



Office of the Secretary of Defense
Reserve Forces Policy Board
Quarterly Meeting
Wednesday, September 13, 2023

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Department of Defense
OFFICE OF PREPUBLICATION AND SECURITY REVIEW

Open Session Location: Army Navy Country Club, Arlington VA

Members Present

1. Major General (Ret.) Arnold Punaro, U.S. Marine Corps Reserve, Chair - Reserve Forces Policy Board (RFPB)
2. Major General John B. Hashem, U.S. Army Reserve, Military Executive - RFPB (Non-voting)
3. Ms. M. Sydney Ashworth, Senior Advisor, CSIS
4. Major General Susan E. Henderson, U.S. Army Reserve
5. Mr. Eric S. Overturf, Major General (Ret), U.S. Air Force Reserve
6. Mr. Carlos E. Martinez, Brigadier General (Ret), U.S. Air Force Reserve
7. Ms. Michelle M. Lenihan, Executive, Hakluyt & Company
8. Ms. Kathy G. Roth-Douquet, CEO, Blue Star Families
9. Brigadier General Michele K. LaMontagne, Air National Guard
10. Ms. Phyllis J. Wilson, President, Women in Military Service for America Memorial Foundation
11. Mr. John F. Sampa, Command Sergeant Major (Ret), Army National Guard
12. Honorable Debra Wada, CEO and Founder of Senshi Ame Advisors LLC
13. Honorable Dr. Paul Stockton, Paul N Stockton LLC
14. Major General Karl D. Pierson, Director, Reserve Affairs Division, Headquarters Marine Corps
15. Sergeant Major Stuart Coupe, Senior Enlisted Advisor, U.S. Army Reserve (Non-voting)

Invited Guests

16. Honorable Grier Martin, PTDO Assistant Secretary of Defense Manpower & Reserve Affairs
17. Mr. Judd Lyons, Deputy Assistant Secretary of Defense for Reserve Integration
18. Major General Marty Klein, Commanding General, Army Reserve Innovation Command
19. Ms. Danielle Miller, SES, Director for Policy, Analysis, and Transition, OASD Industrial Policy
20. Ms. A. Love Rutledge, Principal Director, Force Readiness
21. Colonel Doug Ludwick, Deputy Director, Materiel & Facilities, M&RA (RI)
22. Dr. Laura Freeman, Deputy Director, Virginia Tech National Security Institute
23. Mr. Patrick McCartney, AI Capability Development Team Lead, Air Force Futures
24. Mr. Kevin Hollinger, Legislative Director, Enlisted Association of the National Guard
25. Mr. Cary Russell, Senior Director, GAO
26. Sergeant Major Steve Minyard, OSD M&RA
27. Sergeant Major Reuben Esparza, USMCR, M&RA
28. Rear Admiral Robert Clarke, USNR
29. Mr. Stephen Austin, OCAR
30. Colonel Charles Johnson, AF/REI (AFR LL)
31. Master Sergeant Jade Lundy, Chief, Air Force Reserve
32. Colonel Franklin "Shaune" Jones, Strategy Chief - DARNG
33. Mr. Michael Petring, Director, NGB-J52
34. Mr. Richard Rico, Director, Space NG
35. Sergeant Major Michael Spaulding, National Guard Bureau
36. Mr. Ronald Bogle, Chair - ESGR

37. Captain Jonathan Townsend, Director – ESGR
38. Lieutenant Colonel Jessica Dixon, ESGR
39. Lieutenant Colonel Agata Zana, ESGR
40. Mr. Steve Burris, SOCCOM
41. Major General Shawn Satterfield, SOCCOM
42. Major General von Hoffman, AFR Deputy
43. Colonel Marisa Pace, OCAR-LAD Director
44. Major General Javier Reina, SOUTHCOM – DCG Mob
45. Chief Master Sergeant Vicki Robertson, Air Force Reserve
46. Sergeant Major Robert Foesch, Army National Guard
47. Chief Master Sergeant Aaron Dent, Air National Guard
48. Master Sergeant Jade Lundy, Air Force Reserve
49. Chief Petty Officer Elisandro (Alex) Diaz, U.S. Navy Reserve
50. Marine Science Technician, Petty Officer First Class, Christopher Woo, U.S. Coast Guard Reserve
51. Master Chief Petty Officer Timothy Beard, U.S. Coast Guard Reserve
52. Mr. Tim Williams, NGB IGA
53. Force Master Chief Tracy Hunt, Chief, Navy Reserve

RFPB Staff

54. Colonel Sean Counihan, USAR, Chief of Staff
55. Mr. Eric Flowers, Designated Federal Officer
56. Colonel Richard Sudder, ARNG
57. Colonel Gary Beckett, USAFR
58. Colonel Manaal Burge, ANG
59. Captain DeWuan Booker, USNR
60. Lieutenant Colonel Tammy Megow-Jones, USMCR
61. Lieutenant Colonel Stephen Hedger, USAR
62. Lieutenant Commander Sweeney, USCGR
63. Chief Master Sergeant Nina Reiss, ANG
64. Ms. Margaret Odhiambo, Executive Assistant

The RFPB Fellows Society/Alumni

65. Mr. Al Zapanta, Former RFPB Chairman
66. Ms. Julia Hunt, Colonel (Ret.), U.S. Marine Corps Reserve, former RFPB Chief of Staff
67. Mr. Gus Hargett, Former RFPB Member
68. Mr. Tom Jones, Former RFPB Member
69. Mr. Bobby Green, Former RFPB Member
70. Mr. Timothy Orr, Former RFPB Staff
71. Mr. George Rubesha, Former RFPB Staff

