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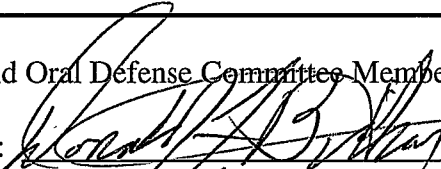
**Improving the Marine Corps Reserve Infantry Battalion:
Manning, Training, Integration, and Retention**

SUBMITTED IN PARTIAL FULFILLMENT
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MASTER OF MILITARY STUDIES

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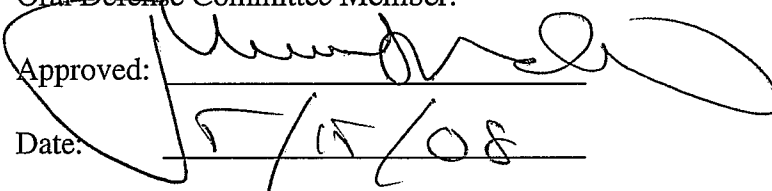
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Executive Summary

Title: Improving the Marine Corps Reserve Infantry Battalion: Manning, Training, Integration, and Retention

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Thesis: Since the terrorist attacks of 11 September 2001 (9/11), the Global War on Terror (GWOT) operational tempo requires a heavier reliance on Marine Corps Reserve Forces to augment and reinforce active duty mission requirements. Recognizing that all Marine Corps reserve infantry battalions have all deployed at least once in support of the GWOT, further improvements in the manning, training, integration, and retention within the reserve infantry battalion will greatly enhance the combat readiness of the unit.

Discussion: Assigned identical missions as their active duty counterparts, reserve infantry battalions' combat readiness must be maintained. Current Department of Defense (DoD) policy aims to decrease a deployment-to-dwell ratio from 1:3 to 1:5 for reserve Marines. By implementing manning, training, integration, and retention changes within the reserve infantry battalion (Bn), drastic readiness improvements are possible in a short period of time.

As the Marine Corps active duty authorized end strength is projected to reach 202,000 by the end of Fiscal Year 2010 (FY 10), the Selected Marine Corps Reserve (SMCR) retains a constant authorized end strength of 39,600. The pressure on active duty accession and retention will create a more difficult recruiting environment for the SMCR in the near future. Therefore, manning the correct number of qualified Marines with the appropriate rank and Primary Military Occupational Specialty (PMOS) within reserve infantry battalions is vitally important.

Adequate training time is a critical vulnerability perpetually faced by reserve Marines. By focusing on leadership training, the reserve infantry battalion's proficiency would improve. With earlier activations, requiring officers in infantry billets to possess an Infantry PMOS, mandating Staff Planning Professional Military Education (PME), and aligning reserve infantry battalions with active duty infantry regiments, further improvements are possible within training.

The active duty Inspector-Instructor (I-I) Staff possesses billets structured to integrate into the reserve unit upon mobilization. A proposal is to restructure the I-I Battalion Table of Organization (T/O) to contain an active duty major as the I-I Battalion Operations Officer in an integrated billet. This would improve integration and training within a reserve infantry battalion.

With current Marine Corps retention incentives and programs, cohesive leadership remains another critical vulnerability in the realm of retention within a reserve infantry battalion. Frequent officer billet changes unnecessarily create a more challenging environment. In addition to the current reserve accession and retention being utilized within the Marine Corps, a proposal is for officers to submit obligatory commitments when joining a reserve infantry battalion.

Conclusion: The implementation of aforementioned improvements will inevitably improve the potential of the reserve infantry battalion to provide a more capable fighting force.

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Preface

This thesis is a result of the author's experiences from January 2002 to December 2005 as a company I-I, an augmentee to a reserve infantry company, and an active duty company commander. As a company I-I, the author assisted in the mobilization of a reserve rifle company (Co G, 2^d Bn, 23d Mar), in support of Operation NOBLE EAGLE in 2002. 2/23 mobilized to Camp Pendleton, California; served as a quick reaction force for homeland defense; and subsequently deployed to Iraq under Regimental Combat Team-1 (RCT-1) in support of Operations IRAQI FREEDOM I (OIF I). In February 2003, the author integrated into 3/23 as an augmentee, participated in a six-week pre-deployment training package, deployed as a rifle platoon commander, and participated in the unit's combat operations near Al Kut, Iraq, in support of OIF I. These experiences between two separate units preparing for combat resulted in an increased respect and admiration for Marine Corps Reserve infantry battalions. After deploying on two subsequent occasions in 2004 and 2005 as a company commander with active duty units in support of OIF, it became apparent that reserve infantry battalions face challenges not experienced by their active duty counterparts.

This paper is intended to propose concepts to improve the conditions under which Marine reserve infantry battalions of the SMCR activate, mobilize, train, and deploy. It will not cover specific issues pertaining to Individual Mobilization Augmentee (IMA) or Individual Ready Reserve (IRR) Marines. Additionally, the paper will not cover healthcare, infrastructure, family readiness, casualty assistance, employer support, or training allowance/table of equipment germane to the activation, mobilization, and deployment of an SMCR Marine.

Ultimately, this thesis is focused on improving the areas of manning, training, integration, and retention within the reserve infantry battalion to provide a more capable fighting force that maximizes its potential against its critical vulnerability of time during its preparations.

Without the patience, guidance, and assistance provided by my wife, Alexis, and my mentor, Dr. D.F. Bittner, Ph.D., this thesis would not have been possible.

INTRODUCTION

First established by the National Defense Act on 29 August 1916,¹ the Marine Corps Reserve has distinguished itself as a vital part of the Total Force Marine Corps (TFMC) that exists today.² By law, the Marine Corps Reserve Component (RC) is divided into the following three elements: Ready Reserve, Standby Reserve, and Retired Reserve.³ At the end of FY 07, the total Marine RC consisted of 231,882 Marines and Sailors.⁴ Of particular concern within this paper is the reserve infantry battalion which serves as a unit within the SMCR under the 4th MarDiv of MFR, ultimately under the Ready Reserve category. (See Appendix B).

