



The United States of America Office of the Secretary of Defense



Annual Report

Reserve Forces Policy Board



The United States of America Office of the Secretary of Defense

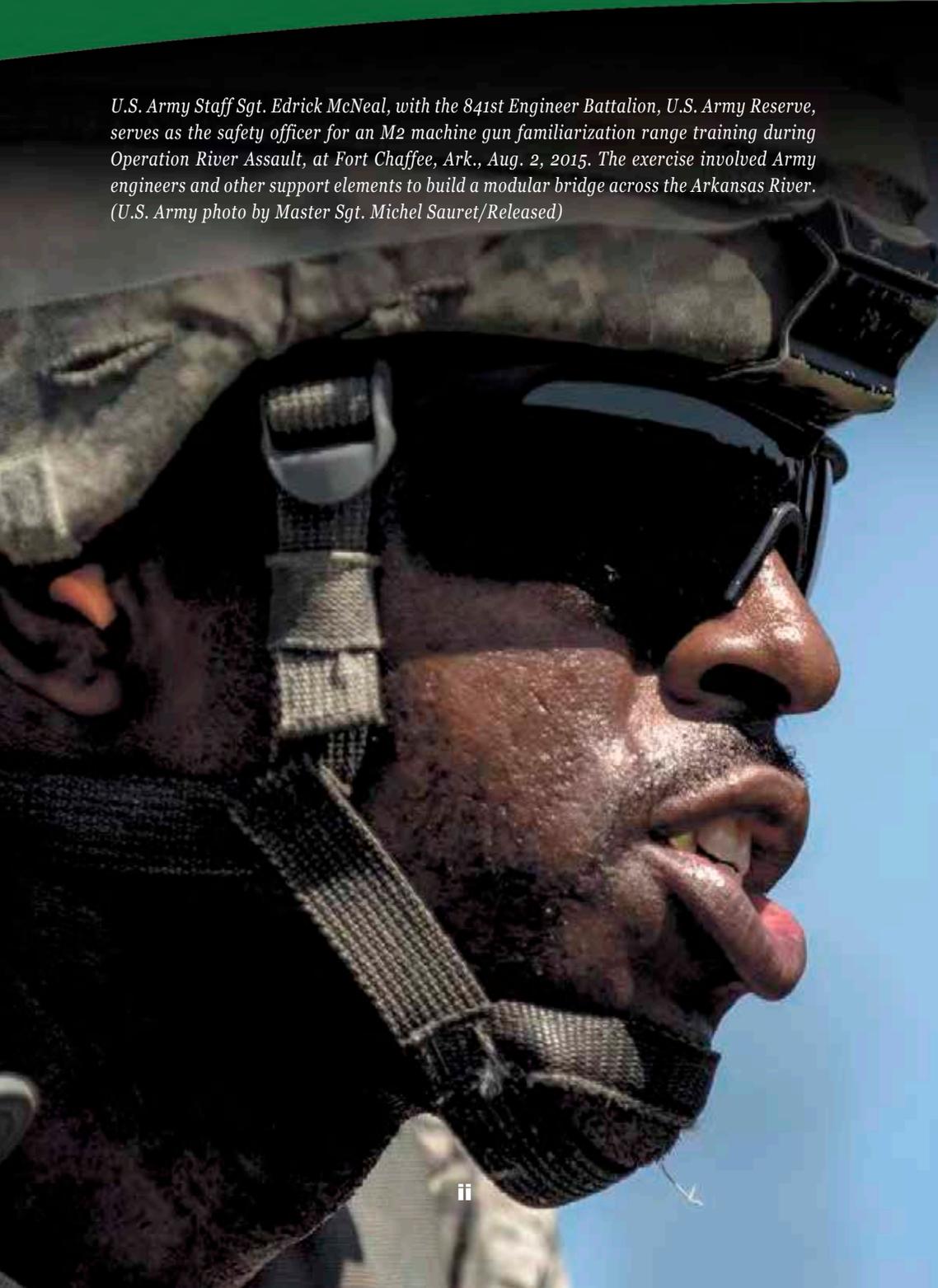
2015 Annual Report

Reserve Forces Policy Board

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U.S. Army Staff Sgt. Edrick McNeal, with the 841st Engineer Battalion, U.S. Army Reserve, serves as the safety officer for an M2 machine gun familiarization range training during Operation River Assault, at Fort Chaffee, Ark., Aug. 2, 2015. The exercise involved Army engineers and other support elements to build a modular bridge across the Arkansas River. (U.S. Army photo by Master Sgt. Michel Sauret/Released)



14 June 1951

The first Chairman of the Reserve Forces Policy Board, Mr. Charles H. Buford (center) is sworn in by Mr. Ralph N. Stohl, Director of Administration, Office of the Secretary of Defense (left), during a special ceremony in the office of the Secretary of Defense George C. Marshall (right) at the Pentagon





**OFFICE OF THE SECRETARY OF DEFENSE
RESERVE FORCES POLICY BOARD**

5113 Leesburg Pike, Suite 601
FALLS CHURCH, VA 22041

CHAIRMAN

MEMORANDUM FOR THE SECRETARY OF DEFENSE

SUBJECT: 2015 Annual Report of the Reserve Forces Policy Board

The Reserve Forces Policy Board met on September 2, 2015 to determine which reserve component matters the Board considered appropriate for inclusion in a separate report to the President and Congress that fulfills the requirement of Section 113(c)(2) of Title 10, United States Code. The attached Annual Report covering Fiscal Year 2015 is respectfully submitted for that purpose.

This Annual Report summarizes two Board reports, covering three recommendations made to you over the course of Fiscal Year 2015. Thus, we have complied with our statutory mandate to serve as an independent source of advice to you and the Department.

In fulfilling our mission in Fiscal Year 2015, the RFPB operated in an open and collaborative fashion with officials throughout the Department of Defense and elsewhere, assuring that diverse perspectives were considered in the process of formulating and approving the Board's recommendations to you.

ARNOLD L. PUNARO
Chairman

"... the Secretary shall transmit to the President and Congress a separate report from the Reserve Forces Policy Board on any reserve component matter that the Reserve Forces Policy Board considers appropriate to include in the report."

10 USC § 113(c) (2)

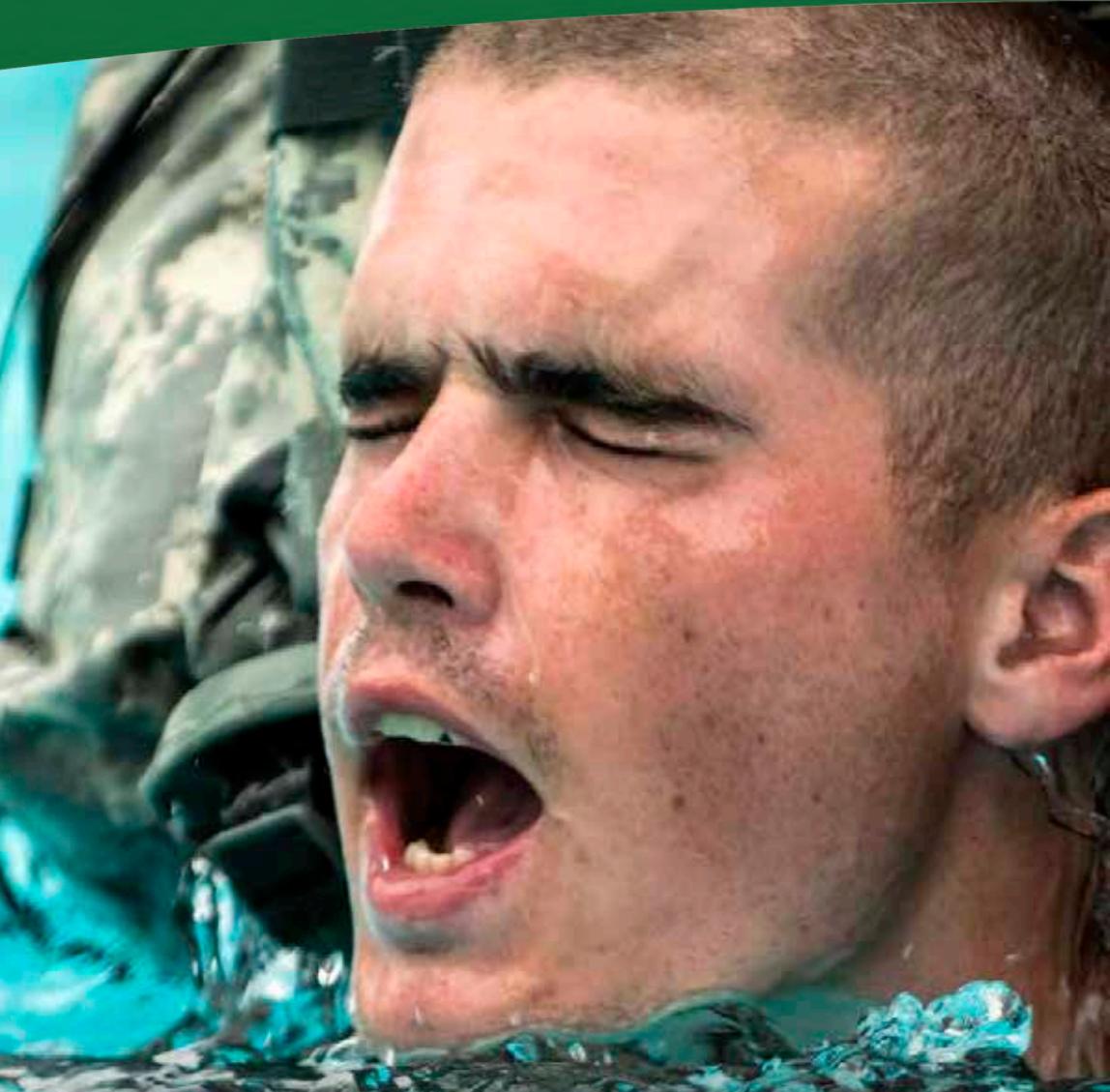


Secretary of Defense, The Honorable Ashton B. Carter (Center), RFPB Chairman, MajGen (Ret) Arnold Punaro (Right), and Acting Undersecretary of Defense for Personnel and Readiness, The Honorable Brad R. Carson (Left) provides guidance to the Reserve Forces Policy Board during closed session, 9 June 2015. (Photo: DoD Photo, SFC Clydell Kinchen)

For additional information:

<http://rfpb.defense.gov>

The estimated cost of this report or study for the Department of Defense is approximately \$8,640 in Fiscal Years 2015–2016. This includes \$1,920 in expenses and \$6,720 in DoD labor. Generated on 25Nov2015. RefID: A-995CCC3



A U.S. Army combat engineer, assigned to the 374th Engineer Company, based out of Concord, Calif., comes up for air while swimming 25 meters with a ruck sack and a dummy weapon during Combat Water Survival Training at Fort Hunter Liggett, Calif., July 17, 2015. The Combat Water Survival Training was part of the Sapper Leader Course Prerequisite Training, a two-week field exercise conducted at Camp San Luis Obispo Military Installation, Calif. The Soldiers were graded on various events to determine which Soldiers will earn the opportunity to attend the Sapper Leader Course at Fort Leonard Wood, Mo. (U.S. Army photo by Master Sgt. Michel Sauret/Released)

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A U.S. Army flight engineer, with the California National Guard looks out the back of a CH-47 Chinook helicopter during a rehearsal flyover for the 374th Engineer Company at Camp San Luis Obispo Military Installation, Calif., July 15, 2015. (U.S. Army photo by Master Sgt. Michel Sauret/Released)



EXECUTIVE SUMMARY

The Reserve Forces Policy Board provides the Secretary of Defense with independent advice and recommendations designed to strengthen the Reserve Components. During fiscal year 2015, the Board held four quarterly meetings and delivered two reports to the Secretary of Defense, containing three total recommendations. These are included in the body of this Annual Report. An additional product on the Department of Defense Force of the Future initiative, developed by the Chairman and staff, contains relevant input based on the Reserve Component military system with formal recommendations to follow in a separate report. Finally, the Board commissioned a study by the Institute for Defense Analysis to conduct research on Reserve Component operational effectiveness, with Operation Iraqi Freedom analysis scheduled completion during FY 2016.

The Board delivered the first report October 1, 2014. This report, entitled “Report of the Reserve Forces Policy Board on Support to ULB RA-006/OLC-104 for inclusion into Fiscal Year



Ash Shuaiba, Kuwait – A Coast Guard 25-foot Transportable Port Security Boat from Port Security Unit (PSU) 308 maintains force protection watch over the Seaport of Embarkation/Debarcation (SPOE/D) during the early morning hours. PSU 308 is an all-Reserve unit based in Kiln, MS. (USCG photo by Senior Chief Boatswain's Mate Roger Holland)



Rifleman with Company A, 1st Battalion, 23rd Marine Regiment, 4th Marine Division, Marine Forces Reserve providing security during mechanized operations during Integrated Training Exercise (ITX) 4-15 at Twentynine Palms, Calif, June 15, 2015. (USMC photo by Cpl Ian Ferro)

2016 National Defense Authorization Act”, identifies inequities within the Reserve Component (RC) regarding members’ ability to accrue active duty time towards Post 9/11 GI Bill benefits. Post 9/11 GI Bill benefits are earned in tiers, with 36 cumulative months of active duty or at least 30 continuous days on active duty and discharged due to service connected disability required to rate the highest tier of 100%.

Currently, when an RC service member is injured or wounded in a combat theater, they are transitioned on orders to a medical hold status under 10 USC 12301(h) for a potentially long recovery and rehabilitation. This stops the accrual of active duty time that would count toward the Post 9/11 GI bill benefits. If the member does not discharge and instead returns to service, none of the time spent in recovery is considered qualifying time, penalizing the RC member with a lesser benefit than those who served the entire time without an injury.

Because of this disparity, the Board recommended that the Secretary of Defense approve the original Unified Legislative

Budget (ULB) RA-006, adding Title 10 12301(h) as a period of “active duty” to Title 38, Section 3301 (1)(B) for the purpose of accruing Post-9/11 GI Bill benefits under the “Post-9-11 Veterans Assistance Act of 2008”.

The second Board report, delivered September 30, 2015 recognizes enduring issues with the Individual Ready Reserve (IRR). The IRR is difficult to manage, access is a cumbersome and lengthy process and there is no central strategy to best utilize the IRR’s skilled manpower. The RFPB believes innovation in IRR management could be an integral contributor to the Secretary of Defense’s current initiative to build the Force of the Future.

The RFPB recommended the Department establish a Joint Working Group comprised of subject matter experts from each of the Services, the Reserve Components and OSD to



U.S. Army COL. Vernon Simpson, the commander of Multinational Battle Group-East, thanks Polish Army soldiers for participatin in an Aug. 18, 2015 joint Administrative Boundary Patrol between Serbian and MNBG-E soldiers in northern Kosovo. COL. Simpson is the commander of the North Carolina National Guard’s 30th Armored Brigade Combat Team, recipients of the RFPB Fellows Society 2015 Citizen Patriot Award. (U.S. Army photo by Capt. Dave Chace)



Australian Army soldiers from 2 Commando Regiment fastrope out of an HH-60H Rescuehawk from the U.S. Navy's Helicopter Sea Combat Squadron 85, flown by Navy Reserve crews during exercise Talisman Sabre, in the Northern Territory, Australia, July 3, 2015. (USAF photo by SrA Stephen G. Eigel)

gather best practices, seek quick wins and explore alternative management structures and methods to improve efficiency and enable more effective use of the IRR in support of the Total Force. OSD should then develop policies and legislative proposals aimed at implementing these changes and improving the effectiveness of the IRR.

In addition, the United States Marine Corps has commissioned the Center for Naval Analysis (CNA) to conduct a study titled "Managing the Individual Ready Reserve," due for completion in February 2016. The RFPB recommends the Department monitor the progress and review the results of this study for applicable policy and legislative changes that could reform the IRR across all services.

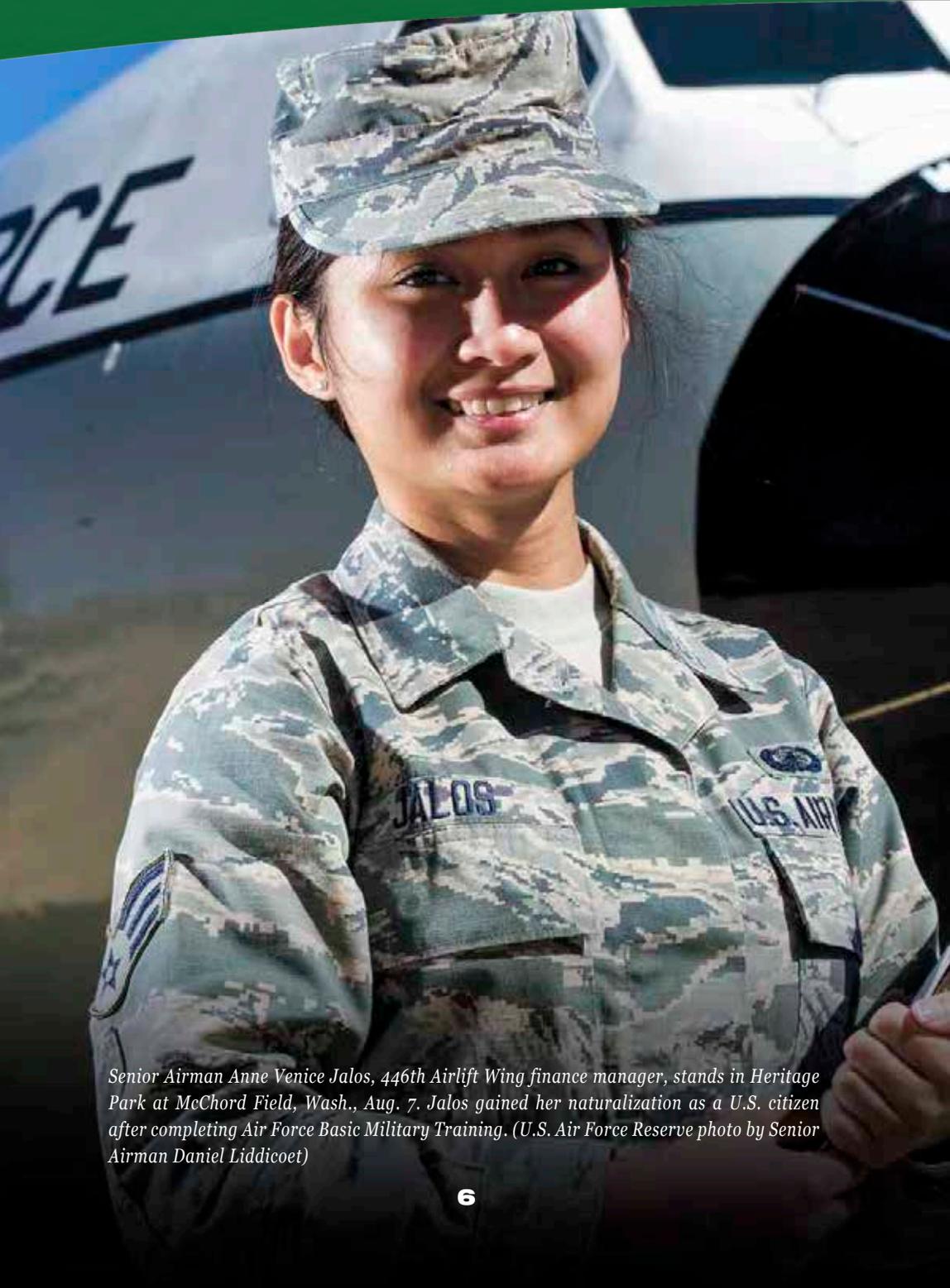
INTRODUCTION

The Reserve Forces Policy Board (RFPB) is a federal advisory committee established by statute within the Office of the Secretary of Defense. Its purpose is to "serve as an independent adviser to the Secretary of Defense to provide advice and recommendations to the Secretary on strategies, policies, and practices designed to improve and enhance the capabilities, efficiency, and effectiveness of the reserve components." By law, the Secretary of Defense transmits annually to the President and Congress a separate annual report from the RFPB on reserve component matters the Board considers appropriate to include in the report.