Other Guests

72. Colonel Jim Hogan, USAFR, OSD-RI
73. Colonel Jennifer Nolan, OSD-RI
74. Colonel Robert Bell, USMCR, DASD-RI
75. Lieutenant Colonel Bret Bohannon, NGB J5
76. Major Alicia Lacy, NGB J5

77. Major General Janeen Birckhead, NG MD ARNG
78. Colonel Larry Muennich, OUSD P&R
79. Colonel Reginald Maddox, M&RA RI
80. Colonel Scott House, M&RA RI
81. Colonel Howard Marotto, Deputy Director, Reserve Affairs Division, HQMC
82. Brigadier General Tim Brower, NGB J5
83. Major General (Ret) Larry Taylor, RFPB Fellows
84. Sergeant First Class Elizabeth Pena, NGB – PA
85. Brigadier General Stephanie Howard, OUSD (A&S)
86. Mr. Ted Graham, OUSD (RI)
87. Mr. Jim Schroeder, OUSD (RI)
88. Lieutenant Colonel Alex Huberstroh, NGB-J1
89. Colonel Jon Ma, OUSD (RI)
90. Master Sergeant Diana Nogiec, NGB/OCCM
91. Colonel Robyn Downer, OSD (P&R), Force Readiness
92. Sergeant Major Chris Stein, OSSOCOM
93. Mr. Jay Steffenhagen, Office of Chief, Naval Reserve
94. Ms. Stacie Pettyjohn, CNAS
95. Major Allison Burk-Lewis, NBG
96. Rear Admiral Tiffany Danko, U.S. Coast Guard
97. Mr. Kuah Freeman, NGB J55
98. Mr. Jeffrey Angers, ASD (M&RA)
99. Mr. Jeff Davis, M&RA
100. Ms. Michaela Johnson, Enlisted Association of the National Guard
101. Mr. David Batz, RFPB Consultant
102. CMSgt Jana Rodberg, DHRA/DSSC
103. LtCol Justin Owens, USMCR, Office of Marine Corps Reserve
104. Major General Virginia Gaglio, NGB – J1

The Reserve Forces Policy Board held its September Quarterly Meeting in open session in Arlington, VA., at the Army Navy Country Club on September 13, 2023

****Start of Meeting****

0830 - Open Session Opening Comments

Major General John Hashem, Military Executive

- MG Hashem welcomed the attendees and thanked them for their support of the RFPB. He then turned over remarks to the Designated Federal Officer.

Mr. Eric Flowers, Designated Federal Officer

- Mr. Flowers introduced himself as the Designated Federal Officer, called the meeting to order and announced, as required by the Federal Advisory Committee Act (FACA), that the USD P&R

approved the opening of the meeting and the agenda. He also stated that the Board had a quorum and noted no persons had submitted written requests to the Board.

Major General Arnold Punaro, USMCR (Ret), Chairman, RFPB

- Chairman Punaro administratively opened the Board to conduct required business. He welcomed members, staff, and invited guests. He also asked if anyone wished to address the board; no persons came forward.

0900-0930 – Honorable Grier Martin, PTDO Assistant Secretary of Defense for Manpower & Reserve Affairs

- Hon. Martin provided the Board and attendees with an overview of M&RA's areas of focus in support of the National Defense Strategy and the role of the Reserve Component and the RFPB in enabling the Nation to compete, deter, deny, and defeat our adversaries.
 - M&RA is committed to defending the Nation; taking care of our people; and finding success through partnerships.
 - RC is 38% of the total force – it's crucial the AC and RC are positioned together.
- He stated that M&RA works for the RFPB and reaffirmed his department's support to the board's efforts, to include the critically important Duty Status Reform initiative and Total Force Policy. He provided some progress updates to these important RFPB issues.
- Duty Status Reform: Streamlining access to RC is critical but must take a measured, deliberate approach to minimize disruption to their civilian lives. Must balance the need for streamlined access when we do need them with the right authorities and process in place to protect RC families.
- Total Force Policy: we are looking to optimize the Total Force: force mix, force design, recapitalization, modernization. RFPB work has been crucial and when the RFPB speaks, people listen. The current efforts to update the 2007 Total Force Policy were driven by RFPB efforts and Under Secretary Cisneros approved the rewrite thanks to the RFPB's recommendation. A GS/O-5 level working group has been stood up to draft the new policy which will be endorsed by the Secretary of Defense. The policy focuses on four areas: Resourcing, Authorities, Modernization, and Personnel. M&RA needs the Board's help and continued advocacy to get the Total Force Policy across the finish line.

Q & A

Hon. Debra Wada: Does the working group have a deadline for completing the review?

Hon. Martin: No. They are in the very early stages but picking up speed (relative to the Pentagon staffing process).

Mr. Charlie Martinez: Noted recent discussion about the all-volunteer force (AVF) and asked if a presidential commission to review the AVF and consider alternatives might be helpful.

Hon. Martin: Recruiting seems to have bottomed out and is improving. While there might be funding in the budget for a national recruiting campaign, that would only offer short-term gains. Long-term we

must rebuild the connection between Americans and the military via a nationwide effort. Could we offer apprenticeships of some kind? Look to bolster JROTC and ROTC programs. Bottom line: requires brick-by-brick rebuilding of the citizen – military / government relationship.

Mr. Charlie Martinez: RC is key to building that relationship.

Ms. Michelle Lenihan: What friction points do you see with the [Total Force Policy] working group?

Hon. Martin: Just the usual suspects and roadblocks, nothing I'm worried about. It will take work, but we have a compelling case. It will take the RFPB's help to overcome these roadblocks.

Dr. Paul Stockton: Do you have strategic recommendations on what we ought to improve on projecting force in homeland with fort to port ops?

Hon. Martin: The services are aware that it will take the RC to protect this, and it should be written into Total Force Policy (TFP). We do not need to wait on the update to take action.

