the Selected Reserve. Next, the Ready Reserve would be called (Selected Reserve, IRR, and ING), possibly accompanied by the recall of regular retirees. Finally, the Standby Reserve and Retired Reserve could be recalled after declaration of war by Congress.

Discussions with the Services indicate that, given no legal restrictions on the recall of any group at the time of mobilization, the Army and Air Force would recall the IRR, ING, and regular retirees ahead of the Standby Reserve and Retired Reserve. The Navy and Marine Corps, on the other hand, would first recall the IRR and Standby Reserve and then regular retirees and the Retired Reserve. This is the result of a recent change in guidance by the Department of Navy due to elimination of the legal requirement for the Selective Service System to screen members of the Standby Reserve prior to their recall. However, as the Standby Reserve declines in size (see Section 6 of this report) and it becomes less of a pretrained manpower asset, this difference in policy between the Services will be diminished.

Army IRR Preassignment Program

Although the Army has a large number of preassigned members of the IRR under the Mobilization Designated (MODDES) program discussed further in Section 10, it is only recently that efforts were begun to preassign

the majority of IRR members. This began in March 1976 when, in response to guidance issued by the Secretary of Defense, the Army implemented a Voluntary Mobilization Preassignment (VMP) program. The VMP resulted in the preassignment of only about 4% of the IRR and the program was terminated in December 1977 to make way for other preassignment systems which were developed during the period of the VMP test. These include two programs which are currently in use by the Army--the Mobilization Preassignment Program (MPP) and the Mobilization Personnel Processing System (MOBPERS). Each of these systems is described below.

MPP is a system which preassigns Army members at the time they are released from active duty. The system has been implemented and tested at 10 installations and has resulted in the preassignment of some 9000 persons.

Under MPP the installation from which the individual will be released requests from RCPAC an appropriate wartime position for the individual. If the individual's grade and skill fit a wartime requirement, RCPAC then issues preassignment instructions and orders are prepared by the losing installation. The orders require the individual to report on a date that is between 10 and 60 days after mobilization. The commander of the installation to which the individual has been preassigned is subsequently notified of the assignment to assist in wartime planning.

The Army currently is considering the expansion of MPP to all 40 installations from which members are released. However, the decision to expand the program has been delayed because of problems with the system as follows:

- MPP is inflexible in that there is no provision for making automated changes in preassignment orders as requirements change.

- The Army believes that many enlisted personnel dispose of their preassignment orders shortly after their release from active duty. These individuals would not report unless a new order were received.
- There is no receipt process to show that the individual actually received the order. Subsequent legal enforcement of the order is in jeopardy.
- Maintaining contact with the preassigned individual is difficult because of the frequent changes of address that usually occur in the 6 months following release from active duty.
- A later decision by the individual to join a Selected Reserve unit causes orders to be revoked and increases the cost of preassignment actions.
- MPP system operation costs about \$25,000 per installation per year for the pay of operators and rental of appropriate terminal equipment.

The future of MPP probably will be decided in 1981 based on resolution of the foregoing problems and the on-going development of MOBPERS. MOBPERS is more accurately described as a predesignation system rather than a preassignment system. Predesignation means that a wartime position and a pretrained asset have been matched in a computer in advance of mobilization, but "hip pocket" orders have not been issued. Preassignment, on the other hand, completes the process and issues orders to the individual in advance of mobilization. The key features of MOBPERS are as follows:

- Wartime position requirements are identified by the DA Deputy Chief of Staff Operations and Plans (DA DCSOPS) who also establishes priorities for fill of units.
- The US Army Military Personnel Center (MILPERCEN) provides to RCPAC quarterly reports containing wartime position requirements. Although priorities of fill is indicated, the requirements are not formally used. Casualty replacement estimates are also provided in a similar format.

- Selected Reserve manpower requirements are determined by RCPAC for the USAR. The National Guard Bureau provides monthly personnel status and wartime requirements tapes to RCPAC so that IRR personnel may be assigned to National Guard units as required.
- RCPAC matches assets to requirements quarterly and predesignates IRR members to fill appropriate AC and RC assignments in accordance with established priorities. Rosters of these tentative assignments are sent to Army installations quarterly where they are available in the event of mobilization. The rosters contain all IRR assignments, including the MPP pre-assignments and the MOBDES assignments. The rosters are used on M-Day to make specific assignments as personnel report for active duty.
- MOBPERS is capable of handling grade and skill substitutions.
- On M-Day RCPAC updates the most recent roster and issues orders via tape to Western Union for dispatch of Mailgrams.
- MOBPERS provides for automatic accession of IRR members to the active personnel system upon mobilization.

MOBPERS allows the Army to retain flexibility in the assignment of IRR personnel upon mobilization because orders are not issued in advance of mobilization. However, this system makes the Army dependent upon Western Union to notify individuals after M-Day. Given that Western Union will also be used extensively by the Selective Service System and the other Military Services, the Mailgram system may be overloaded at this critical time. The study team believes that this potential vulnerability should be evaluated in further depth.

MOBPERS helps the Army to overcome a serious problem discovered during MOBEX 76. Procedures in effect at that time required units to submit requisitions for filler personnel after M-Day. Although this procedure combined the requirements to fill wartime-only positions with

those required to offset current personnel shortfalls, it was extremely slow and cumbersome. As a result the mobilization assignment process was inefficient. As will be seen subsequently, the Air Force currently uses a "pull" requirement system similar to that formerly used by the Army. However, the Air Force system is more completely automated and is more responsive than was the old Army system.

The Army is continuing to improve the capability of MOBPERS as more experience is gained in the assignment of IRR personnel to meet wartime requirements. For example RCPAC will establish procedures in the near future that will allow newly acquired IRR members whose personnel records are incomplete to be predesignated against wartime requirements in the same manner as other IRR members. Missing data (e.g., current address) will be added to the MOBPERS file as the data become available.

As a result of using MOBPERS, which assigns personnel on the basis of geography as well as skill and grade, RCPAC has found that 85% of IRR members live within 300 miles of the installation to which they will be assigned in the event of mobilization. This proximity will reduce considerably the reporting delay due to travel which would be incurred by assignment without regard to geography. The net result is that the Army will be able to order non-preassigned IRR members to active duty expeditiously even though orders have not been issued prior to mobilization.

MOBPERS issues orders to the IRR that require all members to report not later than M + 10 days (a date is specified in the order, but the date is not variable between individuals). The orders are dispatched to the individual by Western Union Mailgram with a paper copy being mailed to the gaining installation. Orders issued to IRR members preassigned through the MPP system direct the individual to report a specified number of days (ranging from 10 to 60) after declaration of M-Day. Thus, preassigned members may be given a longer delay in reporting than predesignated members who receive "pull-out" orders subsequent to mobilization. It appears that the situation should be reversed.

All IRR members who receive orders after M-Day are directed to report not later than M + 10. This common date appears to be established for two reasons. First, the IRR strength is far short of meeting the Army's wartime requirements, so all available members are ordered to report almost immediately. Those required later are simply not available. Second, Army wartime manpower requirements tapes identify the priority for fill by unit but not the time at which the unit must be filled. MOBPERS is capable of assigning personnel to a unit at a specific time if the information were included in its requirements tape. However, MOBPERS would require considerable modification in order to assign personnel against individual, time-phased positions.

As discussed previously, MOBPERS assigns personnel against wartime requirements established by DCSOPS and MILPERCEN. Present planning by the Army establishes requirements only for a full mobilization scenario which would require the recall of all members of the IRR and all Class I and II retirees. If the Army were required to undergo a partial mobilization not requiring the recall of the entire IRR, MOBPERS would be unable to respond quickly because it would not have a special grade/skill/location requirements tape against which to assign personnel. The study team has not attempted to estimate the time required for DCSOPS to generate a special requirements tape, but the time probably would be measured in weeks rather than days.

In summation, the Army is using a mixture of preassignment and predesignation systems for members of the IRR. The principal system, MOBPERS, currently is capable of assigning IRR personnel against wartime requirements on or after M-Day but it is limited in its flexibility to assign against time-phased requirements. MOBPERS integrates the wartime manpower requirements of both AC and RC units and assigns IRR members against those requirements in accordance with the established priority system.

Navy IRR Preassignment Program

As discussed previously the IRR constitutes the first priority group of pretrained individuals to be recalled upon mobilization. As such the Navy has established an IRR preassignment program that will expedite recall of the IRR in the event of mobilization.

Navy planning calls for the IRR to be assigned against wartime positions that must be filled by M + 30 days and later. Positions that are required to be filled prior to M + 30 are filled by transfer of individuals from active and Selected Reserve units. The resulting vacancies are backfilled later using a combination of Ready Reservists, Standby Reservists, and retirees.

The Naval Reserve Personnel Center (NRPC), the functional manager of the IRR, is responsible for assigning the IRR to fill wartime positions in the event of mobilization. In order to reduce the lead-time required to assign the IRR after M-Day, NRPC has established an IRR preassignment system. The Navy system is similar to the Army's MOBPERS system. That is, IRR members are predesignated to fill wartime positions but orders are not issued until after mobilization is ordered. There are some significant differences between the systems, however, which are highlighted in the following discussion.

NRPC receives its wartime requirements and manpower supply information from the Deputy Chief of Naval Operations (Manpower, Personnel, and Training) (OP-01). The OP-01 action agency is the Naval Military Personnel Command (NMPC) which is located in the Washington, D.C. area. NMPC operates the Manpower Personnel and Training Information System (MAPTIS) and maintains master automated records for all active and inactive manpower in the Navy. NRPC maintains hard copy personnel records for the IRR and provides update information on its members to the NMPC master file. However, IRR gains from the active file are automatically transferred from the active to the inactive file when the individual is released from active duty.

The NRPC preassignment process begins with the receipt of a monthly update tape of IRR assets that shows all IRR members who have not been predesignated against a wartime position. The tape is run and a computer card deck is produced that lists all IRR members available for assignment. These cards are then compared manually against vacant wartime positions on the basis of grade, skill, and geography. After the assignments are made, the cards are punched to indicate the wartime position, and a tape is made and transmitted to NMPC. In the event of mobilization, the updated tape would be used by NRPC to write orders and Mailgrams to notify the individuals of their recall.

The Navy orders its personnel to report to mobilization stations located at nearby Reserve centers for processing by Personnel Mobilization Teams. These teams issue hard-copy orders (delivered in bulk from NRPC by United Parcel Service or other available means), prepare personnel documents such as ID card requests, assess requests for delay, provide medical screening, and process the individual to his or her wartime assignment.

The weak link in the Navy's IRR preassignment process is that assignments are made manually. This involves the assignment of 3500 to 4000 new accessions to the IRR each month which creates a significant manual workload for NRPC personnel. The result is that only about 60% of the IRR is predesignated at any time. Installation of an automated system comparable to the Army's MOBPERs could save considerable time and manual effort at NRPC and provide timely assignments for all IRR members. The basic elements--automated requirements and assets tapes--are in place so that only the matching algorithms would have to be developed. It is understood that the matching program could be run on the NMPC computer in the Washington area without the addition of computer capacity at NRPC.

Marine Corps IRR Preassignment Program

Present mobilization planning within the Marine Corps calls for an extremely limited IRR preassignment program for two primary reasons:

- The Marine Corps believes that preassignment is costly in terms of computer time and manpower, primarily due to the high turn-over rate of the IRR (about 50% per year).
- The Marine Corps mobilizes on the east coast or west coast according to the location of the conflict. The Marine Corps believes that preassignment would reduce their flexibility to respond to either an east or west contingency and would induce considerable post-M-Day manpower turbulence.

Despite these reservations, the Marine Corps currently is in the process of identifying wartime-only positions in the Fleet Marine Force that will be filled by IRR personnel. During a period of tension IRR assets would be matched against these requirements and a computer tape would be prepared for later use in the event of mobilization. Thus, the Marine Corps plans to predesignate members of the IRR to fill wartime positions, but not until a period of tension causes increased readiness and a higher probability of mobilization.

The Marine Corps mobilization process is similar to that of the Navy. The Marine Corps Reserve Forces Administrative Center (MCRFAC) in Kansas City maintains personnel files for the IRR, Standby Reserve, and retirees. Assignments to wartime positions are made by comparing these automated personnel files against a wartime requirements tape provided by Headquarters, Marine Corps. The resulting "mobilization file"¹ would be used upon mobilization to prepare orders for dispatch by Express Mail.²

¹ MCRFAC creates a mobilization file 2 or 3 times per year to compare assets to requirements. However, this is so infrequent as to be unuseable without update.

² Express Mail was used successfully during MOBEX 80 (PROUD SPIRIT). However, consideration is being given to the use of Mailgrams in the future.

The individuals are ordered to report to a nearby Mobilization Station where a team receives and processes them similar to the Navy's operation described previously. MCRFAC sends assignment instructions (either hard-copy orders or rosters) to indicate the specific position to be filled by the individual. Following processing the marines are then sent to Stations of Initial Assignment (SIA) which are major Marine Corps bases located on the east and west coasts (e.g., Camp Lejeune, NC). Further processing is accomplished by Military Personnel Processing Centers (MPPCs) located at each of the SIAs. The Mobilization Stations and MPPCs are manned upon mobilization by preassigned members of the IRR or IMAs.

Discussions with individuals at Headquarters, Marine Corps indicate that, as mobilization plans are refined, more preassignment and/or pre-designation of IRR personnel will take place. The Marine Corps appears to be looking for wartime positions that are sufficiently stable (and not scenario dependent) to which members of the IRR, Standby Reserve, and retirees can be assigned in peacetime.

However, the Marine Corps probably will resist the preassignment of the majority of its IRR for the reasons previously stated. They believe that the Marine Corps assignment and notification system is sufficiently responsive to meet any possible requirement and they want to retain flexibility for various contingencies. The Marine Corps estimates that its IRR members would be notified in about 24 hours after the decision to mobilize and would begin reporting to Mobilization Stations by M + 3. It appears, however, that the average reporting time would be reduced by preassigning the IRR to nearby Mobilization Stations and issuing "hip pocket" orders keyed to M-Day announcement over radio and television. This would retain the flexibility desired by the Marine Corps in that final assignments would continue to be determined after M-Day and orders would be issued at the Mobilization Station as is now done. It would also reduce the vulnerability of the Marine Corps to the dependence on post-M-Day communications for recall notification. The

study team believes that the Marine Corps should identify positions that are required to be filled by the IRR by M + 30 and preassign members against those positions in peacetime. Preassignment orders would direct individuals to report to a Mobilization Station, not to the ultimate station of assignment.

Air Force IRR Preassignment Program

The Air Force, unlike the other Services, is not planning at the present time to move toward either preassignment or predesignation of the IRR during peacetime. Many factors affect this policy as explained below.

The Air Force mobilization system is unique among the Services. Wartime requirements are identified by the Major Commands (MAJCOMs) (CONUS and overseas) and approved by Headquarters Air Force. The requirements are stated in terms of Unit Type Codes (UTCs) that describe organizations ranging from very small teams (e.g., traffic control) to an entire tactical fighter squadron. In this way the security maintenance, administration, and tactical elements of the MAJCOMs are expanded from peacetime to wartime strengths.

The Unit Type Codes required overseas are taken from a mixture of active units (usually from lower priority, non-deploying units in CONUS) and Selected Reserve units that are ordered to active duty on M-Day. The vacancies created in CONUS units by these deployments are later backfilled by the assignment of the IRR and other preassigned individuals.

The Air Force attempts to deploy all units at full strength. For the earliest deploying units in a no-notice mobilization, however, there will be inadequate time to fill them by reassigning active personnel from other distant bases or ordering pretrained individuals to active duty. Thus, the responsible commander must either cross-level by reassigning personnel from other local units or deploy the UTC at its current strength. Since the UTCs come from both active and Selected Reserve units, cross-leveling can also take place between different types of units.

The Air Force has established a special program to increase the availability of selected skills for which there is a significant additional demand in wartime. Called "WARSKIL," this program provides additional training in alternate skills for selected individuals. These personnel are then scheduled to deploy in wartime with a UTC requiring that alternate skill. Personnel turbulence among the enlisted force, however, creates a large workload for Air Force personnel managers in assigning members of the WARSKIL program to bases requiring both their peacetime primary and wartime alternate skills.

From the foregoing description it can be seen that the Air Force plans to meet its earliest wartime requirements by utilizing active and Selected Reserve (including IMAs) manpower resources. Under current planning, the IRR, retirees, and the Standby Reserve are not required until after M-Day when they will be recalled to backfill positions made vacant by deployment of members of active and Selected Reserve units. It is for this reason that the Air Force does not plan to preassign or predesignate these individuals prior to mobilization.

The Air Force continues to refine its mobilization planning and its wartime requirements determination process. As this evolves and time-phased requirements are refined, the Air Force may find that it has a substantial M-Day shortfall which should be filled by preassigned members of the IRR and retirees. If this occurs, then OSD should address with the Air Force the need to undertake a preassignment (or predesignation) program.

Following mobilization, the Air Force determines its manpower requirements through its "pull system" under which MAJCOMs determine their unfilled requirements and request fill by grade/skill from AFMPC. These requirements are merged by AFMPC and matched against the AFMPC consolidated personnel data base that contains all Air Force active, Reserve, and retiree personnel records. By this process the most appropriate individual is selected to fill the requirement, including active personnel available for reassignment or who may be enroute to fill the

position. As the IRR and retirees are selected for recall, AFMPC notifies the Air Reserve Personnel Center in Denver which issues orders by Mailgram and initiates appropriate personnel and pay actions.

Although this process selects from all available resources and minimizes personnel turbulence (because specific positions are identified for each person recalled), there appears to be one significant drawback. The system depends on the rapid identification and reporting of manpower requirements by the MAJCOMs. Under the confusion of a short notice mobilization, it is unlikely that the MAJCOMs will be able to respond quickly. It is more likely that they will identify their requirements piecemeal, sending their most critical needs first and following up much later with more routine requirements. The result will be that AFMPC will be reacting to urgent requirements, processing sequential batches of requirements and filling them without knowing whether more urgent requirements will be forthcoming from other, higher priority commands. It appears that estimates must be made to establish total requirements and total assets by grade and skill so that assignment priorities can be established by skill, grade, and command in advance of mobilization.

The study team believes that it is possible for the Air Force to identify in advance of mobilization a significant number of positions that must be backfilled from IRR and retiree assets under any major mobilization scenario. If individuals were predesignated against those positions and the MAJCOMs were aware that they would be filled automatically in case of mobilization, then the post-mobilization "pull system" requirements could be reduced to a more manageable size. The Air Force should consider such an approach as its mobilization planning evolves.

CONCLUSIONS AND RECOMMENDATIONS

This section presents the detailed conclusions and recommendations reached by the study team as a result of its research into IRR issues. The conclusions and recommendations are grouped as follows:

- IRR general
- Strength initiatives
- Personnel retention initiatives
- Preassignment initiatives

Conclusions

IRR General

- The IRR constitutes the most viable pretrained individual mobilization asset for the Services because it consists primarily of junior personnel who have recent military experience. The skills and grades in the IRR are largely consistent with those existing in the active force.

Strength Initiatives

- Taken together the IRR strength initiatives undertaken by the Services have reversed the downward strength trend by adding strength and reducing losses. However, for most Services, the strength of the IRR still remains far short of meeting pretrained manpower inventory objectives.
- The primary policy variables that determine IRR strength are the size of the active force, the allowable enlistment options, and the length of the military service obligation.
- The IRR direct enlistment program should be continued by the Army until major gains in IRR strength are achieved. The other Services should establish a direct enlistment program if their future wartime requirements show the early need for significant numbers of junior personnel with low skills and limited experience.
- Army and Navy IRR accession procedures should be improved to permit earlier accession of individuals from active duty.

- The Army National Guard is discharging a significant number of pretrained individuals who have remaining contractual obligations and who may be potential mobilization assets. Steps should be taken to transfer these individuals to the IRR in lieu of discharge.
- The Army should continue to transfer to the IRR qualified individuals leaving active duty and the Selected Reserve before expiration of their normal tour of duty.
- OSD should continue to address the issue of transferring marginally qualified enlisted members to the IRR. This appears to be desirable only when a Service has a large shortfall of pretrained individuals and requires the early availability in wartime of junior, inexperienced members with low skill levels.
- The Air Force should reevaluate its need for the IRR upon mobilization and establish an appropriate IRR personnel management program.
- The IRR strength issue should be considered as a minor determinant of length of enlistment policies.
- Given that DEP service no longer counts toward fulfillment of the military service obligation, the lack of consistency between the Services in DEP policy does not affect their relative IRR strengths. The lack of consistency does make it difficult to determine the impact on IRR strength of the policy change.

Personnel Retention Initiatives

- OSD should undertake further analysis of IRR training issues to provide better guidance to the Services in this important area.

- OSD should analyze ways to improve enlisted participation in the IRR. The analysis should include a review of Service outprocessing procedures from both active and Selected Reserve units.

Preassignment Initiatives

- The degree to which the Services want to preassign members of the IRR in peacetime depends on numerous factors including:
 - Degree of mobilization (full/partial)
 - Scenario (Europe, Asia, Middle East)
 - Type of position
 - Urgency of fill
 - Responsiveness of personnel assignment and notification systems
 - Volatility of position requirements and manpower supply
 - Mobilization procedures

OSD should undertake additional analysis on preassignment issues in order to refine policy guidance to the Services.
- The dependence by the Services on Western Union Mailgrams for notification of recall upon mobilization is a potential vulnerability that should be evaluated further.
- The Army and Navy wartime personnel assignment systems should be upgraded.
- Army IRR personnel who were preassigned at the time of release from active duty should receive confirmatory orders upon mobilization. The Army should also review the reporting dates of those preassigned versus those who have been pre-designated and will not receive orders until after M-Day.

