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**ACTION MEMO**

Mar 20, 2023

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**FOR:** SECRETARY OF DEFENSE

DepSecDef Action

Department of Defense

OFFICE OF PREPUBLICATION AND SECURITY REVIEW

**THROUGH:** Honorable Gilbert R. Cisneros Jr., Under Secretary of Defense for Personnel and Readiness**FROM:** MajGen Arnold L. Punaro, USMCR (Ret), Chairman, Secretary of Defense Reserve Forces Policy Board (RFPB)**SUBJECT:** Total Force Policy (TFP) in Support of the National Defense Strategy (NDS)

- **Purpose.** The RFPB seeks your endorsement of the RFPB's recommendation to the Secretary of Defense to issue a contemporary and comprehensive Department of Defense (DoD) TFP to optimize the total force in meeting current and future NDS requirements.
- **Background.** The RFPB's recommendation follows three years of research and collaboration. The Board conducted a comprehensive review of the 2018 and 2022 NDS, the Defense Planning Guidance (DPG), other relevant DoD documents, and heard from Active and Reserve Component (AC & RC) civilian and military leaders. A current TFP would address the concurrent consideration of AC and RC capabilities to meet combatant command and national command authority requirements in support of today's national and defense policy, and strategy.
- The RFPB considers this one of our most important recommendations with lasting impact. A contemporary TFP would better integrate the AC and RC, recognize the need for an RC which equally provides operational capabilities and strategic depth at a lower cost, and realizes the advantage of RC civilian acquired skills.
- **Discussion.** Secretaries of Defense historically issue TFPs at key inflection points in the strategic environment. Secretary Gates issued the last TFP in 2007 to address AC and RC utilization for the Global War on Terrorism. NDS 2018 and 2022 moves our strategic imperatives to the rise of Great Power Competition and emerging warfare domains, making the current 16-year-old DoD TFP outdated and not optimized for today and tomorrow's threats and requirements, as stated in official DoD documents and policy.
- The NDS and DPG do not mention the RC and instead use the term "joint force," whose DoD definition is not the total force but, "A force composed of elements, assigned or attached, of two or more Military Departments operating under a single joint force commander." Furthermore, the 2022 DPG only mentions the total force and RC twice. The DPG represents the force planning priorities of the President's National Security Strategy, the NDS, and the Chairman's National Military Strategy. Limited references to the total force do not well represent planning priorities. It is important to continually define, reference, emphasize, and normalize the terminology of total force, instead of joint force, in key strategy documents.

- An updated TFP would support the SecDef's top priorities; **"Defend the Nation"** through optimized lethal, sustained, ready, prepared, and available force capabilities; **"Succeed Through Teamwork and Build Unity Within DoD"** by capitalizing on the capabilities of the total force and recognize the potential savings of significant Department resources, essential in an era of budgetary pressures and the effect of inflation on the Department's purchasing power; and **"Take Care of our People"** through policies beneficial to RC members and their families, such as Duty Status Reform (DSR) and permeability.
- A comprehensive TFP would ensure military readiness in both the AC and RC. The RC plays a critical role in meeting the national security requirements and must be always ready. The RC is not funded to full readiness. This issue alone could degrade total force readiness and capabilities in the absence of a strategic and transformative approach.
- An updated TFP would provide comprehensive guidance within the Department and across the military departments to optimize business practices and address the gap in the NDS and DPG where there is little to no mention of AC and RC integration.
- The RFPB is a federal advisory committee established in law to provide the SecDef with independent advice and recommendations on strategies, policies, and practices designed to improve and enhance the capabilities, efficiency, and effectiveness of the RC.
- As required by Federal Advisory Committee Act, the recommendation was deliberated and approved in an open, public session. Consistent with the Act, a copy of this recommendation will be posted to the RFPB website at <https://rfpb.defense.gov>.

**RECOMMENDATION:** The RFPB recommends the Secretary of Defense direct a DoD lead to develop a contemporary and comprehensive TFP for approval, to include these sub-tasks:

- **Issue a contemporary and comprehensive TFP.**
- **Accelerate legislative efforts to enact Duty Status Reform, which will simplify activation authorities and align benefits. DSR simplifies frequency, duration, and timelines of activations, while enhancing readiness. It has been DoD policy since 2008 to implement DSR and the Department has completed a comprehensive and commendable approach and legislative package.**
- **Accelerate implementation of DSD memo dated December 3, 2020, directing the RFPB report, "Requiring the use of Fully Burdened and Life Cycle Personnel Costs (FBLCC) for all components in Total Force analysis and for budgetary purposes."**
- **Direct the military departments to ensure modernization and interoperability across the AC and RC to include combat systems, mission command & communication systems, and sustainment capabilities.**