MFR

Consisting of 100,784, MFR is a combat organization primarily needed when the active component (AC) is involved in major combat operations.⁵ Its mission is to augment and reinforce active Marine forces in time of war, national emergency, or contingency operations; provide personnel and operational tempo relief for the active forces in peacetime; and provide service to the community. MFR possesses an operational control relationship over its major subordinate commands of 4th MarDiv, 4th Marine Air Wing (4th MAW), and 4th Marine Logistics Group (4th MLG).⁶ There are currently 187 Training Centers (RTCs) for ground and air Marines within MFR.⁷

The Ready Reserve is comprised of two groups of Marines. The first, known as the SMCR, are Marines belonging to drilling reserve units within MFR; it is authorized an end strength of 39,600 Marines.⁸ As of 31 January 2008, the actual end strength was 38,267.⁹ The second group is known as the IRR, which is under the Marine Corps Mobilization Command (MOBCOM). The IRR is composed of Marines who are not affiliated with an SMCR unit and are not actively drilling. IRR Marines in the Ready Reserve consist of Marines who have:

(1) not completed their Mandatory Service Obligation (MSO); (2) completed their MSO and are in the Ready Reserve by voluntary agreement; or (3) have not completed their MSO (are mandatory participants), but are transferred to the IRR. All 62,228 IRR Marines within these categories are deployable, while their names are maintained on a roster for recall in the case of a war or other emergency requiring their participation.¹⁰

4th MarDiv

Under MFR, 4th MarDiv has the mission of providing trained combat and combat support personnel and units to augment and reinforce the AC in time of war, national emergency, and at other times as national security requires; and it must have the capability to reconstitute the Division, if required. 4th MarDiv was activated in August 1943, deactivated in November 1945, and reactivated in February 1966.¹¹ Within the 4th MarDiv there are currently more than 17,500 Marines in the existing three infantry regiments, the 23rd, 24th, and 25th Marines.¹² Each of these regiments possesses three infantry battalions, respectively, the 1st, 2^d, 3^d Bns. Therefore, nine reserve infantry battalions are present within the 4th MarDiv organizational structure.

Reserve infantry battalions share mirror missions to those of the AC. The Marine Corps Reserve's historical focus has been at the battalion level, where higher levels of readiness are achievable with cohesion overcoming limited training time.¹³ With the exception of integrated billets and different ranks for certain billets, the reserve infantry battalions possess a nearly identical T/O to that of an active duty counterpart.

I-I

The United States Marine Corps (USMC) first established its integrated full-time I-I program to support the USMC Reserve in 1936.¹⁴ This program has proven to be a vital investment in the TFMC where active duty personnel form a cadre to support the training and

mobilization of the reserve unit in adherence to the Total Force policy established in 1973.¹⁵

Through the I-I program, AC Marines from a tour in the operational forces are assigned and integrated into reserve units to ensure the benefit of coordinated and current professional training within specific technical billets of the unit's T/O. I-I AC billets requiring a Lieutenant Colonel or senior ranking officers are command screened to ensure the best leaders are assigned to build mutual familiarity and respect across the force.¹⁶ Further integration is achieved at the regimental level where the I-I also serves as the regimental commander.

The SMCR Marine

From the first day an applicant walks into a USMC recruiter's office, the understanding is that every Marine will be a rifleman, regardless of their assigned military occupational specialty (MOS). Equally important in the beginning of this relationship between a recruiter and an applicant, the Total Force Structure is explained to contain the Marine AC and RC forces. There is no issue with understanding that there is one USMC team, especially when the reality is that reservists deploy, are assigned the same missions as the AC forces, and are indistinguishable from active duty Marines who share the same risk and wear the same digital design camouflage patterned uniforms in garrison and while deployed.¹⁷

Within civilian law enforcement personnel, engineers, lawyers, skilled craftsmen, business executives, technicians, and other professions organic to reserve infantry battalions, these units possess an added level of technical competency not inherent within active duty infantry battalions. At the individual level, the reserve infantry Marine is generally more educated than an active duty infantry Marine. Forty percent of Marine reservists are college students, resulting in an older Marine who is typically more mature and learns more quickly.¹⁸ Another inherent advantage within a reserve infantry battalion is the cohesion developed within

the unit. By not being required to conduct a permanent change of station (PCS) every two to three years, the reserve force structure is built to promote within and foster familiarity within a unit. With the exception of command billets, those SMCR Marines who reenlist within a reserve infantry battalion normally have the option to remain in that unit. While the additional skills from civilian professions, higher levels of education, and cohesion are strengths of SMCR Marines in comparison to AC counterparts, the prevailing differences between USMC reserve and active infantry battalions are the disparity of resources and time most notably reflected within the manning, training, integration, and retention of the reserve infantry battalion.

OPERATIONAL TEMPO & EMPLOYMENT

The Global War on Terror (GWOT) Requirements

In February 2005, the Government Accountability Office (GAO) issued a report stating,

The DoD cannot meet its global commitments without sizeable participation from its current 1.2 million National Guard and Reserve members. Since September 11, 2001, more than 363,000 of these reserve component members have been involuntarily called to active duty. On January 19, 2005, more than 192,000 National Guard and Reserve component members remained mobilized... Since the pace of reserve operations is expected to remain high due to the GWOT stretching indefinitely into the future, it is critical that the services maximize their reserve component forces.¹⁹

Under Title 10, United States Code (U.S.C.), members of the RC have been activated to involuntary and voluntary serve since the beginning of the GWOT. In FY 06, USMC implemented force structure changes to establish three additional active duty infantry battalions (1/9, 2/9, and 3/9) to address future operational requirements.²⁰ In January 2007, the Under Secretary of Defense for Personnel and Readiness, Mr. David Chu, explained that the law under a presidential declaration of national emergency previously allowed for 24 consecutive month mobilizations within the RC. To prevent overuse of reserve forces, the DoD standing policy was that 24 cumulative months would be the limit of an individual's activation in support of the

GWOT. Congress and the DoD agreed that the nation required an operational reserve with the intent for it to be used to sustain long-term commitments by the United States. As a result, the DoD's policy changed in January 2007 by reducing the reserve mobilization time window to 12 cumulative months. The policy change implied that reserve forces would not be used once in a generation as a strategic reserve and that remobilization needed to be expected at the individual level.²¹ However, the frequency and duration of reserve mobilizations require close monitoring, as they will affect recruiting and retention within the reserves.