- The Army should establish time-phased reporting requirements at the unit level and, later, by position for installations and headquarters. These should be used as a basis for time-phased assignments of IRR members.

Recommendations

The GRC study team recommends:

General

- That OSD continue to undertake steps that will improve the contribution of the IRR to the Services' wartime manpower requirements.

Strength Initiatives

- That the Army continue the IRR direct enlistment program until major gains in IRR strengths have been achieved. The other Services should establish an IRR direct enlistment program to the extent dictated by future refinements in the wartime manpower requirements.
- That the Army and Navy take steps to improve IRR accession procedures by providing immediate notification to the Reserve personnel center of the home address of each individual released from active duty and the Selected Reserve.
- That the Army take steps to transfer to the IRR those obligated members of the Army National Guard who are potential mobilization assets.
- That the Army continue to screen into the IRR those obligated members leaving active duty and the Selected Reserve (USAR) prior to the expiration of a normal tour of duty.
- OSD analyze further the issue of transferring marginally qualified enlisted members to the IRR.

Personnel Retention Initiatives

- OSD undertake further analysis of IRR training issues as a basis for improved policy guidance to Services.
- OSD consider further new methods to increase enlisted participation in the IRR.

Preassignment Initiatives

- OSD undertake further analysis of preassignment issues and develop improved policy guidance tailored to the needs of the individual Services.
- OSD evaluate the vulnerability of Service mobilization plans to the dependence on Western Union Mailgrams.
- All Services take steps to improve their wartime manpower requirements and assignment systems along the lines discussed in this report.
- Army review the status of currently preassigned members of the IRR and take actions to provide confirmatory orders after M-Day. Reporting dates for these individuals should also be reviewed for possible change.
- Army establish time-phased reporting requirements as discussed in this report.

SECTION 4
INACTIVE NATIONAL GUARD

INTRODUCTION

In order to increase the supply of pretrained individuals available in the event of mobilization, the Army is placing increased emphasis on an existing program--the Inactive National Guard (ING). The ING enables individuals to remain affiliated with the National Guard even though they are unable to train on a regular basis with a National Guard unit. Thus, individuals who might otherwise be lost from the National Guard program will remain available for military service in the event of mobilization.

This section describes the Army's ING program, discusses and evaluates its major features, and provides recommendations for the future.

ING PROGRAM DESCRIPTION

The ING is provided for in Section 303a, Title 32, USC, which states that a person qualified for enlistment in the active Army National Guard (ARNG) may be enlisted in the Inactive Army National Guard for a single term of 1 or 3 years. Section 303b permits transfer from the active to the Inactive Army National Guard so long as the member was not formerly enlisted in the Inactive National Guard. This same section also permits members to transfer from the inactive to the active National Guard without restriction.

It should be noted that Title 32 also provides identical authority to the Air National Guard. However, an inactive Air National Guard program has never been established and, according to members of the National Guard Bureau staff, none is contemplated. The Air National Guard's peacetime strength approximates its wartime requirements which reduces the need for an inactive program in the Air National Guard. However, an

ING program might enable the Air Force to retain members in critical shortage skills such as medical officers.

The ING program is not new. Although no detailed history of the ING program exists, strength figures available at the National Guard Bureau go back to 1958 and the program probably is older than that. Strengths varied from a high of 48,040 at end-FY 1958 to a low of 680 at the end of FY 1970. Obviously there have been major shifts in policy and emphasis to create such a wide variation in strength over the years. Figure 4.1 shows the Army ING strengths for FY 1958-FY 1980. Projected strengths for FY 1981-FY 1986 are also indicated. The basis for the strength projections is discussed below.

The ING program is governed by National Guard Regulation (NGR) 614-1, 28 February 1979. The regulation establishes the policy and objectives related to the ING, governs the status of members, establishes authorized strengths, and prescribes administrative procedures related to membership and transfer of personnel between the active and Inactive National Guard. The details of the ING program that follow are based primarily on NGR 614-1.

Because of the previously described legal prohibition against transfer to the ING of persons who were formerly enlisted in the ING, the Army does not allow persons to enlist directly into the ING. Therefore all members of the ING are transferred from the active National Guard. Transfer to the ING may be for one of several reasons:

- Temporary change of residence
- Temporary incompatibility with civilian employment
- Temporary physical disability
- Pregnancy
- Removal from overstrength status caused by reorganization
- Delay from entering active duty with the active National Guard unit

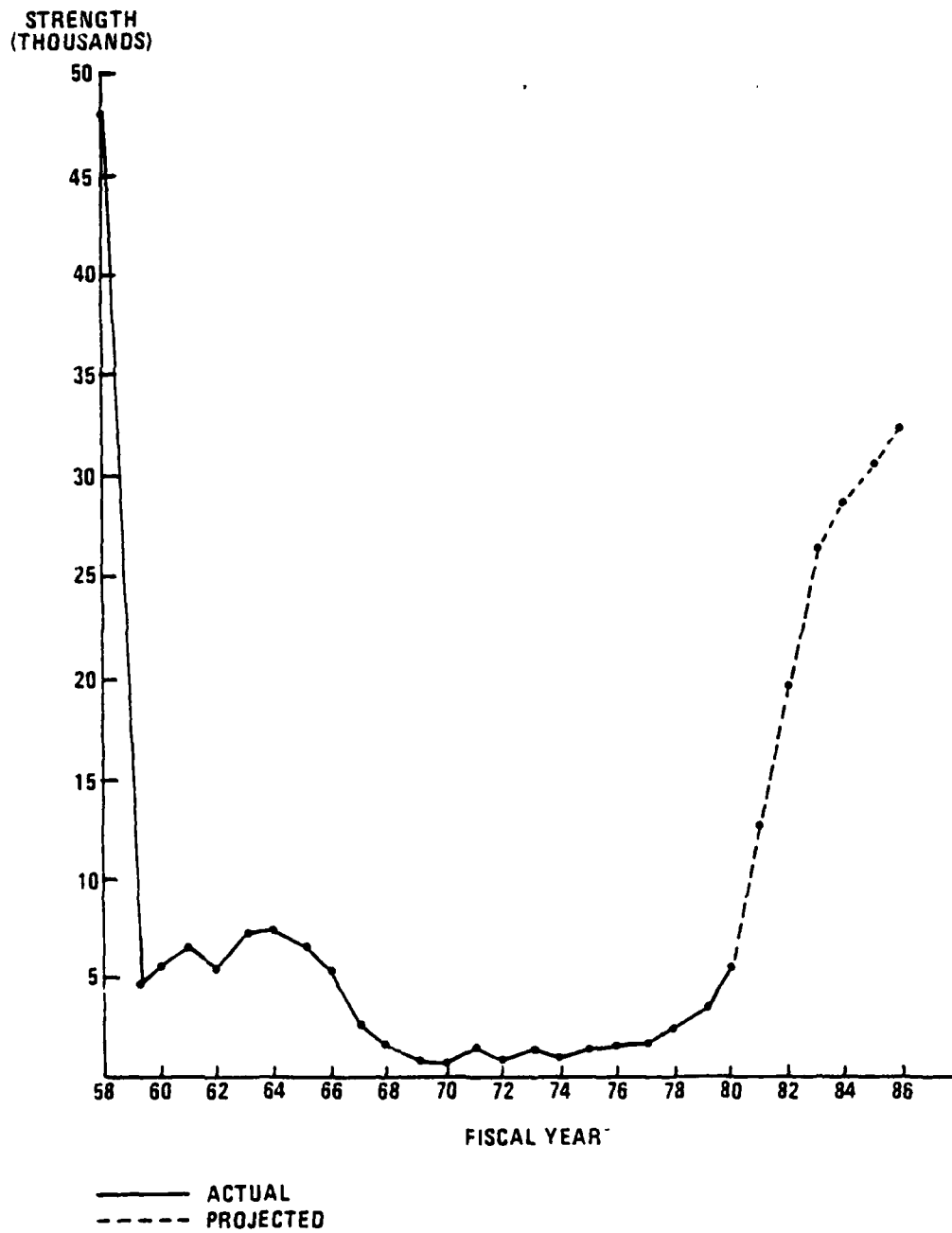


Figure 4.1 — Inactive National Guard End-FY Strength (Officer and Enlisted)

- Release from active duty assignment with a mobilized unit prior to the release of the unit
- Lack of unit vacancy for an individual returning from voluntary extended active duty
- Individuals who enlisted in the National Guard for a period less than 6 years and who desire transfer to the ING for the remainder of their 6-year military service obligation (they may request transfer to the IRR instead)
- Enlisted personnel who voluntarily remain affiliated with the National Guard, but in an inactive status

The Army denies membership in the ING to officers under certain conditions such as during the year preceding the mandatory promotion selection cycle or while serving under a declination of mandatory promotion. The former provision that restricted officer and enlisted membership in the ING to a maximum of 1 year has been rescinded.

Membership in the ING provides few benefits to the individual. Members are not entitled to pay (37 USC 301) or to earn retirement points (10 USC 1332) and are ineligible for promotion (32 USC Appendix 1101). ING members receive longevity credit for basic pay purposes, which is the only direct benefit.

To be members of the ING, individuals must meet professional standards and maintain physical fitness and deployability standards. They must also be qualified for a skill authorized in the National Guard unit with which they are affiliated. Members of the ING retain Federal recognition and Reserve of the Army status as members of the unit with which they are affiliated.

Members of the ING are encouraged to attend 2 weeks of annual training with their unit and to attend an annual muster day assembly with the unit. The annual muster provides the unit an opportunity to:

- Screen ING personnel to determine their availability for mobilization
- Inform members of annual training plans
- Conduct an audit of personnel records

It should be noted that the Army cannot compel members of the ING to attend either annual training or muster day. House Report 94-517, 25 September 1975, requested that the Department of Defense stop the ordering of personnel to 2 weeks of annual training involuntarily because it is inconsistent with the all-volunteer force concept. Obeying this "sense of Congress," the Army has little leverage over ING members as far as training or attendance are concerned.

Training of ING members is further complicated by the requirement to transfer them temporarily to active status in order to pay them and to award retirement point credit. This not only entails the preparation of orders but also requires the member to be accessed to the JUMPS system for the purpose of receiving pay. Thus, attendance by an ING member at either annual training or muster day imposes a substantial administrative workload on the parent National Guard unit.

ING PROGRAM EVALUATION

This section provides an evaluation of various aspects of the ING program including mobilization potential, strength initiatives, attitudes toward the ING, and future policy decisions.

Mobilization Potential

The mobilization potential for members of the ING is better than that for members of the IRR in one principal respect. Members of the ING are associated with a unit which, in most-cases, is the National Guard unit to which they belonged and which probably is located in their home town. This association should create a better environment for the ING member and improve the probability that the individual would report upon mobilization.

The Army IRR member, on the other hand, is a member of a large pool without unit affiliation or local management, factors which tend to reduce the probability of reporting upon mobilization. Although research by the GRC study team has not produced statistical evidence to support this supposition, it would appear that local unit affiliation would always provide an edge to the ING over the IRR in the area of yield upon mobilization. However, efforts by the Army to improve the management of the IRR will eventually narrow the difference between the two.

On the negative side, two factors reduce the mobilization potential of the ING relative to that of the IRR. First, ING members cannot be mobilized until their parent National Guard unit has been federalized.¹ IRR members, on the other hand, may be recalled as individual fillers upon the proclamation of a national emergency by the President. Second, under present law, members of the ING are ineligible to be paid or to earn retirement points, factors that inhibit training because of the administrative burden placed on the unit of attachment. The problem of ING administration is discussed further below.

It should be noted that, in the past, there has been no systematic training program for the ING. Members are encouraged to attend 2 weeks of annual training with their units but the training received is unit-oriented which diminishes its utility to an individual who needs skill refresher training. Although the annual training period may provide for some marginal skill refresher training, its chief value to the ING member who participates is the "regreening" provided by participation in unit training activities.

Another factor affecting the mobilization potential of the ING is the composition of the group. A review of data furnished by the National Guard Bureau provides considerable insight into the ages, grades, and

¹The ARNG is researching the question of call-up of INGs when their parent unit is federalized by the President under the 100,000 call-up authority.

skills of the present (30 September 1980) members of the ING. Tables 4.1 and 4.2 show that the ING members are both young and junior and would likely be mobilization assets. Skill data are less conclusive, as shown in Table 4.3.

The career management fields listed are those that are most critical for fill upon mobilization. As can be seen, 52% of the officers and 60% of enlisted personnel hold skills in fields other than those listed. Thus, the mobilization potential on the basis of skill match is questionable.

An additional question of interest is the reason that the current members entered the ING. The data are incomplete because personnel transactions subsequent to entry to the ING replace data regarding the original reason for entry. However, of 1914 enlisted files available, 1736 or 91% entered the ING for reasons of temporary job incompatibility. Another 8% entered due to change of residence. A new set of transaction codes has been developed that will provide for greater detail on the reasons for entering the ING. These data will be useful to track ING progress as the program expands.

Strength Initiatives

The provisions of Public Law 96-342, 8 September 1980, that authorized payment of reenlistment bonuses to the IRR, also entitled the ING. Thus the Army will pay bonuses of \$600 to individuals who agree to reenlist for service in the ING for a period of 3 years. The schedule of payments is \$300 upon reenlistment and \$100 per year on the anniversary of the enlistment. The contract also requires bonus recipients to attend annual muster. For reasons described previously, the Army will continue to prohibit enlistment directly into the ING.

The Army is instituting the ING reenlistment bonus program in FY 1981. The program calls for accessions and payments, as shown in Table 4.4. The cost figures in this table assume that about 10% of the bonus enlistees will leave the program and repay the bonus to the Government

TABLE 4.1
INACTIVE NATIONAL GUARD AGE PROFILE

	<u>Age Group</u>					<u>TOTALS</u>
	<u>-20</u>	<u>20-29</u>	<u>30-39</u>	<u>40-49</u>	<u>50+</u>	
Officers	0	81	498	75	10	664
Enlisted	129	2,576	1,636	444	80	4,865

TABLE 4.2
INACTIVE NATIONAL GUARD GRADE PROFILE

	<u>W-1 to</u> <u>W-4</u>							<u>TOTAL</u>	
	<u>0-1</u>	<u>0-2</u>	<u>0-3</u>	<u>0-4</u>	<u>0-5</u>	<u>0-6</u>			
Officers	201	9	132	260	46	7	9	664	
Enlisted	<u>E-1</u>	<u>E-2</u>	<u>E-3</u>	<u>E-4</u>	<u>E-5</u>	<u>E-6</u>	<u>E-7</u>	<u>E-8</u>	<u>E-9</u> <u>TOTAL</u>
	98	780	365	914	1,512	819	310	60	7 4,865

TABLE 4.3
INACTIVE NATIONAL GUARD SKILL PROFILE

	<u>Career Management Field</u>									<u>TOTAL</u>
	<u>INF</u>	<u>ARMOR</u>	<u>FA</u>	<u>ADA</u>	<u>AVN</u>	<u>ENGR</u>	<u>COMM/ ELECT</u>	<u>MED</u>	<u>OTHER</u>	
Officers	63	41	59	5	39	45	30	37	345	664
Enlisted										
	<u>INF</u>	<u>CBT</u> <u>ENGR</u>	<u>FA</u>	<u>ADA</u>	<u>ARMOR</u>	<u>MED</u>	<u>LAW</u> <u>ENF</u>	<u>OTHER</u>	<u>TOTAL</u>	
	609	319	322	60	288	233	140	2,894	4,865	

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F/G 5/1

PRETRAINED INDIVIDUAL MANPOWER STUDY.(U)
FEB 81 J R LOOME, R E COTTLE, J I MCNIFF

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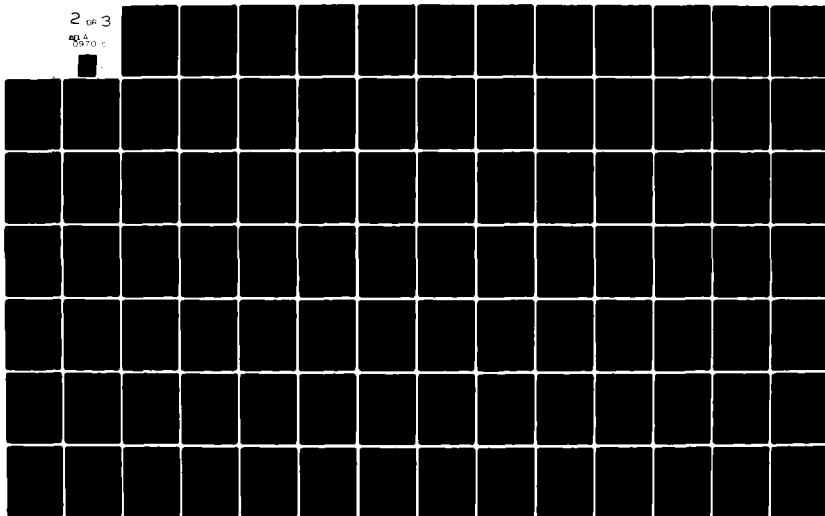


TABLE 4.4
INACTIVE NATIONAL GUARD BONUS PROGRAM
(FY 1982 Budget)

	<u>FY 81</u>	<u>FY 82</u>	<u>FY 83</u>	<u>FY 84</u>	<u>FY 85</u>	<u>FY 86</u>
Bonus Enlistments	4900	4900	4900	5500	5500	5500
Bonus Cost (\$ millions)	1.47	1.86	2.22	2.73	2.79	2.84

under the formula prescribed by law. Bonus enlistments are projected to increase in FY 1984 and thereafter based on the assumption that some of the original bonus enlistees will enlist a second time.

In addition to the reenlistment bonus, the Army plans to increase the number of enlisted personnel transferred annually from National Guard units to the ING through two additional initiatives:

- The Army has directed that National Guard members who have mobilization potential and who probably will become unsatisfactory participants be involuntarily transferred to the ING in lieu of discharge.¹
- Personnel who enlist in the active National Guard for fewer than 6 years will serve the remainder of their 6-year military service obligation in the ING if they choose not to extend in the Selected Reserve. They may also request transfer to the IRR. In FY 1979 about 10% of National Guard enlistees entered through these special enlistment options. In FY 1980 the figure was 13%.

As a result of the reenlistment bonus and other strength initiatives, the Army projects that ING enlisted strength will increase, as shown in Table 4.5. As can be seen, the ARNG projects a consistent gain

¹Members who miss nine or more drill periods become unsatisfactory participants and, following board proceedings, are transferred to the IRR with a less-than-honorable character of service.

TABLE 4.5
ING ENLISTED STRENGTHS

	<u>FY 81</u>	<u>FY 82</u>	<u>FY 83</u>	<u>FY 84</u>	<u>FY 85</u>	<u>FY 86</u>
Gains from NG Units	3,351	4,218	5,305	6,707	8,587	11,237
Bonus Gains	4,900	4,900	4,900	5,500	5,500	5,500
Aggregate End-FY Strength	12,696	19,910	26,218	28,691	30,699	32,229

in ING strength through the FY 1986 period, reaching a total ING strength of 32,229, up sharply from a strength of about 5000 at end-FY 1980.

The ARNG currently projects that the officer strength of the ING will remain constant at about 700 officers. No efforts are being made to increase officer strength parallel to that of the enlisted program. The principal reason is that the ARNG does not need additional officers to meet its wartime strength. Further, the professional development and advancement of National Guard officers depends on their continued participation in the Selected Reserve. For these reasons, the Army National Guard does not want to retain officers in inactive status except on a temporary basis. If National Guard officers want to retain their commission in inactive status, then they must transfer to the IRR where some career management is available. This policy appears to be in the best interest of the Army and the individual officer and should remain in effect.

The Army is implementing the ING bonus program at the state/unit level with bonus payment checks being issued centrally by the US Army Finance and Accounting Center. At the present time the Army has not programmed additional resources to administer the ING bonus program. The Army National Guard requested an increase of 80 civilian spaces to administer the IRR bonus and other incentive programs (one for each of 53 states/territories and one additional in each of 27 larger states), but the request was not approved within the Army.

The effectiveness of the bonus program in attracting additional members to the ING will not be known until the Army has gained about 1 full year of experience. The bonus program was not implemented by Headquarters, DA until January 1981 and field implementation will require additional start-up time. Therefore, even preliminary results will not be known until mid-1981.

Attitude Toward ING Program

In discussing the ING program with members of the National Guard, the study team received the impression that there is considerable resistance to the program throughout the National Guard. The principal reasons cited are:

- The perception in the states is that in recent history few members of the ING have been mobilization assets.
- Unit administrators are presently overworked and the addition of ING members to the unit would worsen the situation. It is believed that members of the ING would be even more difficult to track than active Guardsmen from a viewpoint of current address, communications, notification of training activities, etc.
- The ING causes an administrative burden at the unit associated with maintaining personnel records, accessing the individual to the active National Guard for muster day or annual training, etc. Some believe that the benefit derived is not equal to the cost involved.
- ING members will not be adequately trained and will require refresher training after M-Day before they become productive members of their units.