During fiscal year 2015, the RFPB successfully fulfilled its statutory role by delivering to the Secretary of Defense two reports containing three recommendations. As required under Title 10 U.S. Code, Section 113(c)(2), this Annual Report contains those reserve component matters the Reserve Forces Policy Board considers appropriate to include in the report for transmission from the Secretary of Defense to the President and Congress. The text of statutes governing Board operations is included as an appendix to this report.



Chairman Punaro talks with RAND Arroyo Center's Josh Klimas over his recently authored report on "Assessing the Army's Active-Reserve Component Force Mix" at the 9 December 2014 RFPB meeting. (Photo: US Army Photo, Mr. Jerome Howard)



Senior Airman Anne Venice Jalos, 446th Airlift Wing finance manager, stands in Heritage Park at McChord Field, Wash., Aug. 7. Jalos gained her naturalization as a U.S. citizen after completing Air Force Basic Military Training. (U.S. Air Force Reserve photo by Senior Airman Daniel Liddicoet)

ORGANIZATIONAL OVERVIEW

The 20-member Reserve Forces Policy Board is led by a civilian chair and includes a non-voting Military Executive and Senior Enlisted representative, a member (serving or retired) of each of the seven reserve components of the armed forces, and ten U.S. citizens with significant knowledge and experience in national security and reserve component matters. Board members represent a wide range of military, industry, business, professional, and civic experience, which combined provide the Secretary of Defense with a unique and independent body of senior officials to provide advice and recommendations on Reserve Component strategies, policies, and practices.

The Board is supported by a full-time staff consisting of a Colonel or Navy Captain from each of the six DoD reserve components, plus a part-time detailed member of the Coast Guard Reserve. These officers also serve as liaisons between their respective components and the Board. The law requires them “to perform their staff and liaison duties under the supervision of the military executive officer of the board in an independent manner reflecting the independent nature of the board.”

The RFPB is one of the oldest advisory committees in the Department of Defense. In September 1949, in response to inadequate recruitment and strength in the reserve program of the armed services, Secretary of Defense Louis A. Johnson established a Civilian Components Policy Board. On June 13, 1951, Secretary of Defense George C. Marshall re-designated the Civilian Components Policy Board as the Reserve Forces Policy Board. In July 1952, Congress passed the Armed Forces Act of 1952. This act established the Reserve Forces Policy Board as “the principal policy advisor to the Secretary of Defense on matters relating to the Reserve Components.” Passage of the Reserve Officer Personnel Act of 1954 and the Reserve Bill of Rights and Revitalization Act of 1967 underscored the Board’s role and expanded its authority, responsibility, and membership. In 1995, a member of the staff of the Joint Chiefs of Staff was added to the Board’s membership.

In 2008, the Commission on the National Guard and Reserves recommended that the RFPB's governing statute (10 USC 10301) be amended, because the Board was not structured to obtain and provide independent advice directly to the Secretary of Defense on a wide range of National Guard and Reserve matters due to the nature of its membership and its subordination to other offices within DoD. Other than the Chairman, the Board's membership included only DoD officials who made recommendations through the Assistant Secretary of Defense for Reserve Affairs.

In the National Defense Authorization Act of 2011, after receiving input from the Department of Defense and a wide range of outside experts, Congress significantly changed the operating framework and membership of the RFPB to its present structure. The revised law became effective July 1, 2011. On September 12, 2011, Arnold L. Punaro succeeded William S. Greenberg as Chairman of the RFPB. Fiscal year 2015 was the fourth full year of Board operations under the revised statute.



Mr. David LaCroix, Standards of Conduct Office, DoD Office of General Counsel conducts annual ethics training required by the Board under 5 CFR Section 2638.705 at the 9 December 2015 RFPB meeting. (Photo: US Army Photo, Mr. Jerome Howard)

SUMMARY OF MEETINGS

Quarterly Meeting (December 9, 2014)

The quarterly meeting was held on December 9, 2014 in the Secretary of Defense Conference Room. Presentations were made by: Mr. David LaCroix, Standards of Conduct Office, DoD Office of General Counsel; MG Marcia Anderson, Subcommittee Chair for Supporting and Sustaining Reserve Component Personnel; VADM (Ret) John Cotton, Subcommittee Chair on Ensuring a Ready, Capable, Available and Sustainable Operational Reserve; and At-Large Board member, Ms. Dawn Halfaker in open session. Closed session presentations included Mr. Timothy M. Bonds, Vice President, RAND Army Research Division and Director, RAND authors Mr. Josh Klimas and Mr. Al Robbert; NDAA overview by Chairman MajGen (Ret) Arnold Punaro and General John F. Kelly, USMC, Commander, U. S. Southern Command.

MajGen (Ret) Arnold Punaro, Chairman administered the oath of office to incoming Military Executive to the Board, BG Walter T. Lord and new USCG board member RADM Kurt B. Hinrichs.

Mr. Lacroix presented the Board's annual Ethics for Federal Advisory Committee Members training, focusing on Special Government Employees and ethics rules applicable to members and the Designated Federal Officer. Chairman Punaro thanked Mr. LaCroix for his sustained support and urged members to contact the DoD Standards of Conduct office for any questions.

MG Marcia Anderson updated members on the July 2013 Reserve Forces Policy Board (RFPB) recommendation and current USD (P&R) proposal to reduce the total number of reserve duty statuses and noted the P&R has completed a draft proposal required by Congress no later than 1 January 2015. This proposal is expected to mirror the 11th Quadrennial Review of Military Compensation.

MG Anderson provided an update to the RFPB's recommendation that SECDEF approve a pending Unified Legislation and Budgeting proposal, which would add Title 10 12301(h) (i.e. medical hold)

as a period of “active duty” under Title 38, Section 3301 (l)(B) for the purpose of accruing Post-9/11 GI Bill benefits. The proposal was approved for submission to OMB on October 29, 2014, subject to confirmation by USD (P&R) that the purpose of the proposal is parity between active duty and reserve personnel and does not require DoD funding.

MG Anderson provided an update regarding recent subcommittee activities and current focus. On November 13th, the subcommittee met with Mr. Jason Forrester, Deputy Assistant Secretary of Defense (DASD) for Reserve Affairs (Manpower and Personnel), regarding current M&P initiatives. Topics discussed included: issues in attraction and transfer of talent from AC to RC, health of the RC, disability overpayment issues, and several additional efforts to increase language, cultural and other skills in the RC and the need for cyber professionals in the DOD Cyber Enterprise.

MG Anderson explained that the subcommittee is investigating the past use, management and future plans for the Individual Ready Reserve (IRR) across the different services. There is a need to analyze and develop future plans for the IRR and maximize its use to mitigate budget impacts on the total force as the United States moves forward in an era with significantly constrained resources.

Discussion turned to a claim that 25% of reservists do not have health insurance and that increased use of TRICARE Select can assist in reducing these numbers. VADM Cotton mentioned that dental plans are also underutilized and there are numerous “ghost” reservists who may be contributing to inaccurate numbers of the non-insured. It was also mentioned that RC members lose TRICARE Select when they are forced out of the reserves due to force reductions, etc. Regarding the IRR, MG Anderson mentioned recent changes to policy which included the cancellation of annual IRR conferences. She also mentioned the recent increase in the Army’s IRR personnel from 70,000 to nearly 100,000 and its lack of readiness. She concluded that it is time to “re-imagine” the IRR. Chairman Punaro agreed that the IRR had been neglected and plans for future use and improved effectiveness should be developed.

VADM (Ret) John Cotton, Subcommittee Chair, provided an update from the Subcommittee on Ensuring a Ready, Capable, Available and Sustainable Operational Reserve. VADM Cotton reminded members that at the Board’s September 2014 meeting, BG Fountain, on behalf of the Director, Army National Guard, questioned the continued use of assumptions like those found in the December 2007 “Utilization of the Total Force” policy memo and the use of those assumptions, by the Services, in determining or influencing AC/RC force mix.

VADM Cotton also noted that in 2013, the Chief of the National Guard Bureau, in letters to the Chiefs of Staff of the Army and Air Force, offered that “two-year notice, nine-months boots on the ground, 30-day individual notice, not more than 50 percent of a state’s force structure deployed at once and other policies were helpful over the last decade, but they should not govern force planning assumptions for future contingencies.” VADM Cotton proposed that the Board examine what assumptions the Services use in making force size and AC/RC mix decisions. Several members expressed doubt that the Department’s 1:5 Mobilization to Dwell rotational use ratio is appropriate in planning for the future use of the National Guard and Reserve. A number of members expressed support for a review. The Chairman concurred and tasked the subcommittee with developing the framework for such an examination.

Maj Gen Edwards, Subcommittee Chair, provided an update from the Subcommittee on Enhancing DoD’s role in the Homeland. Maj Gen Edwards noted continued work on funding for National Special Security Events and that the subcommittee would be shadowing Ohio as they prepare an upcoming nominating convention. The Chairman thanked the Subcommittees for their work.

Ms. Dawn Halfaker, Operational Reserve Subcommittee Member, provided a read-out from panels conducted with Reserve Component Junior Officers. Ms. Halfaker reminded members that her presentation built on two prior RFPB Operational Reserve Subcommittee briefings (March and June 2014) that examined data from the Defense Manpower Data Center and

its Status of Forces Survey of the Reserve Components over the period 2001 to 2013. She noted that to further refine our understanding of observations made in the previous efforts, we conducted small group discussions with three panels of company grade officers and one panel of field grade officers from across the Reserve Components.

Ms. Halfaker offered that discussions with our panelists validated general observations made in prior efforts, specifically that: all of the panelist expressed satisfaction with the Military Way of Life and most perceived their families and employers support their participation in the Reserve Components; all of the panelist expressed an intent to continue serving; and virtually all of the panelists support recurring use of the Reserve Components and are willing to serve in support of a wide variety of missions at home and abroad. She also reported that the panelists were: acutely aware of the pressure on the Department's budget; hugely frustrated with access to DoD automation systems and networks; very concerned with increases in administrative and general military training requirements; and concerned with the readiness and retention impacts of these and other challenges.

She offered the following topics/issues for further Board examination: The funding profile for Reserve Component training, Policies governing General Military Training/Ancillary Training, Policies governing Reserve Component access to DoD networks, Mental Health treatment options for Reservists and Trends in employment/Uniformed Services Employment and Reemployment Rights Act (USERRA) issues.

The Chairman thanked Ms. Halfaker for her valuable work and asked her to conduct similar periodic reviews with Reserve Component junior officers in the future. The Chairman further directed that the Board look into general military training requirements and policies governing Reserve Component access to DoD networks. He then started the closed session.

Vice President, RAND Army Research Division and Director, RAND Arroyo's Mr. Timothy M. Bonds with Mr. Josh Klimas and Mr. Al Robbert discussed two of their recent reports. Mr. Bonds introduced himself and conducted a preliminary

introduction of RAND reports - "Assessing the Army's Active-Reserve Component Force Mix" and "Air Force Manpower Requirements and Component Mix." Mr. Bonds also discussed how they planned to address Active Component/Reserve Component cost, force mix, and use to address national security challenges in a fiscally constrained environment. He concluded by introducing Mr. Josh Klimas and Mr. Al Robbert, the reports' lead authors.

Mr. Klimas, "Assessing the Army's Active-Reserve Component Force Mix," stated that budget reductions and new defense strategic guidance are causing the Army to reassess how it balances the mix of forces between its active and reserve components (AC/RC). Mr. Klimas noted the study was sponsored by Headquarters, Department of the Army, (HQDA) G-8 and that this report describes analyses from an ongoing stream of RAND research on the Army's AC/RC force mix. He also noted his study used HQDA cost data, not their own analysis. Mr. Klimas believes that multiple factors should influence the Army AC-RC force mix decisions, including the capabilities that AC and RC forces provide and their cost. The key findings of his report are: Force mix decisions must account for differences in the capabilities that Active and Reserve Components provide, as well as differences in cost; Policymakers should consider both capability and cost as they weigh force mix decisions; and while a need to surge forces for potential future major combat operations may once again drive total Army force size decisions, the mix of forces required for sustained operations and the relative cost of AC and RC forces in providing sustained output remain relevant planning considerations.

Mr. Robbert, "Air Force Manpower Requirements and Component Mix: A Focus on Agile

Combat Support," stated that the report explored policies regarding manpower and personnel requirements processes. Since some requirements are based on wartime or deployment needs rather than peacetime or garrison needs, RAND sought to determine if a common-sight picture of wartime demands was available. Mr. Robbert stated that he found that

manpower processes differ across components, functional areas (operations, maintenance, and combat support), and workforces (active military, active Guard/Reserve (AGR), Air Reserve Technician (ART), dual-status state technician (ANG equivalent of the AFR's ART), traditional part-time reservist/guardsman (TR), Individual Mobilization Augmentee (IMA), civilian, and contractor). Mr. Robbert concluded by recommending a broader manpower requirements processes that focuses most heavily on AC/RC interfaces and the determination of wartime requirements.

Chairman, Reserve Forces Policy Board, MajGen (Ret) Arnold Punaro began by noting that his presentation represented his individual views and opinions and not those of the RFPB. He then provided the RFPB his personal perspective and analysis of the effect that the newly elected Congress and appointment of The Honorable Ashton B. Carter as the new Secretary of Defense will have on the readiness, availability, and future use of the National Guard and Reserve. Chairman Punaro also gave an overview and specifics of the FY16 NDAA Amendment: Report True Cost of Manpower with the proposed bill that amends 10 USC § 115a, the section of law that directs the annual Defense Manpower Requirements Report.

The Closed Session final presentation consisted of remarks by Commander, U.S. Southern Command, Gen John F. Kelly, USMC (via Secure VTC). Gen Kelly started his brief by stating that he has had outstanding experiences working with the National Guard and Reserves and gained respect for them during his command tours in Iraq and Afghanistan, his command of Marine Forces Reserve, and in his current position as Commander, U.S. Southern Command. He also noted that some senior leaders have a weak understanding of what the Reserve Components can provide. Gen Kelly praised the Reserve Components' service in Iraq and Afghanistan, their demonstrated military professionalism, and usefulness of their civilian experience. He cited one example of his command experience in theater during which he facilitated establishment and training of local community police forces by embedding them with Marine Corps Reservists, who had police force experience from their civilian capacity. He further stated that he was able to establish local community commerce and economic programs by using a

Marine Reservists with business and financial experience. Gen Kelly concluded by emphasizing that the National Guard and Reserves have contributed significantly to the U.S. Southern Command's operational mission, that they are ready, relevant, and responsive to his needs and requirements.

Chairman Punaro thanked Gen Kelly for taking the time to address the Board and his support of reserve forces during his career. The Reserve Forces Policy Board concluded business in Closed Session and the meeting was adjourned.

Quarterly Meeting *(March 11, 2015)*

The quarterly meeting was held on March 11, 2015 in the Secretary of Defense Conference Room. Presentations were made by: MG Marcia Anderson, Subcommittee Chair for Supporting and Sustaining Reserve Component Personnel; CSM Michael Biere, Enlisted Military Advisor to the Chairman; VADM (Ret) John Cotton, Subcommittee Chair on Ensuring a



Chief, National Guard Bureau and member of the Joint Chiefs of Staff, General Frank Grass provides comments to the Board in open session, 11 March 2015. (Photo: US Army Photo by Mr. Jerome Howard)

Ready, Capable, Available and Sustainable Operational Reserve; Maj Gen Michael Edwards, Subcommittee Chair on Enhancing DoD's Role in the Homeland with Maj Gen Donald McGregor, Director, National Guard J-5; Mr. Sergio "Satch" Pecori, At-Large Board member and former Chair for the RFPB Cyber Policy Task Group; and Mr. Robert Daigle, Executive Director, Military Compensation and Retirement Modernization Commission. Closed session speakers included LtGen Robert E. Schmidle, Jr., USMC, Principal Deputy Director, CAPE; and ADM William E. Gortney, Commander, U.S. Northern Command.

Chairman Punaro administered the oath to Dr. Janine Davidson, LTG (Ret) David Barno, and MajGen (Ret) Cornell Wilson and presented Secretary of Defense Appreciation certificates to outgoing Board member Maj Gen Michael Edwards and retiring staff augmentee SMSgt Joyce Voyles.

The Chairman called the meeting to order and announced, as required by the Federal Advisory Committee Act (FACA), that the Designated Federal Officer was present and had pre-approved the opening of the meeting and the agenda. Invited attendees were asked to provide thoughts or comments to his overview of Secretary Carter's Advanced Policy Questions and Questions for the Record. LTG (Ret) Barno noted the Department of Defense should review deployment / mobilization-to-dwell ratios and the rationale behind it and the Chairman ensured the staff was reviewing the issue. GEN Grass commented about National Guard mobilizations during the wars in Iraq and Afghanistan. GEN Grass also noted the different approaches the Army and the Air Force are taking with respect to Title 10 12304(b) mobilization authority that allows use of the reserve component (RC) to augment the active component (AC) for missions in support of Combatant Command requirements. In particular, he noted that the Air Force was budgeting for those deployments while the Army was not. In conclusion, GEN Grass also expressed concern that if all of the National Guard AH-64 Apache helicopters were moved into the AC and the Army reduced to 20 AC Apache battalions, the Army would lack capacity to train with RC divisions and brigade combat teams and hinder their readiness.

MG Marcia Anderson, Subcommittee Chair, provided an update from the Subcommittee on Supporting and Sustaining Reserve Component Personnel. MG Anderson began with updates to the July 2013 RFPB recommendation and current USD (P&R) proposal (as mandated by the 2015 NDAA) to reduce the total number of reserve duty statuses. P&R completed the required response to Congress which states that the Department will review the recommendations in the Military Compensation and Retirement Modernization Committee (MCRMC) Report in lieu of providing a separate proposal.