Ms. Phyllis J. Wilson: Raised the issue of cross-licensing or cross-certification initiatives, i.e. military truck drivers to commercial driver licenses (CDL), that make skills portable from state to state for service members and their families. How can we assist with this?

Hon. Martin: Highlighted recent licensing portability efforts within M&RA – their work with states to develop interstate compacts that allow portable licensing, especially in locations with high density population of military spouses. You can lobby your own states to pass these compacts in support of the federal initiative. Military OneSource has a list of current state compacts. M&RA is working to partner with private sector companies to get RC truck drivers CDLs, so they work commercially day-to-day, then drive military vehicles at drill on the weekends.

0930-1030 – Equipping and Modernization of the Reserve Force & Equipping Ukraine (Presidential Drawdown, Payback, and Resupply)

Ms. A. Love Rutledge, Principal Director, Force Readiness OUSD P&R OASD Readiness /
Colonel Doug Ludwick, Deputy Director, Materiel & Facilities OUSD P&R, OASD M&RA (RI)

Major General John Hashem, Military Executive, RFPB

- MG Hashem opened by introducing the two speakers: COL Doug Ludwick and Ms. A. Love Rutledge. He then discussed the Total Force Integration subcommittee's new initiative following the submission of the Total Force Policy recommendation to the Secretary of Defense: ensuring the reserve components are adequately equipped and modernized to ensure interoperability with the active component in achieving the National Defense Strategy.
- He then stated the subcommittee has received briefings monthly from the individual reserve components regarding their equipment concerns/shortages and their costs in achieving the NDS, to include equipment allocation and modernization. Some of these observations include aircraft procurement, recapitalization, and service allocations shortfalls.

- MG Hashem finished his portion by re-introducing COL Ludwick, an Army Reserve Officer, previously the Director of Strategic Equipping Division, and recently transitioned to OASD, M&RA Reserve Integration's Materiel & Facilities Division.

COL Ludwick, Materiel & Facilities, OASD M&RA (RI)

- COL Ludwick thanked the Board for inviting him to speak and then referred them to his slides. He provided historical data showing that although the RC makes up 38% of the Total Force, over the last 10 years, it has only received 4.4% of resourcing for new requirements. This fact has resulted in a reliance on National Guard and Reserve Equipment Appropriation (NGREA) funds which Congress provides each year IF they pass a budget. Unfortunately, as the RC community continues to rely more and more on NGREA instead of planned and approved base funding, it increases risks in RC. This is mostly due to an aging fleet of equipment which requires substantial maintenance dollars, causing the Components to make undesirable trade-offs between upkeep of legacy equipment or modernization.
- COL Ludwick then discussed Department of Defense Instruction 1225.05: Equipping the Reserve Components, and the Presidential Drawdown Authority for Military Assistance for Ukraine. He stated that there has been a significant amount of RC equipment transferred to Ukraine. These transfers have resulted in short-term risk to readiness in the Marine Corps Reserve, Army National Guard, and the Army Reserve. He did say that in light of these readiness risks, the Army National Guard and the Army Reserve are experiencing some mid to long-term wins in modernization. Most recently, the pace of transfers has decreased with current Presidential Drawdown Authorities.
- Next, he provided a summation of equipment procurement and friction points by individual service component. The common theme across all the components was the increased reliance on maintenance of aging fleets due to the lack of money or ability to procure new equipment. Consequently, this over-reliance on maintaining older equipment significantly compromises RC readiness.
- He finished his brief by discussing The Joint Parity Assessment. This is a statutory requirement (Title 10, Section 10541) that requires a Joint Parity Assessment by the Army Chief of Staff, and the Chief, National Guard Bureau that accompanies the NGREA for five specific systems. COL Ludwick then opened his presentation for questions.

Q & A

Ms. Phyllis Wilson: When it comes to modernizing equipment, there are many different models or versions. When determining who is getting the funds for fleet modernization, do the powers-that-be consider all the additional costs that accompany an updated system (i.e., training seats?) and is this done without consulting the services?

COL Ludwick: I'm mainly from the equipping side of the house, but you are correct. Whenever you get new equipment there is the training piece that is associated with it, and the required school seats that also consume funding over the next two to three years. So how do we plan for that and where does that funding come from? The Services need to plan and prioritize for training seats, and there always is the

trade-off of contract maintenance until we are able to get our service members adequately trained. This is one of the benefits of NGREA funding.

Brig Gen Michelle LaMontagne: Ukraine replenishment, is it 100% new equipment to the RC or the transfer of older equipment from the AC?

COL Ludwick: The USAR is seeing new equipment replenishment but that is mainly because of the type of equipment they are providing to Ukraine (i.e., logistical and construction equipment) but the plan for replenishment of the combat systems is a tiered modernization plan.

Mr. Eric Overturf: What is the scope of this Board in providing a recommendation to preserve the funding stream for equipment modernization?

DASD Judd Lyons: Unfortunately, it would be hard for the DoD to make a recommendation since the funding is Congressionally approved. The bigger issue here is the risk the RCs assume by relying on NGREA as a modernization strategy. The services need to include RC equipping and modernization funding in their base budget requests.

Chairman Punaro: NGREA was not created to be the modernization end-all. It was created as a supplemental appropriation, but it has slowly become a 100% solution which is not good at all.