Although these attitudes are not universal throughout the ARNG, the success of the ING strength improvement program may require command emphasis by the Director of the Army National Guard. To be effective, however, the program must be carefully structured to help meet Army pretrained manpower objectives while not imposing an undue burden on the active National Guard units.

Future Policy Decisions

In order to increase the membership of the ING program and to provide for the management of ING members as mobilization assets, the Army is reviewing and updating its current policy guidance. However, the policy review is not yet complete. In its review, the Army must answer the following questions:

- What is the ultimate strength objective for the ING?
- What types of soldiers should comprise the ING (age, grade, skill)?
- Should Title 32, US Code be amended to allow members of the ING to train and earn retirement points while in inactive status?

Maximum Strength of the ING

At the present time, NGR 614-1 prescribes the maximum authorized strength as follows:

The total number of personnel assigned to the Active Army National Guard in a State plus the number attached in the Inactive National Guard may not exceed ten percent above the total Army National Guard structure strength of the State.

For end-FY 1980, the maximum strength of the ING would be computed as follows (strengths in thousands)

110% Structure Strength (Army NG)	= 419.1 × 1.10 = 461.0
- End-FY 1980 Assigned Strength	<u>-366.6</u>
ING Maximum Strength	94.4

Thus, under the present formulation, the strength of the ING could be as high as 94,400, although present projections call for attainment of a strength of only about 32,000 by FY 1986. The question to be addressed is: "To what size should the ING expand?"

In the establishment of a strength objective for the future ING program, the Army must consider two competing goals. First, the Army

needs far more pretrained personnel than are projected to be available on M-Day, a factor that suggests the maximum attainable ING strength. On the other hand, ING members must be administered by their National Guard units which suggests a constrained ING strength target. Current ARNG planning suggests that the Army is considering both goals.

Although it has not been possible to measure the precise workload involved in the administration of the ING member by the parent unit, it can be postulated that, as a minimum, the following functions would have to be performed for each ING member:

- Maintain current address/telephone number
- Maintain field personnel files (update annually or more frequently if required)
- Screen to ensure that the member retains the required physical status for mobilization and is current on immunization, designation of insurance beneficiaries, etc.
- Issue orders and access to JUMPS for muster day and annual training as appropriate

Although these functions will not require a great amount of administration time for each attached ING member, they would create a significant workload for 20 to 30 members. The study team believes that, pending further study, the number of attached ING members should not be more than 10% of the unit's peacetime Congressionally authorized strength. The use of this figure has the following advantages:

- ING strength is tied to the same peacetime strengths that form the basis for the authorization of unit administrators.
- Congressional peacetime authorizations have been relatively stable in recent years.

Under current plans, the Army is programming an increase in National Guard peacetime strength levels from 380,000 (end-FY 1980) to an average strength of about 400,000. Using the 10% rule proposed above, the ING strength would be 40,000, a figure that, combined with active National Guard strength, would create a total National Guard strength of 440,000, which approximates the stated wartime requirement of 438,300.

Skill Requirements

As described previously, the Army requires that the ING member have a skill that is authorized in the unit of attachment. This restriction would appear to be valid if members were allowed to enlist directly into the ING. However, all members now are transferred to the ING from a National Guard unit, which implies that the individual possesses a skill authorized in the National Guard. Further, the ING member usually is attached to his or her original National Guard unit which ensures skill compatibility. If the individual moves to another city, ING membership should be retained regardless of skill match because the individual can be transferred to a different unit upon mobilization. Therefore, it appears that the Army's restriction on skill match should be dropped in future revisions of NGR 614-1.

The principal disadvantage to a skill mismatch is that the ING member attending annual training with the unit will not receive refresher training in his or her skill. However, the annual training period focuses primarily on unit-level activities rather than individual skill training. Thus, there will not be a significant adverse impact upon the individual whose skill does not match unit needs. The ING member can still participate in unit training activities and receive considerable benefit from them.

Training Requirements

The training of ING members presents even greater problems than those associated with the IRR. ING status implies little or no participation in unit or individual training activities which is also true for the IRR. However, the ING member has no central career management

activity to help the individual maintain skill proficiency. Further, the ING member cannot accrue retirement points for training participation while in inactive status. A further impediment to ING training is the administrative burden imposed on the unit in preparing orders to return to active status and accessing the individual to the JUMPS system for pay during muster day or annual training periods.

If the Army is to make ING service and training more attractive, Titles 32 and 37, US Code should be amended to allow ING members to accrue retirement points for training in the same manner as the IRR. Although the National Guard personnel system will assume the burden of maintaining retirement points for ING members, the additional cost should be offset by the increased attractiveness of the program.

OSD and the Army have initiated actions to submit the required legislation. Even if the law is changed to allow ING members to accrue retirement points and draw pay, the National Guard unit will still have to prepare (or request that State Headquarters prepare) orders allowing the individual to attend annual training or muster day. This is necessary to control the expenditure of National Guard training funds.

In this sense, the unit will be performing functions that are performed for the IRR by RCPAC. This situation is a direct result of the decentralized system of administration and control over the ING. Although there may be ways to ease the burden, the problem will always remain with the program.

Despite steps that may be taken to make ING service and training more attractive, the heavy enlisted composition of the ING makes it unlikely that ING members will participate in training to any significant degree. Based on the experience by the Army and other Services to encourage enlisted IRR members to attend annual training, few in the ING will choose to do so voluntarily. Therefore, the proficiency of the ING members will decline over the period of their 3-year enlistment, probably to the point that most will require refresher training by the 3-year

point. The Army should require appropriate refresher training as a precondition to reenlistment for a second term in the ING.

CONCLUSIONS AND RECOMMENDATIONS

Based on the evaluation of the ING program as discussed above, the study team has concluded that the ING represents a potential valuable addition to the supply of pretrained Army manpower. The following specific conclusions were reached.

- The ING fills an important need in that it allows the retention of qualified National Guardsmen who wish to remain affiliated but not in the Selected Reserve. However, the size of the ING must be constrained to limit the adverse impact on National Guard units.
- Present Army strength projections call for reaching a level of about 32,000 enlisted ING members by FY 1986. This represents a level of less than 10% of Army National Guard peacetime authorized strength, a figure which should not place an unreasonable administrative burden on the National Guard units. However, the National Guard Bureau should evaluate the impact on the units and recommend appropriate changes in ING strength authorizations along the lines discussed in this report.
- Command emphasis will be required to overcome negative attitudes within the National Guard relating to the ING program.
- In order to maintain a minimum level of proficiency, ING members should not be allowed to reenlist in the ING for a second term without volunteering to attend appropriate refresher training.
- Titles 32 and 37, US Code should be amended to allow members of the ING to accrue retirement points for training in an inactive status under conditions prescribed by the Secretary of the Army.

- The Air Force should consider establishment of an ING program to retain members with critical skills.

The GRC study team makes the following recommendations relative to the ING program:

- That the Army continue to build the strength of the ING in the same manner as currently employed.
- That the Director of the Army National Guard study the problem associated with administration of the ING and establish strength targets accordingly.
- That the Director of the Army National Guard emphasize the ING program by endorsement through command channels.
- That completion of appropriate refresher training be established as a prerequisite for reenlistment in the ING for a second term.
- That Titles 32 and 37, US Code be amended to allow members of the ING to accrue retirement points for training while in an inactive status under conditions prescribed by the Secretary of the Army.
- That the Director of the Air National Guard consider the establishment of an ING program to retain members with critical skills.

SECTION 5
INDIVIDUAL MOBILIZATION AUGMENTEE PROGRAM

INTRODUCTION

As discussed in previous sections, all of the Services have M-Day mobilization manpower requirements in excess of the manpower available in the active force and Selected Reserve units. Many of these requirements exist in active organization which must be brought to wartime strength rapidly and which could be augmented effectively by pretrained individual reservists. Since many of these requirements exist on M-Day, the Reservists must be trained in peacetime in order to be able to function immediately upon mobilization. The Individual Mobilization Augmentee (IMA) program is designed to partially satisfy this need.

The IMA program is not a new one. It has been a successful program in the Air Force for many years. The Army has long had a similar concept in its Mobilization Designee (MOBDES) program. This section describes the IMA program as envisioned by the Office of the Secretary of Defense (OSD), addresses the status of the Air Force program, and discusses the efforts of the Army, Navy, and Marine Corps to implement IMA programs within their Services.

THE IMA CONCEPT AS ENVISIONED BY OSD

The 1980 ASD(MRA&L) Guidance to the Military Departments stated, "The Army, Navy, and Marine Corps should establish an individual mobilization augmentee (IMA) program for Ready Reserve manpower required at M-Day. These individuals will be subject to the training requirements necessitated by the specific position." The guidance was amplified by ASD(MRA&L) memorandum, subject, Individual Mobilization Augmentee (IMA)

program, 15 May 1980, which provided interim policy guidance and directed the establishment of IMA programs by the Army, Navy, and Marine Corps no later than 1 October 1981. The memorandum permitted the Air Force to continue its present mobilization augmentee program. It further stated that priority should be given to identifying and filling IMA positions augmenting active organizations that have high priority mobilization missions such as the Rapid Deployment Force.

The IMA program provides pretrained officer and enlisted personnel as individuals (as opposed to units) to augment active force headquarters and staff, units, and installations on mobilization. The IMA must be able to report and begin functioning without delay, orientation, or post-mobilization training. To achieve this, Reservists must be preassigned to their mobilization jobs and train in those jobs during peacetime. These individuals are in the Selected Reserve rather than the IRR in order to facilitate call-up during mobilization and to increase peacetime training. IMAs normally train with their gaining command or similar organization. This provides for an individual who is familiar with the mission and operation of the gaining unit and who can "hit the ground running" when called up. In addition, the IMA is a volunteer for the organization, has orders to report to the organization upon mobilization, and usually resides in the geographic area. These factors, taken together, provide an individual who is better trained, better motivated, and more readily available for mobilization than the IRR member.

According to the OSD guidance, augmentation by IMAs is appropriate when:

- The organization being augmented is an active force organization
- Augmentation by a Selected Reserve unit that would continue as a unit after mobilization is not desirable or feasible
- The requirement for augmentees occurs at M-Day or shortly thereafter

- Individuals augmenting the active force organization can train with that organization in peacetime
- Individuals augmenting the active force organization reside close enough to that organization to be able to report on M-Day or shortly thereafter

In addition, the guidance states that IMAs will be assigned in peacetime to the active organization that they augment in wartime. However, the guidance provides that IMAs may be formed, for administrative purposes, into an IMA unit that would cease to exist on M-Day. Moreover, if these units are formed, they are to contain only those IMAs required to augment the same active force organization. Individuals with the same or related specialties who augment several active force organizations in various locations may not form an IMA unit.

To facilitate training, IMAs should be assigned to active force units that are close to their place of residence so that inactive duty training (IDT) with the active unit of assignment is feasible. In unusual cases, such as possession of unique skills or skills in extremely short supply, IMAs may be assigned to an active force organization outside a reasonable commuting distance. In these cases, IDT may be performed at organizations comparable to the one the IMA will augment in wartime. However, in any case, annual training will be performed either with their mobilization organization or as prescribed by that organization. IMAs are not to be assigned to positions that would normally be filled by active force personnel but are temporarily vacant.

IMAs are members of the Selected Reserve in Training Category A (minimum of 12 days annual training and 48 training assemblies), Category B (minimum of 12 days annual training and 24 training assemblies), or Category D (minimum of 12 days of annual training).¹ The memorandum permits the active organization to determine the amount of training that each individual is required to accomplish.

¹Category D personnel are members of the IRR until 1 October 1981.

AIR FORCE IMA CONCEPT

The Air Force IMA program can be traced back to the Army Air Corps Mobilization Assistance program that existed prior to World War II. Its purpose was to identify individuals to augment active units in the event of mobilization. The original program later evolved into the Mobilization Assignee program and, more recently, into the current Individual Mobilization Augmentee program.

The Air Force has until now referred to the people in the program as mobilization augmentees (MA) and to the military manpower authorizations as individual mobilization augmentees (IMA). With the DOD guidance on the IMA program, both the people and the authorizations are now called IMAs.

The Air Force IMA concept, which constitutes the basis for the OSD-directed program, closely resembles the key elements of the program described above. IMAs provide the Air Force with a source of preassigned, pretrained officer and enlisted personnel who are available for immediate recall in the event of war or other emergency. They augment active units and are assigned to train with those units in peacetime. IMAs are members of the Selected Reserve rather than the IRR to provide increased peacetime training and to enhance their availability for recall. Normally, only prior-service personnel who are fully qualified in their specialties are assigned to IMA positions.

In addition to IMAs who augment specific active units, the Air Force also has IMA positions that are centrally managed by the Air Reserve Personnel Center (ARPC) under the "single manager" concept. Individuals filling these positions include medical personnel, lawyers, and chaplains. Each group is controlled by a functional manager at ARPC who assigns them to appropriate pay categories (mostly Category B) and directs their participation at active duty installations. The following is the status of the single manager programs as of 30 September 1980:

<u>GROUP</u>	<u>OFFICER</u>	<u>ENLISTED</u>
Medical	696	265
Judge Advocate General	735	83
Chaplain	<u>139</u>	<u>45</u>
TOTAL	1,570	393

IMA Authorizations

IMA positions are established by Air Force Major Commands (MAJCOMs) and Separate Operating Agencies (SOAs) based on guidance provided by Air Force Manual (AFM) 26-1. IMA positions must support specific wartime or emergency plans and conform to approved manpower standards. The positions are identified by the MAJCOMs without input from Air Force Reserve personnel. Thus, IMA positions reflect the needs of the active component and are not based on a Reserve component program. The MAJCOM selects the grades and skills required and assigns a training category appropriate to the position. IMA positions are further categorized by program element code (PEC) according to the function performed.

IMA positions may not be authorized to support peacetime tasks and missions, solve peacetime manning shortages, replace operational attrition losses on or after M-Day, or replace military personnel projected to be unavailable on or after M-Day due to leave, hospitalization, etc. Further, IMAs may not serve as replacements for DAF civilian employees who are Ready Reservists; perform activities solely in support of survival, recovery, or reconstitution of an Air Force organization; or be assigned when there is another approved manning source. In addition, positions are not authorized if there is a projected wartime overage in the specialty of the requested position. Headquarters, Department of the Air Force (AF/MPMX) approves all IMA positions annually based on the foregoing criteria. General officer IMAs are validated by the General Officer Manning and Position Review Board.

Current IMA Program

Table 5.1 provides details of the IMA program for FY 1981. The table shows authorized positions, positions funded in the FY 1981 budget, and actual strengths as of 30 September 1980.

TABLE 5.1
AIR FORCE INDIVIDUAL
MOBILIZATION AUGMENTEE PROGRAM
(FY 1981)

TRAINING CATEGORY	AUTHORIZED POSITIONS	OFFICERS		AUTHORIZED POSITIONS	ENLISTED	
		FUNDED POSITIONS	ASSIGNED (30 Sep 80)		FUNDED POSITIONS	ASSIGNED (30 Sep 80)
A		385	328		0	3*
B		6,000	5,787		2,400	2,461
D		870	781		130	115
TOTAL	8,832	7,255	6,896	7,385	2,530	2,579

* Recently assigned FAA controllers.

Wartime requirements are not allocated to training categories.

Funding for the FY 1981 program is as follows:

Reserve Pay (Categories A, B, and D)	\$20,213,000
Travel	1,626,000
Special Tours	766,000
Total IMA program	\$22,605,000

It can be seen in Table 5.1 that the FY 1981 funded positions are essentially filled for both officers and enlisted personnel. However, funded positions represent 82% of those authorized for officers but only 34% of those authorized for enlisted personnel. This difference appears to be the result of two primary factors:

- A higher propensity on the part of officers to participate in individual training programs

- More emphasis in the past on officer Reserve programs than enlisted

The Air Force plans to increase the funding for enlisted IMA positions as funds become available in future years. However, this will not be done at the expense of the officer programs.

As discussed previously, IMA positions are assigned to PECs according to the function performed. Currently IMAs are found in 38 PECs, up from 29 in recent years. Air Force Reserve Personnel, who are responsible for IMA program and budget justification at Headquarters, Department of the Air Force, believe that this requirement (imposed by OSD Comptroller) unduly complicates the budget justification process both in the field and at the OSD level. However, the practice parallels the budget justification process for active Air Force personnel and is unlikely to be changed.

Administration of IMAs

The Air Force concept of IMA administration is that IMAs will be administered by a combination of active and reserve organizations. The active organization which the IMA augments is responsible for training management (schedules, content, etc.), attendance records, performance ratings, and local personnel support (identification cards, etc.). The Air Reserve Personnel Center (ARPC), on the other hand, maintains master and field personnel records, retirement points, promotion records, etc. The Air Force concept effectively minimizes the administrative burden placed on the active organization while retaining control of Reserve-peculiar records and procedures (e.g., retirement point accounting) under a Reserve headquarters. However, administration of the program has been inconsistent across the Air Force as is described below.

A functional management inspection of the Air Force Mobilization Augmentee program conducted by the Office of the Air Force Inspector General in 1978-1979 pointed out the lack of active force and base level

support of the program. The report cited a lack of adequate guidance and procedural direction for the management and administration of the IMA program in the field, resulting in an open-ended and nonstructured environment where local administrators had license to define and operate their own IMA programs.

As a result of the IG inspection, the Air Force has revised mobilization, manpower, assignment, and training directives. It has also developed and has begun testing the concept of a Base Mobilization Augmentee Administrator. Under this concept an administrator is assigned full time to the base and is located within the Consolidated Base Personnel Office (CBPO). The Base Mobilization Augmentee Administrator test program is currently in progress at four test sites: MacDill AFB, Scott AFB, Bergstrom AFB, and the Pentagon. The test is to be concluded in mid-1981. If the test is successful, the Air Force states that administrators will be added at 30 locations.

The administrator will be a Reserve senior NCO assigned to the base under 10 USC 678. The main function of the administrator will be to educate the key personnel of the units to which IMAs are assigned regarding all aspects of the IMA program. The administrator will also assist in accomplishing various administrative items for the assigned IMAs and act as a central information point for all personnel programs for IMAs. However, the administrator is not a personnel technician and will not fill out paper work for the IMAs. That function is performed by a combination of the active CBPO and the Consolidated Reserve Personnel Office (CRPO) which maintains field records for IMAs at ARPC.

Under the ongoing test, the following duties are assigned to the administrators:

- Maintain up-to-date strength accountability for all assigned and attached IMAs.
- Assist the major commands in determining the training attachment for IMAs.

- Ensure that qualified supervisors are assigned for all IMAs and that their name, grade, SSAN, Personnel Accounting System (PAS) code, and unit of assignment are forwarded to the appropriate MAJCOM Reserve Affairs Office.
- Provide guidance to training supervisors and IMAs to ensure that they are knowledgeable about the IMA program and their specific responsibilities.
- Ensure proper training.
- Assist in recruiting for vacancies and answer inquiries concerning reserve participation.
- Accomplish a variety of administrative action for each IMA to include (when necessary/requested) ID cards, emergency data records, SGLI forms, security data actions, enlistment/reenlistment actions, and in-and-out processing clearances.
- Ensure that airman/officer classification actions, OJT, and testing service are provided for all IMAs when necessary.
- Serve as the base level focal point for processing performance reports on IMAs.
- Assist in the accomplishment of base plans for rapid recall and accession to active duty of assigned IMAs.
- Upon mobilization, assist and advise in the processing and proper accession to active duty of assigned IMAs.

If this test is successful and funds are made available to support the program, one administrator will be added to each of 30 additional bases, covering about 85% of all IMAs. The remainder of the IMAs at isolated locations will be supported primarily by the CRPO in Denver. The average grade of the administrator will be E-6. The pay for 34 administrators is projected to cost \$510,000 annually.

Training of IMAs

The training of IMAs is normally conducted in the section or office to which the IMA will be assigned in wartime. The training consists of a combination of annual training and inactive duty training designed to upgrade or maintain proficiency in assigned skills and familiarity with the actual job to be performed. IMA training can also be conducted at formal active force technical and career development schools or through special tours of active duty for training in primary skills.

In those cases where an IMA lives beyond normal commuting distance from the active unit, the individual may perform inactive duty training with a like-type unit nearer the IMA's home. This can be accomplished at active or Reserve units, Air National Guard units, or with units of another Service. Close coordination between the commanders concerned is required to ensure proper training of the IMA. Annual training should be performed with the organization to which the IMA is assigned for mobilization.

IMA training responsibilities are centered at four headquarters.

- HQ USAF/RE writes the governing training directive (AFR 35-41, Vol II), validates and programs school and special tour man-days, programs school requirements, and tracks the use of man-days.
- The Air Reserve Personnel Center manages the allocation of training tour man-days, schedules school attendance, accounts for the use of man-day spaces, and provides training administration (orders for training, crediting retirement points, processing pay documentation, following training participation of members).
- The MAJCOMs and SOAs determine the training requirements, ensure assigned and attached IMAs train or perform duties in proper positions, and track individual training progress.

- The unit trains the IMAs and documents attendance and performance.

Inactive duty training schedules for IMAs are developed based on mutually agreeable dates between the member and the supervisor. Training dates are normally projected for six months in advance. The number of training periods depends upon the pay category to which the individual is assigned. Inactive duty training is scheduled on normal work days when the active force members are present to train and assist the IMA. There are certain exceptions, such as doctors on emergency room duty on nights and weekends.