- **Identify, review, and re-write directives, instructions, and policies regarding readiness, resourcing, force mix, and employment of the RC in support of the NDS with an aim to optimize AC and RC integration.**
- **Direct the military departments to plan for and program funding for recurring and routine operational employment of the RC, setting conditions of readiness and trust to ensure RCs are trained and equipped to integrate with the joint force.**

Approve \_\_\_\_\_ Disapprove \_\_\_\_\_ Other \_\_\_\_\_

**Attachments:**

TAB A - Background

TAB B - Previous TFPs

TAB C - RFPB memo dated October 5, 2022, "Report of the Reserve Forces Policy Board on Support for ongoing Duty Status Reform efforts led by the Under Secretary of Defense for Personnel and Readiness."

TAB D - DSD memo dated December 3, 2020, "Requiring the use of Fully Burdened and Life Cycle Personnel Costs (FBLCC) for all components in Total Force analysis and for budgetary purposes."

TAB E - RFPB Report FY19-01 dated September 10, 2019, "Requiring the Use of Fully Burdened and Life Cycle Personnel Costs for all Components in Total Force Analysis and for Budgetary Purposes."

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Phone Number: 571-425-3089

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**UNCLASSIFIED**

# TAB A

## Background and Discussion

The current National Defense Strategy (NDS) identifies four major Department of Defense (DoD) priorities: 1) defend the homeland, paced to the growing multinational domain threat posed by China; 2) deter strategic attacks against the U.S., allies, and partners; 3) deter aggression while being prepared to prevail in conflict, when necessary; prioritize the challenge posed by China in the Indo-Pacific region and Russia in Europe; and 4) build a resilient joint force and defense ecosystem. DoD must be prepared to execute a combatant command operation plan and a protracted globally integrated campaign, all while projecting power in a contested U.S. homeland. To accomplish these tasks, the Department must seamlessly integrate its deterrence efforts by aligning its activities and investments across all theaters, the full spectrum of conflict, and all domains. If both global competition and operational commitments continue, this state of increased operational need stresses the joint force. A contemporary and comprehensive Total Force Policy (TFP) will align policies, resourcing, and decision support constructs to maximize the effectiveness of the total force to meet our national security requirements.

An updated TFP would support The Secretary's top priorities; **"Defend the Nation"** through optimized lethal, sustained, ready, prepared, and available force capabilities; **"Succeed Through Teamwork and Build Unity Within DoD"** by capitalizing on the capabilities of the total force and recognize the potential savings of significant Department resources, essential in an era of budgetary pressures and the effect of inflation on the Department's purchasing power; and **"Take Care of our People"** through policies beneficial to RC members and their families, such as Duty Status Reform (DSR) and permeability.

Note: The DoD defines the total force as the organizations, units, and manpower used to meet the requirements associated with the DoD missions. It includes Active and Reserve Component (AC and RC) military personnel, DoD civilian personnel (including foreign national direct- and indirect-hires), as well as non-appropriated fund employees, host nation support personnel, and contracted services.<sup>1</sup>

### AC and RC Integration

The RCs are essential to the DoD for operational mission sets and strategic depth. While historically designed for the latter, since 9/11, over one million RC personnel have mobilized in support of combat operations overseas and in response to national emergencies such as hurricanes, flooding, wildland fires, civil disturbances, and in support of the Nation's response to COVID including Operation Warp Speed. The RC has been integral to all peacetime and combat operations, including pre-planned missions in support of Combatant Commanders and have been increasingly relied upon as part of the total force. The Institute for Defense Analysis (IDA) concluded after an exhaustive two-year analysis that the RC met the same requirements as the AC when mobilized.<sup>2</sup> TFPs issued by previous Secretaries continuously increased RC

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<sup>1</sup> DoD Directive 5124.11, Assistant Secretary of Defense for Readiness (ASD (R)), September 6, 2019, pg. 10

<sup>2</sup> *Sharing Burden and Risk in another Theater: An Operational Assessment of Reserve Component Forces in Afghanistan*, IDA Paper P-8915, January 2018

operational roles to alleviate AC “boots on the ground,” dwell time, and to provide low density, high demand skills. These TFPs were a necessity given the demand for an operational RC which was not fully codified in DoD and Military Department policies. In the sixteen years since the last TFP was issued, this demand has only intensified and increased.