MG Anderson provided an update on two other RFPB recommendations. In September 2014, it was recommended that Secretary of Defense (SecDef) approve a pending Unified Legislation and Budgeting proposal which would add Title 10 12301(h) (i.e. medical hold) as a period of "active duty" under Title 38, Section 3301 (1)(B) for the purpose of accruing Post-9/11 GI Bill benefits. In May 2013, the RFPB recommended the Department change the law regarding the RC Survivor Benefit Plan, to achieve parity between "Active Duty" and "Inactive Duty" survivor benefits. Both recommendations were submitted to the Office of Management and Budget on December 19, 2014 and are now at the Hill for consideration in the 2016 NDAA. Finally, MG Anderson provided an update regarding their February subcommittee meeting on management of the Individual Ready Reserve (IRR) in the RCs. It was discussed that many of the issues impacting effective IRR management have existed for years. Key findings included: 1) a lengthy mobilization process results in IRR members out of sync with their units; 2) neither USAF or USN significantly accessed the IRR for OIF/OEF; 3) all components experience significant tracking/screening issues of IRR personnel; and 4) there is a common desire among the services to maintain high-demand-low-density skillsets in the IRR for easier access. MG Anderson noted potential areas for further study would include USA IRR management, re-establishment of the OSD-sponsored annual IRR conference, officer commissioning (scrolling) process, lessons learned from other nations, monitor progress/findings of USMCR CNA Study, and USN Career Intermision Pilot Program. LTG (Ret) Barno asked if there had been lessons learned efforts on the use of the IRR during OIF

or OEF and no one was aware of any. MG Anderson closed the discussion by emphasizing the increasing importance of the IRR during periods of reduced end strength and budgets. She stated the IRR has not significantly changed since the 1980's and it is important to determine what we want the IRR to look like and how we will manage its 270,000 members for maximum benefit in the 21st Century.

SGM Michael Biere, Enlisted Military Advisor to the Chairman, RFPB, provided observations on his recent visit to Fort Gordon, GA with Chairman Punaro and MG Lord. He noted the significant growth and investment in Ft. Gordon along with family housing and school issues. He also addressed Signal and Cyber School leader perspectives and their challenges associated with educating service members in this emerging area. One highlight was information provided by the USAR that they were building structure to accommodate AC members leaving active duty to enable them to continue to serve. MG Lord noted the excellent representation of RC soldiers among the graduates of the Signal Course Class they visited, with Guard and Reserve garnering the top two graduate awards.

Maj Gen Edwards, Subcommittee Chair, provided an update from the Subcommittee on Enhancing DoD's Role in the Homeland. He discussed National Special Security Events funding for military capabilities and noted plans to work with Ms. Tierney's staff in FEMA Region III and observe the process during their upcoming National Special Security Events. He also noted conversations he had with Mr. Thomas Atkin, Principal Deputy Assistant Secretary of Defense for Homeland Defense and Global Security, and the Directors of National Guard Bureau J-37 and J-5 and that all three agreed to review the issue.

Maj Gen Edwards also thanked Dr. Davidson for meeting with the subcommittee's staff members as part of the examination of the consistency of strategies, policies, and practices with respect to the homeland. Dr. Davidson provided the staff the broader context of the homeland recommendations in the National Commission on the Structure of the Air Force report that the "DoD and the

Air Force should treat Homeland Defense and DSCA [Defense Support to Civil Authorities] as real priorities and Governors as essential stakeholders in planning processes." Maj Gen Edwards then introduced Maj Gen Donald McGregor, Director, National Guard J-5, and the J-5's homeland planning efforts.

Maj Gen McGregor presented information on National Guard Bureau's Domestic Catastrophes and Integrated Planning effort. He identified the problem statement as limited integration and/or synchronization of state and federal catastrophic planning and further described the National Guard Bureau's effort to improve the process and serve as a "shock absorber" when the next catastrophe hits the United States. GEN Grass noted he briefed National Guard Bureau's Integrated Planning efforts to Secretary Carter when he was the Deputy Secretary of Defense and one of the first things Secretary Carter asked him after being confirmed as the secretary was about progress with this effort. Maj Gen McGregor displayed the Federal Emergency Management Agency's data for the Cascadian subduction zone earth quake with an associated tsunami to highlight the enormity of the task. He also noted the different approaches to planning with civil authorities, working within the National Response Framework, moving from bottom to top, while the Department of Defense typically plans top to bottom. Maj Gen McGregor then engaged Board Members regarding the efficacy and efficiency of federalizing the response and argued it is better to have federal forces plug into and support civil authorities and emergency managers rather than placing the Department of Defense in charge of the response. As an example, he described the base plans of the fifty-four states and territories as the foundational documents, overlaid with regional and catastrophic incident planning, both civilian and military, and National Guard Bureau efforts to identify gaps and seams between those and federal military planning efforts. Dr. Davidson asked a question regarding whether or not these efforts were tasked in the Guidance for the Employment of the Force and related documents. The answer was that U.S. Northern Command does have taskings to plan for federal military contributions, but the Chief, National Guard Bureau, is not tasked to do the same for non-federalized military forces. However, non-federalized military forces are likely to

arrive sooner and be provided in much larger numbers. Dr. Davidson also asked why the planning task had not been added to the Guidance for the Employment of the Force and Maj Gen McGregor replied it is a paradigm shift and that law and policy responsibilities granted to the Chief, National Guard Bureau, as a member of the Joint Chiefs of Staff in 2012, has not been articulated in strategy and strategic documents. The Chairman thanked GEN Grass and Maj Gen McGregor for their work.

Under Secretary of Defense (Personnel & Readiness), The Honorable Jessica L. Wright, provided remarks explaining the congressionally approved Personnel and Readiness reorganization efforts. She expounded that the proposed structure implementation is on hold currently awaiting the Deputy Secretary of Defense's signature that is expected within the next week. She stated the proposed structure was formed via diverse committees and worked at the lowest levels, to create three Assistant Secretary of Defenses under the Under Secretary of Defense for Personnel and Readiness (P&R): Health Affairs remains intact from the current structure; Manpower and Reserve Affairs (M&RA) looks just like the services M&RA offices that combines what used to be the personnel pieces of the previous Readiness and Force Management and Reserve Affairs offices; Readiness is the third ASD created as standalone to highlight the focus this area needs. Ms. Wright explained that implementation will be done in phases. During the initial phase there will be a Reserve Integration Cell to address the concern that the focus on reserve issues will be lost once the reorganization is complete. She stated that she believes the structure will focus equally on AC and RC issues. Additionally, she explained that the re-organization now institutes "like functions talking to like functions" and that no jobs are expected to be lost. Ms. Wright closed by thanking the Board for their value added efforts and thanked the Chairman for his efforts in reinvigorating and focusing the board following legislative changes in 2011 that re-established the Board's independence.

Reserve Forces Policy Board Member, Mr. Sergio A. Pecori, provided thoughts on the DoD's cyber efforts and the general cyber environment. He iterated that cyber attacks continue to grow unabated and gave examples of some recent effects of

cyber attacks in the commercial arena that could possibly affect millions of people. Mr. Pecori restated several reported facts regarding state actors that were of concern and how the DoD should leverage the Reserve Components to address its cyber professional needs. Mr. Pecori also covered how many major North American universities have focused cyber curriculums and that these talented people should be the recruiting focus of the reserve components. He also explained some of the issues currently faced with attaining and retaining highly skilled cyber professionals, specifically enlisted personnel, due to the high civilian position demand environment that offers larger salaries and diverse employment options. Mr. Pecori addressed how the RCs could support DoD's efforts, the current state of Reserve cyber units and locations, and the evolution of the cyber mission force implementation planned through 2017. He mentioned recent SecDef statements that focused on the National Guard and Reserves as being a large talent resource pool and approaches the DoD should consider to ensure the Reserve Components are leveraged and fully integrated in the DoD's cyber capabilities and personnel needs.

The Executive Director, Military Compensation and Retirement Modernization Commission (MCRMC), Mr. Robert Daigle, provided remarks on the establishment of the commission in the FY 13 NDAA and explained the commission's purpose and the congressional mandates required within the review that would ensure the long-term viability of the All-Volunteer Force, enable the quality of life for members, and modernize and achieve fiscal sustainability. Mr. Daigle expounded on the numerous working groups implemented within many organizations and the outreach to and support of many organizations and installations that greatly supported recommendation development. Mr. Daigle further explained the structure the committee used to focus recommendation development centered on the design of the current compensation system and historic proposals or recommendations needed to update the system. He also elaborated on the effects on retention, effects on leave and earning statements, and effects on retirement value considering the current retirement plan versus blended retirement plans proposed. Finally, Mr. Daigle extensively briefed



MG (Ret) Richard Wightman, Acting Assistant Secretary of Defense for Reserve Affairs addresses the Board for his final time during closed session, 9 June 2015. (Photo: US Army Photo, Mr. Jerome Howard)

the board on the commission's 15 specific recommendations and provided personal insights as to how each were developed.

The Reserve Forces Policy Board concluded the Open Session and moved to Closed Session. The agenda items covered during this period were presentations from the Principle Deputy Director, Cost Assessment and Program Evaluation (CAPE); and the Commander, U.S. Northern Command.

LtGen Schmidle discussed CAPE's role in the PPBE process. Within the PPBE process, CAPE develops the fiscal guidance; co-leads the Strategic Portfolio Reviews of initiatives in advanced technologies, and chairs the 3 Star GO programmers meetings prior to a DMAG. He outlined FY 2016 program priorities: Protect the Homeland, Build Security Globally, Project Power and Win Decisively. This Defense strategy calls for a smaller, leaner force that is agile, technologically advanced, and ready to deploy quickly. The Department continues to face hard choices in the FY 2016

President's budget with balancing force structure, modernization, and readiness across the Active and Reserve Force with the return of sequestration leading to even more difficult choices.

The Commander, U.S. Northern Command, ADM William E. Gortney, USN outlined two command priorities: Improving C2 and ensuring the defense of the homeland. One of the biggest threats to the homeland is "Weather of Mass Destruction." He stressed the importance of using the lessons learned from recent hurricanes to improve interagency partnerships and DSCA capabilities. ADM Gortney identified NORTHCOM as the DoD advocate for the capabilities needed to protect US interests in the Arctic. Additionally, he discussed the regional partnerships and bilateral command agreements with Canada, Mexico, and the Bahamas. He emphasized that the National Guard and Reserves have contributed significantly to NORTHCOM's operational readiness; thus he emphasized the need for predictable RC funding. Chairman Punaro thanked Admiral Gortney for taking the time to address the Board and his support of reserve forces. In closing remarks by Chairman, Reserve Forces Policy Board, MajGen (Ret) Arnold Punaro noted Maj Gen Scott Gorske, Assistant to the Chairman for National Guard Matters was about to retire and thanked him for his service.

Quarterly Meeting (June 9, 2015)

The quarterly meeting was held on June 9, 2015. The entire meeting was conducted under "Closed" session and contained presentations made by: Chief, National Guard Bureau, GEN Frank J. Grass; Chief Navy Reserve, VADM Robin R. Braun; Commander, Marine Forces Reserve, LtGen Richard P. Mills; USCG Director, Reserve and Military Personnel, RDML James M. Heinz; Deputy Director, Air National guard, Maj Gen James C. Witham; Deputy Chief, Air Force Reserve, Maj Gen Maryanne Miller; Director, Army National Guard, LTG Timothy J. Kadavy; Secretary of Defense, The Honorable Ashton B. Carter; Acting Under Secretary of Defense (Personnel and Readiness), the Honorable Brad R. Carson; Chief, Army Reserve, LTG Jeffrey W. Talley; and RFPB Board member and MajGen Burke W. Whitman, USMCR.

Chief, National Guard Bureau, GEN Frank J. Grass, thanked Chairman Punaro and the Board for providing him an opportunity to address the Board. He spoke of today's National Guard and highlighted that it transitioned from a strategic reserve to an operational force because resources were made available. He also provided examples demonstrating that the National Guard is accessible, capable, ready, and affordable. GEN Grass identified the current fiscal environment as one of the most significant challenges for the future of the National Guard. GEN Grass noted that we should build the future force based on our current mobilization authorities and not be artificially constrained by rotational policy goals. GEN Grass also identified numerous activities that the National Guard has or is conducting in context of the warfight, the homeland, and building partnerships.

Chief of the Navy Reserve, VADM Robin R. Braun, began by recognizing the 100th anniversary of the Navy Reserve. She highlighted changes in component end strength, operational use and funding. She provided the Navy Reserve 2015-2025 Vision of staying integrated with the Navy, maintaining readiness, aligning civilian and military skills to the needs of the Navy, maintaining a technological edge, and developing leaders. She expressed concerns with the impact of funding reductions on the Navy Reserve.

Commander, Marine Forces Reserve, LtGen Richard P. Mills made comments on the preparation and use of Marine Reserve forces. He noted that the USMCR mirrors the active force and operates as part of an integrated force, both in operations and exercises around the world. He expressed concerns with keeping pace with force modernization.

Director, Reserve and Military Personnel, RDML James M. Heinz, USCG, presented comments on the operational use of the Coast Guard Reserve, funding and end strength reductions, and meeting current and future challenges. He noted funding as a significant challenge. He also noted that the USCGR is small but fully integrated with the active Coast Guard, with just over 7,000 in their operational force and getting smaller. As a result, he added, the Coast Guard Reserve must be operational to generate necessary readiness to support national and international crises.

Deputy Director, Air National Guard, Maj Gen James C. Witham offered thoughts on the composition, integration and use of the Air National Guard. He highlighted Active-Reserve integration and stated that the Air Force needs its Reserve Components to fulfill its warfighting requirements. Maj Gen Witham emphasized the homeland role of the Air National Guard, adding that support to civil authorities is in the National Guard's DNA. He closed by providing an overview of the Director's three priorities: taking care of Airmen, maintaining a strong operational reserve, and modernizing/capitalizing on equipment and platforms.

Deputy Chief, Air Force Reserve, Maj Gen Maryanne Miller highlighted the role of the Air Force Reserve in helping to meet Air Force requirements now and into the future. She gave examples of how the Air Force Reserve provides operational capabilities and strategic depth to the Air Force on a daily basis and helps to serve as a hedge against risk. Maj Gen Miller also highlighted Air Force Reserve integration with the Active Component through associate units - sharing operational equipment and platforms.

Director, Army National Guard, LTG Timothy J. Kadavy provided thoughts on the current and future use of the Army National Guard, both at home and abroad. At 350,000 Soldiers, he observed that today's Army National Guard is the best equipped and most modern force since World War II. He discussed the value of the Army National Guard in Domestic operations. He also highlighted the State Partnership Program, implications on the continued use of mobilization to dwell ratios, and expressed concern about reductions to Fulltime Support.

Secretary of Defense, The Honorable Ashton B. Carter provided guidance to the RFPB. First, he asked the RFPB to conduct an assessment to help him understand the lessons from Iraq and Afghanistan relative to the Reserve Components. Second, he asked the RFPB to provide input to help him understand how the Reserve Components fit into the Force of the Future.

Acting Under Secretary of Defense (Personnel & Readiness), the Honorable Brad R. Carson, presented his views on the Force of the Future initiative, described systematic issues

with the military personnel system, commented on the lack of performance measures for talent management, and described the ongoing effort to develop reform proposals to modernize the personnel system. Mr. Carson asked that, within the limits of the Federal Advisory Committee Act, and prior to 19 August, the RFPB provide advice regarding the integration of the Reserve Components into the Force of the Future.

Chief, Army Reserve, LTG Jeffrey W. Talley made comments on force structure, operating tempo, the Army Reserve's global footprint, and its Public-Private Partnership program. He suggested that the Army Reserve is a great business model for national defense. He recommended five ways to sustain the operational reserve: fully implement the Army's Total Force Policy; plan, program and budget to Total Force requirements; enhance Fulltime Support; apply the "plan, prepare, and provide" business model; and plan, program, and utilize 12304b for overseas operational use.

MajGen Burke W. Whitman, USMCR, provided observations from his recent deployment to Kabul, Afghanistan as the US Advisor to the Afghan Ministry of Interior. He also commented on recent experiences in the Republic of Jordan during Exercise Eager Lion, a Theater Security Cooperation event. Closing Remarks were made by the Chairman, Reserve Forces Policy Board, MajGen (Ret) Arnold Punaro and the meeting was adjourned.

Annual Meeting *(September 2, 2015)*

The annual meeting was held on September 2, 2015. The entire meeting was held in "Open" session with presentations made by: Brig Gen Brian T. Kelly, USAF, Director of Military Force Management Policy, Deputy Chief of Staff for Manpower, Personnel and Services; RDML Robert Burke, USN, Director, Military Personnel Plans and Policy; The Honorable Brad R. Carson, Acting Under Secretary of Defense (Personnel and Readiness); LTG James C. McConville, USA, Deputy Chief of Staff, G-1; LtGen Mark A. Brilakis, USMC, Deputy Commandant for Manpower and Reserve Affairs; RADM Kurt B. Hinrichs, USCG, Acting Director, Reserve & Military Personnel; VADM (Ret) John



Chairman Arnold Punaro presents Sergio "Satch" Pecori with the Secretary of Defense Medal for Exceptional Public Service at the annual RFPB meeting, 2 September 2015 at the Army Navy Country Club in Arlington, Virginia. (Photo: US Army Photo, Sgt. Courtney Russell)

Cotton, Chair of the Operational Reserve Subcommittee; Joe Adams, Institute for Defense Analysis; and RADM Brian LaRoche, Personnel Subcommittee. Chairman Punaro administered the oath to RDML Francis S. Pelkowski and incoming RFPB consultant, Mr. Mark Cancian. He then presided over an awards ceremony for departing Board members Mr. Grier Martin and Mr. Sergio "Satch" Pecori, awarding them the Secretary of Defense Medal for Exceptional Public Service and RADM Kurt Hinrichs with the Secretary of Defense Certificate of Appreciation. Chairman Punaro also covered RFPB administrative business, including the report format for the RFPB Annual Report, which was officially adopted, Subcommittee membership and the proposed schedule for next year's RFPB meetings.

Brig Gen Brian T. Kelly, Director of Military Force Management Policy Deputy Chief of Staff for Manpower, Personnel and

Services, U.S. Air Force, presented a brief on the Future of the Force (FotF) impacts to the Air Force. Brig Gen Kelly noted that balancing manpower, modernization, and readiness is a challenge, stating that we must look at what the Air Force can afford while remaining ready and preparing for the future. The Air Force had been downsizing as destabilization in Eastern Europe and the growth of ISIS required an increase in manpower. Brig Gen Kelly noted that the Air Force looks at the Total Force to meet increased requirements and seeks permeability; enabling personnel transitions between the AC and RC. He mentioned that one way they are stepping up this challenge is through testing Total Force Support Squadrons at four locations to service both active and reserve component personnel. Overall there is much overlap with FotF, but there are concerns with the timeline for implementation and unknown impacts. In response, the Deputy Chief of the Air Force Reserve noted that the Air Force and employers of Reserve Airmen preferred more frequent rotations of less duration. The Chairman noted that Goldwater-Nichols took a long time to implement and that FotF implementation would likely take 10 years. LTG Barno noted that changes to policy for Officers could result in each service having a completely different Officer Corps, with potential negative impacts to future Joint operations.