Since the GWOT began, reserve forces have proven integral to DoD operations, with ground forces especially operating at a rapid pace.²² The total number of U.S. reservists activated through July 2007 was approximately 931,000.²³ As a significant and respected commentator and analyst serving as the Senior Advisor of a non-governmental think-tank, Larry Korb testified on behalf of the Center for Defense Information to the Senate Armed Services Committee in April 2007. He noted the United States was threatened with a residual "broken force" with no ready reserve of ground forces prepared to deal with additional global threats. He surmised that providing additional troops could only be accomplished by cutting corners on training and further stressing the force.²⁴ His testimony was reinforced by General Barry McCaffery (USA, Ret) who stated, "All 'fully combat ready' active-duty and reserve combat units are now deployed or deploying to Iraq or Afghanistan. No fully-trained national strategic reserve brigades are prepared to deploy to new combat operations...the increase in deployment-to-dwell ratio means a direct decrease in the readiness of deployed units to carry out the full range of missions required for our global fighting force."²⁵ In May 2007, the Congressional Budget Office (CBO) reported that reservists accounted for 25% of all United States service members deployed to Iraq and Afghanistan in December 2006; at times throughout the GWOT,

this number rose to 33%.²⁶ In January 2008, the CBO reported Army readiness rates had declined to its lowest levels since the end of the Vietnam War, with roughly half of all Army units, active and reserve, at the lowest readiness ratings available for current available units.²⁷ While the Marine Corps is not in as dire straits as the U.S. Army, its operational tempo and employment obstacles will be explained in greater detail.

Marines in Support of the GWOT

In 2003 and 2004, the USMC active duty infantry battalions were at a deployment-to-dwell ratio of one-to-three (e.g. 7 months deployed, 21 months at home station). In 2005, the ratio increased to one-to-one (e.g. 7 months deployed, 7 months at home station). Additionally, the FY 05 National Defense Authorization Act (NDAA) allowed the USMC to increase its AC end strength by 3,000 Marines from 175, 000 to 178,000 in order to assist the increased need of manning infantry battalions to address the increased operation tempo.²⁸ As of March 2006, nearly one in three active duty Marines were forward deployed.²⁹ In February 2007, 33,700 Marines were deployed globally.³⁰ Due to the unparalleled personnel tempo among the services, the Secretary of Defense established a 1:2 deployment-to-dwell ratio for AC forces.³¹

USMC planning guidance for SMCR activation in support of the GWOT has primarily been based on a 12-month involuntary activation with a 7-month deployment followed by no more than a month of dwell time. The 7-month deployment period was the same time-frame required of the active duty battalions. The initial months within the activation period were to ensure the reserve force was adequately manned, equipped, integrated, and trained prior to their deployment. If a second 12-month involuntary reactivation was required and approved, the unit would deploy for a subsequent 7-month tour. This philosophy proved efficient and effective in

maximizing the SMCR 24-month cumulative activation time limit, allowed by the DoD, for a more well-balanced and cohesive unit.³²

SMCR is in its seventh year of augmenting and reinforcing the USMC active component in support of the GWOT³³ and generally constitutes a third of the size of the active force.³⁴ Reserve forces provided 3,000 of the 23,000 Marines & Sailors in Iraq in 2005.³⁵ The total of Marine reservists activated from 9/11 to January 2005 exceeded 70%, with more than 6% being activated more than once.³⁶ By March of 2006, more than 97% of all MFR ground units were activated.³⁷ As of 31 Jan 2007, 41,440 Reserve Marines were mobilized since 9/11.³⁸ 74% of all mobilized reservists have deployed to U.S. Central Command (CENTCOMM) Area of Operations (AO), with SMCR providing 10% of the TFMC commitment in support of OIF.³⁹ However, USMC reserve units were deployed to support the plus-up operations in January 2007.⁴⁰ The percentage of Marine reservists activated in support of the GWOT is the highest of the four military services; this is due to its small size, as the Marine Reserve is half as large as the Army Reserve and less than a third the size of the Army National Guard.⁴¹

After the 9/11 terrorist attacks, the first SMCR infantry battalions were activated in February 2002. For instance, 2/23, 4th MarDiv was the second reserve battalion activated and served within a quick reaction force role of homeland defense. Mobilized to Camp Pendleton, California, this unit trained for 12 months with the possibility of an extension and subsequent deployment in support of OIF I alongside their active duty brethren within I Marine Expeditionary Force (I MEF). The training focused on the squad to battalion levels and maximized resident school attendance. 2/23 then served as the third maneuver battalion of RCT-1 in support of OIF I. Not regulated to the rear area security mission that many reserve

infantry battalions experienced during Operation DESERT STORM (ODS) in 1991, 2/23 assumed maneuver roles equivalent to its active duty counterparts in OIF I.⁴²

Indisputably, Marine reservists have worked more closely with AC forces as one Marine Corps in a single integrated force. They gained considerable combat experience while the pace of integration increased as a result of the GWOT.⁴³ All reserve infantry battalions have been activated and deployed at least once in support of the GWOT.⁴⁴ Currently two reserve battalions are activated each year, with one deploying every seven months.⁴⁵ Without the assistance of the reserve infantry battalions, active duty forces could not have accomplished their assigned missions during the GWOT.⁴⁶ Despite the stop-loss policy being utilized during OIF I, future execution of that policy would be considered a last ditch effort.⁴⁷ “The progression of current mobilization has reinforced the point that the Corps’ Reserve force is a limited resource that must be carefully managed to ensure optimum employment over a protracted conflict.”⁴⁸