Approval and implementation of DSR would provide a significant advantage for the RC and their families by providing streamlined duty statuses, linked to benefits. DSR would also alleviate the unnecessary complexities with the current 32 duty statuses. NDAA 2018 Sec. 513 calls for the “Consolidation of Authorities to Members of the Reserve Components of the Armed Forces to Perform Duty. Known as DSR, this legislative proposal has not passed the Office of Management and Budget (OMB) to Congress. The proposed DSR has nine statutory authorities linked to four duty categories. This long overdue legislation was first identified as problematic in the 2008 Report of the independent commission on the National Guard and Reserves, chaired by Major General (retired) Arnold Punaro.

Enacting policy for permeability would greatly benefit DoD’s workforce readiness. Permeability is the mobility into, out of, and throughout the Department. This portability of service, benefits, and skills are critical enablers to permeability and the holistic management of the Department’s human capital. Permeability offers greater career fluidity and flexibility and would provide our service members and their families many options to serve throughout their career. Permeability would make the total force much more flexible, while providing direct benefits with the potential of increased civilian acquired skills.

The Department should evaluate force mix and design required to optimize the force to meet the pacing threats. Today’s force mix was designed for past strategic environments which required one year maximum deployments of tailored capabilities. Global campaigning requires large numbers of formations, across all domains, against a near peer competitor. For example, our Joint Force Commanders (JFC) require a large number of RC logistics and sustainment formations in the force flow process to open and set the theater. It is imperative the Department resource and equip the RC units that possess these capabilities. A failure to do so would be harmful to mission success in the early phases of operations.

Force mix directly corresponds to equipping and modernizing the force. DoD policy should direct the Military Departments to equip and modernize based upon capabilities required early in operations plans, crises, and emergencies, not whether it is for AC or RC. A generalized view is these resources may go to AC formations first. Congress took notice of this and created the National Guard and Reserve Equipment Appropriation (NGREA) which authorizes resources directly to the RC. This aid helps retrofit the RC, but is inadequate to ensure RC modernization in a timely manner and sufficient quantities to remain fully interoperable with the AC. Recent analysis and reports to Congress have indicated the Guard and Reserve are not being sufficiently equipped to meet the DoD requirements.

The RC is not funded to full readiness, impeding the joint forces' ability to achieve the NDS priorities. Resourcing decisions regarding the RC must include determining the correct composition of the AC and RC and ensure the RC's readiness. The original DoD TFP issued by Secretary Laird (September 21, 1970) emphasized the importance of ensuring RC readiness to meet objective response times and moved as much training to pre-mobilization as possible. A current and comprehensive TFP should prioritize and maintain RC readiness, an enduring issue, to meet the current objectives and response times and direct the Military Departments to plan for and program funding for routine operational employment of the RC to ensure that readiness.

Integrated deterrence spans across all domains, to include cyber and space. To achieve the NDS goals, it is imperative to continue to include the RC in cyber mission force and space requirements. The RC provides an optimal connection to talent management initiatives with the wealth of skillsets honed daily by dedicated professionals working in the rapidly evolving cyber, technology, and space fields. The Military Departments recognize the greater contributions the RC can make in cyber and space operations and are better integrating and leveraging the RC. Building the most effective cyber and space forces necessitate using all available resources including the civilian acquired skills and expertise the RC offer at a fraction of the cost. As the Department continues to build and integrate the future force, RC capabilities must include these valuable skills developed by leading-edge industry.

### **Resource Pressures**

The business case for the use of the RC is critical today with federal budgeting pressures and inflation's effect on purchasing power. Secretary level emphasis is necessary to accelerate implementation of the Deputy Secretary of Defense memo dated December 3, 2020, which requires the use of Fully Burdened and Life Cycle Personnel Costs (FBLCC) for all components in total force analysis and budgetary purposes. This data-driven model will inform cost of manpower for strategic force structure decisions.

DoD should capitalize on realizing potential resource savings through policy and smart planning for a better-integrated RC. The RC comprises 38% of military personnel end strength, while accounting for only 16% of the total defense budget (including procurement, research, development, test & evaluation, and infrastructure costs). Additionally, the FBLCC demonstrates the RC cost 30% of the AC when not mobilized, in part because the RC do not have the infrastructure costs of the AC on duty 365 days a year. Coupled with the previously mentioned IDA study which found the RC met the same requirements as the AC when mobilized, the DoD should re-examine how to find efficiencies and substantial cost savings with the right balance and use of the AC and RC in order to modernize for the complex security environment.