RADM Robert Burke, Director, Military Personnel Plans and Policy, USN, presented a brief on Sailor of 2025 and FotF impacts. He opened with the question; why was change needed? He suggested that at least part of the answer is that recruiting will be harder and millennials like technology and engagement with the process. RADM Burke presented three tenets of the Sailor of 2025: 1) A Modernized Personnel System where Commanders will have more say on who gets promoted, boards will become “blind,” and the focus will be on talent and not just previous performance; 2.) Ready, Relevant Learning where training will be continuous with heavy use of technology; and 3) An Enriched Culture where teamwork and unit performance remain enduring values while the Force will become more empowered, diverse, and resilient, with a focus on families; Women will constitute up to 25% of accessions by 2025, maternity leave will be increased and all ships will be open for females.

The Honorable Brad R. Carson, Acting Under Secretary of Defense (Personnel and Readiness) spoke on the Force of the Future initiative. Mr. Carson stated that the DoD’s personnel systems were once considered a model of industry, but that is no longer true and the systems must be updated. In order to retain talent, FotF will update DoD’s personnel system by knowing people, providing customized career paths, and maximizing talent. He stated that rigid career paths dictated by DOPMA and the ‘up or out’ policy need to be replaced with a ‘perform or out’ system. Officers typically retire after 22 years, often when they are at the peak of their performance. Any deviation from the current career path and can result in non-selection and the loss of talent, creating enormous retraining costs. Mr. Carson believes that diversity benefits the Force and remains a priority, along with increased education and that DoD needs to learn from the best practices of industry and implement change or risk losing our most talented performers.

Dr. Nagl asked a question on timelines and Mr. Carson answered that he hoped to have this done as soon as possible, refusing to believe that the Department is incapable of making changes in a matter of months if the decision was made do so. VADM Cotton noted that DoDI 1235.12, Accessing the Reserve Components (RC) is in staffing and compiles lessons learned from mobilizing the RC into one document. He noted that the instruction is important and requested consideration in expediting its approval.

LTG James C. McConville, Deputy Chief of Staff, G-1, U.S. Army provided a brief on Army manpower and potential FotF reform impacts. He commented on the Army’s drawdown and noted that when determining the final size of the Army, the Total Force must be considered with the RC filling both strategic and operational roles. LTG McConville noted that although the Total Force has come down in overall manpower, Full Time Support (FTS) had grown slightly. However, even these are declining from where they were and that FTS is important to generating reserve component readiness. He noted a focus on building a quality force of committed soldiers consisting of empowered, diverse, cohesive teams who will solve many issues at the lowest level. LTG McConville mentioned the problem of attrition for first



Chairman Arnold Punaro presents Rear Admiral Kurt B. Hinrichs, USCG with the Secretary of Defense Certificate of Appreciation for his service to the Board, 2 September. (Photo: US Army Photo, Sgt. Courtney Russell)

term soldiers as too high, requiring more resiliency. Only 10% of enlisted soldiers and 30% of Officers remain for 20 years. The Army needs to send top performers to schools, and enlisted PME will now be required. Officers will only be allowed to select one soldier as the top performer when completing NCOERs. He mentioned that one personnel system is being developed for the Army's three components and that the Army must manage talent with a new personnel system which will help identify talent so the right soldiers are retained and promoted.

LtGen Mark A. Brilakis, Deputy Commandant for Manpower and Reserve Affairs, U.S. Marine Corps provided a briefing on manpower and FotF impacts. LtGen Brilakis observed that finding and retaining talent remains difficult but the quality of current officer and enlisted accessions remains high, with Recruit Training attrition at just under 7% and TBS under 2%. OCS and Boot Camp are part of the screening process. He noted that readiness remains a priority. He also stated that the female

percentage of overall manpower may rise to 10%, and latitude exists for this change as long as readiness remains high. LtGen Brilakis stated that the Marine Corps is a young force and the right leader at the lowest level can often solve problems such as suicide and sexual assault. In order to achieve the Commandant's Planning Guidance, M&RA is determining where everyone is assigned, developing a plan to ensure "Squad Leader" billets are manned, and reviewing TTPs of the Human Resources Development Plan. The Marine Corps supports the intent of FotF but has concerns over development and implementation. Many authorities currently exist and the Marine Corps is already executing some actions similar to the FotF. More must be known about the impacts and the replacement for DOPMA. There is concern that the final FotF report will be prescriptive and not include input from services. He also noted that the USMC will use 12304b authority for the first time in FY17 to send an infantry Battalion to Okinawa. Finally, LtGen Brilakis mentioned resource impacts of previous DoD funding of an overall recruiting campaign that is now up to each service.

Chairman Punaro recognized LtGen Richard Mills, Commander Marine Forces Reserve, for his support to the RFPB and his pending Change of Command and retirement.

RADM Kurt B. Hinrichs, Acting Director, Reserve & Military Personnel, U. S. Coast Guard, reviewed 13 FotF reform proposals and impacts to the Coast Guard. RADM Hinrichs observed that the Coast Guard is experiencing record retention and requires more flexibility for career advancement. The Coast Guard has no mechanism for O6/E7 lateral entry although there currently is no need, but suggested cyber requirements may change this. The Coast Guard has already implemented "blind" promotion boards and that a program currently exists to recruit at historically Black, Hispanic, and Native American Colleges paying Officer Candidates as an E3 while also providing scholarships. His presentation closed with details on the Coast Guard's one, fully integrated HR system for AC and RC.

VADM John Cotton (Ret), Chair of the Operational Reserve Subcommittee, introduced Mr. Joe Adams from the Institute for Defense Analyses (IDA) to provide an update on a study of RC performance during Operation Iraqi Freedom.

Mr. Adams provided background on how the study was being conducted. He reviewed personnel contributions by service, SIGACTS, THOR Aviation Database input, mission and performance assessments, lessons learned, transcripts, and interviews, and briefly commented on forthcoming engagements and obstacles and challenges related to the study. It was noted that only 2 of 40 BCTs were suggested to have performed poorly, meaning 95% met requirements or performed well.

VADM Cotton provided a brief update on the Operational Reserve Subcommittee to include Key Leader Engagements and methods for accessing the RC. He recommended that the RFPB support efforts to streamline access to the RC through a revision of DoDI 1235.12 and that the Board reintroduce a standard DoD definition for “Operational Reserve”.

RADM Brian LaRoche provided an update from the Personnel Subcommittee and brought a recommendation to the Board for consideration. The Personnel Subcommittee recently took an in-depth look at the Services’ IRR programs to gain an understanding of longstanding issues in managing the IRR. The subcommittee found the IRR remains difficult to manage, access is a cumbersome and lengthy process, and there is no central strategy to manage the IRR. The subcommittee recommended that the Department establish a Joint Working Group to seek quick wins and explore alternative management structures and methods to improve efficiency and more effectively utilize the IRR in support of the Total Force. The recommendation was seconded and approved by the Board.

Chairman Punaro thanked all in attendance for their support of the RFPB and the men and women of our Reserve Components. The Reserve Forces Policy Board concluded business and the meeting was adjourned.



Master Sgt. Natalia Stockhausen, 10th Expeditionary Aeromedical Evacuation Flight technician, connects medical equipment to a C-17 Globemaster III's systems, Nov. 10, 2015, at Ramstein Air Base, Germany. After configuring the inside of the C-17 Globemaster III into a flying ambulance, the Airmen test their equipment to ensure they can provide the best possible treatment while flying thousands of feet in the air. The 10th EAEF is a mixture of active-duty, reserve and guard Airmen deployed to Ramstein, constantly flying to war zones to retrieve patients needing higher levels of medical care. (U.S. Air Force photo/Staff Sgt. Armando A. Schwier-Morales)



U.S. Army Spc. Jacob Saccameno, an infantryman assigned to Headquarters and Headquarters Troop, 3rd Squadron, 2nd Cavalry Regiment, readies his Stryker for redeployment during Operation Atlantic Resolve, near Adazi Military Base, Latvia, March 16, 2015. The U.S. and partner nations conducted land, sea and air exercises and maintained a rotational presence in order to reinforce NATO security commitments in Europe. (U.S. Army photo by Sgt. Aaron Ellerman/Released)

OTHER ACTIVITIES

A performance assessment of the Reserve Component forces during Operation Iraqi Freedom (OIF): An Operational Effectiveness Study

In May 2015, the RFPB commissioned a \$ 1.2 million study by the Institute for Defense Analysis (IDA) on the operational effectiveness of the Reserve Components (RC) with data collected during OIF and OEF from 2001–2014. The deployment of RC Forces during OIF has been the largest RC deployment since World War II. The Reserve Components demonstrated their availability and reliability in providing forces for operational use through a decade of sustained combat operations. Commanders and senior Department of Defense officials have lauded Reserve Component contributions and performance. Some have even publicly commented that the Reserve Components are as effective as their active counterparts; however, the Department does not have thorough, deliberate analysis of the effectiveness of Reserve Component units in a theater of operations. The RFPB's report on Reserve Component Use, Balance, Cost and Savings: A Response to Questions from the Secretary of Defense recommended that such an analysis be conducted in order to form future RFPB recommendations on the effective utilization and employment of National Guard and Reserve forces. Accordingly, this research will:

- A. identify lessons learned in mobilizing and deploying RC forces during OIF;
- B. assess the performance of RC forces during OIF;
- C. identify critical RC capabilities and assets that were employed in support of OIF.

Research results will facilitate necessary changes to policies, strategies, and legislation in order to sustain or improve RC employment and maintain the effectiveness of the RC as a vital part of the Department of Defense.

Chairman's input to the Department of Defense Force of the Future Initiative

The Secretary of Defense and Acting Under Secretary of Defense for Personnel and Readiness asked the RFPB during the June 9 quarterly meeting, to provide inputs on SECDEF's Force of the Future (FoTF) initiative from the RC perspective. Additional formal recommendations will be provided through deliberations by the Board (per FACA rules); however, initial inputs were provided by the Chairman to Acting USD P-R Carson on 11 August, 2015 for consideration. They address the different AC and RC personnel system deficiencies and provide thoughts on the composition of a new system. The full response is included below.



Staff Sgt. Eugene Wilson, 379th Expeditionary Aircraft Maintenance Squadron, 746th Expeditionary Aircraft Maintenance Unit, reads through his technical orders to ensure he followed proper instruction for maintenance on a C-130 Hercules engine Sept. 9, 2015 at Al Udeid Air Base, Qatar. The 746th AMU airmen are responsible for ensuring aircraft are maintained to exact standards to support Operation Inherent Resolve. Wilson is deployed out of 911th Airlift Wing, Pittsburgh International Airport Air Reserve Station, Coraopolis, Pa. (U.S. Air Force photo/Staff Sgt. Alexandre Montes)

Memorandum of the DoD Future Initiative (August 11, 2015)



OFFICE OF THE SECRETARY OF DEFENSE
RESERVE FORCES POLICY BOARD

5113 Leesburg Pike, Suite 601
FALLS CHURCH, VA 22041

CHAIRMAN

August 11, 2015

MEMORANDUM FOR UNDERSECRETARY OF DEFENSE
(PERSONNEL & READINESS)

SUBJECT: Department of Defense Force of the Future Initiative

At the June 9, 2015 meeting of the Reserve Forces Policy Board, you asked for input, within the limits of the Federal Advisory Committee Act (FACA), regarding the integration of the Reserve Components into the Department's Force of the Future initiative. Thank you for the opportunity to provide our thoughts on this historic effort to adapt the civilian and military personnel management systems to better meet the needs of an evolving defense workforce in a period of dramatic change. This memorandum serves as the requested input. It is not formal advice or recommendations of the Board; it is simply independent input focused on the Reserve Component military system based in large part on my own experience from years on the Hill working personnel issues, serving on and chairing the RFPB, chairing the Commission on the National Guard and Reserves, and chairing the National Defense Industrial Association where we have done extensive work on industry best practices. Consistent with the independent nature of the Board, this document has not been formally coordinated with outside offices or agencies of the Department of Defense. The Board, at the request of the Secretary of Defense, will provide formal advice and recommendations regarding this initiative at a later date.

Context

Much has changed since our personnel management system was established at the outset of the Cold War, but defense personnel management statutes, policies and information systems have not kept pace. The last time the Department was looked at comprehensively was the late 1970's and the joint duty provisions are 30 years old. We have an industrial era system in the information age. It is long past time to modernize the Department of Defense and its system for assessing and recruiting; developing and utilizing; and sustaining and retaining its military manpower. International, domestic and social trends now

necessitate this adaptation. The world is a complex and unstable place with a myriad of state and non-state actors challenging

American security interests at home and abroad. Our domestic political and fiscal environment is equally challenging with its political division, unsustainable debt, and sequestration. It is generally acknowledged that the cost-growth considering the all-inclusive, fully-burdened and life-cycle costs of the All-Volunteer Force, under current policies, is unsustainable. Simultaneously, demographic and social trends are reducing both the propensity and the fitness of military service eligible men and women to serve. Those who do decide to serve rely more heavily on access to information, technology and the use of social media than ever before. Today, the force -increasingly made up of millennials -lives within a personnel management system established by baby boomers and their predecessors. Young adults entering the work force today are less likely to stay with employers than their parents or grandparents and the private sector and other non-defense public sector opportunities now represent serious military service. The work force has changed and the system used to assess, manage, and sustain them needs to change as well.

Different Active and Reserve Systems

While the fundamental statutory and policy frameworks governing the Active Component (AC) and Reserve Component (RC) are the same, the Services use and manage their reserve components differently. Their personnel systems are inherently different based on the simple fact that members of the National Guard and Reserves generally perform their duties on a part time basis while also maintaining employment in the private/public sector. The RC personnel system offers greater flexibility than the AC system to accommodate this difference.

The AC personnel management system is dominated by the requirements of the Defense Officer Personnel Management Act (DOPMA) and centralized accession, training, assignment and promotion from entry to separation; up or out advancement within a rigid time-in-service structure; pay based on time-in-grade; and cliff vesting for retirement. It is a system that former Secretary of Defense Thomas Gates, who led the commission in 1970 that recommended moving from the Draft to the All-Volunteer Force, stated had to be changed for the AVF to be sustainable. That was 45 years ago and none of the changes the commission recommended have been made.

The RC personnel management system can be characterized as having greater decentralization and choice. The RCs must comply with the Reserve Officer Personnel Management Act (ROPMA), like DOPMA, with its up or out advancement system. Unlike the active force, Reservists and Guardsmen receive pay for duty performed and have deferred retirement until age 60.

But more significantly, RC accession, training, assignment and promotion are much more decentralized than in the active force. A member can enter the reserves at mid-career (from another Service, component, or special branch); he or she can take a sabbatical when they want/need to (by transferring to their Service Individual Ready Reserve); they have assignment flexibility except for tenured jobs (they can move when they want to or need to and compete for the jobs they want); and there are opportunities for accelerated merit based (vacancy position) promotions- although they are more limited than they could be.

A New System - General Thoughts

The Secretary of Defense, you, and others have indicated that it's time for a new system, and I strongly agree. This new system must be viewed by potential entrants as a desirable and competitive career option; attracting high quality recruits and maintaining the best and the brightest of them for advancement and leadership of our Nation's military services. It must develop professionals, promote institutional values, embrace diversity, and maintain key elements of service culture. It must produce a force that both represents and is connected to the Nation it protects. The system must be fair with transparent policies, practices and processes. It should be cost effective, produce ready service members, and be seamlessly integrated across components. It must be much more flexible and incorporate world-class business practices in terms of assignments, advance schooling and training, family considerations and non-traditional opportunities. Ultimately, however we adapt the personnel system, the U.S. Military must remain capable of deploying and sustaining military power rapidly in response to a variety of threats at home and abroad to win the Nation's wars, support our allies, and defend our interests.

A New System - Specific Thoughts

To create a personnel system that improves the career management, fluidity and flexibility of service options, and makes better use of civilian and military skills found in the Reserve Force, the Department should consider:

- Embracing the "Total Force." In the past, the Department has paid lip service to the notion of a Total Force. The notion that Reservists and Guardsmen are somehow less capable, less committed, or less professional continues to persist among some senior leaders in the Department. The Department's culture needs to change to embrace Active and Reserve members and civilian employees as members of the same team -not separate competing teams. To that end, the Department should encourage and incentivize continued service in the reserves

to preserve talent from the AC that would be lost with total force reductions or otherwise routine transitions from the active force.

- Easing Transitions. Not only should the Department encourage transitions between components, we should make it easier. The Board has previously recommended the establishment of a Continuum of Service to facilitate the transition of service members between service components. We, again, suggest that the Department promote a Total Force personnel system that allows for the seamless transition of members within DoD - between the Services and their components. Statutory impediments and bureaucratic administrative requirements should be reduced to ease transitions.
 - Create an integrated pay and personnel system. The Department should create an integrated Total Force pay and personnel management system that is modernized and accessed through mobile technology. An integrated pay and personnel systems will enable transitions between components and improve the ability of Reservists and Guardsmen to manage their careers by enabling seamless movement of all administrative and other records between components/services:
 - Create single “cradle to grave” personnel record from recruitment to retirement, accessible regardless of component.
 - Improve inter-connectivity of IT systems to reduce redundant information requirements and flow between components/ agencies.
 - Improve access to these systems, especially for RC personnel, who have limited access to personnel management systems necessary to monitor, manage and advance their careers.
 - Eliminate “scrolling” requirements for AC personnel transferring to the RC.
 - Eliminate redundant medical screening requirements.
 - Enable portable qualifications between services and components. Qualifications achieved for like fields in one service or component should be recognized or otherwise streamlined for acceptance during transition. Time and money is wasted retraining experienced personnel who could otherwise add immediate value. acquired knowledge, skills and abilities.
 - Establish “Reverse MEPS” transition centers within or collocated with RC facilities and partner with government and non-government organizations to provide “one stop shops” across the United States to facilitate a more robust and smoother transition

from military to civilian life. A number of pilot programs could be established to do a “proof of concept.” We have a more detailed concept paper available on this topic.

- Reduced Duty Statuses. The Department should reduce the number of RC Duty Statuses to ease the transition between RC Categories - on and off active duty. Again, the Board has recommended this in the past as have other advisory commissions including the Congressional Commission on the National Guard and Reserve, the National Commission on the Structure of the Air Force and the recent Military Compensation and Retirement Modernization Commission (MCRMC). There are currently 30 different RC Duty Statuses. This structure is overly complex and inefficient; the number of duty statuses can and should be reduced to six as proposed by the MCRMC and as previously agreed to by Secretary Gates when the Commission on the National Guard and Reserves made a similar recommendation in 2008. OUSD P&R has been the major bureaucratic stumbling block since and no real progress has occurred.
- Assignment Flexibility and Choice. Employ best practices from the private sector to advertise, apply for, review and select best qualified candidates for assignment to positions across the Reserve Force. The Reserve Components already advertise
 - vacancies and accept applications for assignment to many positions. This practice should be expanded and enabled by a Monster.com-like real-time web accessible position vacancy search and application system.
 - Developmental Opportunities. Ensure the Reserves have opportunities to compete for special assignments or educational opportunities to provide access to deepest talent pool possible. Headquarters and funding reductions have the potential to reduced RC opportunities for combined, joint, service headquarters and deployment experience. Funding reductions may also reduce access to training and educational opportunities. These opportunities are essential for effectively developing RC senior leaders.
 - “Downtime” - Sabbaticals. The Services are experimenting, on a very small scale, with sabbatical programs to allow service members on active duty to “take a knee” for educational or other personal reasons. RC members already have the ability to do this by transferring to an inactive status (Individual Ready Reserve or Inactive National Guard) however they are disadvantaged by doing so: Reservists, like their active counterparts, should have increased opportunities to “take a knee” based on the changing demands in their personal lives for fulltime educational opportunities or family and employment obligations.