IMAs use Air Force Form 40a (see Appendix D) to account for their training. This is a 3-part form that serves as an authorization, verification, and certification document. Section I authorizes the IMA to conduct the training on specific dates at specific locations while Sections II and III permit the supervisor to verify that the training was conducted and certify the voucher for payment. When completed, the form is forwarded to the CRPO at ARPC for extracting of retirement point data and forwarding to the USAF Accounting and Finance Center for payment.

While some IMAs are assigned directly from active duty, many individuals come into the IMA program from Selected Reserve units. However, once in the program, very few actually return to units. The reason for this is that the IMA authorizations are primarily higher grades and are attractive to personnel who are promoted out of a position in a Selected Reserve unit. Since there are relatively fewer higher grades in the units, it is less likely that the IMA will be able to return to a unit.

A mobilization exercise in June 1980, called PAID REDOUBT 80, tested the IMA alert/notification system. Both the telephone notification system and the Mailgram mobilization order system were tested.

- In the telephone notification, the Air Force test units notified their own IMAs. The result was that 90% of their IMAs were contacted within the time allowed.

- In the Mailgram test, the MAJCOMs identified to ARPC the IMAs to be contacted. A computer tape was generated by ARPC and delivered to Western Union. Delivery of the Mailgrams was made within 24 hours. IMAs acknowledged receipt of the Mailgram by calling a toll-free number; 83% of the IMAs responded within the time allowed.

PAID REDOUBT 80 tested the notification process, but did not survey IMAs to determine how long it would actually take them to report to their unit. The Air Force policy is that preassigned IMAs must report to their initial duty station within a maximum of 24 hours plus travel time. Undoubtedly, some personnel will be out of town, some will request delay or an exemption, and some will take longer in clearing up personal business. As a parallel, a separate Air Force survey of IRN members asking how fast they could report revealed that 46% of those returning the survey replied that they could report within 1 to 5 days. Since IMA members have their assignment and know their priority of need, there should be a high percentage reporting within 24 hours plus travel time.

THE ARMY IMA PROGRAM

The Army is responding to OSD guidance to develop an IMA program by converting its present Mobilization Designee (MOBDES) program. The Army has had an officer MOBDES program since 1948 and an enlisted program since 1972.

A Mobilization Designee is a member of the Individual Ready Reserve who is preselected, pretrained, and assigned to occupy an authorized active duty position upon mobilization. The MOBDES is in training category D, which provides for at least 12 days of training annually. Annual training is performed with the office that the MOBDES would join upon mobilization and is directed toward maintaining proficiency in the specific duties and functions which will be performed after mobilization. MOBDES positions are limited to headquarters, installation staffs, training organizations, etc. MOBDES positions are not found in tactical units.

The requirements for MOBDES are established in Mobilization Tables of Distribution and Allowance through the Army Authorization Documents System (TAADS). Current MOBDES requirements total approximately 9000 positions of which approximately 8000 are officer positions.

MOBDES personnel are required to report for duty by M + 7 or M + 30, depending on the particular mobilization position. They have "hip pocket" mobilization orders which may be confirmed or adjusted at time of mobilization.

Using the MOBDES program as a basis, the Army is planning to develop an IMA program that includes:

- Adding positions to tactical units
- Assigning IMA members to the gaining organization which would be responsible for unit-level personnel administration, finance, military justice, training management, and mobilization recall
- Providing for centralized personnel management relative to accessions, promotion, retirement, and the like
- Performing training with the gaining organization
- Assigning programming responsibility to the Office of the Chief, Army Reserve (OCAR) for IMA training

Proposed IMA authorizations are shown in Table 5.2.

TABLE 5.2
ARMY INDIVIDUAL MOBILIZATION AUGMENTEE PROGRAM

	<u>CONVERSION OF MOBDES POSITIONS</u>	<u>NEW IMA POSITIONS</u>	<u>TOTAL</u>
Officers	8,094	15,118	23,212
Enlisted	<u>841</u>	<u>38,776</u>	<u>39,617</u>
TOTAL	8,935	53,894	62,829

Some 9000 MOBDES positions will be converted and about 54,000 new positions will be added, all of which are programmed for augmentation of Army units. These positions will raise the authorizations from peacetime to wartime strengths.

As can be seen in Table 5.2, the officer/enlisted mix will change drastically as the new positions are added. This reflects the need for large numbers of enlisted personnel to bring units to wartime strength. However, as described in Section 3, prior-service enlisted personnel have a low propensity to participate in Reserve training and the Army may be unable to attract enlisted personnel in sufficient numbers to fill the identified positions.

It should be noted that the Army plans to recruit IMAs from among those officers and enlisted personnel being released from active duty who plan to remain in the geographical area of the unit with which they served. By this means, a person of known capability might be persuaded to remain associated with his or her unit in order to retain unit affiliation and to draw Selected Reserve pay. For members not planning to live in the vicinity of their active duty unit or installation, the Army will furnish personnel information to the nearest Reserve or National Guard recruiter who will also recruit for IMA positions. The Army will also consider direct enlistment of personnel into the IMA program if they are qualified by reasons of prior service or civilian-acquired skills.

MARINE CORPS IMA CONCEPT

Planning for the establishment of an IMA program within the Marine Corps began in mid 1980 and, as of the writing of this report, had not progressed sufficiently to yield a definitive IMA program. The Marine Corps generally supports the concept of the IMA program as defined by OSD and is moving toward the establishment of such a program.

The Marine Corps favors preassignment of individual Reservists and, for that reason, likes the IMA concept. The Marine Corps approach is similar to that of the Army in that it plans to convert its present

augmentation positions to IMA positions. These include augmentation groups organized within the Selected Reserve, e.g., the Fleet Marine Force, Atlantic (FMFLANT) Augmentation Unit and Special Mobilization Augmentation List (SMAL) positions filled by the IRR that augment active headquarters in a manner similar to the Army MOBDES program described previously. In addition, base support augmentation positions such as the Cadre Fleet Assistance Program and Military Personnel Processing Centers established as part of the installation staffs at four Stations of Initial Assignment will be filled by IMAs.

The Marine Corps also wants to use IMAs to fill positions in two programs that fall outside the OSD guidance for IMAs. The first of these is in mobilization stations that will be established in some 50 Marine Reserve Centers on M-Day to process members of the IRR and Standby Reserve as they report for active duty. These mobilization stations are temporary activities that are organized and trained in peacetime, perform an essential mobilization function, and disappear shortly thereafter. Thus, the IMA concept of augmenting permanent, active headquarters and units is not realized in the mobilization station organization. Given that individuals filling mobilization station positions must be trained in peacetime, it appears that these positions should be formed into units and placed in the Selected Reserve in an appropriate training category. At the time of mobilization, the units would be ordered to active duty to perform their mission, and would be inactivated later as unit members are reassigned to other active positions. Mobilization station units, however, should not be considered as IMA units that would "cease to exist on M-Day" as permitted by OSD guidance.

The second program that falls outside the OSD guidance is that of augmenting Selected Reserve units with IMAs. The Marine Corps concept is that persons with shortage skills who require fewer than 48 drills to maintain proficiency might be recruited for Selected Reserve units through the IMA program because they would be liable for fewer inactive duty training periods. However, OSD guidance currently limits IMA positions

to the augmentation of active units because the Congress desires all members of a Reserve unit to be in a single training category. This would preclude IMAs in training category B or D from augmenting a Selected Reserve unit (because all Selected Reserve units are in training category A). Further, if an IMA can be recruited into the Selected Reserve with a 2-week annual training commitment plus 24 or 48 drills, he/she could probably be recruited directly into the Selected Reserve unit.

The Marine Corps approach on the augmentation of Selected Reserve units is similar to the Reserve Unit Augmentee (RUA) program recently authorized by OSD for Reserve medical units. Under this concept, members of the Army IRR are formed into augmentation units and designated to augment Selected Reserve medical units and are required to train only 5 days per year. This special case for critically short medical skills might be extended to other shortage skills if required for purposes of mobilization. However, the use of IMAs is not appropriate for augmentation of Selected Reserve units.

NAVY IMA CONCEPT

The Navy does not yet recognize the need to establish an IMA program as directed by OSD, for two principal reasons. First, the Navy's wartime manpower requirement is not yet firmly established. Work is progressing on the Navy Manpower Mobilization System (NAMMOS) which will establish a time-phased wartime manpower requirement. When complete NAMMOS may identify wartime manpower requirements appropriate for fill by IMAs structured along the lines directed by OSD.

The second reason that the Navy is not moving toward the establishment of an IMA program is that the Navy Selected Reserve force structure contains many units that augment active force units and headquarters. The Navy believes that these units constitute an IMA program as envisioned by OSD because the individuals:

- Are in the Selected Reserve.
- Have mobilization missions of augmenting active units.

- Are formed into administrative units that cease to exist on M-Day.

Analysis of the composition of the Naval Reserve provides some insight into the Navy's position in this matter. The Naval Reserve is comprised of a mixture of commissioned units and squadrons and augmentation units as shown in Table 5.3.

TABLE 5.3
NAVAL RESERVE UNITS

	<u>No. Units</u>	<u>Personnel Required (Wartime)</u>
Surface		
Commissioned Units	354	20,708
Augmentation Units	1890	47,796
Air		
Reserve Force Squadrons	48	9,870
Reserve Squadron Augmentation Units	39	3,146
Augmentation Units	282	12,232
	<u>Recap</u>	
Commissioned Units/Squadrons	402 (15%)	30,578 (33%)
Augmentation Units	<u>2211</u> (85%)	<u>63,174</u> (67%)
Total	2613	93,752

As can be seen, personnel in augmentation units comprise 67% of the total wartime requirement in the Selected Reserve. Thus, the organization of the Navy's Selected Reserve is heavily oriented toward augmenting active Navy units, a concept that is very different from the Selected Reserve organization of the other Services.

Despite the Navy's claim that it has an IMA program similar to that directed by OSD, there are some major differences. OSD guidance directs the Services to assign IMAs in peacetime to the active unit that

they will augment in wartime and further specifies that the IMAs will be administered by that active unit. The Navy resists implementing this guidance because it believes that Naval Reservists are more effectively administered by a Reserve organization than by an active unit that is unfamiliar with the unique characteristics of Reserve administration. Further, the Navy believes that assignment of Naval Reservists to active units would impose an undue administrative burden on those augmented units.

A second difference is that many of the augmentation units are comprised of teams rather than individuals. The mission of many of these teams is to add in wartime a capability that does not exist in peacetime (e.g., avionics repair for a helicopter-capable ship). Other teams may add additional capacity to an existing organization. In all cases, the Selected Reserve augmentation units cease to exist on M-Day as their members join an existing active unit.

Another major difference is that the augmentation units often are not located close to the active unit and cannot perform periods of inactive duty training with that unit. Thus, their only direct association occurs during periods of annual training, a concept which does not meet the intent of OSD's IMA program guidance.

In summation, the Navy's Selected Reserve augmentation unit program does not fulfill the characteristics of the IMA program as envisioned by OSD. Although the units cease to exist on M-Day, none are administered by their gaining active unit, many are comprised of teams rather than individuals and many are unable to train on a year-round basis with their gaining active unit.

There are augmentation units in the Naval Reserve that could be converted readily to IMA units if they were assigned to their active unit for purposes of administration. These are primarily headquarters augmentation units that are comprised of individuals (rather than teams)

and that perform inactive duty training with their gaining units. The Navy should consider converting these to IMA units in the near term in order to comply with OSD guidance and to bring the structure of the Naval Reserve more into line with that of the other Services. This action probably would help the Navy to justify its Selected Reserve in the annual programming and budgeting process with OSD, the Office of Management and Budget, and the Congress.

CONCLUSIONS AND RECOMMENDATIONS

After reviewing the IMA programs of the Services, the GRC study team has reached the following conclusions:

- IMAs provide an excellent source of pretrained, preassigned manpower who are readily available for active duty in the event of mobilization. Their membership in the Selected Reserve provides better training than that received by members of the IRR and makes IMAs more available for call-up for mobilization.
- The combination of Reserve and active force management of IMAs practiced by the Air Force appears to be better than "all-Reserve" or "all-active" management solutions. Under this concept the augmented active unit establishes training schedules, rates IMA performance, and handles routine personnel administration. However, the active unit is not burdened with the accomplishment of unfamiliar Reserve personnel management matters such as promotion, retirement point accounting, maintenance of field personnel files, etc.
- Some of the Navy's Selected Reserve augmentation units adequately meet the characteristics of an IMA program at the present time, with exception of assignment for administration. These should be converted to IMAs in the near term, assigned to their active units for administration, and accounted for as IMAs in future program/budget justification cycles.

- Expansion of Service IMA programs to include large numbers of enlisted members may not be successful due to the low propensity of enlisted personnel to participate in Reserve training.
- The Marine Corps should not establish IMA positions for mobilization stations or for augmentation of Selected Reserve units.
- OSD should consider expansion of the Reserve Unit Augmentee (RUA) program for critical skills beyond the medical profession if a strong case can be made by the requesting Service.

The GRC study team makes the following recommendations related to the IMA program:

- That OSD continue to support the development of IMA programs within the Army and Marine Corps and continuation of the Air Force program. However, the Marine Corps should be cautioned against planning to use IMAs to form mobilization station units or to augment the Selected Reserve.
- That OSD request that the Navy establish an IMA program in the near term by converting appropriate augmentation units to IMAs.
- That OSD guidance regarding assignment and administration of IMAs be as follows: "Administration of IMAs will be conducted by the responsible active unit for, as a minimum, training attendance, training management, and performance appraisal. Unit personnel records should be established by the active unit as required for local management. Maintenance of master personnel records should remain the responsibility of the Service Reserve personnel centers as should the responsibility for promotion, retirement point accounting, Reserve pay, etc."

- That OSD reaffirm the guidance that IMAs may not be assigned to units of the Selected Reserve. RUAs will be utilized as necessary to augment Selected Reserve units with persons holding critical skills.

SECTION 6
STANDBY RESERVE

INTRODUCTION

Section 267, Title 10, US Code provides that in each armed force there are a Ready Reserve, a Standby Reserve, and a Retired Reserve and states that each Reserve shall be placed in one of these categories. Previous sections of this report have addressed the various elements of the Ready Reserve, including the Selected Reserve, the Individual Ready Reserve, and the Inactive National Guard. This section addresses the Standby Reserve and discusses legal authority, composition, mobilization potential, and actions being undertaken by the Services to manage the Standby Reserve.

LEGAL AUTHORITY

In addition to the provision of Section 267, Title 10, US Code that establishes a Standby Reserve in each armed force, Section 267 also provides for the existence of both active status and inactive status members in the Reserve components. Inactive status members are those Reserves who:

- Are on the inactive status list of a Reserve component, or
- Are assigned to the Inactive National Guard.

All other Reserves are in an active status.

Section 273, Title 10, US Code provides that the Standby Reserve consists of units (currently there are none organized) or members, or both, of the Reserve Components, other than those in the Ready Reserve or Retired Reserve, who are liable for active duty under Sections 672 and

674 of Title 10. Section 273 also provides for an inactive status list in the Standby Reserve as follows:

- Permits transfer of a Reserve (if qualified) from the active status list to the inactive status list under regulations prescribed by the Secretary concerned whenever it is in the best interest of the armed force concerned.
- Prohibits pay or promotion of persons while in inactive status.

The involuntary recall of the Standby Reserve requires that the Congress declare war or a state of national emergency (Section 672a, Title 10, US Code). However, a member in inactive status may not be ordered to active duty unless the Secretary concerned, with the approval of the Secretary of Defense, in the case of a military department, determines that there are not enough qualified Reserves in an active status or in the Inactive National Guard in the required category who are readily available. This same section of Title 10 formerly required the Director of Selective Service to screen members of the Standby Reserve prior to recall to determine their availability for active duty. However, this requirement was removed from Title 10 by PL 96-357, 24 September 1980.

COMPOSITION

As discussed previously, the Standby Reserve is composed of an active status list and an inactive status list comprised as follows:

- The active status list is composed of reservists who:
 - Are completing their obligation
 - Are being retained under Section 1006, Title 10, (retention of twice passed over officers with over 18 years' service until credited with 20 good years)
 - Were screened from the Ready Reserve as being key personnel and requested assignment to the active status list

- Are temporarily assigned for hardship or other cogent reason, with the expectation of being returned to the Ready Reserve
- The inactive status list is composed of members who are not required by law or regulation to remain members of an active status program but who:
 - Desire to retain their Reserve affiliation in a non-participating status
 - Have skills which may be of possible future use to the armed forces concerned
 - Do not volunteer for assignment to the active status list
 - Desire to be placed in the Standby Reserve to avoid promotion passover (Army and Air Force only)

The foregoing lists are general and there are some differences between the Services in the categories of individuals assigned to each list.

The total strength of the Standby Reserve of the Military Services has declined in recent years from about 576,000 in FY 1973 to about 86,000 in FY 1980. Table 6.1 provides details. Several factors are responsible for the decline in strength:

- The overall size of the armed forces has declined since the Vietnam conflict, resulting in fewer people transferring from the active component and Selected Reserve to the IRR and Standby Reserve.
- Increase in the length of active duty enlistments, which reduces the amount of time spent in the IRR or Standby Reserve.
- Discontinuing the automatic transfer of IRR members to the Standby Reserve of those personnel in their last, or sixth, year of obligated military service. See Section 3 of this report for details.

TABLE 6.1

SUMMARY STRENGTH - TOTAL STANDBY RESERVE *

	FISCAL YEAR							
	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>1980</u>
USAR	415,268	340,481	282,698	217,426	152,784	82,677	30,544	19,407
USNR	48,657	48,679	50,442	50,587	48,668	36,684	26,019	23,337
USMCR	65,899	60,112	40,698	30,020	28,796	20,773	2,712	1,929
USAFR	45,968	46,442	38,628	42,081	44,234	42,932	44,146	41,359
TOTAL	575,792	495,714	412,466	340,114	274,482	183,066	103,421	86,032

* From DASD(RA) Official Guard and Reserve Manpower Strengths and Statistics (Reserves not on Active Duty) RCS:DD:M(M)1147/114, September 30, 1980.

- Retention of non-obligated members in the IRR without regard for their training participation as long as they possess a skill needed in wartime.
- Screening of the Standby Reserve by the Military Services to identify members who are mobilization assets and encourage their transfer to the Ready Reserve. Those who are determined not to be required for mobilization are discharged.

Table 6.2 shows Standby Reserve strength at the end of FY 1980 by Service, active and inactive list, and officer and enlisted. The data show that officers comprise some 67% of the active list and 97% of the inactive list.

TABLE 6.2
STANDBY RESERVE STRENGTH - END FY 1980*

	<u>Army</u>	<u>Navy</u>	<u>USMC</u>	<u>Air Force</u>	<u>Total</u>
Active List					
Officers	8,085	69	1,610	6,361	16,125 (67%)
Enlisted	939	3,106	232	3,578	7,855 (33%)
Total	9,024	3,175	1,842	9,939	23,980
Inactive List					
Officers	10,382	20,040	87	29,722	60,231 (97%)
Enlisted	1	122	--	1,698	1,821 (3%)
Total	10,383	20,162	87	31,420	62,052

* From DASD(RA) Official Guard and Reserve Manpower Strengths and Statistics (Reserves not on Active Duty) RCS:DD:M(M)1147/114, September 30, 1980.

Tables 6.3 and 6.4 provide further details on the composition of the officer and enlisted force in the active and inactive lists of the Standby Reserve.

TABLE 6.3
STANDBY RESERVE OFFICERS

SERVICE	ACTIVE STATUS			INACTIVE STATUS		
	% Junior Grade (01-03)	% Senior Grade (04+)	Average Age	% Junior Grade (01-03)	% Senior Grade (04+)	Average Age
Army	92.5	7.5	33.7	91.0	9.0	35.0
Navy	52.2	47.8	38.3	70.5	29.5	35.4
Marine Corps	78.9	21.1	33.3	31.0	69.0	43.8
Air Force	82.8	17.2	33.6	87.2	12.8	34.7
DoD	76.6	23.4	34.7	69.9	30.1	37.2

TABLE 6.4
STANDBY RESERVE ENLISTED MEMBERS

SERVICE	ACTIVE STATUS			INACTIVE STATUS		
	% Junior Grade (E1-E4)	% Senior Grade (E5+)	Average Age	% Junior Grade (E1-E4)	% Senior Grade (E5+)	Average Age
Army	96.7	3.3	25.4	0.0	100.0*	46.0
Navy	95.4	4.6	25.6	84.4	15.6	35.4
Marine Corps	86.2	13.8	26.1	+	+	+
Air Force	79.5	20.5	31.6	82.1	17.9	33.7
DoD	89.5	10.5	27.2	83.3	16.7	37.1

* One member

† No enlisted members

The tables show that both the active and inactive status lists comprise junior officers and junior enlisted personnel who, on the average, are under the age of 40 and are young enough to return to active duty in the event of mobilization.

MANAGEMENT INITIATIVES

OSD Guidance

In view of the numbers of individuals in the Standby Reserve and the statutory restrictions on their recall in time of emergency, OSD undertook in early 1980 a number of initiatives to reduce the flow into the Standby Reserve, to remove the requirement for screening by the Director of Selective Service prior to recall, and to urge members of the Standby Reserve who are mobilization assets to return to the Ready Reserve. As discussed previously, legislation was sponsored by the Department of Defense and passed by the 96th Congress, removing the requirement for prior screening by the Director of Selective Service.