### **Current and comprehensive TFP is essential to meet the demands of the NDS**

To meet the demands of the NDS, it is imperative the DoD issue a contemporary and comprehensive TFP to provide guidance and oversight to the Military Departments for the optimization of the force. A TFP will promote the conditions for success in all domains and the DoD culture required to sustain a total force that is lethal, resilient, sustainable, survivable, agile,

and responsive. *The AC cannot execute the NDS without the additional combat and combat support power and enabling formations provided by the RC.* For this reason, it is essential the TFP address the need for cost and data informed decisions regarding modernization, equipping and interoperability for the joint force.

Historically, Secretaries of Defense issued TFPs at key inflection points in the strategic environment such as the adoption of the all-volunteer force (post-Vietnam) or the need for operational tempo relief (post-Cold War drawdown and Global War on Terrorism). The last TFP was issued by Secretary Gates in 2007 and directed that utilization of the total force adjust to meet the rotational deployment demands of that era. The strategic security environment has shifted significantly in recent years with the emergence of peer-competitors in the space and cyber domains, and the pivot away from the rotational military operations in a regional conflict. Innovation and modernization of the current military force for this environment will require a holistic review of the total force to maximize resources and manpower for the NDS.

**The RFPB recommends the Secretary of Defense issue guidance to DoD Senior Leaders to advance NDS implementation and support Joint Warfighting in an updated TFP**

The Secretary of Defense should appoint a DoD lead and include the following in a TFP:

- Affirm senior civilian and military leadership accountability for implementing and maintaining an updated TFP that supports the current NDS.
- Institutionalize total force approaches and responsibilities in force design, force mix, force development, force employment processes, talent management, and the supporting business enterprises.
- Accelerate implementation of the DSD memo dated December 3, 2020, which requires the use of Fully Burdened and Life Cycle Personnel Costs (FBLCC) for all components in Total Force analysis and for budgetary purposes policy.
- Set expectations for the Service Secretaries and OSD Component leaders to identify barriers that challenge a fully integrated Total Force.

**Recommended Tasks to Organizations**

**OSD**

- Develop a contemporary and comprehensive TFP for the Secretary of Defense to issue.
- Support legislative efforts to enact Duty Status Reform, which will simplify activation authorities and the frequency/duration/timelines of activations while enhancing readiness.



- Update DoD Instruction (DoDI) 7041.04, "Estimating and Comparing the Full Costs of Civilian and Active-Duty Military Manpower and Contract Support," to include Reserve Components and requiring the Use of Fully Burdened and Life Cycle Personnel Costs for all Components in Total Force Analysis and for Budgetary Purposes.
- Direct a review and re-write of directives, instructions, and policies regarding topics of RC availability, force mix, authorities, and access.
- Review laws, policies, systems, structures, and processes to support full AC and RC integration.
- Consider a policy change to normalize RC for integrated deterrence and campaigning. Routine mobilization will allow for strategic surprise when needed by not unnecessarily broadcasting U.S. intent and capabilities with a presidentially declared RC mobilization.
- Set expectations for TFP governance for oversight and assessment.

#### Joint Staff

- Include RC mobilization factors (particularly in defending the homeland) in DoD's operational planning, wargames, and exercises.
- Include RC capabilities in all OPLANS, Contingency & Integrated Deterrence plans, and Campaigning planning.
- Maximize use of RC capabilities in readiness models.

#### Service Secretaries / Military Departments

- Develop supporting TFP with governance for oversight and assessment.
- Determine and implement the most advantageous mix of the AC and RC to support the NDS.
- Provide necessary resources in future budgets, to permit the appropriate balance in equipment fielding and the modernization of the AC and RC.
- Provide the manning, equipping, training, facilities, construction, and maintenance necessary to ensure RC units meet deployment times and readiness required by contingency plans.
- Apply a total force approach in all aspects of planning, programming, manning, equipping, and employing the RC.
- Ensure interoperability and effective training and mobilization of AC and RC capabilities.

- Develop adequate equipment inventory reporting systems to identify obsolete, incompatible and/or unsupportable equipment and quantitative shortages.