- Increase ability for RC members to pause promotion clocks during periods where they would be less available for military service. During periods where personal needs or civilian professional requirements make military service difficult, pausing promotion clocks would prevent members from being forced out due to lack of competitiveness for promotion and allow members to continue service once these demands subside.
- Modernizing the Individual Ready Reserve (IRR). The Services maintain Individual Ready Reserves - pools of pre-trained talent - accessible for use in both peace and war. The Department should gather best practices and explore alternative management structures and methods to improve efficiency and enable more effective use of the IRR in support of the Total Force. This is a large pool of pre-trained manpower that is largely ignored.
- Enabling Use of Civilian Acquired Skills. Reservists and Guardsmen bring with them unique civilian acquired skills. Some of these skills compliment their military specialties and some do not. The Department has taken advantage of these skills in a sporadic and haphazard way principally because we lack visibility of the civilian knowledge, skills and abilities resident in the Reserve Components. An example of the successful use of civilian skills was the deployment of farmers and members with food supply chain experience with Agriculture Development Teams in Afghanistan. The Department should collect civilian skills data residing in the RC (as a condition of service) to enable access to critical civilian skills. The creation of a civilian skills database has been a perennial recommendation for several decades but to date, the Department has failed to produce a useful system.

Again, thank you for the opportunity to share our thoughts and ensure the equities of the Reserve Components are considered in this important initiative. I am happy to clarify, expand upon or discuss further at your convenience. I can be reached directly at (703) 942-5770 or by mail at apunaro@punarogroup.com, or through my Military Executive, Major General Walt Lord, at (703) 681-1270 or by e-mail at walter.l.lord.mil@mail.mil



Arnold L. Punaro
MajGen, USMCR (Ret)
Chairman

RFPB REPORTS OF ADVICE AND RECOMMENDATIONS TO THE SECRETARY OF DEFENSE

During Fiscal Year 2015, the RFPB delivered to the Secretary a total of two reports containing three recommendations. This section of the annual report includes a summary of these recommendations provided to the Secretary of Defense by the RFPB.

“Report of the Reserve Forces Policy Board on Support to ULB RA-006/OLC-104 for inclusion into Fiscal Year 2016 National Defense Authorization Act”

Recommendation delivered to the Secretary of Defense on *(October 1, 2014)*

The RFPB met on September 10, 2014 and voted to recommend the Department ask Congress to change the law regarding the definition of active duty as it relates to reservists under Title 38, United States Code – Veterans Benefits.

Under the Veterans Educational Assistance Act Of 2008 (Post 9/11 GI Bill), a reserve component (RC) service member of the Armed Forces accrues active duty service time credit for the calculation of educational assistance benefits only while serving on active duty as defined in Title 38 USC Section 3301. In this section, active duty for reserve component members is defined as service under section 688, 12301(a), 12301(d), 12301(g), 12302, or 12304 of title 10 USC. Excluded from the current definition of active duty under Title 38, is Title 10 USC, 12301(h). Title 10, 12301(h) provides a category of active duty for reservists while receiving medical treatment (i.e. medical hold status).

The Post 9/11 GI Bill benefit is earned with active duty service time (as defined by Title 38) accrued since September 10, 2001 and the benefit is earned in tiers. To earn 100% of the benefit, a service member must accrue 36 cumulative months of active duty time or serve at least 30 continuous days on active duty and be discharged due to service connected disability. Currently,



MG Walt Lord, Military Executive to the Reserve Forces Policy Board proposes content and organization of the RFPB annual report to the President and Congress, 2 September 2015. (Photo: US Army Photo, Sgt. Courtney Russell)

when a RC service member is injured or wounded in a combat theater, that member is transitioned on orders to a medical hold status under 10 USC 12301(h) for a potentially long recovery and rehabilitation. This stops the accrual of active duty time that would count toward the Post 9/11 GI Bill benefit. If the member does not discharge and instead returns to service - either deployed or as a Selected Reservist - none of the time spent in recovery is considered qualifying time. The service member would earn less qualifying time than those who served the entire time without an injury, and would not receive an equal benefit. In effect, this service member is penalized for being wounded or injured in theater. Coincidentally, if that same member was discharged from service because of the injury, the member would earn 100% of the benefit (assuming 30 days of continuous active duty service). OUSD P-R has recently approved a Unified Legislative Budget (ULB) Change Proposal and forwarded it to the Office of Legislation Council for review and inclusion into the 2016 NDAA [TAB D].

The Board recommends that the Secretary of Defense approve the Unified Legislative Budget (ULB), adding Title 10 12301(h) as a period of “active duty” to Title 38, Section 3301 (1)(B) for the purpose of accruing Post-9/11 GI Bill benefits under the “Post-9-11 Veterans Assistance Act of 2008.

“Report of the Reserve Forces Policy Board on the Need for Improvements in the Individual Ready Reserve.”

Recommendation delivered to the Secretary of Defense on *(September 30, 2015)*

The RFPB met on September 2, 2015 to recommend the Department establish a Joint Working Group to conduct a comprehensive review and pursue policy and legislative changes to improve the efficiency and relevance of the Individual Ready Reserve. Declining Budgets and reduced force structure, combined with increased personnel cost and world-wide instability, encourage new approaches in personnel management necessary to maintain an effective fighting force. During this time, critical capabilities available in the Reserve Component, which come at a reduced



North Carolina Air National Guard C-130H from the 153rd Airlift Wing, utilizing Modular Airborne FireFighting System (MAFFS), 2 May 2015. (Photo: US Air Force, MSgt Charles Delano)

cost, should be increasingly relied upon. The Individual Ready Reserve contains trained and talented manpower and has suffered for years from neglect and inefficient management at the same time that force reductions increase its size.

The RFPB's Subcommittee on Supporting and Sustaining Reserve Component Personnel conducted an in-depth look at Service IRR programs to understand issues in managing the IRR. The RFPB recognizes that the Individual Ready Reserve is difficult to manage, access is a cumbersome and lengthy process, and there is no central strategy to best utilize the IRR's skilled manpower.

The RFPB recommends the Department establish a Joint Working Group comprised of subject matter experts from each of the Services, the Reserve Components and OSD to gather best practices, seek quick wins and explore alternative management structures and methods to improve efficiency and enable more effective use of the Individual Ready Reserve (IRR) in support of the Total Force. OSD should then develop policies and legislative proposals aimed at implementing these changes and improving the effectiveness of the IRR.

The RFPB believes innovation in IRR management will contribute to the Secretary of Defense's current initiative to build a Force of the Future. Potential changes for consideration of the JWG should include:

1. re-establishing the OSD sponsored annual IRR Conference,
2. expanding the use of the IRR as a Continuum of Service option for both AC and RC,
3. transfer of IRR management responsibilities to respective Reserve Components,
4. affiliation of IRR personnel with Selected Reserve (SELRES) units,
5. expanding TRICARE Reserve Select coverage to IRR members,
6. providing incentives to IRR members to maintain current screening and contact information, immunizations and physical fitness,
7. improving access to virtual muster and distant learning, updating and improving IT systems and data sharing to improve information flow between components and agencies to allow for easier transfer of personnel,

8. mandating and maximizing the collection of civilian skills information,
9. reviewing mobilization laws and policies for potential IRR access improvements,
10. allowing IRR members increased flexibility to freeze promotion or high-year tenure clocks without penalty
11. adopt lessons learned and best practices from allied and partner nations.

The United States Marine Corps has commissioned the Center of Naval Analysis (CNA) to conduct a study titled "Managing the Individual Ready Reserve." The study is estimated for completion in February 2016. The RFPB also recommends the Department monitor the progress and review the results of this study for applicable policy and legislative changes that could reform the IRR across all services."



Master Sgt. Jeff Stack, from the Air Force Reserve's 53rd Weather Reconnaissance Squadron, holds a dropsonde while inside a WC-130J, Aug. 26, 2015, Keesler Air Force Base, Miss. The dropsonde is one of the primary tools the Hurricane Hunters use to accurately track and collect data on tropical storms and hurricanes. (U.S. Air Force photo by Tech. Sgt. Greg C. Biondo)

Citizen Airmen and Citizen Soldiers sharpened their skills during the 349th Air Mobility Wing's latest Air Force Specialty Code training weekend, Sept. 26, 2015, at Travis Air Force Base, Calif. Held periodically throughout the year, AFSC training weekends provide reservists hands-on qualification and proficiency training. The participating Army Reservists are from the 308th Chemical Company, 453rd Chemical Battalion, Vallejo, Calif.; and Bravo Company, 319th Expeditionary Signal Battalion, Dublin, Calif. (U.S. Air Force photo/Lt. Col. Robert Couse-Baker)



IMPACT OF RECOMMENDATIONS MADE

The RFPB is not required by statute or policy to track or assess the degree to which its recommendations and advice are agreed to or actually implemented by the Department of Defense. However, in an era of increasing fiscal constraint, the Board feels that good governance drives all governmental organizations to be accountable and effective in the use of limited resources devoted to its work.

In order to continually gauge its effectiveness, it is the intention of the RFPB to have its staff actively monitor the responses to and implementation of RFPB recommendations by the Department.



U.S. Soldiers assigned to the Maintenance Platoon, 391st Forward Support Company, and the 94th Regional Training Site Maintenance Company return their pulley to their wrecker during the 2015 Combat Support Training Exercise at Fort McCoy, Wis., Aug. 13, 2015. The Combat Support Training Exercise, hosted by the 86th Training Division, is a multi-component and joint endeavor aligned with other Reserve component exercises including Diamond Saber, Red Dragon, Trans Warrior and Exportable Combat Training Capability. (U.S. Army photo by Spc. Austin Stein/Released)

A NASA WB-57 crew prepares to depart Robins Air Force Base Oct. 3, 2015, to track Hurricane Joaquin. Don Darrow, the sensor equipment operator, was responsible for the operation of all payloads on the aircraft as well as assisting the pilot, Dave Johnson, in navigation, communications and checklists. The aircraft is capable of flying at altitudes above 60,000 feet. At 12 miles high, the environment is inhospitable to people. Flight rules mandate that for flight above 50,000 feet, crew members must wear a full-pressure suit. If the cabins were to depressurize, or the crew was forced to eject, it would be the only means of survival. The aircraft is stationed at Ellington Field Joint Reserve Base, Texas.



APPENDIX 1 MEMBERS OF THE RFPB

Major General (Ret) Arnold L. Punaro, *US Marine Corps Reserve, Chairman*

Reserve component members

Major General Lewis G. Irwin, *Army Reserve Member*
Rear Admiral Brian L. LaRoche, *Navy Reserve Member*
Major General Timothy E. Orr, *Army National Guard Member*
Rear Admiral Francis S. Pelkowski, *Coast Guard Reserve Member*
Major General L. Scott Rice, *Air National Guard Member*
Lieutenant General (Ret) James E. Sherrard III, *Air Force Reserve Member*
Major General Burke W. Whitman, *Marine Corps Reserve Member*

Citizens having significant knowledge of and experience in policy matters relevant to national security and reserve component matters

Lieutenant General (Ret) David W. Barno, *US Army*
Vice Admiral (Ret) John G. Cotton, *US Navy Reserve*
Dr. Janine Davidson, *Senior Fellow, Council of Foreign Relations*
Ms. Frances Dawn Halfaker, *CEO Halfaker and Associates*
General (Ret) John W. Handy, *US Air Force*
Hon. D. Grier Martin, *North Carolina House of Representatives*
Dr. John Nagl, *Headmaster, The Haverford School*
Mr. Sergio A. "Satch" Pecori, *President & CEO, Hanson Professional Services, Inc*
Ms. MaryAnn E. Tierney, *FEMA Region III Administrator*
Major General (Ret) Cornell A. Wilson, Jr.

Non-voting members

Major General Walter T. Lord, *USA, Military Executive Officer*
Sergeant Major Michael E. Biere, *USAR, Senior Enlisted Military Adviser to the Chair*



Arnold L. Punaro
Chairman



SGM Michael E. Biere
Enlisted Military Advisor to the Chair (non-voting)



LTG David W. Barno
USA, (Retired)



VADM John G. Cotton
USN, (Retired)



Phillip E. Carter
Senior Fellow Counsel & Director of the Military, Veterans & Society Program



Dr. Janine A. Davidson
Senior Fellow Council on Foreign Relations



Ms. Frances Dawn Halfaker
Captain USA (Retired)



Gen John W. Handy
USAF, (Retired)



MG Lewis G. Irwin
USAR



RADM Brian L. LaRoche
USN



MG Walter T. Lord
Military Executive (non-voting) ARNG



Dr. John A. Nagl
Headmaster, Haverford School



MG Timothy E. Orr
ARNG



RADML Francis S. Pelkowski
USCGR



MG L. Scott Rice
ANG



Lt Gen James E. Sherrard III
USAFR (Retired)



Mary Ann E. Tiemey
Regional Administrator FEMA Region III



Maj Gen Burke W. Whitman
USMCR



Maj Gen Cornell A. Wilson, Jr.
USMCR, (Retired)



Lt Gen Charles E. Stenner, Jr.
USAFR, (Retired)

APPENDIX 2 STAFF OF THE RFPB

MG Walter T. Lord, *Military Executive Officer*
SGM Michael E. Biere, *Enlisted Military Advisor*
COL Timothy J. Lynch, *Chief of Staff*
Mr. Alex J. Sabol, *Designated Federal Officer (DFO)*
COL William J. Hersh, *Senior Policy Advisor for Army National Guard*
COL Tyrone D. Clifton, *Senior Policy Advisor for Army Reserve*
CAPT Jay A. Gagne, *Senior Policy Advisor for Navy Reserve*
Col Bart L. Pester, *Senior Policy Advisor for Marine Corps Reserve*
TBD, *Senior Policy Advisor for Air National Guard*
Col Jay D. Jensen, *Senior Policy Advisor for Air Force Reserve*
LT James P. McKnight, *Senior Policy Advisor for Coast Guard Reserve*
Mark F. Cancian, *Consultant*
Mrs. Cindy S. Tyrie, *Administrative Assistant/Executive Secretary*
SFC India L. Boddie, *Administrative Support*



Staff Sgt. Leland Hastings, 919th Special Operations Security Forces Squadron, controls the Raven-B, a four-by-four foot unmanned aerial system, via remote control at Camp Guernsey, Wyo., Aug. 4. The 919th SOSFS brought the UAS to demonstrate its capabilities to other security forces units involved in a large field training exercise at the camp. The Raven-B has the ability to take photos, video in day or night, and even designate locations via an IR laser. It also provides coordinates, magnetic azimuths, and linear distances creating a birds-eye view to topographical map. (U.S. Air Force photo/Tech. Sgt. Sam King)

A U.S. Army Stryker with Alpha Company, 1st Battalion, 5th Infantry Regiment, 1st Stryker Brigade Combat Team, 25th Infantry Division, loads onto a U.S. Air Force C-17 Globemaster III transport aircraft at Fort Wainwright, Alaska, as part of Exercise Northern Edge, June 23, 2015. Northern Edge 2015 is Alaska's joint training exercise designed to practice operations, tactics, techniques and procedures as well as enhance interoperability among the services. Thousands of airmen, soldiers, sailors, Marines and Coast Guardsmen from active duty, reserve and National Guard units are involved. (U.S. Marine Corps photo by Cpl. Tyler S. Giguere/Released)

APPENDIX 3 GOVERNING STATUTES

Title 10, United States Code, Section 175. Reserve Forces Policy Board

There is in the Office of the Secretary of Defense a Reserve Forces Policy Board. The functions, membership, and organization of that board are set forth in section 10301 of this title.

Title 10, United States Code, Section 10301. Reserve Forces Policy Board

- a. **In General.** As provided in section 175 of this title, there is in the Office of the Secretary of Defense a board known as the "Reserve Forces Policy Board" (in this section referred to as the "Board").
- b. **Functions.** The Board shall serve as an independent adviser to the Secretary of Defense to provide advice and recommendations to the Secretary on strategies, policies, and practices designed to improve and enhance the capabilities, efficiency, and effectiveness of the reserve components.
- c. **Membership.** The Board consists of 20 members, appointed or designated as follows:
 1. A civilian appointed by the Secretary of Defense from among persons determined by the Secretary to have the knowledge of, and experience in, policy matters relevant to national security and reserve component matters necessary to carry out the duties of chair of the Board, who shall serve as chair of the Board.
 2. Two active or retired reserve officers or enlisted members designated by the Secretary of Defense upon the recommendation of the Secretary of the Army—
 - a. one of whom shall be a member of the Army National Guard of the United States or a former member of the Army National Guard of the United States in the Retired Reserve; and
 - b. one of whom shall be a member or retired member of the Army Reserve.

3. Two active or retired reserve officers or enlisted members designated by the Secretary of Defense upon the recommendation of the Secretary of the Navy—
 - a. one of whom shall be an active or retired officer of the Navy Reserve; and
 - b. one of whom shall be an active or retired officer of the Marine Corps Reserve.
4. Two active or retired reserve officers or enlisted members designated by the Secretary of Defense upon the recommendation of the Secretary of the Air Force—
 - a. one of whom shall be a member of the Air National Guard of the United States or a former member of the Air National Guard of the United States in the Retired Reserve; and
 - b. one of whom shall be a member or retired member of the Air Force Reserve.
5. One active or retired reserve officer or enlisted member of the Coast Guard designated by the Secretary of Homeland Security.
6. Ten persons appointed or designated by the Secretary of Defense, each of whom shall be a United States citizen having significant knowledge of and experience in policy matters relevant to national security and reserve component matters and shall be one of the following:
 - a. An individual not employed in any Federal or State department or agency.
 - b. An individual employed by a Federal or State department or agency.
 - c. An officer of a regular component of the armed forces on active duty, or an officer of a reserve component of the armed forces in an active status, who—
 - i. is serving or has served in a senior position on the Joint Staff, the headquarters staff of a combatant command, or the headquarters staff of an armed force; and
 - ii. has experience in joint professional military education, joint qualification, and joint operations matters.
7. A reserve officer of the Army, Navy, Air Force, or Marine Corps who is a general or flag officer recommended by the chair and designated by the Secretary of Defense, who shall serve without vote—
 - a. as military adviser to the chair;
 - b. as military executive officer of the Board; and
 - c. as supervisor of the operations and staff of the Board.
8. A senior enlisted member of a reserve component recommended by the chair and designated by the Secretary of Defense, who shall serve without vote as enlisted military adviser to the chair.
 - a. **Matters To Be Acted on.** The Board may act on those matters referred to it by the chair and on any matter raised by a member of the Board or the Secretary of Defense.
 - b. **Staff.** The Board shall be supported by a staff consisting of one full-time officer from each of the reserve components listed in paragraphs (1) through (6) of section 10101 of this title who holds the grade of colonel (or in the case of the Navy, the grade of captain) or who has been selected for promotion to that grade. These officers shall also serve as liaisons between their respective components and the Board. They shall perform their staff and liaison duties under the supervision of the military executive officer of the Board in an independent manner reflecting the independent nature of the Board.
 - c. **Relationship to Service Reserve Policy Committees and Boards.** This section does not affect the committees and boards prescribed within the military departments by sections 10302 through 10305 of this title, and a member of such a committee or board may, if otherwise eligible, be a member of the Board.