Future Operational Tempo

After receiving testimony in May 2007 that stated the DoD foresaw continued reliance on the reserves,⁴⁹ the CBO prepared estimates on costs to the United States in September 2007 for maintaining a long-term presence in Iraq. The two scenarios considered were combat and noncombat. Under the combat scenario, units would rotate in and out of Iraq as they do today, with 55,000 personnel required from Army and USMC reserve forces; initial costs would be \$4-8 billion, and annual costs would be \$25 billion. Within the noncombat scenario, units would be stationed within Iraq for extended periods of time (two to three years), 55,000 personnel would again be required with the initial costs being \$8 million and annual costs at \$10 billion. The main differences between the two scenarios are the time requirement of the individual’s service in the AO and the price tag associated with each scenario. CBO assumed that within the combat

scenario, reserve forces would augment/reinforce active duty battalions as they do today; the employment of reserve forces requires significant increases in incremental costs not experienced within the active duty forces who are already receiving full-time pay and allowances, whether deployed or not. However, it must be noted that the costs of training a reserve battalion is generally one-third the cost of training an active duty battalion. Within the noncombat scenario, CBO assumed that no reserve forces would be utilized.⁵⁰ The determination of combat or noncombat scenario will rely on the country's ability to provide the required security within Iraq.

The USMC efforts in the GWOT, which is now often referred to as the Long War, will remain a Total Force effort.⁵¹ Reserve forces currently operate at a 1:4 deployment-to-dwell ratio with 8,668 reserve Marines mobilized; the USMC will call for 6,000 to be on active duty at any one time to obtain its 1:5 ratio of augmenting and reinforcing active duty counterparts.⁵² Along with assistance from the Department of the Navy and Office of the Secretary of Defense (OSD), the USMC is developing a new activation policy to provide reserve Marines with advance notification of activation.⁵³ This new Force Generation Model will provide reserve Marines predictability into the foreseeable future to best plan recruiting; the activation of leadership and key billets required to prepare for activation; a cohesive, well-coordinated development of a training plan for the deploying unit; and the funding requirements. Additional desired products of the new Force Generation Model are for reserve forces to obtain the 1:5 deployment ratio and manage mobilizations at a unit level to decrease the "cross-leveling" of Marines from other units to obtain staffing goal percentages.⁵⁴

The future will remain challenging within our nation's current conflicts and in subsequent campaigns of the Long War; however, the USMC will continue to fulfill its congressionally mandated mission of being "*the most ready when the Nation is least ready.*"⁵⁵ As the

Commandant of the Marine Corps (CMC) postulated that it historically takes eight to twelve years to counter or quell an insurgency within a fledgling nation in order to secure, stabilize, and set economic conditions to attain the goal of a viable nation.⁵⁶ Marines are deploying more frequently with shortened time at home to train, while the CMC has addressed a concern in regards to a deficiency of experience within the regular force due to operational tempo relief/retention issues related to the GWOT.⁵⁷ He elaborated, "Everything we read about the future indicates that well-trained, well-led human beings with a capacity to absorb information and rapidly react to their environment have a tremendous asymmetric advantage over an adversary. That advantage goes to us."⁵⁸

Essentially, the future expectation is that reserve units will achieve the same level of proficiency that their predecessors have in support of the GWOT, while operating within greater activated time constraints for predeployment training under the OSD 12 cumulative month policy. While the early notification provided by the new Force Generation Model will greatly assist units in their preparations, manning, training, and unit cohesion will remain paramount concerns within the reserve infantry battalions under the current 12-month activation policy.

AREAS TO IMPROVE

Manning

On 19 January 2007, the DoD announced it would seek congressional approval to increase the USMC AC by 27,000. The increase from its previous permanent authorized end strength base of 175,000 would be attained with the largest increase of 9,000 Marines occurring in FY 07, resulting in 184,000 active duty Marines by October 2007. As of 30 November 2007, there were 186,300 active duty Marines and 40,000 in the SMCR. The subsequent accessions

will be 5,000 per year until FY 11, when the end strength of 202,000 is achieved.⁵⁹ The cost of this increase will be approximately \$32 billion.⁶⁰

While the USMC active duty end strength will increase from 189,000 in FY 08 to 202,000 by the beginning of FY 11, there is no estimated increase projected for SMCR Marines.⁶¹ The FY 11 end-strength of 202,000 will be achieved through increased retention and accession within active duty components, creating a reduction in the number of personnel transitioning into the SMCR.⁶² The USMC overall goal in accessing these additional personnel is to relieve the operational tempo currently experienced by active and reserve forces. The current deployment-to-dwell ratios for active and reserve forces are 1:1 and 1:2 respectively. The goal with this manpower increase is to adjust the deployment-to-dwell ratios to 1:2 and 1:5 for active and reserve forces respectively.⁶³

The manner in which the USMC plans to accomplish this is by creating an additional RCT, including 9th Marine Regimental Headquarters, by the Fall of 2008. The addition would increase its number of active duty RCTs from eight to nine; by adding the three RCTs available in the reserves brings the USMC total to twelve.⁶⁴ As the USMC increases its active duty end-strength to 202,000 and with improved security conditions within Iraq, the Force will transition to other battles in the Long War for the inevitable contingencies that arise within the GWOT.⁶⁵

The USMC official stance is that the current authorized SMCR end strength of 39,600 is adequate.⁶⁶ Typically, reserve units experience a 10-20% yearly turnover rate, which would result in a dwell unit with two years back home having 30-40% brand new service members within their unit.⁶⁷ Continuous review is required to ensure the make-up and structure of the SMCR provide the right capabilities across the Force.⁶⁸ Despite the USMC success in recruiting and retention efforts, an example of one reserve infantry battalion slated to deploy in 2006 was

missing as many as 445 Marines due to deployment-to-dwell time requirements. Within these vacancies, 20 company grade officers and 25 Staff Noncommissioned Officers (SNCOs) were not joined to the unit until four months from potential activation. The vacancies were filled as best possible by another reserve infantry battalion within the same reserve regiment.⁶⁹