# TAB B

## Total Force Policies

	1970 - Laird	1973 - Schlesinger	1984 - Weinberger	1995 - Perry	
<b>THEME</b>	Expected force reductions and budget post-Vietnam	RC Readiness / inclusion of the RC in future conflicts	Equip RC for rapid expansion / full wartime requirements	Reduce AC OPTEMPO	
<b>STRATEGIC ENVIRONMENT</b>	Cold War; US nuclear supremacy	Cold War; US nuclear supremacy	Soviet Union-nuclear and protracted large-scale ground war threat	US sole super-power; regional conflicts and humanitarian missions	
<b>DEFENSE STRATEGY</b>	Sufficiency	Sufficiency	Deterrence	Global Order through forward presence	
<b>HIGHLIGHTED TASKS</b>	-Find AC/RC balance and force mix -Establish total force concept -Increase RC readiness	-Increase RC readiness -Maximize pre-mob activities -Creates ASD (M&RA) and suggests Service M&RAs	- Goal to equip AC and RC to full wartime requirements - Achieve equipment compatibility (interoperability)	- RC as an operational force but maintains strategic depth and flexibility in training and global employment -RC use by CCMDs	
	1997/2001 - Cohen	2003 - Rumsfeld	2007- Gates	2023 - Recommended	
<b>THEME</b>	Eliminate AC and RC residual, structural, and cultural barriers	Rebalance Forces	Utilization of the Total Force and OPTEMPO management; burdens to families and RC employers	Total Force Integration	
<b>STRATEGIC ENVIRONMENT</b>	US sole super-power; regional conflicts and humanitarian missions	US sole super-power; Global War on Terrorism and Transnational Crime	US sole super-power; Global War on Terrorism and Transnational Crime	US in global competition; simultaneous threats in multiple domains	
<b>DEFENSE STRATEGY</b>	Global Order through forward presence	Global Order through forward presence	Global Order through forward presence	Integrated Deterrence	
<b>HIGHLIGHTED TASKS</b>	- Create a seamless, flexible, and interoperable total force - Create Joint Staff RC Matters office (no longer exists) - Review Statute and Policy to support the total force	- Structure AC and RC to reduce need for invol mob - Establish better process to review joint rqmts; ensure force structure designed appropriately and allows for validated RFFs and mob	- Cap invol AC and RC mob at 1 year with 2 years stabilization for AC and 5 for RC 5 years demob - Manage mob on unit basis, not individuals - Incentivize AC and RC who deploy early or often		

## SECRETARY OF DEFENSE POLICIES ON TOTAL FORCE

### Secretary Melvin R. Laird's August 21, 1970 policy memorandum, "Support for Guard and Reserve Forces":

"...economies will require reductions in overall strengths and capabilities of the active forces, and increased reliance on the combat and combat support of Guard and Reserves."

"A total force concept will be applied in all aspects of planning, programming, manning, equipping and employing Guard and Reserve Forces."

"...attention will be given to the fact that Guard and Reserve Forces can perform peacetime missions as a by-product or adjunct of training with significant...savings."

### Secretary James R. Schlesinger's August 23, 1973 policy memorandum, "Readiness of the Selected Reserve":

"It must be clearly understood that...Guard and Reserve forces will be used as the initial and primary augmentation of the Active forces."

"Total Force is no longer a "concept." It is now the **Total Force Policy** which integrates the Active, Guard and Reserve forces into a homogenous whole."

"Each Secretary will provide the manning, equipping, training, facilities, construction and maintenance necessary to assure that the Selected Reserve units meet deployment times and readiness required by contingency plans."

### Secretary Caspar W. Weinberger's June 21, 1982 policy memorandum, "Equipment Shortages in the Guard and Reserve":

"The Total Force Policy...clearly established that the National Guard and Reserve Forces "will be used" should this country enter into armed hostilities."

"...units that **fight first shall be equipped first** regardless of component. Therefore, Active and Reserve components deploying at the same time should have equal claim on modern equipment."

### Secretary William J. Perry's April 7, 1995 policy memorandum, "Increased Use of Reserve Forces in Total Force Missions":

"We need to...capitalize on Reserve component capabilities to accomplish operational requirements while maintaining their mission readiness for overseas and domestic operations."

"Increased reliance on the Reserve components is prudent and necessary in future policy, planning, and budget decisions."