Ms. Rutledge, Force Readiness, OUSD P&R OASD Readiness

- Ms. Rutledge opened with a discussion on the implementation of OASD's Strategic Readiness Framework. She highlighted the importance of a strategic readiness assessment to meet the requirements of the National Defense Strategy from a total force perspective. She went on to define readiness as the ability to build and maintain wartime readiness capabilities in the Department across multiple time horizons. She noted that readiness is more than just looking at how DoD reports in the Defense Readiness Reporting System at the unit level.
- Ms. Rutledge then stated a DoD instruction should publish in the next 30 days, with the intent of providing an updated definition of Strategic Readiness and a baseline for DoD. She also mentioned that an annual strategic readiness assessment will be conducted to inform modernization plans to include the Defense Planning Guidance and the defense budgeting process.
- She noted that while modernization is one facet of OASD's Strategic Readiness Framework, there are nine others, one of which is Human Capital Management. She went on to provide an overview of the process OASD uses to assess strategic readiness. The five phases of the process are (1) Define Analytic Parameters, (2) Gather and Process Data, (3) Conduct and Synthesize Analysis, (4) Coordinate Final Readiness Assessment, and (5) Submit Final Analysis.

Q & A

Ms. Sid Ashworth: What's the timeline to complete an assessment?

Ms. Rutledge: Typically, less than two weeks.

Ms. Sid Ashworth: How much equipment has been returned from Ukraine and what's the readiness impact?

Ms. Rutledge: Overall, there has not been a huge degradation to operational readiness.

MG Hashem: where is the Reserve Component lagging against the Active Component in interoperability and could we create a false sense of readiness when, in reality, the Reserve Component has older equipment?

COL Ludwick: Equipment needs to be deployable, operational, and sustainable. He further noted that mission command systems are vital, but also cited an example of logistical issues when ordering outdated parts, with some having taken 500 days to arrive. Knowing this, the Army decided to accept risk in this area.

Chairman Punaro: asked about stockpile assessment and if it has been compared to contingency plans when assessed. He also asked if OASD performs a "get-well plan" assessment.

Ms. Rutledge: Yes, we do take a look at global stocks, but there is also the challenge of not having a single repository which has aggregate stockpiles data.

Chairman Punaro: Who owns the "get-well plan?"

Ms. Rutledge: The individual Services own it.

1030-1040 – BREAK

1040 – 1130 – Supply Chain Resiliency: Ms. Danielle Miller, SES, OASD Industrial Policy, Director for Policy, Analysis, and Transition (PA&T)

- Ms. Miller began by foot stomping the importance of supply chain and how it is a relevant and real current issue. She noted that the 2022 NDS first identifies industrial base as an issue and the need to collaborate with our partners (not just companies but tribal and international partnerships). We need to meet demands of the future.
- Her office is publishing a National Defense Industrial Strategy. They are monitoring things like where the industrial base is affecting states – and that the commercial sector is affected alongside the DoD.
- The Industrial Base Strategy has four attributes:
 - Support the NDS and Administration's priorities
 - Be aligned across DoD enterprise
 - Be underscored by people, programs, and policy (3P's)
 - Reflect the importance of DoD relationships with industry, academia, and global allies as partners

- The priorities are:
 - Resilient Supply Chains and Dynamic Production
 - Sustainability and Green Initiatives
 - Workforce Readiness
 - Fit for Purpose Customization
 - Fair Markets/Economic Deterrence
- Ms. Miller noted the importance of production diplomacy to include focusing on “friends-shoring” and leveraging existing relationships with allies and partners while protecting economic relationships.
- Currently NO single data source exists for defense industrial base data. Various reports have cited data as an undermining challenge to DoD’s ability to proactively identify vulnerabilities. They are looking to develop something that uses publicly available information to help future analysis and prediction.
- She also talked about Executive Order 14017 – which is an order covering the whole-of-government effort to assess risk, identify impacts, and propose recommendations in support of a healthy manufacturing and defense industrial base – a critical aspect of economic and national security. The DoD is implementing EO 14017 Report recommendations to bolster strategic and critical materials supply chains necessary for DoD systems and critical civilian infrastructure.
- EO 14017 Report Recommendations:
 - Strengthen U.S. stockpiles
 - Expand sustainable production
 - Standards development for intensive industries (policies)
 - International partnerships
- The EO 14017 Report also emphasizes the importance of a whole-of-government approach to coordinate all available tools across the U.S. government to secure strategic materiel supply chains.
- It specifically focuses on Strategic Enablers:
 - Select Kinetic Capabilities
 - Energy Storage and Batteries
 - Strategic and Critical Materials
 - Castings and Forgings
 - Microelectronics

Q & A

Dr Stockton: How to we prevent Chinese penetration of the supply chain?

Ms. Miller: Responded that they are looking at prioritizing parts and processes. There’s a difference between screws and semi-conductors in terms of mitigation. They are looking at intellectual property and where it might be critical in the process. Once they identify the parts that are a priority, then they need to figure out where they are being sourced and work with partners like DIU or DOE, etc. to analyze and develop alternatives.

Ms. Lenihan: What approaches do we have to address China's hold on minerals and timing to source?

Ms. Miller: Responded that overseas they work extensively with DSC and partners. Other factors, such as the EU's ESG standards will also affect us. They will require reporting and increased sustainability standards. She indicated she thought we would see more tracking across industry. Problems like these are easy to "want to avoid" due to their challenging nature, but it will take thought and creativity to overcome them.

MG Lamberton: How are we mitigating the cyber threat in the supply chain?

Ms. Miller: Responded that the Security Supply Chain Strategy will be published in October. She said they are looking at weapon systems and how they exchange data as well as looking at the companies themselves and their cyber security. It's important to analyze how to move IT up and down the supply chain but some companies are hesitant to share data because they aren't sure. From a business standpoint – there is help available – The NSA has tools available for small business, but they are trying not to be onerous to businesses – the requirements are scaled depending on the scale of the company.