In FY 06, USMC exceeded its goals for active duty accession and its recruiting goals for the reserve forces. However, the recruiting of junior officers to the reserve forces remains one of the most challenging problems within the SMCR because the primary source of accession in this case is from officers who leave active duty. The continued support of Congress in the form of enlistment bonuses and other recruiting efforts is essential to the USMC continuing to meet these challenges.⁷⁰

The recruiting goals for personnel accession were met for SMCR in FY 04 when 6,165 non-prior service and 2,941 prior service Marines were accessed.⁷¹ In FY 05, 5,927 non-prior service and 2,259 prior service Marines were accessed.⁷² In FY 06, 5,880 non-prior service & 3,165 prior service were accessed.⁷³ While the USMC achieves its SMCR recruiting goals, discrepancies still exist between the numbers recruited and SMCR infantry battalion billets being filled to the appropriate rank and MOS.

Training

During peacetime, SMCR units participate in a minimum of 48 paid drill periods of Inactive Duty Training (IDT) per year; this averages one weekend per month. Additionally, SMCR units participate in a 15-day Annual Training Period (ATP), normally scheduled during the summer to maximize drill attendance participation in coordination with collegiate summer breaks.⁷⁴ The IDT and ATP total 39 training days in a year per unit. While reserve Marines are generally expected to be equipped and trained to the same standards as active Marine forces,

time and cohesive leadership become the critical vulnerabilities in ensuring all annual training standards are achieved.

To ensure standardization in training among deployable forces, the USMC instituted a five-block Predeployment Training Program (PTP) in March 2006. This is a requirement for any unit deploying in support of the GWOT. The last PTP block is accomplished at Twentynine Palms, California, during a training exercise called, "Mojave Viper."⁷⁵ In March 2007, the CMC testified in a congressional hearing where he assured that all Marines going into Al Anbar Province would be properly trained. Even with the accelerated deployment rotations and adjusted training schedules across the force, he confirmed that the schedules covered all five phases of the USMC PTP.⁷⁶ For reserve battalions to complete the required PTP blocks of training prior to participating in Mojave Viper, they must be activated early. Within the current 12-month cumulative policy, more difficult challenges exist than when previously under the 24-month cumulative policy. Another advantage previously experienced under the 24-month cumulative policy was the potential to send Marines to resident PME courses that were not available when not on active duty. PME is essential in its production of respected leaders with mental agility.⁷⁷

While attempting to match an officer to the rank and PMOS required by a vacant billet is difficult within a reserve infantry battalion, the Reserve Infantry Officer Course (RIOC) has been offered as an attempted solution to build infantry officers within the SMCR. The active duty Infantry Officer Course (IOC) that began in 1977 is now a 12-week course; RIOC is a two-week course. IOC is currently offered four times throughout the FY with a 90 student maximum capacity per class; whereas, RIOC is offered only once every two years on even FY numbers with a minimum student enrollment of 26 for FY 08. IOC is an MOS producing school, while

RIOC is not an MOS producing school. Great discrepancies exist between the curricula of the two courses. RIOC does not adequately train an officer from another MOS to become an infantry officer; it familiarizes reserve officers to infantry skills. Thirty-five students attended RIOC in FY 04 and nine attended in FY 06. Historic attendance percentages at RIOC have limited the class to being well smaller than that of a platoon, which is the base unit required to develop an understanding of the billets and responsibilities at the unit size the students are expected to command within their future assignments. IOC and RIOC students are required to serve within numerous billets to gain a greater appreciation of their future expectations for their infantrymen. If there are not enough reserve officer students to create an RIOC platoon, that added benefit is lost for that class. With the minimum number mandated for RIOC in FY 08, these students are expected to train as squads.⁷⁸

If the SMCR has a vacant billet for any infantry officer, every effort should be made to provide that officer an educational opportunity amenable to his personal schedule in which he can succeed. By committing to additional funding and mandating that reserve officer attend a course at IOC versus attending RIOC, a more viable solution is provided to obtain the PMOS of Infantry for a reserve officer fulfilling the billet of a rifle platoon commander within a reserve infantry battalion. On-the-job training (OJT) is a valid means for a reserve officer to earn an infantry MOS; however, the time, means, and proper evaluation required to accomplish this are rarely available. While reserve officer commissioning programs have been initiated to address the company grade shortfalls within the reserve infantry battalions, reserve lieutenants are being required to attend IOC to obtain a PMOS in Infantry and reserve enlisted Marines are required to attend an MOS school. The MOS requirements should not be different for their fellow reserve company grade officers desiring to join a reserve infantry battalion.

To attain the level of proficiency required to command and control a reserve battalion, staff training is required. If a post-mobilization and pre-deployment training period is offered to a reserve battalion, every effort should be made to ensure Staff Planning PME and Command Post Exercises (CPEXs) are maximized. Even during peacetime, reserve infantry battalions need to focus on the perishable skill of staff planning. A concerted effort needs to be made more consistently to consolidate multiple reserve battalion staffs and attend a Marine Corps Planning Process (MCP) Course formally instructed by the Expeditionary Warfare Training Groups (EWTGs), the Expeditionary Warfare School (EWS), or the Command and Staff College (CSC). With the defined curriculum, course schedule, and limited instructor availability at EWS and CSC, the potential time window for a coordinated two-week MCP Course would likely occur in the summer at those institutions. The summer scheduling of a MCP course would also provide the best possibility to accommodate the civilian work and school schedule of reserve officers. Whether coordinated at a regimental or 4th MarDiv level, the funding and time required for a MCP Course would greatly enhance warfighting capabilities at the reserve infantry battalion level. This concept of two-week staff planning PME for reserve battalions during the summers was also utilized in the 1970s and 1980s and should be replicated in a contemporary format. While resident PME course for Career Level School and Intermediate Level Schools are often not readily available to SMCR officers, staff training is required to disprove a perception from Operation DESERT STORM that reserve rifle companies perform very well while reserve infantry battalions are marginal.⁷⁹