The other initiatives were the subject of a memorandum¹ to the Military Departments that stated that the Ready Reserve is the preferred source of mobilization manpower and directed the Services to:

- Screen members of the Standby Reserve to determine which members would be mobilization assets and request that they transfer to the Ready Reserve or, as a minimum, from the inactive to active Standby Reserve.
- Eliminate consideration of the Standby Reserve as a mobilization asset (inactive status effective immediately; active status effective end FY 1981).
- Stop the involuntary transfer of members from the Ready Reserve to the Standby Reserve for failure to earn 27 retirement points each year so long as they possess a skill needed in wartime and are otherwise satisfactory members.

¹ OASD(MRA&L) Memorandum, subject: Standby Reserve Policy, 23 January 1980.

- Submit a plan for screening the active and inactive status Standby Reserve by 20 February 1980.

A subsequent memorandum from the Deputy Assistant Secretary of Defense (Reserve Affairs)¹ clarified the earlier policy and allowed the Services to transfer members to the Standby Reserve (inactive) in order to preclude officers from failing promotion and becoming subject to discharge or transfer to the Retired Reserve. This applied primarily to the Army and Air Force which are required to discharge or transfer to the Retired Reserve (if they are eligible and apply) officers who have failed promotion twice. Navy and Marine Corps officers who twice fail promotion may be retained at the discretion of the Secretary of the Navy. The memorandum also reminded the Services to submit their screening plans as requested in the January memorandum from the ASD(MRA&L).

Service Implementation

The Military Services have taken steps to comply with OSD guidance relating to the Standby Reserve. The Army and Marine Corps no longer automatically transfer members to the Standby Reserve for the final year of their military service obligation (see Section 3 of this report). Although members who enlisted prior to October 1978 remain eligible for transfer, few of them so request. Thus, there are very few obligated individuals remaining in the Standby Reserve. Likewise, the Army, Navy, and Air Force have stopped transferring to the Standby Reserve members of the Ready Reserve who fail to accrue 27 retirement points in a year. The Marine Corps continues this practice despite OSD guidance to the contrary.

The OSD guidance directing the Services to screen the Standby Reserve is being implemented more slowly than the foregoing initiatives. Although each of the Services has taken steps toward the screening process, many express some reservations about the program. The intent of the OSD guidance is that neither the active nor the inactive Standby Reserve

¹ ODASD(RA) Memorandum, Subject: Standby Reserve Policy, 19 March 1980.

should be considered to be a mobilization asset and that the Services should instead rely on the Ready Reserve. The Services agree with the general thrust of the OSD guidance but believe that the Standby Reserve should remain as a source of mobilization manpower for certain groups of individuals. Further, some of the Services are reluctant to send out queries to members of the Standby Reserve who hold skills critical to mobilization. They fear that these individuals will elect discharge and thereby eliminate a potential source of manpower in critical skills. Doctors and pilots are the groups most frequently mentioned in this regard. The Services believe that these individuals are unlikely to return to the Ready Reserve (in the Air Force there are few, if any, positions available for them in the Selected Reserve) and a screening letter will elicit a request for discharge or, at best, retention in the Standby Reserve.

Another issue raised by the Services is that there is little cost involved in maintaining the records of Standby Reservists while there is a substantial cost involved in a one-time screening effort. The prevailing attitude seems to be that the Services should restrict the numbers and types of personnel who enter the Standby Reserve but should not attempt to undertake a major, one-time screening effort. Instead, normal Service screening procedures should be used to weed out members who are not mobilization assets. The Navy, in particular, believes its annual screening of officers who have been in the Standby Reserve for 3 or more years and who do not have critical skills will be sufficient to keep the size of the Standby Reserve down to manageable levels.

CONCLUSIONS AND RECOMMENDATIONS

Based on the preceding discussion the study team concludes that:

- The limitation of the requirement for prior screening of the Standby Reserve by the Director of Selective Service has removed a major impediment to the recall of the Standby Reserve in the event of mobilization. Therefore, OSD should allow the Services more latitude in the management of the Standby Reserve.

- The Department of Defense should sponsor legislation to allow the Army and Air Force to retain in the Ready Reserve officers who have twice failed promotion.
- The Standby Reserve should be considered a source of mobilization manpower to be recalled after the Ready Reserve but before the Retired Reserve.
- The Standby Reserve (active) should comprise individuals who are unable to participate in the Ready Reserve because they are key employees, temporarily disabled, or otherwise are unable to participate in training and have the expectation of being returned to the Ready Reserve.
- The Standby Reserve (inactive) should comprise individuals who are not required by law or regulation to remain in an active status but who desire to retain Reserve membership without participating in training. The inactive status list should be the source of trained individuals from the Standby Reserve for mobilization.

Accordingly, the study team recommends:

- That OSD amend its guidance to the Services to allow persons to remain in the Standby Reserve under conditions described above.
- That OSD prepare and submit legislation to allow the Army and Air Force to retain in the Ready Reserve officers who have been twice passed over for promotion.

SECTION 7
RETIRED PERSONNEL

INTRODUCTION

In order to provide for a young, viable military force and to reduce promotion stagnation in the Military Services, current law permits military personnel to retire with 20 or more years of active service and requires most of them to retire upon reaching 30 years of active service. For this reason, military retirees constitute a significant pool of thoroughly experienced personnel, many of whom are young enough to perform additional years of military service in the event of mobilization.

Prior to the advent of the all-volunteer force and the subsequent decline in the size of the IRR, retired military personnel were not considered to be a major source of mobilization manpower. There were sufficient manpower resources in the IRR to meet mobilization needs, primarily junior officers and enlisted personnel required to fill out combat units and to replace early casualties. Further, retired personnel were considered to be too old (and senior in grade) to fill such positions.

However, retired personnel who are young enough to return to active duty are fully capable of filling staff, administrative support, and training positions, thereby releasing other personnel for assignment to combat units. There are thousands of such positions in the United States that could be filled by retirees recalled to active duty in the event of national emergency. Toward this end, the Military Departments are undertaking programs that will permit the orderly recall and assignment of retired military personnel in the event of mobilization. This section describes the initiatives being taken and assesses the contribution of retired personnel to the supply of pretrained individuals. Before discussing the initiatives, however, it will be useful to describe the various categories of retired military personnel and the rules under which they may be recalled.

CATEGORIES OF RETIRED MILITARY PERSONNEL

The pool of military retirees consists of two groups of personnel. In the first group, termed active duty retirees in this report, are found regular officers and regular enlisted personnel who have retired upon reaching 20 or more years of active service. Some Reserve officers whose combined service on active duty and active duty for training equals 20 or more years also qualify for active duty retirement.¹

In the second group, termed Reserve retirees in this report, are found Reserve officers and enlisted personnel who accumulate a combination of 20 "qualifying" years of active duty, active duty for training, and inactive duty for training, thereby becoming eligible to draw retired pay upon reaching age 60. The following subsections describe these groups in more detail, including size, composition, and availability for recall in the event of national emergency.

It should be noted that personnel may be retired from military service for reasons of physical disability, being placed on either the Disability Retired List or the Temporary Disability Retired List (physical condition reevaluated every 18 months until returned to active duty or placed on the Retired List or Disability Retired List, or transferred to the Retired Reserve). For purposes of this report, persons who are disabled are not considered to be mobilization assets and are not considered further in this study.

Active Duty Retirees

Officers

Under Title 10, USC, regular and Reserve officers may apply for retirement upon reaching 20 or more years of active service (of which at

¹ Reserve enlisted personnel must enlist in a Regular Component in order to serve on active duty for extended periods. Therefore, Reserve enlisted members attain active duty retirement only infrequently.

least 10 years must be as a commissioned officer). The following sections of law apply:

Army	10 USC 3911
Navy	10 USC 6323 ¹
Marine Corps	10 USC 6323 ¹
Air Force	10 USC 8911

Upon retirement, regular officers are transferred to the Retired List maintained by their Military Department and begin drawing retired pay based on a formula relating to their grade and years of service. Reserve officers follow the same steps except that they are transferred to the Retired Reserve, an important distinction when considering their availability for recall to active duty.

For reasons not totally clear, regular and Reserve officer retirees are subject to different recall rules. Retired regular officers of the Army and Air Force may be recalled without their consent by the President at any time.² However, retired regular officers of the Navy and Marine Corps may not be recalled involuntarily without declaration of war or a national emergency declared by the Congress or a national emergency declared by the President.³ Retired Reserve officers, on the other hand, may not be involuntarily recalled to active duty except in time of war or national emergency declared by Congress and unless the Secretary concerned, with the approval of the Secretary of Defense in the case of the Secretary of a Military Department, determines that there are not enough qualified Reserves in an active status or in the Inactive National Guard in the required category who are readily available for mobilization.⁴ Thus, under present law, regular officers of the Navy and Marine Corps are somewhat less available for recall than regular Army and regular Air Force officers. Reserve officers of all Services who retired after 20 years of active duty are even less available for recall than retired regular officers, even though both receive the same retired pay for comparable periods of service.

¹ Other sections of Title 10 grant authority to the President or Secretary of the Navy to grant retirement at the 20-, 30-, and 40-year points.

² Authority: Army, 10 USC 3504; Air Force, 10 USC 8504.

³ Authority: 10 USC 6481.

⁴ 10 USC 672.

Enlisted Personnel

Regular enlisted personnel retiring with 30 or more years of service are immediately transferred to the Retired List.¹ They are subject to recall under the same sections of law that pertain to regular officers. However, those retiring between their 20th and 30th service anniversaries are transferred to the Reserve until they reach their 30th year of service, at which time they are placed on the Retired List maintained by their Military Department. In the Army and the Air Force (10 USC 3914 and 10 USC 8914, respectively), no special name is given to this group of retirees and they are assigned to the Retired Reserve. Thus, they hold dual status as Retired Regular personnel and members of the Retired Reserve, complicating the question of their availability for recall.² However, both the Army and the Air Force have interpreted the law to allow for the recall of Retired active duty enlisted personnel as retired regulars rather than as members of the Retired Reserve. Thus they are considered immediately available for recall by the President at any time.

In the case of the Navy and the Marine Corps, enlisted personnel retiring between their 20th and 30th service anniversaries are transferred to the Fleet Reserve or the Fleet Marine Corps Reserve (10 USC 6330), where they draw retainer pay and remain until their 30th service anniversary. At that time they are transferred to the appropriate Retired List (or to the Retired Reserve).

As members of the Fleet Reserve or Fleet Marine Corps Reserve, enlisted personnel may be ordered to active duty for training and may be recalled involuntarily as prescribed in 10 USC 6403:

- (a) a member of the Fleet Reserve or the Fleet Marine Corps Reserve may be ordered by competent authority to active duty without his consent -
 - (1) in time of war or national emergency declared by Congress, for the duration of the war or national emergency and for six months thereafter;

¹ Authority: Army 10 USC 3917; Navy and Marine Corps, 10 USC 6326; Air Force, 10 USC 8917.

² For purposes of recall, the distinction between regular and Reserve officers applies equally to regular and Reserve enlisted personnel.

- (2) in time of national emergency declared by the President;
or
 - (3) when otherwise authorized by law.
- (b) In time of peace any member of the Fleet Reserve or the Fleet Marine Corps Reserve may be required to perform not more than two months active duty for training in each four-year period.

Thus, members of the Fleet Reserve and Fleet Marine Corps Reserve are more readily available than retired Reserves in that they may be recalled in time of national emergency declared by the President. However, they are less available than their Army and Air Force counterparts who may be recalled by the President at any time.

Reserve Retirees

Reserve Officers and Enlisted Personnel

Under present laws, officer and enlisted members of the Reserve components (including the National Guard) may retire following the completion of 20 "qualifying" years of service.¹ For purposes of determining qualifying years, Reservists may count periods of active duty, active duty for training, and inactive duty training. A point system is used to compute retirement eligibility, with the Reservist being awarded points for participation in various Reserve activities.² Typically, a point is awarded for each day of service or drill attendance, with 15 points being awarded each year for membership in a Reserve component. A qualifying year requires that a total of 50 points or more be earned by the Reservist.

Although Reservists may complete 20 qualifying years of service at a relatively early age, they do not begin to draw retired pay until they reach age 60 (10 USC 1331). Reserve retired pay is based on active duty pay scales in effect at the time retired pay commences. It is computed according to the member's grade and years of qualifying service as determined by the point system described previously.

¹10 USC 1331, 1332, 1333.

²E.g., training assemblies, Reserve schools, correspondence courses.

Upon reaching 20 years of qualifying service, the Reservists may request either transfer to the Retired Reserve or discharge from the Reserve altogether. Those who elect discharge return to the Retired Reserve upon application at age 60 when they begin to draw retired pay. Thus, during the interim period, Reservists who elected discharge have no Reserve status and are not subject to recall.

As described previously, Reserve retirees may not be involuntarily recalled to active duty except in time of war or national emergency declared by Congress and not until it is determined that there are not enough qualified Reserves in an active status or in the ING in the required category who are readily available for mobilization.¹ Thus, retired Reservists are far less available for recall than regular officer and enlisted retirees.

MANAGEMENT INITIATIVES

Introduction

The Military Departments, under the guidance of the Office of the Secretary of Defense, have undertaken management initiatives that will improve the utilization of retirees as mobilization assets by permitting the orderly recall and assignment of retirees in the event of national emergency. In providing guidance to the Services, OSD defines classes of retirees for the purposes of mobilization management as follows:

<u>Retiree Class</u>	<u>Status</u>
I	Under age 60, non-disability retirement, retired no more than 5 years
II	Under age 60, non-disability retirement, retired between 5 and 10 years
III	All other retirees

¹10 USC 672

Specifically, OSD guidance in 1979 and 1980 directed the Services to:

- Identify by end-FY 1981 those wartime mobilization positions that may be filled by retirees
- Identify, classify, and maintain data on Class I and II retirees in accordance with the following schedule:
 - Class I -- end-FY 1981
 - Class II -- end-FY 1983
- Preassign retirees in peacetime to mobilization positions that are required to be filled by M + 30 and are appropriate for fill by retirees

Service response to the foregoing guidance varies widely as is explained below.

Army Retiree Recall Program

The Army, which has the greatest need for retirees in the event of a national emergency, has made significant progress toward the capability to use retirees upon mobilization. Positions to be filled by retirees are being identified, personnel data files are being established, and some retirees have been preassigned (on a test basis).

Mobilization Positions for Retirees

Upon mobilization, the Army plans to use retirees primarily to fill positions in the CONUS support base, thereby releasing other personnel on active duty to deploy with combat units. Retirees would be restricted to filling CONUS positions unless they volunteer for overseas duty. Automated personnel data files would be annotated to identify recalled retirees.

To identify positions to be filled by retirees, the Army has reviewed each military manpower position required in the CONUS base during wartime and identified those not appropriate for fill by retirees. The lists of mobilization positions, which were prepared at the installation

level, have been consolidated by Headquarters, Department of the Army as shown in Table 7.1.

TABLE 7.1
ARMY MILITARY POSITIONS IN CONUS
(As of 30 April 1980)

	<u>Officer</u>	<u>WO</u>	<u>Enlisted</u>	<u>Total</u>
Peacetime Requirements	35,855	3,432	88,725	128,012
Wartime-only Requirements	<u>40,973</u>	<u>408</u>	<u>82,217</u>	<u>123,598</u>
Total Wartime Requirements	76,828	3,840	170,942	251,610
Less:				
Positions Not Appropriate for Fill by Retirees	11,590	1,344	13,125	26,059
Total Wartime Positions Appropriate for Fill by Retirees	65,238	2,496	157,817	225,551

As can be seen, approximately 90% of the total CONUS wartime military positions have been identified by the Army as being appropriate for fill by military retirees. The Army plans to review these positions semi-annually in connection with updates of its CONUS manpower authorization documents.

Retiree Personnel Data

Management of personnel data for retirees presented special problems. Prior to 1977, when the Army began thinking about the use of military retirees to offset shortfalls in pretrained manpower, only "skeleton" personnel records were maintained. Reserve Components Personnel Administration Center (RCPAC), which is responsible for managing retired personnel, maintained only name, SSAN, sex, and officer or enlisted identification codes in its automated personnel files, records that were insufficient for the management of retirees as mobilization assets. Accordingly, RCPAC began a manual review of its retiree paper records to establish more complete automated files. Completion dates of the review are as follows:

<u>Retiree Class</u>	<u>Completion Date</u>
Class I	October 1979
Class II	
RA Officers	March 1980
RA Enlisted	June 1981
Reserve Off/Enl	June 1982
Class III	Data not planned to be captured

RCPAC plans to update the retiree data base annually through surveys sent to each retiree.

The distribution of Army retirees by class and component is displayed in Table 7.2.

TABLE 7.2
ARMY RETIREE DISTRIBUTION
(As of April 1980)

	<u>Class I</u>	<u>Class II</u>	<u>Class III</u>	<u>Totals</u>
Officers				
Regular	8,811	7,726	1,319	17,856
Reserve	<u>16,194</u>	<u>49,478</u>	<u>113,036</u>	<u>178,708</u>
Subtotal Off	25,005	57,204	114,355	196,564
Enlisted				
Regular	43,047	121,925	58,837	223,809
Reserve	<u>4,999</u>	<u>4,757</u>	<u>1,712</u>	<u>11,468</u>
Subtotal Enl	48,046	126,682	60,549	235,277
Total Officers and Enlisted	73,051	183,886	174,904	431,841

It should be noted that the Army, with the concurrence of OSD, defines Class II retirees as those non-disability retirees who are less than age 60 and who have been retired more than 5 years. The OSD definition limits Class II retirees to those who are less than age 60 and who have been retired between 5 and 10 years. Figures were not available

to determine the impact on retiree distribution due to this difference in definition. The net effect, however, is to increase the numbers of retirees in Class II at the expense of Class III. There is a corresponding increase in the numbers of Army retirees available for recall.

As discussed previously, Reservists with 20 or more qualifying years but who are less than age 60 may elect discharge in lieu of transfer to the Retired Reserve. They must request Reserve status upon reaching age 60 in order to draw Reserve retired pay. During the interim, they are unavailable for recall upon mobilization. Although figures are not maintained, RCPAC personnel estimate that about 20,000 Reserve retirees are in this group. The problem is compounded by the fact that the Reservists must request transfer to the Retired Reserve upon reaching the mandatory removal date. Otherwise the Army is required to discharge him or her. Legislation is required to solve this problem.

As of late 1980, the Army was continuing to improve the personnel data for Class I and II retirees. A survey of the data files in November 1980 showed that skill, address and other critical information was missing from a substantial number of retiree records. This represents a significant degradation in mobilization capability that requires increased attention on the part of the Army.

Preassignment Actions

The Army is moving rapidly toward preassignment of Class I and II retirees. A pilot program was conducted during 1980 at four Army installations (Fort Carson, CO, Ft. Riley, KS, Ft. Lewis, WA, Ft. Benning, GA). The program was designed to determine policy requirements and operational details related to the recall of retirees and to assess both voluntary and involuntary assignment programs. During the test, a total of 1100 retirees (255 officers, 847 enlisted) were selected for involuntary preassignment to the four installations. The voluntary portion of the test was conducted by US Army Forces Command (FORSCOM) and the report on the test is not yet available. Highlights of the involuntary portion of the test conducted by Headquarters, Department of the Army and RCPAC are as follows:

- Requirements were limited to garrisons and hospitals at the selected test sites.
- Personnel considered in the involuntary test program were Regular retirees in Class I. Priority for assignment was given to those residing within 300 miles of the installation, but CONUS-wide assignments were permitted (and made).
- Of those preassigned, about 50% of the officers and 94% of the enlisted personnel were fitted to requirements that matched their grade and skills. The others required grade substitution (mostly downward) using a rule of "one up, two down."
- 1102 retirees were involuntarily preassigned against a total of 16,553 requirements for the test sites. Thus, only about 7% of the garrison and hospital requirements at the test installations could be filled by Class I Regular retirees.
- RCPAC received about 200 calls per week during the period immediately following the mailing of the preassignment orders to the 1102 selected retirees. The extent to which this workload could have been avoided by improved publicity and more complete administrative instructions to the retirees is not known.
- The overwhelming majority of retirees responded positively to their preassignment.
- The recall of retirees may create problems related to uniforms, pay, insurance, promotions, medical standards, etc.

Based on the test, the Army is developing plans to preassign a substantial portion of Class I and II Regular retirees in accordance with the following schedule:

80,000	--	End-FY 1981
100,000	--	End-FY 1982
120,000	--	End-FY 1986

The Army has not yet begun to preassign Reserve retirees because of the provision of Title 10, USC, 672(a) that specifies that retired Reservists may not be involuntarily ordered to active duty during war or Congressionally declared emergency until the Secretary concerned makes a determination that qualified Reservists in active status or the Inactive National Guard are not readily available. The Army interpreted this language to mean that retired Reservists could not be preassigned in peacetime. However, the OSD Assistant General Counsel ruled to the contrary, a decision that was announced to the Military Departments by ASD(MRA&L) memorandum on 12 December 1980. This ruling cleared the way for preassignment of retired Reservists if the Army so desires.

In the preassigning of retirees, the Army selects retirees to fill wartime jobs by grade, skill, and geographic location. RCPAC uses a newly developed computer program to match retirees to requirements. The program is capable of making skill and grade substitutions as required. However, Army requirements are not time-phased with the result that all retirees are ordered to report within the same time period.