1130-1300 – WORKING LUNCH / ADMINISTRATIVE TIME

1300-1430 – Senior Enlisted Leader Roundtable and EANGUS Update

Mr. Kevin Hollinger, Legislative Director, Enlisted Association of the National Guard / Sergeant Major Michael Spaulding, National Guard Bureau / Sergeant Major Robert Foesch, Army National Guard / Chief Master Sergeant Aaron Dent, Air National Guard / Master Chief Petty Officer Timothy Beard, Coast Guard Reserve / Chief Master Sergeant Vicki Robertson, Air Force Reserve / Force Master Chief Tracy Hunt, Navy Reserve / Marine Science Technician, Petty Officer First Class Christopher Woo, USCGR / Master Sergeant Jade Lundy, Air Force Reserve / Sergeant Major Steve Minyard, Senior Enlisted Advisor, OASD M&RA

Mr. Kevin Hollinger, EANGUS

- Mr. Hollinger provided an update on current EANGUS legislative initiatives and priorities. Their legislative priorities are strong soldiers, strong families, and strong employers. Their number one priority is healthcare for servicemembers which directly impacts retention and readiness. They opposed the recent dental-only legislative proposals because it does not do enough for service members.
- Reserve Employers Comprehensive Relief and Uniform Incentives on Tax Act – incentivizes civilian employers to hire National Guard and Reserve members. EANGUS continues to urge the 118th Congress to legislate a Reserve Employers Comprehensive Tax Incentive to small businesses that employ National Guard and Reserve Servicemembers.
 - "The Reserve Component Employer Incentive, Compensation, and Relief Act of 2019," (H.R. 801, of the 11th Congress), proposed a \$1,000 tax credit to an employer per qualified

employee as well as an additional dollar amount depending on the total number of days served in uniform during the year, up to \$10,000 for employees with 180+ days of service.

- “Reserve Employers Comprehensive Relief and Uniform Incentives on Taxes Act of 2021”, otherwise known as the “RECRUIT Act of 2021, (117th Congress), provided two changes to the preceding legislative proposal:
 - 1) To calculate qualifying days of service, regularly scheduled weekend drills and annual training (39 days/year) were exempted.
 - 2) Employer eligibility was limited to only small business concerns as defined by the Small Business Administration.
- Enlisted access to .mil email accounts: there are approximately 172,000 licenses of .mil email accounts for enlisted members. This falls short of the more than 280,000 enlisted members who are without a .mil email. This is a problem for enlisted members to complete mandatory online training and access to online accounts that require .mil log-in access.
- USERRA remains an area of interest as claims continue to be a problem. There are over 700 pending claims with the DOJ, and an unknown amount pending with the states. We are advocating for the removal of forced arbitration from SCRA and USERRA – in forced arbitration, 87% of claims are decided in favor of the employers not the members. We are also exploring USERRA protection for spouses, providing similar protections to spouses when member is activated to provide for the welfare of families.
- NG GI Bill Parity Act – looking for parity for day-to-day qualification towards Post-911 GI Bill.
- Lastly, Mr. Hollinger noted the implementation of MHS Genesis has increased the recruiting contact to contract timeframe from 14 to 100 days. There are substantial challenges keeping prospects engaged for 100 days. Additionally, MHS Genesis screening is not standard across MEPS, and discretion by reviewing medical personnel has led to recruiters “shopping” for the right MEPS depending upon a prospect’s individual scenario. Mr. Hollinger appealed to the RFPB to look into MHS Genesis implementation and impacts to recruiting.

SGM Spaulding, NGB

- SGM Spaulding stated as is the National Guard motto – Always Ready, Always There – the National Guard is standing ready to support all different missions, including DSCA, and stated they are ready to support NYC as we speak. Many Guardsmen were activated for COVID. NGB supports duty status parity across all services, same benefits for same service, equal credit for equal work; especially post mobilization benefits.
- He further highlighted that resources and benefits post mobilization are not consistent with the regular component.

SGM Foesch, ARNG

- SGM Foesch noted that Army recruiting is going well. He stated that even though the Army Guard is doing the best of all three components (at 85% of goal), force structure is still threatened. He noted the challenge getting from 325K to 350K.
- He further stated that suicide continues to be a problem but is lower than last year.
- He also noted that changes to fitness test have proven difficult due to a lack of preparation by RC.

- SGM Foesch also cited pay as a challenge due to electronic system complications. He noted that some retirees must wait up to two years for retirement pay.
- Finally, he stated that parity for 9/11 benefits is an ARNG focus, and that Duty Status Reform (DSR) will hopefully address that.

CMSgt Dent, ANG

- Modernization and recapitalization are the key issues for the Air National Guard. Latency issues in getting new initiatives implemented poses a threat to national security.
- He stated that Airmen are affected when new equipment recapitalization takes five years. He noted that the majority of Airmen are in maintenance squadrons and when the ANG converts to new missions sets, these Airmen are impacted.
- He also noted that Wings with new equipment are the best at retention and recruiting.
- He said the ANG is looking into increasing the development of junior and senior Airmen. ANG is focused on health and mental health.
- Lastly, Chief Dent noted that across the Guard, initiatives with Memorandums of Understanding (MOU) between Wings and the local community are in place for needed support.