*Title 10, United States Code, Section 113.
Secretary of Defense [EXCERPT]*

- a. There is a Secretary of Defense, who is the head of the Department of Defense, appointed from civilian life by the President, by and with the advice and consent of the Senate. A person may not be appointed as Secretary of Defense within seven years after relief from active duty as a commissioned officer of a regular component of an armed force.

- b. The Secretary is the principal assistant to the President in all matters relating to the Department of Defense. Subject to the direction of the President and to this title and section 2 of the National Security Act of 1947 (50 U.S.C. 401), he has authority, direction, and control over the Department of Defense.
- c. ... (1), the Secretary shall transmit to the President and Congress a separate report from the Reserve Forces Policy Board on any reserve component matter that the Reserve Forces Policy Board considers appropriate to include in the report.



U.S. Air Force Senior Master Sgt. Larry Smith, 169th Force Support Squadron base training manager and reserve deputy with the Richland County Sheriff's Department, acts as a sniper during an active shooter exercise. The South Carolina Air National Guard hosted an active shooter exercise combined with the Richland County Sheriff's Department at McEntire Joint National Guard Base, Eastover, S.C., Aug. 20, 2015. The exercise scenario involved an incident where armed individuals attacked entrance points on base and due to limited personnel on-duty, Richland County responded to assist with K-9, SWAT and explosive ordnance disposal units. Responders tracked the assailants through the woods on base and eventually neutralized the threat. (S.C. Air National Guard photo by Tech. Sgt. Caycee Watson/RELEASED)

APPENDIX 4 RFPB REPORTS

Annual Report GIB Recommendations (October 1, 2014)

 DEPARTMENT OF DEFENSE CHAIRMAN	OFFICE OF THE SECRETARY OF DEFENSE RESERVE FORCES POLICY BOARD 5113 Leesburg Pike, Suite 601 FALLS CHURCH, VA 22041	OCT 1 2014
INFO MEMO		
FOR: SECRETARY OF DEFENSE		DepSec Action _____
FROM: MajGen Arnold L. Punaro, USMC (Ret), Chairman, Reserve Forces Policy Board		
SUBJECT: Report of the Reserve Forces Policy Board on Support to ULB RA-006/OLC-104 for inclusion into Fiscal Year 2016 National Defense Authorization Act.		
<ul style="list-style-type: none"> • The Reserve Forces Policy Board (RFPB) is a federal advisory committee established in law to provide you with independent advice and recommendations on strategies, policies and practices designed to improve and enhance the capabilities, efficiency, and effectiveness of the reserve components. • The RFPB met on September 10, 2014 and voted to recommend the Department ask Congress to change the law regarding the definition of active duty as it relates to reservists under Title 38, United States Code – Veterans Benefits [TAB A]. • Under the Veterans Educational Assistance Act Of 2008 (Post 9/11 GI Bill), a reserve component (RC) service member of the Armed Forces accrues active duty service time credit for the calculation of educational assistance benefits only while serving on active duty as defined in Title 38 USC Section 3301 [TAB B]. In this section, active duty for reserve component members is defined as service under section 688, 12301(a), 12301(d), 12301(g), 12302, or 12304 of title 10 USC. • Excluded from the current definition of active duty under Title 38, is Title 10 USC, 12301(h) [TAB C]. Title 10, 12301(h) provides a category of active duty for reservists while receiving medical treatment (i.e. medical hold status). • The Post 9/11 GI Bill benefit is earned with active duty service time (as defined by Title 38) accrued since September 10, 2001 and the benefit is earned in tiers. To earn 100% of the benefit, a service member must accrue 36 cumulative months of active duty time <i>or</i> serve at least 30 continuous days on active duty and be discharged due to service connected disability. • Currently, when a RC service member is injured or wounded in a combat theater, that member is transitioned on orders to a medical hold status under 10 USC 12301(h) for a potentially long recovery and rehabilitation. This stops the accrual of active duty time that would count toward the Post 9/11 GI Bill benefit. If the member does not discharge and instead returns to service - either deployed or as a Selected Reservist - none of the time spent in recovery is considered qualifying time. The service member would earn less 		

qualifying time than those who served the entire time without an injury, and would not receive an equal benefit. In effect, this service member is penalized for being wounded or injured in theater. Coincidentally, if that same member was discharged from service because of the injury, the member would earn 100% of the benefit (assuming 30 days of continuous active duty service).

- OUSD P-R has recently approved a Unified Legislative Budget (ULB) Change Proposal and forwarded it to the Office of Legislation Council for review and inclusion into the 2016 NDAA [TAB D].
- The board recommended you approve this ULB (RA-006, now OLC-104) which would add Title 10 12301(h) as a period of "active duty" to Title 38, Section 3301 (1)(B) for the purpose of accruing benefits under the "Post-9/11 Veterans Assistance Act of 2008".
- As required by the Federal Advisory Committee Act, the recommendations were deliberated and approved in an open, public session. The briefing presented to and approved by the Board [TAB A] will be posted to the RFPB web site. Background information about the RFPB is at TAB E.

COORDINATION: NONE

Attachment(s):
As stated

Prepared by: CAPT Jay Gagne, 703-681-0600

Tab A



Subcommittee on Supporting and Sustaining Reserve Component Personnel

As approved by RFPB – 10 September 2014

Major General Marcia M. Anderson
Subcommittee Chair



CORRECTED

New Issue for discussion



Issue: Medical hold duty status for RC members does not qualify for the accrual of Post-9/11 GI Bill benefits

- Current definition of active duty for reservists in Title 38, Veterans Benefits, Section 3301 (1)(B) excludes Title 10, 12301(h) as active duty when considered for the purposes of Post-9/11 GI Bill entitlement
 - Title 10, 12301(h) provides a category of active duty for reservists while receiving medical treatment (i.e. medical hold status)
- Presented by the NGB to OASD-RA and approved as a Unified Legislative Budget (ULB) Change Proposal
 - Pending ULB would add Title 10 12301(h) as a period of "active duty" to Title 38, Section 3301 (1)(B) for the purpose of accruing Post-9/11 GIB benefits
 - Per year (FY16-20 FYDP): Requires ~\$8.2M and benefits ~2960 people
 - Costs borne by Department of Veterans Administration
- Services and OSD are pressing to include in the 2016 NDAA
- Not currently recommended as retroactive



CORRECTED

Recommendation



Recommend SECDEF approve the ULB, adding Title 10 12301(h) as a period of "active duty" to Title 38, Section 3301 (1)(B) for the purpose of accruing **Post-9/11** GI Bill benefits

Pursuing an amendment for the change to be retroactive is *not* recommended at this time

- Possible future proposal once law is passed

3

Tab B

38 USC 3301

NB: This unofficial compilation of the U.S. Code is current as of Jan. 4, 2012 (see <http://www.law.cornell.edu/uscode/inuscript.html>).

TITLE 38 - VETERANS BENEFITS PART III - READJUSTMENT AND RELATED BENEFITS CHAPTER 33 - POST-9/11 EDUCATIONAL ASSISTANCE SUBCHAPTER 1 - DEFINITIONS

§ 3301. Definitions

In this chapter:

- (1) The term "active duty" has the meanings as follows (subject to the limitations specified in sections 3002 (6) and 3311 (b)):
- (A) In the case of members of the regular components of the Armed Forces, the meaning given such term in section 101 (21)(A).
- (B) In the case of members of the reserve components of the Armed Forces, service on active duty under a call or order to active duty under section 688, 12301 (a), 12301 (d), 12301 (g), 12302, or 12304 of title 10.
- (C) In the case of a member of the Army National Guard of the United States or Air National Guard of the United States, in addition to service described in subparagraph (B), full-time service—
- (i) in the National Guard of a State for the purpose of organizing, administering, recruiting, instructing, or training the National Guard; or
- (ii) in the National Guard under section 502 (f) of title 32 when authorized by the President or the Secretary of Defense for the purpose of responding to a national emergency declared by the President and supported by Federal funds.
- (2) The term "entry level and skill training" means the following:
- (A) In the case of members of the Army, Basic Combat Training and Advanced Individual Training or One Station Unit Training.
- (B) In the case of members of the Navy, Recruit Training (or Boot Camp) and Skill Training (or so-called "A" School).
- (C) In the case of members of the Air Force, Basic Military Training and Technical Training.
- (D) In the case of members of the Marine Corps, Recruit Training and Marine Corps Training (or School of Infantry Training).
- (E) In the case of members of the Coast Guard, Basic Training and Skill Training (or so-called "A" School).
- (3) The term "program of education" has the meaning given such term in section 3002, except to the extent otherwise provided in section 3313.
- (4) The term "Secretary of Defense" means the Secretary of Defense, except that the term means the Secretary of Homeland Security with respect to the Coast Guard when it is not operating as a service in the Navy.

(Added Pub. L. 110-252, title V, § 5003(a)(1), June 30, 2008, 122 Stat. 2359; amended Pub. L. 111-377, title I, § 101(a), Jan. 4, 2011, 124 Stat. 4107.)

Amendments

2011 — Par. (1)(C), Pub. L. 111-377, § 101(a)(1), added subpar. (C).

Par. (2)(A), Pub. L. 111-377, § 101(a)(2), inserted "or One Station Unit Training" before period at end.

Par. (2)(E), Pub. L. 111-377, § 101(a)(3), inserted "and Skill Training (or so-called 'A' School)" before period at end.

Effective Date of 2011 Amendment

Pub. L. 111-377, title I, § 101(d)(1)-(3), Jan. 4, 2011, 124 Stat. 4108, provided that:

1-

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NR: This unofficial compilation of the U.S. Code is current as of Jan. 4, 2012 (see <http://www.law.cornell.edu/uscode/uscpnt.html>).

"(1) Service in national guard as active duty.—The amendment made by subsection (a)(1) [amending this section] shall take effect on August 1, 2009, as if included in the enactment of chapter 33 of title 38, United States Code, pursuant to the Post-9/11 Veterans Educational Assistance Act of 2008 (title V of Public Law 110-252) [see Short Title of 2008 Amendment note set out under section 101 of this title]. However, no benefits otherwise payable by reason of such amendment for the period beginning on August 1, 2009, and ending on September 30, 2011, may be paid before October 1, 2011.

"(2) One station unit training.—The amendment made by subsection (a)(2) [amending this section] shall take effect on the date of the enactment of this Act [Jan. 4, 2011].

"(3) Entry level and skill training for the coast guard.—The amendment made by subsection (a)(3) [amending this section] shall take effect on the date of the enactment of this Act, and shall apply with respect to individuals entering service on or after that date."

Effective Date

Chapter effective Aug. 1, 2009, see section 5003(d) of Pub. L. 110-252, set out as an Effective Date of 2008 Amendment note under section 16163 of Title 10, Armed Forces.

Findings

Pub. L. 110-252, title V, § 5002, June 30, 2008, 122 Stat. 2357, provided that: "Congress makes the following findings:

"(1) On September 11, 2001, terrorists attacked the United States, and the brave members of the Armed Forces of the United States were called to the defense of the Nation.

"(2) Service on active duty in the Armed Forces has been especially arduous for the members of the Armed Forces since September 11, 2001.

"(3) The United States has a proud history of offering educational assistance to millions of veterans, as demonstrated by the many "G.I. Bills" enacted since World War II. Educational assistance for veterans helps reduce the costs of war, assist veterans in readjusting to civilian life after wartime service, and boost the United States economy, and has a positive effect on recruitment for the Armed Forces.

"(4) The current educational assistance program for veterans is outdated and designed for peacetime service in the Armed Forces.

"(5) The people of the United States greatly value military service and recognize the difficult challenges involved in readjusting to civilian life after wartime service in the Armed Forces.

"(6) It is in the national interest for the United States to provide veterans who serve on active duty in the Armed Forces after September 11, 2001, with enhanced educational assistance benefits that are worthy of such service and are commensurate with the educational assistance benefits provided by a grateful Nation to veterans of World War II."

Applicability to Individuals Under Montgomery GI Bill Program

Pub. L. 110-252, title V, § 5003(c), June 30, 2008, 122 Stat. 2375, provided that:

"(1) Individuals Eligible to Elect Participation in Post-9/11 Educational Assistance.—An individual may elect to receive educational assistance under chapter 33 of title 38, United States Code (as added by subsection (a)), if such individual—

"(A) as of August 1, 2009—

"(i) is entitled to basic educational assistance under chapter 30 of title 38, United States Code, and has used, but retains unused, entitlement under that chapter;

"(ii) is entitled to educational assistance under chapter 107, 1606, or 1607 of title 10, United States Code, and has used, but retains unused, entitlement under the applicable chapter;

"(iii) is entitled to basic educational assistance under chapter 30 of title 38, United States Code, but has not used any entitlement under that chapter;

"(iv) is entitled to educational assistance under chapter 107, 1606, or 1607 of title 10, United States Code, but has not used any entitlement under such chapter;

"(v) is a member of the Armed Forces who is eligible for receipt of basic educational assistance under chapter 30 of title 38, United States Code, and is making contributions toward such assistance under section 3011(b) or 3012(c) of such title; or

"(vi) is a member of the Armed Forces who is not entitled to basic educational assistance under chapter 30 of title 38, United States Code, by reason of an election under section 3011(e)(1) or 3012(d)(1) of such title; and

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NR: This unofficial compilation of the U.S. Code is current as of Jan. 4, 2012 (see <http://www.law.cornell.edu/uscode/uscpnt.html>).

"(B) as of the date of the individual's election under this paragraph, meets the requirements for entitlement to educational assistance under chapter 33 of title 38, United States Code (as so added);

"(2) Cessation of Contributions Toward GI [sic] Bill.—Effective as of the first month beginning on or after the date of an election under paragraph (1) of an individual described by subparagraph (A)(v) of that paragraph, the obligation of the individual to make contributions under section 3011 (b) or 3012 (c) of title 38, United States Code, as applicable, shall cease, and the requirements of such section shall be deemed to be no longer applicable to the individual.

"(3) Revocation of Remaining Transferred Entitlement.—

"(A) Election to revoke.—If, on the date an individual described in subparagraph (A)(i) or (A)(ii) of paragraph (1) makes an election under that paragraph, a transfer of the entitlement of the individual to basic educational assistance under section 3020 of title 38, United States Code, is in effect and a number of months of the entitlement so transferred remain unutilized, the individual may elect to revoke all or a portion of the entitlement so transferred that remains unutilized.

"(B) Availability of revoked entitlement.—Any entitlement revoked by an individual under this paragraph shall no longer be available to the dependent to whom transferred, but shall be available to the individual instead for educational assistance under chapter 33 of title 38, United States Code (as so added), in accordance with the provisions of this subsection.

"(C) Availability of unrevoked entitlement.—Any entitlement described in subparagraph (A) that is not revoked by an individual in accordance with that subparagraph shall remain available to the dependent or dependents concerned in accordance with the current transfer of such entitlement under section 3020 of title 38, United States Code.

"(4) Post-9/11 Educational Assistance.—

"(A) In general.—Subject to subparagraph (B) and except as provided in paragraph (5), an individual making an election under paragraph (1) shall be entitled to educational assistance under chapter 33 of title 38, United States Code (as so added), in accordance with the provisions of such chapter, instead of basic educational assistance under chapter 30 of title 38, United States Code, or educational assistance under chapter 107, 1606, or 1607 of title 10, United States Code, as applicable.

"(B) Limitation on entitlement for certain individuals.—In the case of an individual making an election under paragraph (1) who is described by subparagraph (A)(i) of that paragraph, the number of months of entitlement of the individual to educational assistance under chapter 33 of title 38, United States Code (as so added), shall be the number of months equal to—

"(i) the number of months of unused entitlement of the individual under chapter 30 of title 38, United States Code, as of the date of the election; plus

"(ii) the number of months, if any, of entitlement revoked by the individual under paragraph (3)(A).

"(5) Continuing Entitlement to Educational Assistance Not Available Under 9/11 Assistance Program.—

"(A) In general.—In the event educational assistance to which an individual making an election under paragraph (1) would be entitled under chapter 30 of title 38, United States Code, or chapter 107, 1606, or 1607 of title 10, United States Code, as applicable, is not authorized to be available to the individual under the provisions of chapter 33 of title 38, United States Code (as so added), the individual shall remain entitled to such educational assistance in accordance with the provisions of the applicable chapter.

"(B) Charge for use of entitlement.—The utilization by an individual of entitlement under subparagraph (A) shall be chargeable against the entitlement of the individual to educational assistance under chapter 33 of title 38, United States Code (as so added), at the rate of one month of entitlement under such chapter 33 for each month of entitlement utilized by the individual under subparagraph (A) (as determined as if such entitlement were utilized under the provisions of chapter 30 of title 38, United States Code, or chapter 107, 1606, or 1607 of title 10, United States Code, as applicable).

"(6) Additional Post-9/11 Assistance for Members Having Made Contributions Toward GI [sic] Bill.—

"(A) Additional assistance.—In the case of an individual making an election under paragraph (1) who is described by clause (i), (ii), or (v) of subparagraph (A) of that paragraph, the amount of educational assistance payable to the individual under chapter 33 of title 38, United States Code (as so added), as a monthly stipend payable under paragraph (1)(B) of section 3313(c) of such title, or under paragraphs (2) through (7) of that section (as applicable), shall be the amount otherwise payable as a monthly stipend under the applicable paragraph increased by the amount equal to—

"(i) the total amount of contributions toward basic educational assistance made by the individual under section 3011 (b) or 3012 (c) of title 38, United States Code, as of the date of the election, multiplied by

"(ii) the fraction—

"(1) the numerator of which is—

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Note: This unofficial compilation of the U.S. Code is current as of Jan. 4, 2012 (see <http://www.law.cornell.edu/uscode/usgprn.html>).

"(aa) the number of months of entitlement to basic educational assistance under chapter 30 of title 38, United States Code, remaining to the individual at the time of the election; plus

"(bb) the number of months, if any, of entitlement under such chapter 30 revoked by the individual under paragraph (3)(A); and

"(II) the denominator of which is 36 months.