The preassigned retiree receives a letter of instruction and a mobilization order, an example of which is contained in Appendix E, and is directed to report within 7 days of full mobilization. The retiree is instructed that full mobilization will be announced by the President on television, radio, or other news media. The order states that it is automatically rescinded when the retiree reaches his or her 60th birthday.

All preassigned retirees will be directed to report to one of 40 CONUS Mobilization Reporting Installations where prepositioned rosters provided during peacetime by RCPAC will list tentative assignments. Installation commanders have authority to modify the specific assignments

according to the situation existing at the time each retiree reports. Following processing at the Mobilization Reporting Installation, some retirees will be further assigned to satellite installations (e.g., from Ft. Sill, OK to Ft. Chaffee, AR).

Selection criteria generally will follow those used during the pilot program. Selections will be based first on skill and grade match, then skill match and grade substitution (one up, two down), and finally, skill and grade substitutions. Geographic criteria for selection are first, that the retiree lives within 300 miles of the installation, then the same state, then within CONUS Army area, and, finally, CONUS-wide. The Army excludes disability retirees, retirees who reside outside CONUS, and retirees in pay grades O1, E1, E2, E3, and E4. The Army does not consider the award of disability payments by the Veterans Administration in selecting retirees for recall unless reported by the individual. Warrant Officers may be involuntarily assigned up to age 62, General Officers up to age 64. However, the recall of General Officer retirees is managed on a case-by-case basis at Headquarters, Department of the Army.

Retiree Management

As discussed previously, RCPAC is responsible for implementation of the retiree recall program and personnel management of retirees. The Retired Activities Directorate of RCPAC, which is assigned responsibility for all retiree personnel and assignment actions, will perform the following retiree management functions:

- Replacing preassigned retirees who reach age 60, become disabled, etc.
- Adding and deleting retiree assignments as requirements change or in response to retiree personnel actions
- Reviewing requests for medical exemptions
- Answering queries from retirees
- Screening retirees annually to update records (address, physical status, skill, etc.)

It should be noted that RCPAC has no plans to conduct any refresher training for retirees. RCPAC estimates that it would cost \$40 million per year to provide biennial refresher training to Class I and II retirees.

RCPAC has identified a requirement for 56 military and 38 civilian positions to perform the foregoing functions. The positions have been included in the Army program beginning in FY 1982, but their approval in the FY 1982 budget is uncertain. It is estimated that the cost for civilian pay and operation of the toll-free telephone system for retiree management will be about \$1 million per year from the O&M Army Reserve (OMAR) appropriation. Reserve Personnel Army (RPA) costs for 56 military would be about \$0.8 million per year (@ \$14,500 per military man-year). Thus, the direct cost of the Army retiree recall program is about \$1.8 million per year (excluding indirect RCPAC costs such as utilities, rent, postage, etc).

As discussed previously, the Army has discovered numerous problems associated with the recall of retirees to extended periods of active duty in wartime. These include:

- Promotion consideration
- Uniform allowance
- Insurance conversion (Veterans to Servicemen's Group Life Insurance)
- Survivor Benefit Program
- VA disability compensation
- Accessing retirees to the active pay system
- Recomputation of retired pay upon release from active duty
- GI Bill/Veterans Education Assistance Program
- CHAMPUS entitlement
- Reemployment rights
- Skills acquired since retirement

- Nonmedical deferment/exemption
- Assistance to dependents
- Key civilian employee status
- Screening of requests for medical deferment
- Orientation for wartime positions
- Refresher training
- Assignment restrictions (CONUS vs worldwide)
- Grade/skill substitution criteria
- Establishment of field and master personnel records
- Revised medical fitness standards
- Professional certification for medical, legal, and ecclesiastical personnel

The Army has moved to resolve these issues by the formation of a Headquarters, Department of the Army working group, chaired by DCSPER, consisting of members from responsible Army Staff agencies. Position papers are being prepared for consolidation by DCSPER. An omnibus paper will be staffed and published early in 1981, following which actions will be taken to change regulations, submit legislative proposals, etc. In addition, OSD is establishing a joint Service working group to address issues related to the recall of retirees.

Army Retiree Recall Program Summary

In summation, the Army retiree recall program is progressing well. Although actual preassignment of the Class I and II retirees has begun only on a test basis, the program is in place to recall retirees if mobilization occurred today. The Army's current program will meet or exceed the OSD guidance on the preassignment of retirees. However, the current Army program must be considered to be a preliminary effort that must be refined as time permits. Several areas require improvements:

- The current Army requirement for retirees is based only on one scenario--full mobilization. Although the Army does not plan to recall retirees in a partial mobilization, it has no automated process to identify selected, high-priority positions to be filled by retirees. For that reason, the Army would be unable to recall quickly a substantial number of retirees if needed during the early stages of a full mobilization prior to declaration of a national emergency by the President.
- The current Army wartime requirements system does not specify time-phased requirements with the result that all retirees are ordered to report not later than M + 7 days. Although the actual reporting dates will vary, up to 120,000 retirees will be reporting over a period of a few days. This may create an unacceptable burden on Army facilities that will be straining under the load of units preparing to deploy and a major influx of fillers from the IRR. The requirements determination system should be modified to provide time-phasing for positions to be filled by retirees.
- Retiree personnel records require a substantial effort to add missing data.
- RCPAC has not yet established automated files on Class III retirees holding critical skills. If the data were available, retirees over the age of 60 holding critical skills, (e.g., medical) could be recalled on a selective basis.
- Retiree preassignment orders lack any specific codeword that would cause the retiree to report for active duty. It is likely that many retirees would report under conditions of partial mobilization declared by the President such as call-up of some units of the Selected Reserve (100,000 call-up authority) or other declarations of a national emergency.

Navy Retiree Recall Program

In response to OSD guidance, the Navy has begun to establish a retiree recall program similar to the Army program described above. The Navy's program was begun later and thus, lags behind the Army program in some areas. However, the situation within the Navy is considerably different from that of the Army, and the later start may have only limited effect on the Navy program.

Mobilization Positions for Retirees

At the present time, the development of the Navy's retiree recall program is awaiting further refinement of wartime manpower requirements. Although a gross wartime manpower requirements has been established, the positions to be filled by retirees have not been identified. As discussed in Section 3 above, the Navy employs the Navy Manpower Mobilization System (NAMMOS) to determine both shore-based and sea-based wartime manpower requirements. Phase I of the NAMMOS development effort establishes the wartime requirement for the Selected Reserve for the first 60 days of a conflict. Phase I was completed in FY 1980.

NAMMOS Phase II will extend the wartime manpower requirements analysis to M + 180 days and identify positions to be filled by the IRR, retirees, and Standby Reserve. The Phase II development work will continue through FY 1981 and beyond. Members of the staff of the Deputy Chief of Naval Operations (Manpower, Personnel, and Training)(OP-01) have indicated that a preliminary list of positions to be filled by retirees will be published during FY 1981. At that time work can begin on pre-assignment of retirees against mobilization positions.

Retiree Personnel Data

Responsibility for implementation of the retiree recall program will be assumed by NRPC in New Orleans. NRPC maintains automated personnel records on all Navy retirees (active and Reserve) and thus, is in position now to assign retirees against mobilization requirements based on grade, skill, and geographical locations. However, NRPC retiree

files contain numerous omissions, creating the need for update of the files. The Navy plans to query its retirees regarding missing information, skills, physical status, etc.

The Navy has a substantial pool of nondisability retirees as shown in Table 7.3.

TABLE 7.3

NAVY RETIREE DISTRIBUTION (NONDISABILITY)
(As of January 1980)

	<u>Class I</u>	<u>Class II</u>	<u>Class III</u>	<u>Totals</u>
Officers				
Regular	10,718	10,283	38,630	59,631
Reserve	<u>5,545</u>	<u>10,281</u>	<u>90,688</u>	<u>106,514</u>
Subtotal Off	16,263	20,564	129,318	166,145
Enlisted				
Regular	4,141	14,950	85,455	104,546
Reserve	2,072	4,466	9,285	15,823
Fleet Reserve	<u>45,412</u>	<u>35,182</u>	<u>1,374</u>	<u>81,968</u>
Subtotal Enl	51,625	54,598	96,114	202,337*
Total Officers and Enlisted	67,888	75,162	225,432	368,482*

* Does not include 53,348 Regular and 3,565 Reserve enlisted retirees whose release dates from active duty are unknown.

Table 7.3 shows that the Navy has about 143,000 retirees in Classes I and II (as defined by OSD) who could be available for recall upon mobilization. However, the retiree files, particularly for enlisted personnel, will have to be updated to add dates of release from active duty (as indicated in Table 7.3) and to confirm dates of birth for some 18,000 enlisted retirees.

Preassignment Actions

Except for the augmentation of AFEES (discussed below), the Navy now preassigns retirees only to the Convoy Commodore program. Convoy Commodores are recently retired admirals and captains who had significant tactical command at sea immediately prior to retirement. The Convoy Commodores would go to sea on merchant ships during wartime to assist the merchant captain in communicating with Navy escorts and in convoy tactics. About 300 retirees are in the program at any time. Some of the members of the program are recalled to active duty periodically to participate in convoy exercises.

Navy plans regarding the preassignment of significant numbers of military retirees are not yet firm. NRPC currently is capable of assigning retirees to specific billets if mobilization should occur. Notification would be either by Mailgram or the US Postal Service. The Navy believes that its retiree assignment and notification systems will provide adequate response to meet its needs upon mobilization. For this reason, the Navy may resist any guidance to preassign retirees during peacetime, preferring instead to retain flexibility to meet various mobilization scenarios. Refinement of time-phased wartime manpower requirements, however, will likely show a need for significant numbers of retirees within the first 30 days. These should be preassigned in peacetime in accordance with OSD guidance.

Retiree Management

Present planning within the Navy makes no provision for resources to manage retirees. NRPC reported that it is not now staffed to manage retirees beyond maintaining personnel files. It appears that if the Navy begins to preassign its retirees, a significant personnel management workload may be created similar to that experienced by the Army. At a minimum toll-free lines would be required, together with ADP support and sufficient numbers of personnel to answer queries, process changes in physical status, update retiree records, etc.

Navy Retiree Recall Program Summary

In summation, the Navy retiree recall program is progressing, but slowly. The following major points pertain:

- It appears that the Navy is capable of meeting OSD guidance to preassign by end-FY 1981 retirees required to fill positions between M-Day and M+30. However, there is no evidence that the Navy plans to preassign those retirees.
- The Navy retiree personnel records are capable of supporting mobilization assignment actions today. However, much work remains to be done in updating the records.
- Identification of positions to be filled by retirees is impeding the Navy's capability to utilize retirees in the event mobilization occurs in the near future.
- The absence of resources for retiree management could impair the future effectiveness of the Navy's retiree recall program.

Marine Corps Retiree Recall Program

The Marine Corps is moving to establish a retiree recall program in accordance with OSD guidance. Major parts of the retiree recall system were exercised successfully during exercise PROUD SPIRIT in late 1980 and planning continues as described below.

Mobilization Positions for Retirees

The Marine Corps is in the process of identifying mobilization positions to be filled by retirees. Retirees will be assigned primarily to positions in CONUS including staffing of the 50 mobilization stations, base support activities on Marine Corps installations, and for duty as casualty assistance personnel. In addition, some retirees may be assigned to the Force Service Support Groups of the Marine Divisions. Current plans call for the identification of about 15,000 positions to be filled by retirees under the present (4 Divisions/Wings) wartime force structure.

Responsibility for the selection of positions to be filled by retirees is within the Office of the Deputy Chief of Staff (DCS) for Manpower, Headquarters, Marine Corps. Based on the criteria described above, DCS Manpower staff members select positions to be filled by retirees and construct a "requirements" tape which is sent to the Marine Corps Reserve Forces Administrative Center (MCRFAC) in Kansas City. MCRFAC compares the retiree file to the requirements tape and issues assignment orders.

Retiree Personnel Data

MCRFAC is responsible for maintaining automated personnel records on all Marine Corps retirees. Automated files are constructed from information extracted from JUMPS or Reserve pay system files at the time of retirement. Paper records for retirees are sent to the National Personnel Records Center in St. Louis, MO, following retirement of the individual.

MCRFAC updates retiree personnel data files semiannually through the use of questionnaires. In addition, retiree files are compared to Veterans Administration files on a quarterly basis to identify retirees who have been granted a VA disability. Results of PROUD SPIRIT indicated that the health status of retirees is out of date to a greater degree than anticipated as many retirees reported they were disabled. Thus MCRFAC is anticipating a significant workload in bringing the retiree files up to date.

Table 7.4 displays the distribution of nondisability Marine retirees by class and component:

Presssignment Actions

During Exercise PROUD SPIRIT, the Marine Corps implemented its retiree recall procedures on a test basis. Approximately 3500 positions were chosen for fill and retirees were assigned to them. Based on the results of PROUD SPIRIT, the Marine Corps plans to expand the program to additional positions and to predesignate retirees against those positions. That is retirees will be earmarked to fill specific positions but notification will be limited to "Dear Retiree" letters informing those selected that, in the

event of mobilization, they would likely be recalled to active duty and sent to a CONUS installation to fill a certain type of position. Upon mobilization, the Marine Corps plans to finalize the retiree requirements, make assignments, and notify selected retirees by Express Mail. Mailgrams are not used due to the uncertainty surrounding Western Union's ability to handle the load imposed upon it at the time of mobilization. The Marine Corps believes that Express Mail, with its overnight delivery, will be able to meet Marine Corps notification requirements.

TABLE 7.4

MARINE CORPS RETIREE DISTRIBUTION (NONDISABILITY)
(As of 31 January 1981)

	<u>Class I</u>	<u>Class II</u>	<u>Class III</u>	<u>Totals</u>
Officers				
Regular	3,481	3,135	4,131	11,747
Reserve	1,288	715	1,764	3,767
Subtotal	4,769	3,850	5,895	15,514
Enlisted				
Regular*	7,553	11,350	14,231	33,134
Reserve	620	436	477	1,533
Subtotal	8,173	11,786	14,708	34,667
Total Officers and Enlisted	12,942	15,636	21,603	50,181

* Includes Fleet Marine Corps Reserve

Retiree Management

At the present time, Marine Corps resources devoted to management of retirees are limited to the maintenance and updating of personnel records at MCRFAC. There are no plans to add personnel managers or toll-free lines to handle retiree queries and personnel problems that are likely to arise as a result of the "Dear Retiree" letters.

It should be noted that MCRFAC, as its name implies, is a Reserve force administrative center rather than a personnel management organization. This is amply demonstrated by its staffing mix of 10 military and 110 civilian employees. Approximately 80% of the civilian employees are clerk-typists whose job is to maintain Reserve personnel records. Thus MCRFAC is not staffed to handle retiree personnel management problems. Although this situation may change over time, unless immediate action is taken to add missions and resources to MCRFAC, the Marine Corps will be unable to respond adequately to retiree personnel management problems as they arise.

Marine Corps Retiree Recall Program Summary

In summation, the Marine Corps retiree recall program is progressing well. Highlights of the program are as follows:

- The Marine Corps is able to meet OSD's guidance to preassign by end-FY 1981 those retirees required to fill positions between M-Day and M+30. However, the Marine Corps plans to retain flexibility by providing only general notification to its retirees rather than issuing preassignment orders.
- Although the Marine Corps retiree records require considerable update and improvement, retirees could be assigned against required positions if mobilization occurred today.
- The absence of resources to manage retirees could reduce the effectiveness of the retiree recall program.

Air Force Retiree Recall System

The Air Force is also moving to establish a retiree recall program along the lines of the guidance from OSD. The following discussion shows that the Air Force is presently capable of recalling retirees to meet wartime requirements and will meet schedules prescribed by OSD for establishing data files on Class I and II retirees. However, the Air Force currently has no plans to preassign retirees except for AFEES augmentation. Details of the Air Force program are described below.

Mobilization Positions For Retirees

Mobilization positions for Air Force retirees are not identified in advance of the mobilization event. Instead, the Air Force uses its "pull system," described in Section 3, to identify individual manpower requirements after mobilization.

The Air Force will normally recall retirees to replace a deployed member or fill a wartime requirement in a unit that has not yet deployed. Thus, retirees are not required to be on active duty until a considerable (but unspecified) number of days after mobilization. The Air Force believes that its "pull system" will be able to identify requirements for retirees after M-Day in time to meet the needs of the MAJCOMs. However, a detailed review of Air Force time-phased wartime manpower requirements may identify additional positions that must be filled within the first 30 days before the retiree assignment system is able to respond. If so, retirees should be preassigned to meet these early requirements.

Retiree Personnel Data

The responsibility for maintenance of retiree personnel data is split between the Air Force Manpower and Personnel Center (AFMPC) and the Air Reserve Personnel Center (ARPC). Although an automated file is maintained by AFMPC for all retirees, AFMPC updates the files for regular retirees while ARPC updates those for Reserve retirees. Hard copy records for all retirees (except for General Officers and those on the Temporary Disability Retired List) are stored at the National Personnel Records Center in St. Louis, MO.

The Potential use of retirees upon mobilization has caused the Air Force to upgrade its retiree records. The file was constructed originally to comply with the requirements of law that the Secretary maintain a "retired list." That "compliance file" contained only a minimal information including name, rank, date of birth, date of retirement, and section of law under which the individual retired. The Air Force upgraded the information by extracting the Air Force Finance Center records and by querying retirees for recent skill, health, and address changes. Records for Class I retirees are now in reasonably good condition while those on Class II require further

work before they are fully usable for purposes of mobilization. Class II retiree files should be usable before end-FY 1983, meeting OSD guidance. Automated files are also available for Class III retirees; however, skill and other critical data elements have not been updated. The Air Force is searching for ways to do this without a manual review of Class III retiree records stored in St. Louis.

Updating of Air Force retiree files in the future will be accomplished as follows:

- Regular retirees are asked to verify recall data at the 13th and 37th months following retirement. These dates were selected on the basis of permanent settlement (following the 12-month final move period) and after the retiree has settled into a new career (if applicable). A copy of the questionnaire is attached as Appendix F.
- Skills (AFSCs) will be converted semiannually so that retiree skills will match the most recently approved list of skills Air Force-wide.

The Air Force does not plan to restrict to CONUS the assignments of retirees recalled in the event of mobilization. Thus, recalled retirees will be eligible for worldwide assignments. For this reason retirees having 30% or more VA-awarded disability are omitted from the available mobilization assets. The identification of this group of personnel is accomplished by extract of the Air Force Finance Center automated files. The Air Force manages the recall of Colonel and General Officer retirees on a case-by-case basis. Air Force Regulation 28-5 has been revised to include administrative procedures to be used for the recall of retirees.

The distribution of Air Force retirees is shown in Table 7.5.

TABLE 7.5
AIR FORCE RETIREE DISTRIBUTION
(as of 30 September 1980)

	<u>Class I</u>	<u>Class II</u>	<u>Class III</u>	<u>Totals</u>
Officers				
Regular	14,530	12,028	28,142	54,700
Reserve	<u>2,342</u>	<u>7,529</u>	<u>65,161</u>	<u>75,032</u>
Subtotal Off	16,872	19,557	93,303	129,732
Enlisted				
Regular	68,705	114,699	159,410	342,814
Reserve	<u>5</u>	<u>0</u>	<u>3,409</u>	<u>3,414</u>
Subtotal Enl	68,710	114,699	162,819	346,228
Total Officers and Enlisted	85,582	134,256	256,122	475,960

Preassignment Actions

With the exception of the AFEES program, which is discussed below, the Air Force does not plan to preassign (hip-pocket orders) or predesignate (computer match of person and requirement) its retirees in peacetime. The Air Force believes that its policy provides the most flexibility to meet a wide range of mobilization and deployment scenarios. Further, for reasons explained previously, the Air Force believes that its requirements determination, assignment, and notification systems are adequate to meet time-phased individual manpower needs without preassignment or predesignation of retirees in peacetime.

Upon mobilization, or earlier when requirements are firm, ARPC receives automated assets (regular and Reserve) and requirements information from AFMPC. Assets are matched against requirements and the individual is notified by Mailgram. ARPC then transmits assignment data to AFMPC to access retirees to active files and to establish field personnel records at the gaining installation.

The retiree assignment system was recently developed by ARPC and is currently operational. Selection is based on skill, grade, and geographic location. Grade substitution is allowed on the basis of "1 up - 1 down." The primary source of retirees are those who have been retired 3 years or less and are less than 56 years of age (a subgrouping of Class I retirees). Extensive tests of the retiree assignment system are planned during FY 1981.

Retiree Management Actions

Personnel management of Air Force retirees will be accomplished largely within current assets. Regular and Reserve retirees will continue to receive approximately 6 information mailings per year and will continue to have access to ARPC through the existing toll-free lines (now receiving a total of 500 to 600 calls per day, primarily from members of the Air Force Reserve). This level of effort should be entirely adequate as long as the Air Force does not preassign its retirees in significant numbers. If that should occur in the future, additional personnel managers would be required at ARPC to administer the program.

At the present time, ARPC has added a total of 9 enlisted members to its staff to administer the 13th and 37th month regular retiree surveys. One of the individuals will screen medical documentation submitted by retirees to reflect changes in physical status.