MCPO Beard, USCGR

- MCPO Beard opened by stating that 85% of the Reserve is integrated, and that the USCGR does not possess solely RC units, but that some AC units are staffed by RC. He noted the USCGR is the only force in garrison.
- For recruiting and retention, he noted the USCGR has 6,100 members, 900 short of its 7,000 goal. The Coast Guard Reserve's biggest focus is competency attainment. It struggles to get beyond 5,100 Title 10 deployable members and 2,000 Title 14 deployable members. The USCGR is focusing on three lines of effort: recruit, train, and employ our members. To do so they are working on a Legislative Change Proposal for pre-planned/pre-funded missions in parity with DoD.
- He also noted the Coast Guard Reserve is working to improve C-School management process to improve competency attainment. It is currently funded at \$139M, but that does not cover the requirement. The Coast Guard Reserve will continue to advocate for the requirement, not current funding levels.
- It has also stood up a recruiting Incident Management Team (staffed by reservists) to address recruiting shortfalls. The RC has met this year's recruiting goal. The USCGR realizes Active Duty (AD) recruiters don't speak reserve. To address this, it has hired additional reserve recruiters to actively recruit reservists. Further it stood up a Return To Service Team (RTST) to harvest members that were separated for COVID vaccine refusal. Another initiative is the "everyone is a recruiter" initiative, where members can earn \$1,000 and a Letter of Commendation worth one point on the Service Wide Exam if they recruit someone.
- Finally, he noted that the Coast Guard Reserve is recognizing civilian training for law enforcement professionals to shorten boarding officer school for Maritime Enforcement Specialists.

CMSgt Robertson, USAFR

- Chief Robertson noted the Air Force Reserve's recruiting goal is 3,600 short this year. AFR is focusing on retention as a cheaper option than recruiting.
- She then discussed increased exercises, which ensures members have the opportunity to go out and do the job; and it is paying dividends. AFR is currently doing a large exercise to allow as many reservists as possible to be involved.
- She also cited opening training centers for RC and creating community partnerships as well as other opportunities for Airmen to stay.
- Chief Robertson stated AFR is looking at Individual Mobilization Augmentee (IMA) "bullpens." Currently IMAs are attached to AD members as backup to them. Bullpens will directly improve talent management.
- She noted that the biggest factor in retention is budgetary constraints. The lack of consistent budgeting hinders predictability and creates uncertainty which negatively impacts retention.
- She also stated that TRICARE Reserve select is not available for everyone until 2030, and that AFR would like it accelerated to help with retention.
- The Chief went on to highlight other opportunities, such as license reciprocity, which is not available for Air Reserve Technician spouses. She also said that the Exceptional Family Member Program (EFMP) does not cover RC unless you are on orders for 30 days or more and noted that enrollment sometimes cannot be accomplished before deployment. She stated that AFR wants to restructure EFMP to provide coverage sooner and have spouses pre-identified with a "Q code," which identifies early that there are special requirements.

FORCM Hunt, USNR

- FORCM Hunt stated that the USNR's priority number one is warfighter readiness. He stated the Navy must design the force, train the force, mobilize the force, and develop force. The Navy Reserve wants to get out of RC centers and on the waterfront. He stated they must improve processes, and to that end, they are holding Mobility Exercises (MOBEXs) to get in sets and reps and work out kinks.
- He said the Navy Reserve is decentralizing from mobilizing only through Norfolk and allowing processing at local bases.
- In 2022, the USNR reestablished RC recruiting command. It is now recruiting at the waterfront, targeting sailors coming off the ships rather than in malls.
- In 2020, the Navy Reserve structured Mandatory Service Obligation (MSO) as 4-2-2. He noted that for retention, the USNR must keep what it has, however it must.
- He noted that weekend drill childcare is a big win. This program provides in-home, low-cost childcare to drilling reservists.

MST1 Woo, USCGR

- MST1 stated that travel pay is a huge issue for USCGR.
- He also noted that parity in duty status is critical.
- Finally, he noted that a reservist may spend 15-20 years chasing a GI bill and that VA home loans for servicemembers need to be promoted.

MSgt Lundy, USAFR

- MSgt Lundy noted that retention and recruiting issues are in large part to society influencers.
- He also stated that the military pay scale does not accurately reflect the work and talent of our members. Military pay does not keep pace with the competitors of talent especially in time when those that can serve and are willing to serve are so hard to find.

SGM Minyard, SEA, OASD M&RA

- SGM Minyard stated that M&RA used to be a reserve affairs office, but it has since evolved. The Department gave all services five years to develop a form that would capture all RC service on one form especially those that are not receiving a DD-214. The data will go to the Department of Labor and the VA directly. This form must capture all service back 20-30 years. Army and Air Force are ahead of the other services but are working with the other services for parity.
- He stated that this past summer a quality-of-life panel was established. One of its lines of effort is parity of pay and benefits to Reserve Components. Often this effort stops at OSD, but this time it has survived contact.
- He further noted that when the AC addresses pay, it addresses a dollar amount, whereas the Reserve addresses whether a member is compensated or not based on duty status. M&RA's input to the quality-of-life panel is one method used to offer improvements. SGM Minyard went on to say there is a discussion of reviewing RC pay to be reexamined biannually.
- He then cited MEPS as a challenge. He stated that we must examine policies and procedures at MEPS to get around the time it takes to get a recruit through MEPS. He noted that although MHS Genesis improved available data, it slows things down. M&RA has a pilot at some MEPS to remove the 2nd exam the day before shipping. They are reviewing disqualifying conditions such as ADHD. M&RA will not lower standards, but rather examine a more realistic standard.
- Finally, he said M&RA is exploring tripling the amount of maximum IDT travel pay with changes to JTR.

Q & A

Chair Arnold Punaro: Is the problem with the new e-medical record at MEPS happening to members and family members?

SGM Foesch: Yes, it is, the old system did not have the same amount of info.

Chair Arnold Punaro: Is it really horrible for people using it 365 or just recruiting?

SGM Foesch: Yes, it is horrible, none of my records are updated.

Mr. Timothy Orr (RFPB Consultant): The services are allowed to bring in a percent of applicants who test below a CAT 4. The Army allows 4%, Navy allows 21%, Air Force allows 0%, and OSD allows 20%. In modern times are we still needing this limitation?