While geographic separation and training area availability generally preclude a reserve regiment from conducting an annual training exercise, attaching a reserve battalion to an active RCT would be facilitated by a pre-existing relationship or pre-determined alignment based on an

inclusion and alignment of the deploying reserve battalions being slated on the active duty training schedule. This concept of integrated training between regular and reserve units was predicated in 1962 when General David M. Shoup, the CMC, directed this transformation for the summer training period.⁸⁰ By aligning reserve battalions to active duty regimental headquarters as early as possible, command relationships are established and enhance the combat readiness of the reserve infantry battalion in more rapidly understanding and meeting the regimental commander's expectations. A similar alignment during peacetime would continue to be of great benefit to the reserve infantry battalion. ATPs could be coordinated to occur during regimental, division, or MEF level exercises. CPEXs from the battalion level and higher would allow the companies to focus on proficiency training while the battalion staff could train in staff planning. An argument can be made for the necessity of reserve infantry regimental headquarters to be held responsible to train their subordinate battalion staffs; however, reserve infantry battalions are deploying under the operational control of active duty infantry regiments. The establishment of an early command relationship would best facilitate cohesion and a common understanding of standard operating procedures for a reserve infantry battalion preparing to deploy under a regimental headquarters.

Integration

While not training with SMCR units during peacetime, active duty personnel were integrated into SMCR units to deploy for ODS. MFR developed an integration policy of I-I staffs to mentor reserve units, enhance cohesion, maintain standards and accountability, and serve as the force of continuity throughout the activation, mobilization, and deployment process. The intended by-products of this integration were a vested interest in the training and combat readiness of the unit.⁸¹

An initiative approved at the August 2007 USMC Ground Board⁸² that will be in effect by October 2009 and manned by 2010 is the placement of active duty Infantry Weapons Officers (Warrant Officers) on Battalion I-I Staffs. The Gunners joining the Battalion I-I Staffs will have the experience of a tour as an active duty Battalion Gunner, be Chief Warrant Officer-3 (CWO-3) in rank, and have attended the resident Marine Corps Tactics and Operations Course (MCTOG). Besides the added proficiency in core skills that will result from this placement of Gunners, there will now be a true weapons subject matter expert to participate in staff planning at the battalion level. Currently, there are no mirrored reserve SMCR battalion Gunners; hence the active duty Gunner would integrate into the reserve battalion in the event of unit activation.

However, there are SMCR Gunner billets within the reserve structure, but it is the sole warrant officer billet that is not promoted to within the reserves. An argument can be made for the active duty Gunner to train and mentor an SMCR battalion Gunner. Coordination for the selection and resident PME requirements would need to be addressed for the creation of SMCR battalion Gunners. Besides the longer-lasting residual benefits that would be experienced internally by a reserve battalion possessing a SMCR Gunner, this would provide qualified and eligible Marines to fill a vacant AC battalion Gunner billet if required.⁸³ Regardless of whether active duty or SMCR, every effort should be made to maximize the exposure and supervision of a Gunner at all battalion training.

At the battalion level, the Assistant Battalion Inspector-Instruction (Asst Bn I-I)/Supply Officer is the only officer who integrates from Battalion I-I Staff to the reserve battalion staff. The integration of this sole officer billet does not accomplish the intent within the MFR policy. While the current integration of I-I Battalion Infantry Weapons Officers would greatly enhance the tactical employment of organic weapons systems and fire support procedures within reserve

infantry battalions, the additional key billet recommended at the battalion level is an I-I Battalion Operations Officer; this billet is not currently allocated for within the T/O structure for a Battalion I-I. The addition of an I-I Battalion Operations Officer would enhance employment of the MCPP within the Battalion Staff and maintain planning, training, and coordination continually throughout the activation, mobilization, and deployment process. Considering the compressed timelines that will be imposed on reserve forces for GWOT deployments under the 12-month activation limits, a viable option for Marine Corps Manpower to consider is the cost of nine active duty infantry majors to support this proposal. To best match the capabilities of these individuals to the needs of the reserve infantry battalion, it is recommended that the I-I Battalion Operations Officer have combat experience, be PME complete for his grade prior to being assigned to the I-I Staff, be senior in time-in grade to all Company I-Is, and also assume the role as the Asst Bn I-I.

Retention

As the Nation's Force in Readiness, more than 332,000 Marines have either reenlisted or re-enlisted since 9/11, with more than 184,000 having done so since March 2003. Selfless decisions of service were made by these individuals to make a difference with the realization that this would require going into harm's way.⁸⁴ In March 2007, the CMC testified to the Senate Armed Service Committee that more than 70% of the proposed USMC end strength increase is comprised of first-term Marines. This will significantly challenge future recruiting and retention efforts.⁸⁵ He also stated in January of that year that his biggest concern in the area of retention was losing the combat experience within mid-level leadership at the enlisted and officer levels.⁸⁶

In FY 04, 73.8% of reservists were retained,⁸⁷ while in FY 05 and FY 06, 80% were retained.⁸⁸ These numbers were well above the pre-9/11 historic norm of 70.7%. However,

enlisted reserve retention was lower than what it had been in the past two years.⁸⁹ Active duty retention efforts are a potential cause for this impact. To increase retention within the SMCR reenlistment monetary incentives are being offered to units scheduled for future deployments.⁹⁰

Due to the high retention rate for company grade officers in the active force, reserve officer recruiting and retention continues to be one of the most significant challenges for the SMCR. USMC recruits its reserve officers almost exclusively from those who have served an active duty tour as an officer.⁹¹ Reserve officer retention in FY 04 was 75%, below the historical average of 77%.⁹² In FY 05, the retention rate was 79.5%. A major contributing factor to this dilemma was the high retention of active duty officer at 91.3% in FY 05, which reduced the number of officers transitioning into the SMCR.⁹³ In FY 05, reserve officer retention was 80.1%, well above the historical norm of 75.3%.⁹⁴ In FY 06, there was a 91% aggregate officer retention within the active forces.⁹⁵

Most USMC reserve officers have completed an active duty obligation that they signed to uphold within a contract. Conversely, officer participation within an SMCR unit is on a non-obligatory basis. While a change in personnel or leadership generally create a healthy environment of reform in active duty battalions, a reserve unit that drills for one weekend a month and a two-week ATP has the critical vulnerability of time to train its Marines. Frequent changes in reserve officer leadership create great challenges to maintain cohesive leadership in a battalion that possesses significantly less time to train its unit than its active duty counterparts.