"(B) Months of remaining entitlement for certain individuals.—In the case of an individual covered by subparagraph (A) who is described by paragraph (1)(A)(v), the number of months of entitlement to basic educational assistance remaining to the individual for purposes of subparagraph (A)(ii)(A) shall be 36 months.

"(C) Timing of payment.—The amount payable with respect to an individual under subparagraph (A) shall be paid to the individual together with the last payment of the monthly stipend payable to the individual under paragraph (1)(B) of section 3313 (c) of title 38, United States Code (as so added), or under paragraphs (2) through (7) of that section (as applicable), before the exhaustion of the individual's entitlement to educational assistance under chapter 33 of such title (as so added).

"(7) Continuing Entitlement to Additional Assistance for Critical Skills or Specialty and Additional Service.—An individual making an election under paragraph (1)(A) who, at the time of the election, is entitled to increased educational assistance under section 3015 (d) of title 38, United States Code, or section 16131 (i) of title 10, United States Code, or supplemental educational assistance under subchapter III of chapter 30 of title 38, United States Code, or supplemental educational assistance under subchapter III of chapter 30 of title 38, United States Code (as so added), in an amount equal to the quarter, semester, or term, as applicable, equivalent of the monthly amount of such increased educational assistance or supplemental educational assistance payable with respect to the individual at the time of the election.

"(8) Irrevocability of Elections.—An election under paragraph (1) or (3)(A) is irrevocable."

Tab C



AMENDMENTS

1984—Pub. L. 103-537 renumbered section 599 of this title as this section.

DELEGATION OF FUNCTIONS

Functions of the President under this section delegated to the Secretary of Defense, see section 140 of Ex. Ord. No. 11390, Jan. 22, 1968, 33 F.R. 841, set out as a note under section 301 of Title 5, The President.

§ 1224. Warrant officers discharge or retirement for years of service or for age

Each reserve warrant officer of the Army, Navy, Air Force, or Marine Corps who is in an active status and has reached the maximum years of service or age prescribed by the Secretary concerned shall—

- (1) be transferred to the Retired Reserve if the warrant officer is qualified for such transfer and does not request (in accordance with regulations prescribed by the Secretary concerned) not to be transferred to the Retired Reserve; or
- (2) be discharged if the warrant officer is not qualified for transfer to the Retired Reserve or has requested (in accordance with regulations prescribed by the Secretary concerned) not to be so transferred.

(Added Pub. L. 107-407, div. A, title V, § 517(e)(1), Dec. 28, 2001, 115 Stat. 1695.)

EFFECTIVE DATE

Section effective on the first day of the first month that begins more than 180 days after Dec. 28, 2001, see section 510(e) of Pub. L. 107-407, set out as an Effective Date of 2001 Amendment note under section 19154 of this title.

CHAPTER 1209—ACTIVE DUTY

- 12301. Reserve components generally.
- 12302. Ready Reserve.
- 12303. Ready Reserve members not assigned to, or participating satisfactorily in, units.
- 12304. Selected Reserve and certain Individual Ready Reserve members: order to active duty other than during war or national emergency.
- 12304a. Army Reserve, Navy Reserve, Marine Corps Reserve, Air Force Reserve: order to active duty to provide assistance in response to a major disaster or emergency.
- 12304b. Selected Reserve: order to active duty for preplanned missions in support of the combatant commands.
- 12305. Authority of President to suspend certain laws relating to promotion, retirement, and separation.
- 12306. Standby Reserve.
- 12307. Retired Reserve.
- 12308. Retention after becoming qualified for retired pay.
- 12309. Reserve officers: use of in expansion of armed forces.
- 12310. Reserves for organizing, administering, etc., reserve components.
- 12311. Active duty agreements.
- 12312. Active duty agreements: release from duty.
- 12313. Reserves: release from active duty.
- 12314. Reserves: kinds of duty.
- 12315. Reserves: duty with or without pay.
- 12316. Payment of certain Reserves while on duty.
- 12317. Reserves: biological standards limitations.
- 12318. Reserves on active duty: duties, funding.
- 12319. Ready Reserve: muster duty.

Sec.

- 12320. Reserve officers: grade in which ordered to active duty.
- 12321. Reserve Officer Training Corps units: limitations on number of Reserves assigned.
- 12322. Active duty for health care.

AMENDMENTS

2011—Pub. L. 112-81, div. A, title V, § 51504(x2), 51603(a)(3), Dec. 31, 2011, 125 Stat. 1494, 1397, added items 12304a and 12304b.

1968—Pub. L. 106-45, div. A, title VII, § 706(a)(2), Oct. 6, 1969, 118 Stat. 653, added item 12322.

1997—Pub. L. 105-85, div. A, title V, § 5116(e)(2), Nov. 18, 1997, 111 Stat. 1322, inserted "and certain Individual Ready Reserve members" after "selected Reserve" in item 12304.

1968—Pub. L. 104-106, div. A, title XV, § 1501(b)(16), Feb. 19, 1996, 110 Stat. 499, substituted a semicolon for a colon in item 12304 and struck out "on active duty" after "Retention" in item 12308.

§ 12301. Reserve components generally

(a) In time of war or of national emergency declared by Congress, or when otherwise authorized by law, an authority designated by the Secretary concerned may, without the consent of the persons affected, order any unit, and any member not assigned to a unit organized to serve as a unit, of a reserve component under the jurisdiction of that Secretary to active duty for the duration of the war or emergency and for six months thereafter. However a member on an inactive status list or in a retired status may not be ordered to active duty under this subsection 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.

(b) At any time, an authority designated by the Secretary concerned may, without the consent of the persons affected, order any unit, and any member not assigned to a unit organized to serve as a unit, in an active status in a reserve component under the jurisdiction of that Secretary to active duty for not more than 15 days a year. However, units and members of the Army National Guard of the United States or the Air National Guard of the United States may not be ordered to active duty under this subsection without the consent of the governor of the State (or, in the case of the District of Columbia National Guard, the commanding general of the District of Columbia National Guard).

(c) So far as practicable, during any expansion of the active armed forces that requires that units and members of the reserve components be ordered to active duty as provided in subsection (a), members of units organized and trained to serve as units who are ordered to that duty without their consent shall be so ordered with their units. However, members of those units may be reassigned after being so ordered to active duty.

(d) At any time, an authority designated by the Secretary concerned may order a member of a reserve component under his jurisdiction to active duty, or retain him on active duty, with the consent of that member. However, a member

of the Army National Guard of the United States or the Air National Guard of the United States may not be ordered to active duty under this subsection without the consent of the governor or other appropriate authority of the State concerned.

(c) The period of time allowed between the date when a Reserve ordered to active duty as provided in subsection (a) is alerted for that duty and the date when the Reserve is required to enter upon that duty shall be determined by the Secretary concerned based upon military requirements at that time.

(d) The consent of a Governor described in subsections (b) and (c) may not be withheld (in whole or in part) with regard to active duty outside the United States, its territories, and its possessions, because of any objection to the location, purpose, type, or schedule of such active duty.

(g)(1) A member of a reserve component may be ordered to active duty without his consent if the Secretary concerned determines that the member is in a captive status. A member ordered to active duty under this section may not be retained on active duty, without his consent, for more than 30 days after his captive status is terminated.

(2) The Secretary of Defense shall prescribe regulations to carry out this section. Such regulations shall apply uniformly among the armed forces under the jurisdiction of the Secretary. A determination for the purposes of this subsection that a member is in a captive status shall be made pursuant to such regulations.

(3) In this section, the term "captive status" means the status of a member of the armed forces who is in a missing status (as defined in section 55(2) of title 37) which occurs as the result of a hostile action and is related to the member's military status.

(h)(1) When authorized by the Secretary of Defense, the Secretary of a military department may, with the consent of the member, order a member of a reserve component to active duty—

(A) to receive authorized medical care;

(B) to be medically evaluated for disability or other purposes; or

(C) to complete a required Department of Defense health care study, which may include an associated medical evaluation of the member.

(2) A member ordered to active duty under this subsection may, with the member's consent, be retained on active duty, if the Secretary concerned considers it appropriate, for medical treatment for a condition associated with the study or evaluation, if that treatment of the member is otherwise authorized by law.

(3) A member of the Army National Guard of the United States or the Air National Guard of the United States may be ordered to active duty under this subsection only with the consent of the Governor or other appropriate authority of the State concerned.

(Aug. 10, 1956, ch. 1041, 70A Stat. 27, 1672; Pub. L. 85-961, § 1(13), 33(a)(5), Sept. 3, 1958, 72 Stat. 1440, 1564; Pub. L. 96-357, § 6, Sept. 24, 1980, 94 Stat. 1182; Pub. L. 96-504, § 1, Dec. 23, 1980, 94 Stat. 3377; Pub. L. 96-500, § 101(c) [title IX, § 1222], Oct.

18, 1986, 100 Stat. 1783-82, 1783-127, and Pub. L. 99-591, § 101(c) [title IX, § 1222], Oct. 30, 1986, 100 Stat. 3341-62, 3341-127; Pub. L. 99-601, div. A, title V, § 1522, 52(a), Nov. 14, 1986, 100 Stat. 3971; Pub. L. 100-456, div. A, title XII, § 1234(a)(1), (2), Sept. 28, 1988, 102 Stat. 2059; renumbered § 12301 and amended Pub. L. 103-337, div. A, title XVI, § 1162(a)(2), 1075(a)(1), Oct. 5, 1994, 108 Stat. 2992, 3017; Pub. L. 106-65, div. A, title V, § 512, Oct. 5, 1989, 113 Stat. 592; Pub. L. 108-375, div. A, title V, § 511(a), Oct. 28, 2004, 118 Stat. 1882.)

HISTORICAL AND REVISION NOTES—1958 ACT

Revised section	Source (U.S. Code)	Source (Statutes at Large)
62(a)	4890(a)	July 9, 1952, ch. 688, § 222 (see also ch. 171, 234)
62(b)	4890(b)	(1) 48 Stat. 66 Stat. 420, 424
62(c)	4890(c)	
62(d)	4892 (last sentence)	
62(e)	4890(d)	

In subsection (a), the word "hereafter" is omitted as surplusage. The words "there are not enough . . . who are" are substituted for the words "adequate numbers of * * * are not". The words "without the consent of the persons affected" and "under the jurisdiction of that Secretary" are inserted for clarity. The words "and the members thereof" are omitted as surplusage.

In subsection (b), the words "without the consent of the persons affected" are substituted for the words "without his consent", since units as well as individuals are covered by the revised subsection. The words "and the members thereof", "and required to perform", "or required to serve on", and "in the service of the United States" are omitted as surplusage.

In subsections (b) and (d), the words "active duty for training" are omitted as covered by the words "active duty".

In subsection (c), the words "to active duty" are substituted for the words "into the active military service of the United States", in 50-901(g) (last and last sentences). The words "to serve" are substituted for the words "for the purpose of serving". The words "without their consent" are substituted for the word "involuntarily". The words "to that duty" are substituted for the words "into active duty". The last sentence of the revised subsection is substituted for 50-901(f) (last sentence).

In subsection (d), the words "the consent of that member" are substituted for the words "his consent". The words "under his jurisdiction" are inserted for clarity. 50-902 (last 13 words of last sentence) is omitted as covered by 50-901(d).

In subsection (e), the words "to active duty (other than for training)" are substituted for the words "into the active military service of the United States". The words "period of" are omitted as surplusage. The word "requirements" is substituted for the word "condition" for clarity.

1958 ACT

Revised section	Source (U.S. Code)	Source (Statutes at Large)
62(a)	4890(a)	Aug. 9, 1956, ch. 953, § 2(a), 70 Stat. 109.

The word "hereafter" is omitted as surplusage. The words "there are not enough . . . who are" are substituted for the words "adequate numbers of . . . are not". The words "without the consent of the persons affected" and "under the jurisdiction of that Secretary" are inserted for clarity.

The changes are necessary to reflect section 301(b) of the Armed Forces Reserve Act of 1952 (50 U.S.C. 901(b)), which defines the term "active duty" to exclude active-duty for training. This definition applied to the source

law for these sections [sections 672 and 673], section 239(a), (b)(1), and (c) of the Armed Forces Reserve Act of 1952 (50 U.S.C. 901(a), (b)(1), (c)).

CONFIRMATION

Pub. L. 99-591 is a corrected version of Pub. L. 99-500.

AMENDMENTS

2004—Subsec. (a), Pub. L. 108-375, § 16(a)(1), struck out "other than for training" after "that Secretary to active duty".

Subsec. (c), Pub. L. 108-375, § 16(a)(2), substituted "as provided in subsection (a)" for "(other than for training)" and "as ordered to active duty" for "ordered to active duty (other than for training)".

Subsec. (e), Pub. L. 108-375, § 16(a)(3), substituted "as provided in subsection (a)" for "(other than for training)".

1989—Subsec. (b), Pub. L. 106-65 added subsec. (b).

1984—Pub. L. 103-337, § 1162(a)(2), renumbered section 672 of this title as this section.

Subsec. (b), Pub. L. 103-337, § 1162(a)(1)(A), substituted "or, in the case of the District of Columbia National Guard, the commanding general of the District of Columbia National Guard" for "or Territory, Puerto Rico, or the District of Columbia, whichever is" after "authority of the State".

1988—Subsec. (b), Pub. L. 100-456, § 1234(a)(1), substituted "or Puerto Rico" for "or Puerto Rico, or the Canal Zone".

Subsec. (d), Pub. L. 106-65, § 1162(a)(3), struck out "or Territory, Puerto Rico, or the District of Columbia, whichever is" after "authority of the State".

1986—Subsec. (c), Pub. L. 99-500 and Pub. L. 99-501, § 101(c) [§ 1222], Pub. L. 99-501, § 22, amended section identically adding subsec. (f).

Subsec. (g), Pub. L. 99-501, § 1224(a), added subsec. (g).

1988—Subsec. (a), Pub. L. 99-507 struck out (1) designation for second sentence and (2) prohibition against ordering a member of the Standby Reserve to active duty unless the Director of Selective Service determined that the member was available for active duty.

Subsec. (c), Pub. L. 99-584 substituted provisions respecting determination of the allowable time in terms of military requirements for provisions authorizing a reasonable time.

1988—Subsec. (a), Pub. L. 85-801, § 11(13), 33(a)(5), inserted "other than for training" after "active duty", substituted "inactive National Guard" for "inactive Army National Guard or in the inactive Air National Guard", and inserted provisions prohibiting a member of the Standby Reserve from being ordered to active duty under this subsection unless the Director of Selective Service determines that the member is available for active duty.

Subsec. (c), Pub. L. 85-801, § 33(a)(5), inserted "(other than for training)" after "active duty".

EFFECTIVE DATE OF 1984 AMENDMENT

Amendment by Pub. L. 103-337 effective Dec. 1, 1994, except as otherwise provided, and section 1001 of Pub. L. 103-337, set out as an Effective Date note under section 1001 of this title.

EFFECTIVE DATE OF 1986 AMENDMENT

Section 526(b) of Pub. L. 99-501 provided that "Section 672(b) [now 12301(b)] of title 10, United States Code, as added by subsection (a), does not authorize a member of a reserve component to be ordered to active duty for a period before the date of the enactment of this Act [Nov. 14, 1986]."

EFFECTIVE DATE OF 1988 AMENDMENT

Amendment by section 33(a)(5) of Pub. L. 85-801 effective Aug. 10, 1956, see section 33(g) of Pub. L. 85-801, set out as a note under section 101 of this title.

RULE OF CONSTRUCTION FOR DUPLICATE AUTHORIZATIONS AND APPROPRIATIONS PROVISIONS OF PUBLIC LAWS 99-500, 99-501, AND 99-501

For rule of construction for certain duplicate provisions of Public Laws 99-500, 99-501, and 99-501, see Pub. L. 105-20, 14 Aug. 23, 1987, 101 Stat. 274, set out as a note under section 2002 of this title.

ADVANCE NOTICE TO MEMBERS OF RESERVE COMPONENTS OF DEPLOYMENT IN SUPPORT OF CONTINGENCY OPERATIONS

Pub. L. 110-181, div. A, title V, § 511, Jan. 29, 2008, 122 Stat. 89, provided that:

(a) **ADVANCE NOTICE REQUIRED.**—The Secretary of a military department shall ensure that a member of a reserve component under the jurisdiction of that Secretary who will be called or ordered to active duty for a period of more than 30 days in support of a contingency operation (as defined in section 101(a)(3) of title 10, United States Code) receives notice in advance of the mobilization date. In so far as is practicable, the notice shall be provided not less than 30 days before the mobilization date, but with a goal of 90 days before the mobilization date.

(b) **REDUCTION OR WAIVER OF NOTICE REQUIREMENT.**—The Secretary of Defense may waive the requirement of subsection (a), or authorize shorter notice than the minimum specified in such subsection, during a war or national emergency declared by the President or Congress or to meet mission requirements. If the waiver or reduction is made on account of mission requirements, the Secretary shall submit to Congress a report detailing the reasons for the waiver or reduction and the mission requirements at issue.

§ 12302. Ready Reserve

(a) In time of national emergency declared by the President after January 1, 1953, or when otherwise authorized by law, an authority designated by the Secretary concerned may, without the consent of the persons concerned, order any unit, and any member not assigned to a unit organized to serve as a unit, in the Ready Reserve under the jurisdiction of that Secretary to active duty for not more than 33 consecutive months.

(b) To achieve fair treatment as between members in the Ready Reserve who are being considered for recall to duty without their consent, consideration shall be given to—

- (1) the length and nature of previous service, to assure such sharing of exposure to hazards as the national security and military requirements will reasonably allow;
- (2) family responsibilities; and
- (3) employment necessary to maintain the national health, safety, or interest.

The Secretary of Defense shall prescribe such policies and procedures as he considers necessary to carry out this subsection.

(c) Not more than 1,000,000 members of the Ready Reserve may be on active duty, without their consent, under this section at any one time.

(Aug. 10, 1956, ch. 1041, 70A Stat. 29, 1673; Pub. L. 85-961, § 1(14), 33(a)(5), Sept. 3, 1958, 72 Stat. 1441, 1564; Pub. L. 93-155, title III, § 330(a), Nov. 16, 1975, 87 Stat. 607; renumbered § 12302, Pub. L. 100-456, § 1234(a)(5), Sept. 28, 1988, 102 Stat. 2059.)

Tab D

- 1 **SEC. ___, INCLUSION OF DUTY PERFORMED UNDER 10 U.S.C. 12301(h) AS**
 2 **QUALIFYING ACTIVE DUTY TIME FOR CALCULATION OF POST**
 3 **9/11 VETERANS EDUCATIONAL ASSISTANCE ACT OF 2008**
 4 **BENEFITS .**
 5 Section 3301 of title 38, United States Code, is amended in subsection (a)(1)(B) by
 6 inserting "12301(h)," after "12301(g)".