FORMC Hunt: The Navy has found that CAT 4 is not an indicator of intelligence. He noted that he himself is a CAT 4 for not taking the ASVAB seriously, and that 14 of 16 students in a command course

were CAT 4s.

SGM Spaulding: The Army has implemented future soldier program to help with ASVAB scores of these members. Does not believe increasing CAT-4 recruitment will hurt NG.

CMSgt Dent: It's an entry level test; it is not meant to serve as an indicator of long-term success.

Phillis Wilson: It can take months to get people through MEPS right now. I heard 100 days, and we may lose them, but sometimes it takes that amount of time to screen properly. What if we miss a condition and find out 12-14 months later that we have a huge problem?

Kevin Hollinger: It will be very few. MHS Genesis pulls prescriptions from 20-30 years where members may have had ADHD 20 years ago and they now become complex case or if they had a severe cold and got an inhaler. Therefore, recruiters shop MEPS because they are not standard.

SGM Foesch: Stated that if a recruit had the condition prior and it was documented, then found later, it would be fraudulent enlistment. He noted that the Army is only "buying them" if conditions develop later. The challenge is with the delays, members and families change their minds and we lose the recruit.

Mr. Sampa: For Guardsmen and Reservists, they must balance their civilian life, and disruptions which lengthen the process and disrupt civilian employment negatively impact retention. In 1987, it took 30 days and now here we are at 100 days.

1430- 1600 – Artificial Intelligence (AI) and Machine Learning (ML) Panel

Dr. Laura Freeman, Deputy Director, Virginia Tech National Security Institute / Mr. Patrick McCartney, U.S. Air Force Futures Command / Major General Martin Klein, Commanding General, Army Reserve Innovation Command.

Dr. Freeman, Virginia Tech NSI

- Dr. Freeman opened with three topics for discussion:
 - What is AI?
 - Total Force Readiness capability and capacity
 - How do we enable AI?
- She noted the lack of a common definition for AI. Often people say that AI is the ability of machines to perform tasks normally performed by humans, but she struggles with this broad and abstract definition and posits that it needs more fidelity. She prefers the DARPA definition: AI is a programmed ability to process information. This is important because it differentiates processing information from machine autonomy that requires action.
- Dr. Freeman then discussed handcrafted knowledge, i.e., if I do this, then I do that. Current wave of handcrafted knowledge is in the statistical learning stage where machines learn from data in one of three ways:

- Supervised learning – adds context in a way that is human interpretable
- Unsupervised learning
- Reinforcement learning – need to set a policy where we reward algorithms for making “right” decisions.
- Overall, she emphasized data collection for the current wave of AI and pattern recognition capability, especially in connection with AI impacts on warfighting (total force readiness capability & capacity). AI enables pattern recognition that exceeds human speed and capacity to aid commanders in the decision-making cycle.
- She noted three keys to success in enabling the adoption of AI:
 - Does the data exist? Can we get to the unsupervised state (dependent on data quality)?
 - Will it have huge operational impact? Can it be used in an area of limited human capacity, i.e. sonar spectrums?
 - Adaptable data pipelines – not just a matter of what data we have now, but as context and ethics change over time, can the data keep up? Hinges on ability to respond to dynamic, changing environments, i.e. reprogrammable radars or anything with an electronic signature, AI must be able to learn quickly and respond.
- Lastly, Dr. Freeman noted that the greatest interest in how we use AI should focus on business and planning processes used to reduce inefficient human efforts/time. Humans should focus on what is different while AI should focus on what is the same. She noted the critical importance of testing and evaluation to the protection / assurance of AI systems as well as quality, resilient system design with built-in redundancy and monitoring ability so we can disengage at will. Active human oversight is vital and must be inserted into the processes.

Mr. McCartney, USAF AF/A5

- Mr. McCartney began by noting that about 80% of his thoughts overlapped with Dr. Freeman’s. He went on to note that Air Force Futures works closely with industry leaders and academia to develop technical solutions for the warfighter through data driven insights. Data is a critical asset and is the primary driver of AI.
- He reaffirmed that there is no single definition for AI – different across academia, DoD, NDAA, and industry. Therefore, his team finds it more useful to focus on capability needs that can be delivered to the warfighter.
- Generally, human intelligence is the natural benchmark for AI (think increasingly complex games being won by machines), but this benchmark makes a lot of people uncomfortable. However, nothing about AI is magic, it’s just math...but it can do some incredible things.
- After noting some USAF initiatives, Mr. McCartney highlighted the importance of large volumes of data, a computational task, and input of human experts to the success of AI systems/projects. He emphasized that the human pipeline is critical to the development of AI. It’s not just about the people, it’s all about the people: trust isn’t in the machine but in the people who are building it.
- Lastly, he noted that responsible, reliable systems must underly this work along with the inclusion of clear ethics guidance in capabilities development publications. USAF has a designated AI Responsibility and Ethics Officer with a PhD in philosophy from Oxford. Ethics are critically important when it comes to the development of AI.

MG Klein, Army Reserve Innovation Command

- MG Klein began by providing an overview of the Army's 75th Innovation Command: they use RC members with civilian certifications. They have 30 AI engineers who work at places like Google, Amazon, etc. who know very sophisticated techniques that are not well-known within the DoD. These service members can translate civilian "speak" to their fellow service members. As such, the innovation command seeks to enable the DoD enterprise to look at cognitive aids through the lens of RC members who can enable more effective knowledge transfer and integration of these ideas into the DoD/military apparatus.
- He discussed DoD's use of Advana as a deep learning network platform but noted that kind of system infrastructure has not filtered down to the military departments. He further noted that most Services are using cloud structures vs modular systems. The right systems infrastructures are key to future proof our ability to produce AI. Additionally, we must work to integrate AI with our systems of record.
- MG Klein reinforced the concept of the human-machine team. People are the most important asset to ensure AI is done right. Human-machine teaming puts the technology at the center of where the soldier works with his or her equipment. He highlighted the need to start integrating with C2 to build decision support tools and predictive models to aid commanders' decision-making. He sees reserve soldiers at the heart of this initiative.
- Lastly, he noted that many of our systems (business or weapons) were primarily designed for active duty use cases. Need to look at bringing RDTE funding to the RC. Commanders can use O&M funding for RDTE projects.
- Overall, he loves the way the Department is heading with a campaign of learning, going past algorithms, and developing applications that provide capabilities to our nation.