Air Force Retiree Recall Program Summary

The Air Force retiree recall program differs substantially from that of the other Services as demonstrated by the following points:

- Except for AFRES augmentation, Air Force retirees will not be preassigned in peacetime. Retirees will not be used to fill the earliest wartime requirements.
- The Air Force excludes Colonels, General Officers, and those having greater than 30% VA disability from automated recall.
- Recalled Air Force retirees must be physically qualified and will be subject to worldwide assignment.

- Retiree recall data will be verified with the retiree at the 13th and 37th months following retirement. Addresses and skills will be updated automatically.
- Air Force time-phased manpower requirements should be refined to identify positions requiring early fill by retirees and individuals should be preassigned to those positions.

JOINT AUGMENTATION UNITS (JAUs)

OSD has established a special program to utilize retirees upon mobilization to augment the Armed Forces Entrance and Examining Stations (AFEES). The AFEES are under the control of the Military Enlistment Processing Command (MEPCOM), a joint activity for which the Army is Executive Agent. There are 67 AFEES throughout the United States and its territories.

In the event of mobilization, the AFEES must expand rapidly in order to process the influx of personnel entering the Armed Forces. The major requirement for expansion is in the area of health professionals to conduct physical examinations and administrative personnel required to process inductees.

The AFEES program was initiated by the establishment of 67 Joint Augmentation Units (JAUs) on the basis of one for each AFEES. Augmentation positions for full mobilization totaled 5,524 military personnel. The Services were tasked by OSD to fill the requirements as indicated in Table 7.6. By memorandum of 24 March 1980, the Assistant Secretary of Defense (MRA&L) directed the Services to preassign retirees to fill the JAU positions not later than 1 January 1981.

Although each Service has taken some actions to fill JAU positions, progress has been slow. Administrative problems arose in the areas of selection and assignment procedures, pay, refresher training, Service coordination with MEPCOM, positions requirements, etc. Additional guidance was provided by OASD(MRA&L) memorandum of 28 October 1980 and assignments to the JAUs has begun.

TABLE 7.6
AFEES MANPOWER AUGMENTATION AUTHORIZATIONS
FOR FULL MOBILIZATION

<u>SPECIALTY</u>	<u>ARMY</u>	<u>NAVY</u>	<u>AIR FORCE</u>	<u>MARINE CORPS</u>	<u>TOTAL</u>
Physicians	193	96	96		385
Psychologists	145	73	73		291
Nurses	145	73	73		291
Chief Disp NCOs	50	25	25		100
Med Tech	273	137	137		547
Lab Specialists	158	78	78		314
X Ray Specialists	111	56	56		223
Admin Personnel	<u>1,551</u>	<u>776</u>	<u>641</u>	<u>405</u>	<u>3,373</u>
TOTAL	2,626	1,314	1,179	405	5,524

As of 1 January 1981 the Army, Navy, and Marine Corps had begun the assignment process and the Army and Navy had actually assigned a total of 1950 personnel to AFEES positions. ARPC, which is responsible for the Air Force JAUs program, has begun soliciting volunteers.

Some Services have expressed concern that the JAUs program will unduly deplete the supply of medical personnel available for other positions that are critical to mobilization. In the case of the Air Force, initial queries will be made only to Class III medical retirees in the hope that younger, more recently retired medical personnel will remain available for other mobilization positions. If successful, this approach might be used by the Army and Navy to conserve scarce medical resources. However, neither the Army nor the Navy is able to identify accurately Class III medical retirees in its current automated records. The Army lacks skill information on nearly all Class III retirees. The Navy's skill information is somewhat better, but is still inadequate for the purpose.

CONCLUSIONS AND RECOMMENDATIONS

As a result of the foregoing evaluation of Service retiree recall programs and related OSD guidance, the GRC study team has reached several conclusions. The conclusions are presented in this section followed by a list of related recommendations.

Conclusions

- The initiatives undertaken by OSD and the Military Departments to utilize retirees upon mobilization substantially improves the supply of pretrained individuals available for military duty.
- All Services have taken steps toward the establishment of a retiree recall program. Although the Services vary in their degree of progress, each is now capable of recalling some retirees in the event of mobilization.
- The retiree recall programs are structured according to the wartime manpower requirements and management structure peculiar to each Service. These differences should be of little concern to OSD so long as each Service is capable of utilizing retirees to supplement the supply of wartime manpower in the event of mobilization.
- All Services have incurred manpower and funding costs in establishing their retiree recall programs.
- The Army, with its forthcoming retiree preassignment program, recognizes a substantial retiree personnel management workload for the foreseeable future. If the other Services undertake a preassignment program comparable to that planned by the Army, they should also anticipate the need to provide resources for retiree management.
- Neither the Army nor the Navy receives automated information on VA-awarded disabilities for use in their retiree recall programs. Both should find ways to do so.
- Regular and Reserve personnel who have retired with 20 or more years of active service should be equally vulnerable to recall in the event of mobilization. Legislation is required to amend Title 10, USC for this purpose.
- Under current law, Reserve retirees may request discharge while awaiting the attainment of age 60 and commencement of

retired pay. Title 10, USC should be amended to require Reservists to maintain membership in the Retired Reserve during this interim period so that these retirees would be available for recall in the event of a national emergency.

- With the exception of the JAUs program, Service compliance with OSD guidance to "preassign retirees to those positions that must be filled by M + 30" is spotty. The Army will comply fully. Navy preassignment plans are not yet firm. Marine Corps retirees will be predesignated but, for the most part, will not be preassigned. The Air Force does not now plan to preassign or predesignate its retirees.
- The Army and Marine Corps are ahead of the other Services in the identification of positions to be filled by retirees. The Navy will identify retiree positions during FY 1981. Air Force does not now intend to identify, in advance of mobilization, positions that will be filled by retirees.
- Retiree assignment policies vary widely across the Services. The Army will restrict retirees to CONUS positions (except for volunteers). The Marine Corps will assign retirees primarily to CONUS, but will assign some retirees involuntarily to deploying units. The Navy retiree assignment policy is not yet established. The Air Force makes no restriction on retiree assignments, although initial assignments will be to CONUS-based units. This issue should be studied further by OSD.
- The recall of retirees creates many heretofore unrecognized personnel management and administrative problems. An OSD working group has been formed to assist the Services in finding solutions to these problems.
- The Army's retiree requirements determination system should be improved to identify time-phased reporting requirements.

- Assignments of retirees to fill wartime positions in the AFEES is lagging behind the schedule established by OSD. The Air Force has made the least progress. All Services and MEPCOM should make a major effort to select and assign retirees to the JAU's positions.
- The use of Class III medical retirees in AFEES could reduce the drain on scarce medical resources among Class I and II retirees. However, Army and, to a lesser extent, Navy automated records on retirees are not sufficient to permit the identification of Class III medical retirees.
- Only the Army has identified resources for management of preassigned retirees. The others will also require additional resources if they preassign substantial numbers of retirees.

Recommendations

GRC makes the following recommendations related to the retiree recall programs:

- That OSD continue to urge the Services to refine their time-phased wartime manpower requirements and to identify in peacetime positions to be filled by retirees in wartime.
- That OSD guidance to the Services continue to emphasize preassignment of retirees to positions required to be filled by M + 30.
- That OSD sponsor legislation to amend Title 10, USC to:
 - Equalize recall vulnerability for all persons who have retired after 20 or more years of active service.
 - Require Reserve retirees to maintain membership in the Retired Reserve as a condition for drawing retired pay at age 60.
- That the Services and MEPCOM be directed to accelerate efforts to assign retirees to AFEES positions.

- That OSD direct the Services to utilize Class III medical retirees in AFEES positions to the extent possible.
- That OSD monitor the retiree personnel management workload experienced by the Army and support appropriate requests from the Army and other Services for retiree management resources.
- That the Army and Navy establish automated procedures for considering VA-awarded disabilities in recalling retirees for mobilization.
- That the Army be directed to improve its retiree recall program by adding the capability to respond to partial mobilizations and to handle time-phased requirements.
- That OSD study further the issue of assignment restrictions for recalled retirees in wartime.

SECTION 8
ISSUES FOR FURTHER ANALYSIS

INTRODUCTION

This section discusses major issues that have been identified during the course of this study together with related areas requiring further analysis. The issues are treated at the summary level with emphasis on OSD policy implications and the identification of problems requiring additional analysis.

Issues are consolidated under several general headings in order to develop coherent topics for future analysis. The following categories of issues are discussed in the order listed:

- Supply of pretrained individual manpower
- Management of pretrained individuals
- Manpower mobilization issues
- The need for marginally qualified manpower

It should be noted that the order in which these topics are presented is not intended to imply a relative order of priority for future analysis. In the discussion that follows, however, the most important issues are highlighted to assist OASD(MRA&L) in making decisions on the relative priorities for analysis.

SUPPLY OF PRETRAINED INDIVIDUAL MANPOWER

Numerous initiatives have been undertaken by the Military Services to increase the supply of pretrained individual manpower for mobilization. However, no consistent, reliable method has been developed that will provide accurate projections of the impact of these initiatives on the future supply of pretrained individuals. By the same token, little work

has been done to determine the relative costs and benefits of the various initiatives. Additional analysis should be undertaken by OSD to develop the cost-benefit relationships of present and future strength initiatives and to develop methodology to assist OSD and the Services in the projection of future strengths of the IRR, ING, and IMA programs.

The supply of pretrained individuals depends not only on management initiatives to improve the present program but also policy variables such as length of military service obligation, enlistment options, etc. Based on the results of this study, it appears that OSD has considered most of the available management initiatives and that these will produce limited strength improvements over time. Major additional improvements in strength will come only with changes in policy such as:

- Longer military service obligation
- Creation of a new Reserve category that permits the call-up of individuals who are beyond their contractual period of service (possibly requiring special authorization by Congress under conditions of dire national emergency)
- A conscious decision to accept the sharply increased costs of shorter periods of active duty in order to strengthen the IRR
- Expansion of direct enlistment and IRR reenlistment bonus programs

Research in these and other areas would be beneficial to OSD in developing longer term policy initiatives that may eventually be required in order to ensure an adequate supply of pretrained individuals.

MANAGEMENT OF PRETRAINED INDIVIDUALS

There are two major problems relating to the management of pretrained individuals that require further analysis. The first is the extent of participation by enlisted members of the IRR. The second is the issue of skill refresher training for the IRR.

Enlisted Participation

During the course of this study, all of the Services reported a lack of participation by enlisted members of the IRR, most of whom are completing contractual periods of service and have no interest in maintaining or upgrading their military skills. Many do not even acknowledge that they have a continuing service obligation.

In the face of this attitude problem, OSD should undertake additional analysis to identify ways to improve the propensity of obligated enlisted personnel to maintain current skills and, possibly, to extend their service in the IRR beyond their contractual periods of service. The IRR reenlistment bonus provides an important, but as yet unmeasured, first step toward encouraging continued service by enlisted personnel. Three additional areas should be considered in the future:

- Outprocessing procedures used by the Services at the time the enlisted person is released from active duty
- Possible additional incentives to encourage participation (both monetary and non-monetary)
- Additional personnel management steps that might be undertaken by the Services

Training of Members of the IRR

The second major area of management analysis is that of training of the IRR. Given that most members of the IRR have been released from active duty for less than 3 years, it is not clear how much training should be provided for them, especially in view of the limited training resources available. Skill decay factors, which could provide some guidance, are largely not available. The Services lack even the most rudimentary training guidance relating to individuals with high-, medium-, and low-technology skills. This represents a major area of analysis that will impact directly on the future effectiveness of the available pretrained manpower at the time of mobilization.

MANPOWER MOBILIZATION ISSUES

Several areas of analysis have been identified for resolution under this heading.

Wartime Manpower Requirements

The development of time-phased, wartime manpower requirements is critical to the success of the pretrained individual manpower program. Without accurate requirements, it is not possible to know whether the supply of pretrained individuals is adequate to meet Service needs. Although the Services have made progress, much work remains to be done to refine the initial estimates that now form the basis for wartime manpower planning. For example, the numbers, skills, and grades of individuals required to report on or immediately after M-Day is not well defined. This affects the required composition of the IRR, Service preassignment policy and other elements of mobilization planning. OSD should continue efforts to evaluate critically the Service estimates, including both methodology and results. This will necessarily be a long-term research effort that must be undertaken with the full cooperation and support of the Services.

Preassignment of the IRR and Retirees

Current OSD guidance requires that the Services identify positions that must be filled by M + 30 days and preassign members of the IRR and retirees to those positions in peacetime. Service response to this guidance varies widely for reasons described in this report. OSD should undertake additional analysis in this important area to identify the precise factors affecting Service preassignment policies. This analysis, which should be coordinated with that described previously in the area of wartime manpower requirements, should address factors such as:

- Degree of mobilization (full/partial)
- Scenario (Europe, Asia, Middle East)
- Type of position
- Urgency of fill
- Responsiveness of the personnel assignment and notification systems

The analysis should lead to the refinement of OSD preassignment policies that are tailored to the unique requirements and missions of each Service.

Priorities for Recall

Mobilization planning appears to have outpaced policy guidance in the area of establishing priorities for recall of the various groups of pretrained individuals. Factors affecting the order in which groups are recalled include:

- The legal authority for recall
- The sequence of events leading up to recall (period of tension, 100,000 call-up, etc.)
- Service perceptions of the relative contribution of each group
- Service mobilization procedures
- Policy guidance on issues such as the recall of retirees short of full mobilization

The objective of such research is to develop OSD policy guidance to assist the Services in their mobilization planning and to establish procedures for OSD use during a full or partial mobilization situation.

Mobilization of Retirees

Section 7 of this report identifies numerous issues that have been raised by the Services relating to the recall of retirees. Although the Services are working to solve these problems, additional OSD guidance and assistance will be required to solve the underlying legal, administrative, and financial problems involved. OSD should continue to pursue these areas and conduct additional research to assist the Services in finding solutions to these problems.

Mobilization Procedures

Each Service employs mobilization procedures unique to its situation. Planning for the mobilization of pretrained individuals reflects many

factors such as the size of the shortfall of pretrained manpower, the time-phasing of wartime requirements, possible scenarios for mobilization, outside constraints (e.g., transportation), Service organization (active/ Reserve), etc. Additional analysis should be undertaken by OSD to identify potential vulnerabilities and to assure that the mobilization of pre-trained individuals can be accomplished in support of Service mobilization plans. Areas of evaluation and research include:

- Vulnerability of the Services to the dependence upon Western Union Mailgrams for notification of individuals on or shortly after M-Day
- Medical examination policies
- Capability to process individuals to active personnel and pay systems
- Ability of installations and bases to absorb large numbers of individuals in a short period of time (equipment, clothing, housing, food, etc.)
- Ability to achieve yield factors as directed by OSD

MARGINALLY QUALIFIED MANPOWER

One of the ways to increase the supply of pretrained individuals is to develop programs that will add to the IRR significant numbers of marginally qualified individuals who have received only minimal training and little hands-on experience. Although these individuals could not perform at the level of a fully qualified Service member, they would be immediately available for recall in the event of mobilization, well ahead of inductees who have no prior military training. The question to be answered is the extent to which Service wartime manpower requirements should be met by such individuals.

The Army, with its large wartime manpower shortfall and ability to utilize relatively inexperienced personnel in some jobs, is pursuing programs to add such individuals to its IRR. The Air Force, on the other hand,

believes that it does not need any such individuals. This is a complex issue which requires considerable analysis on the part of OSD and the Military Services. A necessary first step will be the refinement of wartime manpower requirements to identify more precisely the numbers of minimally trained individuals required in the early days of a war. If the requirements cannot be met by other means, OSD should direct the Services to establish programs such as IRR direct enlistment to meet the early needs for marginally qualified individuals.

APPENDIX A
LIST OF VISITS

During the course of the study, visits were made to the Office of the Secretary of Defense, the Services, and the National Guard Bureau. Interviews were conducted with the staff agencies responsible for each of the pretrained manpower functional areas in these headquarters in the Washington, D.C. area. In addition, the study team visited the appropriate Service Reserve and active military personnel centers outside the Washington area. The following is a list of agencies visited:

Office of the Secretary of Defense

Deputy Assistant Secretary of Defense (MRA&L) (Reserve Affairs)

Deputy Assistant Secretary of Defense (MRA&L) (Military Personnel Policy)

Army

Headquarters, Department of the Army

Office of the Deputy Chief of Staff Operations and Plans
(ODCSOPS)

Office of the Deputy Chief of Staff Personnel (ODCSPER)

Reserve Components Personnel and Administration Center (RCPAC),
St. Louis, MO

Navy

Headquarters, Department of the Navy

Office of the Chief of Naval Operations, Director of Naval
Reserve (OP-09R)

Deputy Chief of Naval Operations (Manpower,
Personnel and Training)/Chief of Naval Personnel
(OP-01)

Naval Military Personnel Command (NMPC), Arlington, VA

Naval Recruiting Command, Arlington, VA

Naval Reserve Personnel Center (NRPC), New Orleans, LA

Marine Corps

Headquarters, Marine Corps

Office of the Deputy Chief of Staff for Manpower

Office of the Deputy Chief of Staff for Reserve Affairs

Marine Corps Reserve Forces Administrative Center (MCRFAC),
Kansas City, MO

G-1, 4th Marine Division, New Orleans, LA

G-1, 4th Marine Aircraft Wing, New Orleans, LA

Air Force

Headquarters, Department of the Air Force

Office of Deputy Chief of Staff, Manpower and Personnel
(AF/MP)

Office of the Chief of Air Force Reserve (AF/RE)

Air Force Manpower and Personnel Center (AFMPC), San Antonio, TX

Air Reserve Personnel Center (ARPC), Denver, CO

APPENDIX B
LIST OF ACRONYMS

The following is a list of acronyms used in this study. Acronyms that are unique to a single Military Service have been annotated to show the Service if it is not otherwise identified in the title.

AC	Active component
AD	Active duty
ADA	Air Defense Artillery (Army)
ADP	Automatic data processing
AFEEES	Armed Forces Entrance and Examining Station
AFM	Air Force Manual
AFMPC	Air Force Manpower and Personnel Center
AFR	Air Force Reserve
AFSC	Air Force Specialty Code
APDS	Advanced Personnel Data System (Air Force)
ARNG	Army National Guard
ARPC	Air Reserve Personnel Center
ASD(MRA&L)	Assistant Secretary of Defense (Manpower, Reserve Affairs and Logistics)
AVF	All-Volunteer Force
CBPO	Consolidated Base Personnel Office (Air Force)
CHAMPUS	Civilian Health and Medical Program of the Uniformed Services
CONUS	Continental United States
CONUSA	Continental United States Army
CRPO	Consolidated Reserve Personnel Office (Air Force)
DA	Department of the Army
DAF	Department of the Air Force
DCS	Deputy Chief of Staff

DCSOPS	Deputy Chief of Staff for Operations and Plans (Army)
DCSPER	Deputy Chief of Staff for Personnel (Army)
DEP	Delayed Entry Program
DOD	Department of Defense
DRC	District Recruiting Command
EMTMS-USAR	Enlisted Mobilization Training and Management System - US Army Reserve
FA	Field Artillery
FMFLANT	Fleet Marine Force Atlantic
FY	Fiscal year
GRC	General Research Corporation
IDT	Inactive duty training
IG	Inspector General
IMA	Individual Mobilization Augmentee
ING	Inactive National Guard
JAU	Joint Augmentation Unit
JUMPS	Joint Uniform Military Pay System
MA	Mobilization Augmentee (Air Force)
MAJCOM	Major Command (Air Force)
MAPTIS	Manpower Personnel and Training Information System (Navy)
MCRFAC	Marine Corps Reserve Forces Administrative Center
MEPCOM	Military Enlistment Processing Command
MILPERCEN	Military Personnel Center (Army)
MOBDES	Mobilization Designee (Army)
MOBPERS	Mobilization Personnel Processing System (Army)
MPP	Mobilization Preassignment Program (Army)
MPPC	Military Personnel Processing Center (Marine Corps)
MRA&L	Manpower, Reserve Affairs and Logistics
MSO	Military service obligation
NAMMOS	Navy Manpower Mobilization System
NCO	Noncommissioned officer
NGR	National Guard Regulation
NMPC	Naval Military Personnel Command
NPS	Non-prior service
NRPC	Naval Reserve Personnel Center

OASD(MRA&L)	Office of the Assistant Secretary of Defense (Manpower, Reserve Affairs and Logistics)
OCAR	Office of the Chief, Army Reserve
ODASDA(RA)	Office of the Deputy Assistant Secretary of Defense (Reserve Affairs)
OJT	On-the-job training
OMAR	Operations and Maintenance, Army Reserve
OPMS-USAR	Officer Personnel Management System, US Army Reserve
OPNAV	Office of the Chief of Naval Operations
PAS	Personnel Accounting System (Air Force)
PDM	Program Decision Memoranda
PEC	Program element code
PIM	Pretrained Individual Manpower
PMNCO	Personnel management noncommissioned officer
PMO	Personnel management officer
POM	Program Objective Memoranda
RC	Reserve component
RCPAC	Reserve Components Personnel and Administration Center (Army)
RPA	Reserve Personnel, Army
RPIRS	Reserve Personnel Information Reporting System (Army)
RUA	Reserve Unit Augmentee
SGLI	Serviceman's Group Life Insurance
SIA	Station of Initial Assignment (Marine Corps)
SMAL	Special Mobilization Augmentation List (Marine Corps)
SOA	Separate Operating Agency (Air Force)
SSAN	Social Security account number
TAADS	The Army Authorization Document System
TAG	The Adjutant General
TAR	Training and Administration of the Reserve (Navy)
USAR	US Army Reserve
USAREC	US Army Recruiting Command
USMCR	US Marine Corps Reserve
UTC	Unit type code (Air Force)
VA	Veterans Administration
VEAP	Veterans Education Assistance Program

VMP	Voluntary Mobilization Preassignment (Army)
WARMAPS	Wartime Manpower Program System
WO	Warrant officer

APPENDIX C
INITIATIVES RELATING TO
PRETRAINED INDIVIDUAL MANPOWER

The following is a list of management initiatives undertaken by OSD and the Military Services to improve the availability and utilization of pretrained individual manpower in the event of mobilization.