Section-by-Section Analysis

Under the Veterans Educational Assistance Act Of 2008 (Post 9/11 GI Bill), enacted as part of the Supplemental Appropriations Act, 2008 (Public Law 110-252, 122 Stat. 2358), a member of the reserve components of the Armed Forces presently accrues active duty service time credit for the calculation of educational assistance benefits for service on active duty under a call or order to active duty only under sections 688, 12301(a), 12301(d), 12301(g), 12302, or 12304 of title 10 or section 712 of title 14, United States Code. This proposal would expand these categories to include that time on active duty under 10 U.S.C. 12301(h). Under 12301(h), the Secretary of a military department may, with the with the consent of the member, order a member of a reserve component to active duty in order to: to receive authorized medical care; be medically evaluated for disability or other purposes; or, to complete a required Department of Defense health care study, which may include an associated medical evaluation of the member.

Currently, when a reserve component (RC) service member is injured or wounded in a combat theater, that Service member (SM) is transitioned on orders to a wounded warrior status under 10 USC 12301(h). This section is not included within the definition of "active duty" for the purposes of Post-9/11 GI Bill entitlement. As detailed in the finding of Congress, contained in section 5002 of the Supplemental Appropriations Act, 2008, particularly paragraphs (2), (5) and (6), these members answered a call and were wounded in a combat environment; their sacrifices must be honored.

Current law scenario:

1. A SM who is called to service under one of the applicable sections and has served at least 30 days, is wounded or injured, and then is discharged due to a service-connected disability will qualify for the 100% tier for Post-9/11 entitlements. In this case, time served under 12301(h) is irrelevant, as the SM qualifies based on the service during the 30 days and subsequent discharge.

2. A SM who is called to service under one of the applicable sections and is wounded in theater could spend significant time in recovery and rehabilitation under 12301(h). Many RC service members will not accrue 36 months of Active Duty to qualify for the Post-9/11 GI Bill at the 100% tier, and will depend on deployment time to add to their tier rate. The average length of qualifying service for an RC service member who deploys and is not wounded is 16 months.

Even if the injury was sustained due to combat operations, if the SM does not discharge and instead returns to service - either deployed or Selected Reserve - none of the time spent in recovery is qualifying time. In this case, the SM would return to Selected Reserve status with less qualifying time than those who served the entire time without an injury, and would not receive an equal benefit. In effect, they are being penalized for being wounded or injured in theater.

Budget Implications: The Department of Defense (DoD) has no responsibility for funding of the basic benefits of the Post-9/11 GI Bill. Costs for the Post-9/11 GI Bill are borne by the Department of Veterans Affairs, under the provisions of section 3324(b) of title 38, which states, "Payments for entitlement to educational assistance earned under this chapter shall be made from funds appropriated to, or otherwise made available to, the Department for the payment of readjustment benefits." While DoD has estimates regarding the number of personnel affected and cost to carry out this proposal, there is no budget implication to DoD.

Unified Legislation and Budgeting (ULB) Proposal Number: TBD

Justification for Resubmitted Proposal: This proposal is being submitted for the first time.

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Changes to Existing Law: This proposal would make the following changes to section 3301 of title 38 United States Code:

§3301. Definitions

In this chapter:

(1) The term "active duty" has the meanings as follows (subject to the limitations specified in sections 3002(6) and 3311(b)):

(A) In the case of members of the regular components of the Armed Forces, the meaning given such term in section 101(21)(A).

(B) In the case of members of the reserve components of the Armed Forces, service on active duty under a call or order to active duty under section 688, 12301(a), 12301(d), 12301(g), 12301(h), 12302, or 12304 of title 10 or section 712 of title 14.

(C) In the case of a member of the Army National Guard of the United States or Air National Guard of the United States, in addition to service described in subparagraph (B), full-time service—

(i) in the National Guard of a State for the purpose of organizing, administering, recruiting, instructing, or training the National Guard; or

(ii) in the National Guard under section 502(f) of title 32 when authorized by the President or the Secretary of Defense for the purpose of responding to a national emergency declared by the President and supported by Federal funds. (B) In the case of members of the reserve components of the Armed Forces, service on active duty under a call or order to active duty under section 688, 12301(a), 12301(d), 12301(g), 12301(h), 12302, or 12304 of title 10.

(2)

Annual Report IRR Recommendations (September 30, 2015)



OFFICE OF THE SECRETARY OF DEFENSE RESERVE FORCES POLICY BOARD

5113 Leesburg Pike, Suite 601
FALLS CHURCH, VA 22041

SEP 30 2015

CHAIRMAN

INFO MEMO

FOR: SECRETARY OF DEFENSE

DepSec Action _____

FROM: MajGen Arnold L. Punaro, USMC, Chairman, Reserve Forces Policy Board

SUBJECT: Report of the Reserve Forces Policy Board on the Need for Improvements in the Individual Ready Reserve

- The Reserve Forces Policy Board (RFPB) is a federal advisory committee established in law to provide you with independent advice and recommendations on strategies, policies and practices designed to improve and enhance the capabilities, efficiency, and effectiveness of the reserve components.
- The RFPB met on September 2, 2015 and voted to recommend the Department establish a Joint Working Group to conduct a comprehensive review and pursue policy and legislative changes to improve the efficiency and relevance of the Individual Ready Reserve.
- As we continue to navigate a period of declining budgets and reduced force structure while simultaneously dealing with increasing personnel costs and instability around the world, your "Force of the Future" recognizes new approaches in personnel management are necessary to maintain an effective fighting force. During this period, critical capabilities that reside in the Reserve Components, which come at reduced cost to DoD, should be increasingly relied upon. We must also take this opportunity to reform the Total Force by realizing needed reforms in the reserves as well as the Active Component (AC). One place to start is with the Individual Ready Reserve (IRR). The IRR contains trained and talented manpower and has suffered for years from neglect and inefficient management. As the active force gets smaller, according to current budget plans, the IRR will increase in size and importance (many of those leaving will have remaining Military Service Obligations and be placed in the IRR) as efficient use of all available talent will be critical.
- The IRR contains a manpower pool of previously trained personnel with and without remaining service obligations. It includes individuals with highly technical skills (e.g. cyber) and very expensive sunk training costs. Members of the IRR are not obligated to drill and are generally not paid. However, they can volunteer for training or active duty assignments, and they can be involuntarily mobilized for Full or Partial Mobilizations as well as for Disaster Response, as was the case during certain phases of Operations Iraqi Freedom and Enduring Freedom. There is no IRR in the Army National Guard or the Air National Guard but the Army Guard does contain a similar category called the Inactive National Guard (ING).
- IRR/ING manning has declined from 800,000 service members in 1993 to just under 273,000 today, and comprises nearly 25 percent of the Ready Reserve. Reserve Component (RC)

members not assigned to Selected Reserve units, Individual Mobilization Augmentee positions, Active Guard and Reserve duty, the Standby Reserve, the Retired Reserve, or on extended active duty, will be placed in the IRR or ING. This includes:

- Members separating from Active Duty (AD) or leaving the Selected Reserve with a remaining Military Service Obligation or other commitment to serve in the Ready Reserve but not placed into or designated as a member of the Selected Reserve
 - Members without prior service awaiting training before beginning service in a regular component or the Selected Reserve
 - Members in the delayed entry program
 - Members awaiting basic military training before beginning service in the Selected Reserve who are not authorized to attend inactive duty training (IDT)
 - Certain personnel participating in officer training programs, such as chaplain candidates and participants in the Armed Forces Health Professions Financial Assistance Programs
 - Members leaving Selected Reserve or AD status who are eligible for and desire to maintain or obtain status as a member of the Ready Reserve
- The RFPB's Subcommittee on Supporting and Sustaining Reserve Component Personnel took an in-depth look at the Services' IRR programs to gain a better understanding of longstanding issues in managing the IRR. What was found is not new. The IRR is difficult to manage (for a variety of reasons); access is a cumbersome and lengthy process; and there is no central strategy in regard to best utilization of the IRR's skilled manpower.
 - The IRR is difficult to manage. Managing the IRR efficiently is an enduring problem and all components experience significant screening and tracking issues of IRR personnel. Accurate data bases are difficult to maintain due to outdated technology and lack of frequent contact with members. Physical musters are often not mandatory and cost-prohibitive, leading to increased use of "virtual" mustering or "snail mail" as the primary means of keeping contact and updating member information. IT systems are not interconnected with other agencies (such as the IRS), who could assist in locating members when services lose contact. These systems also contribute to delays in transitioning from other components into the IRR. Difficulty in assessing, screening, and tracking of personnel often leads to issues filing contingency requirements because of poor awareness of force readiness. Numerous members are required for call-up to source a single set of orders (sometimes as many as eight to ten notifications for every one set filled) as many are unable to execute orders due to medical issues, poor physical fitness, inability to locate, or other disqualifiers. Members who are difficult to find are also hard to train and often lose qualifications. In addition, most IRR members who desire to train are not issued Common Access Cards (CAC) which are required to complete training which is increasingly done on-line.
 - Access is a cumbersome and lengthy process. Members of the IRR are difficult to access. For example, mobilizing an IRR member for service in a deploying National Guard unit often took between 120-150 days to accomplish. Lengthy and cumbersome processes lead to members being out of sync with their units and may deter the Services from using their IRR personnel when they might otherwise be able to reduce strain on the force. Since 2001, neither the Air Force nor the Navy significantly accessed their IRR populations. The IRR

comprises half of the Navy's Ready Reserve but fewer than 100 members were mobilized and all were volunteers who filled admin-oriented billets. During this same period, the Navy uprooted thousands of AD personnel from their normal career fields to use as Individual Augmentees in Iraq, Afghanistan and other locations. The Air Force, who had mobilized 1,133 IRR members for Desert Shield/Storm (with less than 7 days notice), mobilized none for Operation Iraqi Freedom or Operation Noble Eagle. The US Coast Guard, while boasting a very small IRR of just under 1,500 personnel, has never involuntarily mobilized IRR members and is currently cutting nearly 70 percent of their manpower pool for lack of participation. While the Army and Marines have done much better, mobilizing nearly 30,000 members between them, the Army activated less than 4 percent while the Marines used just over 10 percent of their IRR members since 2001.

- There is no central strategy in regard to best utilization of the IRR's skilled manpower. As the Department strives to meet our defense strategy and global force requirements while also becoming more efficient, consideration and integration of the IRR as part of the Total Force Solution has not been a priority of the Services or the Department. The Nation has invested heavily in the capabilities and readiness of the Reserves over the last 15 years but prioritization of reduced resources, cancellation of the OSD-sponsored IRR conference in 2011, and recent organizational changes in OSD reduce oversight and priority of the Reserves as a whole during a time we must leverage every available resource, to include the skilled personnel residing in the IRR.
- The RFPB recommends the Department establish a Joint Working Group comprised of subject matter experts from each of the Services, the Reserve Components and OSD to gather best practices, seek quick wins and explore alternative management structures and methods to improve efficiency and enable more effective use of the Individual Ready Reserve (IRR) in support of the Total Force. OSD should then develop policies and legislative proposals aimed at implementing these changes and improving the effectiveness of the IRR.
- Innovation in IRR management will contribute to SECDEF's current initiative to build a Force of the Future with reduced personnel system inefficiencies and increased career opportunities while attracting and retaining the best and brightest in military service. Potential change areas for research and consideration should include but are not limited to:
 - Re-establishing the OSD-sponsored, annual IRR Conference. Reviving this conference, even if required to use Information Technology (e.g. Visual Teleconference), would enable better sharing of best practices and policy ideas and potentially be the best tool to ensure an effective IRR moving forward. In the past, this annual 2-3 day conference was attended by senior leaders from each service and provided an in-depth review of IRR management, utilization and strategic focus. Participants employed working groups to develop recommendations for the Services and the Department aimed at improving the overall management and relevance of the IRR. The conference was discontinued in 2011 due to budget reductions. As a result, there has been little coordination between the Services and OSD regarding best practices and policies for IRR management.
 - Expanded use of the IRR as a Continuum of Service option for members of the Selected Reserve as well as AD members. Currently, the Navy and Air Force use the IRR for their

Career Interruption Pilot Programs which provides a sabbatical for AD members for up to three years. Forty personnel in each service may participate in this competitive program but not all Services embrace the program equally. The Navy is requesting an expansion from Congress to 400 members in an effort to retain more skilled personnel and provide greater choice in career options. Expansion to include reservists would further assist in retaining critical skills and increased return on investment.

- Transferring IRR management responsibilities and resources to their respective Reserve Components. This would place the readiness and management of the IRR in the hands of those who know them best. However, conflicts over control of resources are likely.
- Affiliation of IRR personnel with Selected Reserve (SELRES) units. Affiliation of members with actual units could improve screening and accountability, training and readiness, increase participation opportunities and provide predictability for members and units during unit mobilizations and deployments.
- Providing TRICARE Reserve Select coverage to IRR members. This could incentivize continued service of Selected Reserve members who might otherwise depart the service altogether. Currently IRR members are not eligible for this optional coverage. This would also assist the Department in reaching its goal of insurance coverage for all service members.
- Providing incentives to IRR members to maintain current screening and contact information, immunizations, physical fitness, etc. By law, members attending muster duty in person are only entitled to a fixed per diem amount as compensation to cover travel, subsistence and other special costs associated with absence from home, but they are not entitled to IDT compensation or given credit toward retirement pay. While some additional cost could be incurred by the Services, changes to these laws could encourage increased participation in muster duty and aid in member screening, readiness, and efficient administration of the IRR. Also, the Marine Corps currently conducts physical "mega musters" (in addition to smaller events) throughout the country that provide career training and other member services such as medical screenings, information on VA entitlements & benefits, IRR opportunities & responsibilities, Veteran support organizations, education, and available employment opportunities. While other services are trending toward virtual musters because of budget constraints, maximizing use of physical muster events are beneficial to IRR members and increase screening and tracking efficiency which improves member readiness and accessibility.
- Improving member access to virtual muster and distance learning sites through development of a CAC card substitute and mobile device compatibility for accomplishment of on-line training and member screening. Most IRR members are not issued CAC cards since they are not entitled to many of the benefits associated with SELRES members. However, the primary method of training IRR members is through on-line courses that require secure access which is only provided through use of CAC cards. Without a CAC substitute or some other solution, member training and readiness will continue to suffer, frustrating members and the Services alike.
- Updating and improving IT systems and data sharing to improve information flow between components/agencies. This would allow for easier transfer of personnel into the IRR and reduce redundant information collection requirements, medical screenings, etc. Numerous inefficiencies and difficulties in assessing personnel occur because of outdated systems which lack data sharing capabilities between Services, Components or Agencies.

- Mandating and maximizing the collection of civilian skills information to enable better decision making while sourcing current and future requirements, in and across services. There is an acknowledged need by the services for easier methods of identifying members with specialized skillsets as well as requirements development of specific skills needed by the services.
- Reviewing mobilization laws and policies for potential improvements that would improve access to IRR personnel to support mission requirements in peace time as well as contingencies.
- Allowing IRR members increased ability to freeze promotion or high-year tenure (HYT) clocks for improved career flexibility without penalty. In the last year, the Navy began imposing HYT caps on its IRR sailors who, per regulations, cannot advance in rank while in the active service pool (these members do not drill or get paid and can earn retirement points only). While having the benefit of trimming the force and reducing the number of future retirees, this policy and others like it, imposes "up-or-out" standards on trained personnel who could still provide value. Members most affected are junior enlisted sailors and the only way for many to avoid discharge is to join a Voluntary Training Unit or become a SELRES in hopes of promotion. If service limitations (many are forced into the IRR because they can no longer drill as a SELRES) or other life commitments prevent them from doing that, they are forced out.
- Lessons learned and best practices from other allied and partner nations regarding past and most efficient use of their IRR personnel. A practice that would have some utility and is used by the United Kingdom is called the Sponsored Reserve. Under this concept, a service normally provided in peacetime by contractors, would also be provided by the contractor's workforce during operations. Contractors providing operational support would be reservists activated as part of a reserve unit supporting contingencies.
- The United States Marine Corps has commissioned the Center of Naval Analysis (CNA) to conduct a study titled "Managing the Individual Ready Reserve." The study is estimated for completion in February 2016. The RFPB also recommends the Department monitor the progress and review the results of this study for applicable policy and legislative changes that could reform the IRR across all services.
- As required by the Federal Advisory Committee Act, the recommendations were deliberated and approved in an open, public session. The briefing presented to and approved by the Board [TAB A] will be posted to the RFPB web site. Background information about the RFPB is at TAB B.

COORDINATION: NONE
Attachment(s): As stated
Prepared by: CAPT Jay Gagne, 703-681-0600



Subcommittee on Supporting and Sustaining Reserve Component Personnel

As approved by RFPB – 2 September 2015

RADM Brian LaRoche, USN
Subcommittee Member



Subcommittee Review of IRR Programs



The Personnel Subcommittee conducted in-depth review of Services' IRR programs to gain an understanding of longstanding issues in managing the IRR

- Met with numerous Reps/SMEs from the Services, RCs and OSD
- Purpose:
 - Learn how each component manages it's IRR
 - Identify potential areas for policy and legislative improvements
- Findings
 - The IRR is *(still)* difficult to manage; access is a cumbersome and lengthy process; and there is no central strategy in regard to best utilization of the IRR's skilled manpower

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Draft Recommendation for RFPB Consideration, 2 Sept 2015



Recommend the Department establish a Joint Working Group to conduct a comprehensive review and pursue policy and legislative changes to improve the efficiency and relevance of the Individual Ready Reserve (IRR)

The RFPB also recommends the Department monitor the USMC's CNA study titled "Managing the Individual Ready Reserve", estimated for completion in February 2016

3



Recommendation - General



- Joint Working Group should be comprised of subject matter experts from each of the Services, the Reserve Components and OSD
- Should seek quick wins and explore alternative management structures and methods to:
 - Improve program efficiency and more effectively use the IRR in support of the Total Force
- OSD should implement changes through policy and legislative proposals

Innovation in IRR management will contribute to SECDEF's current initiative to build a Force of the Future

4



Working Group Focus Areas



Potential change areas for research and consideration should include:

- Re-establishing OSD-Sponsored annual IRR Conference
- Expanded use of IRR as a Continuum of Service Option for SELRES
- Transferring IRR management responsibilities and resources to their respective Reserve Components
- Affiliation of IRR personnel with Selected Reserve (SELRES) units
- Providing TRICARE Reserve Select coverage to IRR members
- Improving member access to virtual muster and distance learning sites with a CAC card substitute and mobile device compatibility
- Updating and improving IT systems and data sharing to improve information flow

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Focus Areas cont...



Potential change areas for research and consideration should include:

- Providing incentives to IRR members to maintain current screening and contact information, immunizations, physical fitness, etc.
- Mandating and maximizing the collection of civilian skills information to enable better decision making while sourcing requirements
- Reviewing mobilization laws and policies for potential improvements that would improve access to IRR personnel to support mission requirements
- Allowing IRR members increased ability to freeze promotion or high-year tenure (HYT) clocks for improved career flexibility without penalty
- Lessons learned and best practices from other allied and partner nations regarding past and most efficient use of their IRR

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Questions?

Rear Admiral Brian LaRoche, USN
Subcommittee Member

Reserve Force Policy Board