Reserve officers desiring to join the reserves after serving on active duty should be required to sign an obligatory contract for their service within a reserve infantry battalion. With the understanding that there are less challenging avenues to obtain a retirement through officer reserve programs, a monetary incentive also needs to be offered with the requirement of these

obligatory SMCR officer contracts. Such incentives would generate interest in the reserve affiliation, provide a better opportunity to match an officer of the appropriate grade and MOS to a billet, and also provide financial assistance during the period of transition from active duty to reserve service.⁹⁶ In January 2008, the MFR Commander stated, "We will continue to put our bonus money where our needs are...we are very focused on putting the right amount of incentive there to keep good people, good Marines, serving longer."⁹⁷

Despite this focus, officer accession and retention within SMCR is traditionally one of the greatest challenges to Marine recruiting. The Reserve officer commissioning program instituted in October 2006 was created to address a company grade officer shortfall. SMCR Marines attend OCS, TBS, MOS schools, and return to a reserve unit or serve an additional year on active service. FY 07 NDAA established funding to support the selected reserve officer affiliation bonus as a method to retain officers leaving active duty and attract qualified officer applicants in the reserve ranks.⁹⁸

As of February 2008, the Marine Corps is offering an Operating Force (OPFOR) Extension Incentive to Noncommissioned Officers (NCOs) with specific infantry MOSs in the active forces. For an 18-month extension of their end of active service (EAS) date, an eligible applicant will receive a lump sum payment of \$15,000. For a 23-month extension, and eligible applicant will receive a lump sum payment of \$20,000. This Assignment Incentive Pay (AIP) increases the ability of an active duty battalion commander to retain combat experience within his unit by extending individuals for essentially another deployment without requesting that a Marine re-enlist for 48-months, while at the same time providing another option of re-enlistment in 18 months.⁹⁹ While AIP provides a retention tool to active duty forces, it creates a dilemma for recruiting prior service infantry NCOs with combat experience to fill reserve infantry NCO

billets. A similar incentive needs to be considered within the reserve forces to ensure cohesion and combat experience both remain within the reserves and especially within units projected to remobilize.

Despite it being a long-term solution with a seemingly limited lifespan for the MOS mismatch and vacant officer billets within SMCR, the SMCR Officer Affiliation Bonus (OAB) is a step in the correct direction. Company grade officers who possess the PMOS and match the rank to fill a validated vacant billet in an SMCR company or battalion level are being offered an incentive of \$10,000 lump sum payment. The main qualifications required to receive the incentive pay include: the officer must not be selected for the rank of Major at the time of affiliation, the officer must be within 48 months from being released from the active component, and a three-year obligation is incurred from date of the affiliation with the SMCR unit. Legislation for the incentive began in 2005 and was effective in the Marine Corps in 2006. The SMCR OAB was expected to fill 50 vacant billets in FY 07,¹⁰⁰ providing monetary incentives for infantry officers to serve in reserves for three to six years and a \$10K bonus for the commitment. The OAB authorization will be cancelled on 30 September 2008, depending on further funding.¹⁰¹

While the aforementioned incentive addresses a long-term solution to recruit company grade officers to a billet that matches their PMOS and rank within the task organization of an infantry battalion, the short term problem remains that many officer billets within a reserve infantry battalion are currently unfilled, filled by officers who do not have the appropriate PMOS, filled by officers who attended RIOC but still do not have an infantry MOS, filled by officers senior in rank to what the billet requires, or filled by SNCOs. This is not a new problem, as the Marine Reserve was faced with a similar problem of mismatched ranks of personnel that did not

match their billets within the reserves in 1964 and the ensuing year.¹⁰² This problem remains in that the current T/O is not being met to support good order and discipline predicated by the ranks delineated within the chain of command for that unit.

CONCLUSION

The aforementioned concepts require manpower, structure, training, leadership integration, and retention changes; the concepts are worth future exploration and the fiduciary requirements to better prepare reserve infantry battalions for deployment. Combat readiness must be maintained in a more efficient manner as the deployment-to-dwell ratio decreases from 1:3 to 1:5 for reserve Marines. While other options are possible to improve the reserve infantry battalion, these changes provide drastic readiness improvements in a short period of time.

As the Marine Corps active duty authorized end strength is projected to reach 202,000 by the end of FY 10, the SMCR retains a constant authorized end strength of 39,600. The pressure on active duty accession and retention will create a more difficult recruiting environment for the SMCR in the near future. Therefore, manning the correct number of qualified Marines with the appropriate rank and PMOS within reserve infantry battalions is of vital importance.

Adequate training time is a critical vulnerability perpetually faced by reserve Marines. By focusing on leadership training, the reserve infantry battalion's proficiency would improve. With earlier activations, requiring officers in infantry billets to possess an Infantry PMOS, mandating Staff Planning PME, and aligning reserve infantry battalions with active duty infantry regiments, further improvements are possible within training.

The active duty I-I Staff possesses billets structured to integrate into the reserve unit upon mobilization. A proposal is to restructure the I-I Battalion T/O to contain and active duty major

as the I-I Battalion Operations Officer in an integrated billet. This would improve integration and training within a reserve infantry battalion.