- Extending the 6-Year Military service obligation to all members
- Eliminating credit for time spent in the Delayed Entry Program (DEP) in fulfillment of the 6-Year service obligation
- Testing shorter active duty enlistment options
- Screening of enlisted personnel for transfer to the ING/IRR in lieu of discharge
- Establishing an IRR direct enlistment program
- Eliminating transfer of individuals from IRR to Standby Reserve for the sixth (final) year of service obligation
- Improving administrative transfer procedures from active and Selected Reserve units to the IRR
- Establishing an IRR enlisted retention program
- Establishing an IRR officer retention program
- Preassigning IRR members to installations/bases or to specific mobilization positions
- Establishing an Inactive National Guard (ING) program

- Individual Mobilization Augmentee program
- Screening members of the Standby Reserve for transfer to the Ready Reserve
- Legislation to delete Selective Service screening prior to mobilizing members of the Standby Reserve
- Identification of mobilization positions that could be filled by retired military personnel
- Establishing personnel data files on retirees and developing appropriate management programs
- Preassigning retirees in peacetime to appropriate mobilization positions
- Selected Reserve NPS enlistment options

APPENDIX D

AUTHORIZATION FOR INACTIVE DUTY TRAINING

The following Air Force Form 40a, Authorization for Inactive Duty Training, is a 3-part form used by the Air Force to authorize and account for inactive duty training performed by Reservists.

See instructions on reverse of Copy No. 3

AUTHORIZATION FOR INDIVIDUAL INACTIVE DUTY TRAINING

(THIS FORM IS SUBJECT TO THE PRIVACY ACT OF 1974)

AUTHORITY: 10 U.S.C. 1332, Entitlement to Retired Pay; E.O. 9397, 22 Nov 43, Numbering System for Federal Accounts Relating to Individual Persons.

PRINCIPAL PURPOSES: To authorize the computation of payment and years of service in determining the inactive duty training performed by the Reserve member. Use of SSAN is necessary to make positive identification of the individual and record.

ROUTINE USES: To compute years of service and eligibility for retired pay, for evaluation in awarding uniform maintenance allowance, to determine if member meets requirements for retention in Ready Reserve, and for review during promotion consideration. Information may be disclosed to any DOD component including the Department of the Air Force at base, major command, and HQ USAF levels, and upon request, to other Federal, state, and local agencies in the pursuit of their official duties.

DISCLOSURE IS VOLUNTARY. Failure to provide the information, including the SSAN, could result in the improper recording of training and retirement credits, thus adversely affecting retirement actions.

I. AUTHORIZATION			
THIS USAF RESERVIST IS AUTHORIZED TO PARTICIPATE IN INACTIVE DUTY TRAINING AS INDICATED BELOW			
1. LAST NAME, FIRST NAME, MIDDLE INITIAL	2. GRADE	3. SSAN	4. ORGANIZATION OF ASSIGNMENT
5. TRAINING LOCATION		6. TRAINING DATE(S)	

7. ELIGIBILITY FOR TRANSIENT QUARTERS AND SUBSISTENCE	
See AFRs 90-9, Chapter 4 and 146-7 Chapter 5, Section. Reservists on inactive duty training (IDT) are authorized to occupy WOQ/VAQ, to include use of contract quarters, at the location and on the date(s) shown above. On an IDT day, enlisted reservists in pay status are authorized subsistence in kind provided the duration of training is 8 hours or more in any one day. When the duration of training is less than 8 hours - in pay status - or if the duty is in a non-pay status, the reservists must pay the basic food charge.	

FOR THE COMMANDER		
8. TYPED NAME, GRADE & UNIT OF AUTHORIZING OFFICIAL	SIGNATURE	DATE

II. TRAINING DATA					
9. NO. POINTS	10. TRAINING UNIT OR ACTIVITY (Address, City, State and ZIP Code)		11. TYPE OF TRAINING		
9. NO. HOURS			TP	ET	OTHER (Specify)
12. DATE OF TRAINING (Yr, Mo, Day)	14. STATUS	15. PAY STATUS	16. IS THIS THE FIRST TIME AF FORM 40A IS BEING SUBMITTED SINCE CURRENT ASSIGNMENT? IF YES, ATTACH A COPY OF ASSIGNMENT ORDERS ☐ YES ☐ NO		
13. DUTY HOURS	READY	PAY			
	STANDBY	NON-PAY			

17. REMARKS

III. CERTIFICATION	
The penalty for willfully making a false claim is: A maximum fine of \$10,000 or maximum imprisonment of 5 years. (U.S. Code Title 18, Section 287)	

18. RESERVIST (Reservist must sign and date upon completion of training and present to certifying official.)
I certify that I performed the training described in Section II and all statements are true and complete.

TYPED NAME, GRADE, & SSAN OF RESERVIST	SIGNATURE	DATE
--	-----------	------

19. CERTIFYING OFFICIAL (Certifying official must sign and date upon completion of training and forward without delay to member's servicing CRPO or CBPO for payment and point credit.)
I certify this Reservist satisfactorily participated in the training indicated in Section II.

TYPED NAME, GRADE, & TITLE OF SUPERVISING OFFICIAL	SIGNATURE	DATE
--	-----------	------

Version No. and Ext.	D-3
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PREPARATION OF AF FORM 40a
(Prescribing Directive is AFR 35-41, Volume II)

Guidance on award of points and performance of IDT is in Chapters 2 and 4. Complete this form in three copies. Distribution should be made as follows:

- a. Copy 1 - sent to member's CBPO or CRPO by the certifying official not later than 48 hours after the member completes his or her training.
- b. Signed copy 2 - kept at the unit for file in reservist's training folder. (Optional for unit personnel)
- c. Signed copy 3 - given to the reservist.

SECTION I: AUTHORIZATION (Complete prior to reservist's reporting for scheduled training to provide authorization for VOQ/BAQ and subsistence.)

- 1-3 Enter reservist's last name, first name, middle initial; grade; and SSAN.
4. Enter the unit and location to which the member is ASSIGNED.
5. Enter the name of the Air Force Base or Facility where the training is to be performed.
6. Enter the date(s) training is to be performed.
7. The authorization for quarters include the night before through the morning after the scheduled training date(s). If the enlisted member is not authorized subsistence, enter following in item 17, "Subsistence is not authorized."
8. Authorizing official is the commander of the unit of assignment of the member or chief of the activity to which the member is attached for training. The commander may delegate this authority IN WRITING to a specific officer or civilian member of the activity. Duties to be performed where direct military/civil service supervision of training is not practical (primarily in area of maintenance support - see paragraph 2-6c) should be briefly defined in item 17. Any documentation resulting from the performance of such duties should also be defined in item 17. Signature will be legible and in ink and must be that of the authorizing official.

SECTION II: TRAINING DATA

9. Show the number of hours and points (4-6 hrs = 1 point; 8 hrs or more = 2 points). Forms are for 1 day only except those activities authorized to accumulate time or for IDT served on consecutive days. The breakout of points earned will be shown in item 17 by date and hours of duty performed. See paragraph 4-6 for restrictions on IDT duration.
10. The unit address where the training is performed (NOT the member's home address).
11. Examples of authorized training: (Check appropriate block or identify in "Other").
 TP - Training Period (training with unit of assignment or attachment)
 ET - Equivalent Training (to make up a missed regular TP)
 ERI - Equivalent Reserve Instruction (attending a professional or trade convention, authorized in advance)
 CSP - Community Service Projects

See paragraph 2-6 for more complete information.

12. This is the date that the training was actually performed. It may be the same, but no earlier than the date indicated in item 8 (Year, Month, and Day).
13. This item will reflect the hours of duty in which training was performed.
14. Check appropriate box to show current Reserve status.
15. Check the pay box when pay is authorized for the training. Check the non-pay box when pay is not authorized or when maximum training for pay has been reached. Separate forms will be submitted for pay and for non-pay training. The maximum IDT periods for which a member can qualify for pay are:

Category	Each Month	Each Half Fiscal Year	Each Fiscal Year
A	*	24-MAs, 28-Unit mbrs	48
B	8	16	24

*With the exception in Footnote 2 to Table 1 - 1, 4 UTAs for unit members; 8 TPs for Selective Service System MAs; 6 TPs for all other MAs

16. Self-explanatory
17. As required - See items 7, 8 and 9 above.

SECTION III: CERTIFICATION

18. Reservist's name and signature will be that of the reservist whose name is cited in item 1. Signature will be legible and in ink.
19. The certifying official is the military member or civilian who supervised the training and has knowledge that it was performed. He may also sign as the authorizing official (see item 8). Signature of certifying official will be legible and in ink. The certifying official's autovon telephone number is required to verify and expedite audit trail, if necessary. The certifying official will then send original to member's CBPO or CRPO not later than 48 hours after the member completes his or her training.

APPENDIX E
SAMPLE LETTER AND ORDER,
ARMY RETIREE PREASSIGNMENT SYSTEM

The following letter and order provide samples of those dispatched to Army retirees at the time they are preassigned to mobilization positions.



DEPARTMENT OF THE ARMY
OFFICE OF THE ADJUTANT GENERAL
U.S. ARMY RESERVE COMPONENTS PERSONNEL AND ADMINISTRATION CENTER
ST. LOUIS, MO 63132

IN REPLY REFER TO:

AGUZ-RAO

COL 61L9A

30 May 1980

SUBJECT: Preassignment for Mobilization

COL

USA Retired

Englewood, CO 80110

Dear COL :

You are probably aware that the Army is faced with a significant manpower shortfall if full mobilization for a major war were required. Army retirees such as yourself possess the skills and experience necessary to fill Continental United States (CONUS) installation positions, thus providing for a faster buildup of forces and freeing other soldiers for demanding troop unit assignments.

In order for the Army to be in the best possible position in case of full mobilization, most members on the Regular Army Retired list would be needed. On the basis of the attached order, you are automatically ordered to active duty upon full mobilization by direction of the President. Authority for this, and your obligation, are covered by Section 3504 of Title 10, United States Code.

While we expect that most physically qualified Regular Army and Army Reserve Retired personnel less than 60 years old will eventually be needed for emergency recall, we are starting by alerting Regular Army personnel who have been on the retired rolls less than five years.

Your status and availability must be kept current to ensure validity of this order; therefore, the Army will make periodic contact with you for verifying items of information. Many details are still to be worked out and we will furnish you more information as additional implementation plans and details are developed.

Your point of contact in the United States Army Reserve Components Personnel and Administration Center is the Director of Retired Activities. The toll free telephone number is 800-325-2660; local number is (314) 263-0517. If you have access to the Autovon system, the Center's prefix is 693. Please feel free to call and discuss the mobilization program, your preassignment, and your responsibilities in case of full mobilization.

1 Incl
Order


ROBERT S. YOUNG
Brigadier General, USA
Commanding

E-2

AGUZ FL
1 May 80 2235



DEPARTMENT OF THE ARMY
OFFICE OF THE ADJUTANT GENERAL
U.S. ARMY RESERVE COMPONENTS PERSONNEL AND ADMINISTRATION CENTER
ST. LOUIS, MO 63132

IN REPLY REFER TO:
ORDERS 05-75778

30 May 80

AGUZ-RA

COL

Englewood, CO 80110

COL 61L9A
REGULAR ARMY RETIRED

EFFECTIVE UPON DECLARATION OF FULL MOBILIZATION, YOU ARE ORDERED TO ACTIVE DUTY FROM RETIRED STATUS AND ASSIGNED AS SHOWN BELOW. WHEN FULL MOBILIZATION IS ANNOUNCED BY THE NEWS MEDIA, YOU WILL PROCEED FROM YOUR CURRENT LOCATION TO THE REPORTING STATION SHOWN BELOW.

ASSIGNED TO: FORT CARSON, CO 80913

REPORTING STATION: FORT CARSON, CO 80913

REPORTING DATE: WITHIN 10 DAYS OF FULL MOBILIZATION ANNOUNCEMENT.

AUTHORITY: SECTION 3504 OF TITLE 10 UNITED STATES CODE.

PURPOSE: MOBILIZATION

ACTIVE DUTY COMMITMENT: DURATION OF WAR OR EMERGENCY AND SIX MONTHS.

MOVEMENT DESIGNATOR CODE: 1AO

ADDITIONAL INSTRUCTIONS: (A) DO NOT REPORT AT THIS TIME. YOU DO NOT COMPLY WITH THIS ORDER UNTIL THERE IS A NATIONAL EMERGENCY AND FULL MOBILIZATION IS ANNOUNCED BY THE PRESIDENT ON TV, RADIO, OR OTHER NEWS MEDIA. FAILURE TO REPORT WHEN AN EMERGENCY IS ANNOUNCED WILL BE CONSIDERED ABSENCE WITHOUT LEAVE (AWOL) AND WILL SUBJECT YOU TO ACTION UNDER TITLE 10 USC 886.

(B) UPON REACHING YOUR 60TH BIRTHDAY, THIS ORDER IS RESCINDED. DO NOT REPORT IF YOU ARE PAST YOUR 60TH BIRTHDAY.

(C) YOU WILL PROCEED TO YOUR MOBILIZATION STATION BY THE MOST EXPEDITIOUS MEANS AVAILABLE USING YOUR OWN FUNDS FOR WHICH YOU WILL BE REPAID. IF YOU DO NOT HAVE SUFFICIENT FUNDS TO PAY FOR THIS TRAVEL, A COPY OF THIS ORDER AND APPROPRIATE IDENTIFICATION PRESENTED AT ANY MILITARY INSTALLATION WILL ENABLE YOU TO RECEIVE TRANSPORTATION FROM THAT INSTALLATION TO YOUR MOBILIZATION (MOB) STATION STATED ON THIS ORDER. THIS ORDER WILL SERVE AS AUTHORITY TO PROCEED THROUGH CIVIL DEFENSE CHECKPOINTS.

(D) YOU WILL REVERT TO YOUR PREVIOUS STATUS UPON YOUR RELEASE FROM ACTIVE DUTY.

(E) SEE REVERSE FOR SPECIAL INSTRUCTIONS

FORMAT: 120

BY ORDER OF THE SECRETARY OF THE ARMY:

* TAG, RCPAC *
* OFFICIAL *

DISTRIBUTION:
INDIV (1)
AGUZ-SOP (1)
AGUZ-RMP-M (OMPF) (1)

ROBERT S. YOUNG
BRIGADIER GENERAL, USA
COMMANDING

SPECIAL INSTRUCTIONS:

A. TRANSPORTATION OF DEPENDENTS AND HOUSEHOLD GOODS IS NOT AUTHORIZED BEFORE YOU REPORT FOR DUTY DUE TO THE UNCERTAINTY OF YOUR FINAL ASSIGNMENT. HOWEVER, UPON YOUR APPLICATION SUBSEQUENT ORDERS MAY BE ISSUED BY THE GAINING COMMAND IF YOU ARE ENTITLED TO SUCH MOVEMENT.

B. YOU ARE STRONGLY ADVISED TO REPORT TO YOUR MOB STATION PRIOR TO MAKING PLANS IN ORDER TO RECEIVE PROPER COUNSELING CONCERNING YOUR SITUATION. YOU SHOULD ALSO REPORT TO YOUR MOB STATION BEFORE BRINGING EXCESS PERSONAL PROPERTY OR A PRIVATELY OWNED VEHICLE.

C. YOU MUST REPORT TO THE HOUSING REFERRAL OFFICER SERVICING YOUR MOB STATION BEFORE ENTERING INTO ANY RENTAL LEASE OR PURCHASE AGREEMENT FOR OFF-POST HOUSING.

D. UPON REPORTING YOU SHOULD HAVE A COPY OF THIS ORDER, PERSONAL IDENTIFICATION, AND OTHER CORRESPONDENCE YOU BELIEVE WILL BE BENEFICIAL. YOU MUST BRING THE UNIFORMS IN YOUR POSSESSION.

APPENDIX F
AIR FORCE REGULAR RETIREE STATUS FORM

The following form, Air Reserve Personnel Center Form 4, Regular Retired Status and Address Verification, is sent to Air Force regular retirees in the 13th and 37th months following their retirement. The completed forms are used to update the retiree data base.

AD-A097 015

GENERAL RESEARCH CORP MCLEAN VA MANAGEMENT SYSTEMS DIV
PRETRAINED INDIVIDUAL MANPOWER STUDY.(U)

F/6 5/1

FEB 81 J R LOOME, R E COTTLE, J I MCNIFF

MDA903-80-C-0664

UNCLASSIFIED

GRC-1189-01-81-CR

NL

3 OF 3

4-81



END

DATE

FILED

4-81

DTIC

RETIRED REGULAR STATUS AND ADDRESS VERIFICATION (READ INSTRUCTIONS ON REVERSE. RETURN WITHIN 15 DAYS AFTER RECEIPT.)		DATE								
THIS FORM IS SUBJECT TO THE PRIVACY ACT OF 1974										
AUTHORITY: 10 USC 275 and 44 USC 3101.										
PRINCIPAL PURPOSE: Information concerning changes in your marital status and occupation is needed to update your Master Personnel File.										
ROUTINE USES: In the event of a national emergency, information will be used to determine availability for mobilization.										
DISCLOSURE IS VOLUNTARY: However, should you fail to keep the military advised of changes in your status, it could affect the conditions of your retirement.										
1. NAME AND ADDRESS L		PRINT CHANGES OR CORRECTIONS								
DATA ELEMENT	CURRENT COMPUTER INFORMATION	CORRECTIONS								
2. SOCIAL SECURITY NUMBER										
3. RETIRED UNDER TITLE 10 SEC _____										
4. PRIMARY AFSC/SECONDARY AFSC (AT TIME OF RETIREMENT)										
5. DATE OF BIRTH (YEAR/MONTH/DAY)										
6. DATE PLACED IN RETIRED STATUS (YEAR/MONTH/DAY)										
PLEASE COMPLETE THE FOLLOWING:										
7. MARITAL STATUS (Married, widowed, divorced, separated, single)		8. TOTAL DEPENDENTS (Do not include yourself)								
9. PRESENT EMPLOYER										
10. JOB TITLE AND DESCRIPTION OF CIVILIAN DUTIES										
PHYSICAL CONDITIONS										
11. a. ARE YOU COLLECTING VA DISABILITY? (IF YES, ATTACH DOCUMENTATION AND INDICATE PERCENTAGE OF DISABILITY.) b. DO YOU HAVE ANY OTHER PHYSICAL DISABILITY, SERVICE OR NON-SERVICE CONNECTED, THAT WOULD PREVENT YOU FROM PERFORMING ON ACTIVE DUTY? (IF YES, ATTACH DOCUMENTATION.) c. ARE YOU DRAWING WORKMEN'S COMPENSATION OR ARE YOU MEDICALLY RETIRED UNDER ANY OTHER PUBLIC OR PRIVATE PROGRAM? (IF YES, ATTACH MEDICAL DOCUMENTATION.)		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 50%;">NO</th> <th style="width: 50%;">YES</th> </tr> <tr><td style="height: 20px;"></td><td></td></tr> <tr><td style="height: 20px;"></td><td></td></tr> <tr><td style="height: 20px;"></td><td></td></tr> </table>	NO	YES						
NO	YES									
CERTIFICATE <i>I certify to the best of my knowledge and belief I have no medical condition or physical defect that would prevent my performance of active military service at mobilization, except as follows:</i>										
SIGNATURE		DATE								

**GENERAL INFORMATION PERTAINING TO THE
RETIRED REGULAR STATUS AND ADDRESS VERIFICATION FORM**

1. As a retired member of the USAF, you represent a valuable asset to our national defense. In the event of serious national emergency, the President may determine that your expertise is again needed to serve the United States.

a. The President has the authority to recall Retired Regular Air Force members (all retired regular officers and enlisted regular retirees) under Title 10, U.S.C. 8504.

b. Congress has the authority to recall those enlisted personnel with less than 30 years active/retired status, under Title 10, U.S.C. 675.

2. The purpose of this form is to update essential data so that the Air Force will have the capability to contact you in the event of a national emergency when your skills may be required.

3. In the event you have a medical condition that would prevent you from serving on active duty that is not already a matter of record, i.e., non-service connected disability, you should obtain verification of that disability from your private physician, VA hospital, active or reserve unit medical facility. In the event of a temporary disability, it is not required that you make it a matter of record unless it becomes a permanent disability. However, if you have a temporary disability and are recalled, you may be eligible for a delay or deferment according to the rules in effect at that time.

4. Inquiries regarding mobilization status or this form should be addressed to ARPC/DPRS, Denver CO 80280, or phone toll-free 800-525-0102, extension 307.

5. Inquiries from Retired Regulars regarding other aspects of retirement, i.e., benefits, receipt of Newsletter, etc., should be addressed to AFMPC/MPAR, Randolph AFB TX 78148.

REMARKS

DATE
FILMED
-8