Q & A

MG Hashem: You all note the importance of trust in people...but you must also have trust in the information/data that is used. How do we ensure factual data/right information use for decision making?

MG Klein: It is certainly a challenge. We must look at the vectors of attack. Algorithms are easy to spoof, and data can be manipulated. We can work in secure enclaves and ensure people are trained in proper techniques to secure the data. Test & evaluation is a big part of fielding AI, but we need to go further. Most systems don't allow commanders to see how AI is performing in an operating environment.

Mr. McCarthy: We need to protect the data itself. We can also use commercially available models to test data sets independently and ensure they come from a trusted source. Based on degrees of risk we need to decide how much oversight is required to ensure a justified sense of trust. The cyber challenges alone for non-AI stuff is already hard.

Dr. Freeman: Test & evaluation! A rigorous test and evaluation program. Also, system design can help protect data. Online monitoring and implementing quality control on algorithms and the data. Human expert oversight and checks are critical.

Kathy Roth-Douquet: could AI allow us to have a smaller military or guard/reserve?

MG Klein: we already have smaller militaries that rely more heavily on RC; I don't think tech is going to drive a force structure decrease. Where the Army is having trouble finding people, we can use tech to mitigate that gap. We can also use AI to reduce cognitive burden on commanders; we are reducing some of the manpower needs with the human-machine team, i.e., robotic systems following our soldiers into mountainous terrain. Machines allow us to balance the force to where we really need human manpower. The main goal of China is to use AI because they don't trust their soldiers, whereas the U.S. culture is one of high-level trust in our people.

Mr. McCarthy: we need to look at NDS/NMS then figure out based on new projected AI capabilities what the right force structure looks like to accomplish our objectives. Smaller force may be more cost effective but must be deliberate. Use of AI may not reduce manpower but instead, enable the same manpower to be more capable.

MG Henderson: I've seen research showing that soldiers trust their computer too much and don't question the data. I agree we trust our soldiers but am concerned that they will start trusting computers too much.

MG Klein: Good points. It'll take different and specific leader development to counter those things. The military professional won't be convinced 100% that the data is right.

Mr. McCarthy: It boils down to understanding the use, environment, and purpose of the system. It is also important to distinguish between autonomy and AI. If introducing AI into autonomous systems, then it becomes a test and evaluation challenge to ensure the system is behaving properly. Trust is built over time whether with machines or people. There are also some risk management frameworks that can be put in place to address some of these well-founded concerns.

Dr. Freeman: I've also read some papers lately. We've learned that we can over rely on technologies. The psychology is really important. How do we design systems that spark human action and reduce that risk? The idea that we can have one platform to solve all things is not feasible. It is better to have open source where we can securely transfer our data between platforms as necessary.

Ms. Sid Ashworth: are there comparable efforts across the government? Are they integrated?

Dr. Freeman: Yes, but the integration is not good and has room for improvement.

Mr. McCarthy: Yes, a fair amount below the surface. I know FBI/DOJ were having discussions and certainly discussion is happening across the intelligence community. This topic brings people together across communities. It would be beneficial to develop a whole-of-government approach.

MG Klein: a lot is going on with DoD/DHS interaction. I get many calls from a variety of agencies who see use cases that they could apply (i.e., US postal service). DoD has also benefited by coaching from other departments.

Hon. Dr. Paul Stockton: There is the threat that AI will be used to hack our infrastructure, and humans

will have a hard time protecting/responding to those attacks. How can the RC help secure the grid from attack? What would you have us include in our report for AI defenses?

MG Klein: the NGB is really starting to help with that. We do have DSCA type exercises that address what you specifically said.

Mr. McCarthy: Two keys: the ability to anticipate adversary's actions and the ability to recover quickly.

Dr. Freeman: Network defense; where do we set our perimeters? What kind of defenses can we put in place using AI? The ability to recover quickly is critical.

Chairman Punaro: There are plenty of processes and procedures in the Pentagon where AI could probably assist.

1600 – Subcommittee Briefs and Issues Deliberation

Personnel Subcommittee

- Ms. Debra Wada briefed the Board on the Personnel Subcommittee's "quick win" initiatives. These three are (1) JTR changes to increase Inactivity Duty Training travel voucher reimbursement to \$1500, (2) created a single "DoD landing page," where the Department has a single website linked to all service recruiting sites, and to (3) offer an online version of the Armed Services Vocational Aptitude Battery (ASVAB) test.
- The Board voted YES to these quick wins.

Homeland Defense Subcommittee

- Informed the board of an upcoming meeting (this week) with the CNGB and a meeting with Grid Ex in November. Ongoing work across their lines of effort indicate Board recommendations may be ready early in the new year.

1630 – Closing Remarks - Major General Arnold L. Punaro, USMCR (Ret), Chair RFPB

- Thanked everyone for attending the meeting and the staff for their planning and execution. He announced that the RFPB's next meeting is scheduled for December 6, 2023 and adjourned the meeting.



Arnold L. Punaro
Major General, USMCR (Ret)
Chairman, Reserve Forces Policy
Board