With current Marine Corps retention incentives and programs, cohesive leadership remains a critical vulnerability in the realm of retention within a reserve infantry battalion. Frequent changes in officer billets unnecessarily create a more challenging environment. In addition to the current reserve accession and retention being utilized within the Marine Corps, a proposal is for officers to submit obligatory commitments when joining a reserve infantry battalion.

While SMCR infantry battalions continue to recruit and retain quality men to serve in their units and deploy to fight the GWOT, the emphasis needs to remain on continuing to train the individual Marine as the most effective weapon in our arsenal.¹⁰³ “The long term success and sustainability of the Corps’ reserve forces is directly related to its ability to prepare and employ forces in ways that best manage limited assets while meeting the expectations and needs of individual Marines.”¹⁰⁴ To ensure a well-balanced total force capable of addressing global challenges as they arise, the USMC will need to continue to monitor current processes and policies, while implementing changes to the structure and support of reserve forces.¹⁰⁵

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Appendix A: Acronyms/Abbreviations

AC	Active Component
AIP	Assignment Incentive Pay
AO	Area of Operations
Asst Bn I-I	Assistant Battalion I-I
ATP	Annual Training Period
Bn	Battalion
CBO	Congressional Budget Office
CENTCOM	U.S. Central Command
CMC	Commandant of the Marine Corps
CPEX	Command Post Exercise
CWO-3	Chief Warrant Officer-3
DoD	Department of Defense
EAS	End of Active Service
EWS	Expeditionary Warfare School
FY	Fiscal Year
GAO	Government Accountability Office
Gunner	Infantry Weapons Officer (Warrant Officer)
GWOT	Global War on Terrorism
I MEF	First Marine Expeditionary Force
I-I	Inspector-Instructor
IDT	Inactive Duty Training
IMA	Individual Mobilization Augmentee
IOC	Infantry Officer Course
IRR	Individual Ready Reserve
MARADMIN	Marine Administrative
MCPP	Marine Corps Planning Process
MCTOG	Marine Corps Training and Operations Course
MFR	Marine Forces Reserve
MOBCOM	Marine Corps Mobilization Command
MOS	Military Occupational Specialty
MSO	Mandatory Service Obligation
NCO	Noncommissioned Officer
NDAA	National Defense Authorization Act
OAB	Officer Affiliation Bonus
OCS	Officer Candidate School
ODS	Operation DESERT STORM
OIF I	Operation IRAQI FREEDOM I
OSD	Office of the Secretary of Defense
OPFOR	Operating Forces
PCS	Permanent Change of Station
PME	Professional Military Education
PMOS	Primary Military Occupational Specialty
PTP	Predeployment Training Program
RC	Reserve Component

RCT-1	Regimental Combat Team-1
RIOC	Reserve Infantry Officer Course
RTC	Reserve Training Center
SMCR	Selected Marine Corps Reserve
TBS	The Basic School
TFMC	Total Force Marine Corps
T/O	Table of Organization
USA	United States Army
U.S.C.	United States Code
USMC	United States Marine Corps
1/9	First Battalion, Ninth Marine Regiment, Fourth Marine Division
2/9	Second Battalion, Ninth Marine Regiment, Fourth Marine Division
3/9	Third Battalion, Ninth Marine Regiment, Fourth Marine Division
2/23	Second Battalion, Twenty-Third Marine Regiment, Fourth Marine Division
4 th MarDiv	Fourth Marine Division
4 th MAW	Fourth Marine Air Wing
4 th MLG	Fourth Marine Logistics Group
9/11	11 September 2001

Marine Corps Reserve End FY07 Personnel Strength Report

Marine Corps Reserve Component

Total 231,882

Ready Reserve

Officer 6,488

Enlisted 94,296

Total 100,784

Standby Reserve

Active Status List

Inactive Status List

Total 1,371

Retired Reserve

Fleet Marine Corps
Reserve

Retired Reserve
Awaiting Pay

Retired Reserve in
Receipt of Pay

Retired Reserve
Without Pay

Total 129,727

Selected Reserve

Officer 3,325

Enlisted 35,231

Total 38,556

Individual Ready Reserve

Officer 3,163

Enlisted 59,065

Total 62,228

Units

Officer 1,526

Enlisted 29,521

Total 31,047

Individual Mobilization Augmentees

Officer 1,429

Enlisted 1,150

Total 2,579

Active Reserves

Officer 370

Enlisted 1,863

Total 2,233

Initial Active Duty Training

Officer 0

Enlisted 2,697

Total 2,697

APPENDIX B

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The sources most helpful in the research of this contemporary topic were the personal e-mails received from Major Juarez (Director of IOC) and Chief Warrant Officer-5 Dunfee (Infantry Weapons Officer Occupational Field Sponsor). Their knowledge of the historical and contemporary facts combined with the level of detail they provided in a vision for the future expectations, within their respective billets, confirmed and reinforced points within this thesis. Additionally, the statements of Marine Corps flag officers to the Senate and House Armed Services Committees provided historical and current statistical data helpful in understanding the retention and accession difficulties within recruiting for active duty and reserve forces. In particular, Lieutenant General Coleman's statement as the Deputy Commandant for Manpower and Reserve Affairs on "Recruiting, Retention, & Policy Overview" provided the most pertinent information applicable to this paper. The MARADMINs provided current information for monetary incentive programs available to reserve Marines, while Manpower and Reserve Affairs at Headquarters Marine Corps assisted in explaining the programs in greater detail and providing statistical information summarizing reserve manpower ending in FY 07.

The sources that had less relevance during this research included the majority of the secondary sources, as they represented commentaries on many of the primary sources. Nonetheless, with exception of the book written by Ernest H. Giusti, all secondary sources were referenced within this paper. Within the primary sources, the only sources that were not referenced in the paper included, General Hagee's statement on 17 February 2005 and MARADMINs 253/06 and 078/08.

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