AUG 21 1970

MEMORANDUM FOR Secretaries of the Military Departments  
Chairman, Joint Chiefs of Staff  
Director, Defense Research and Engineering  
Assistant Secretaries of Defense  
Department of Defense Agencies

SUBJECT: Support for Guard and Reserve Forces

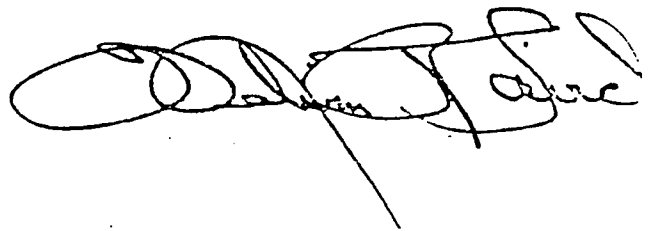
The President has requested reduced expenditures during Fiscal Year 1971 and extension of these economies into future budgets. Within the Department of Defense, these economies will require reductions in overall strengths and capabilities of the active forces, and increased reliance on the combat and combat support units of the Guard and Reserves. I am concerned with the readiness of Guard and Reserve units to respond to contingency requirements, and with the lack of resources that have been made available to Guard and Reserve commanders to improve Guard and Reserve readiness.

Public Law 90-168, an outgrowth of similar Congressional concern, places responsibility with the respective Secretaries of the Military Departments for recruiting, organizing, equipping and training of Guard and Reserve Forces. I desire that the Secretaries of the Military Departments provide, in the FY 1972 and future budgets, the necessary resources to permit the appropriate balance in the development of Active, Guard and Reserve Forces.

Emphasis will be given to concurrent consideration of the total forces, active and reserve, to determine the most advantageous mix to support national strategy and meet the threat. A total force concept will be applied in all aspects of planning, programming, manning, equipping and employing Guard and Reserve Forces. Application of the concept will be geared to recognition that in many instances the lower peacetime sustaining costs of reserve force units, compared to similar active units, can result in a larger total force for a given budget or the same size force for a lesser budget. In addition, attention will be given to the fact that Guard and Reserve Forces can perform peacetime missions as a by-product or adjunct of training with significant manpower and monetary savings.

Guard and Reserve units and individuals of the Selected Reserves will be prepared to be the initial and primary source for augmentation of the active forces in any future emergency requiring a rapid and substantial expansion of the active forces. Toward this end, the Assistant Secretary of Defense (Manpower and Reserve Affairs) is responsible for coordinating and monitoring actions to achieve the following objectives:

- Increase the readiness, reliability and timely responsiveness of the combat and combat support units of the Guard and Reserve and individuals of the Reserve.
- Support and maintain minimum average trained strengths of the Selected Reserve as mandated by Congress.
- Provide and maintain combat standard equipment for Guard and Reserve units in the necessary quantities; and provide the necessary controls to identify resources committed for Guard and Reserve logistic support through the planning, programming, budgeting, procurement and distribution cycle.
- Implement the approved ten-year construction programs for the Guard and Reserves, subject to their accommodation within the currently approved TOA, with priority to facilities that will provide the greatest improvement in readiness levels.
- Provide adequate support of individual and unit reserve training programs.
- Provide manning levels for technicians and training and administration reserve support personnel (TARS) equal to full authorization levels.
- Program adequate resources and establish necessary priorities to achieve readiness levels required by appropriate guidance documents as rapidly as possible.

A handwritten signature in black ink, appearing to read "D. J. [unclear]", is written over a horizontal line.

THE SECRETARY OF DEFENSE  
WASHINGTON, D.C. 20301

AUG 21 1970

MEMORANDUM FOR Secretaries of the Military Departments  
Chairman, Joint Chiefs of Staff  
Director, Defense Research and Engineering  
Assistant Secretaries of Defense  
Department of Defense Agencies

SUBJECT: Support for Guard and Reserve Forces

The President has requested reduced expenditures during Fiscal Year 1971 and extension of these economies into future budgets. Within the Department of Defense, these economies will require reductions in overall strengths and capabilities of the active forces, and increased reliance on the combat and combat support units of the Guard and Reserves. I am concerned with the readiness of Guard and Reserve units to respond to contingency requirements, and with the lack of resources that have been made available to Guard and Reserve units to improve Guard and Reserve readiness.

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Emphasis will be given to concurrent consideration of the total forces, active and reserve, to determine the most advantageous mix to support national strategy and meet the threat. A total force concept will be applied in all aspects of planning, programming, manning, equipping and employing Guard and Reserve Forces. Application of the concept will be geared to recognition that in many instances the lower peacetime sustaining costs of reserve force units, compared to similar active units, can result in a larger total force for a given budget or the same size force for a lesser budget. In addition, attention will be given to the fact that Guard and Reserve Forces can perform peacetime missions as a by-product or adjunct of training with significant manpower and monetary savings.



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- Increase the readiness, reliability and timely responsiveness of the combat and combat support units of the Guard and Reserve and individuals of the Reserve.
- Support and maintain minimum average trained strengths of the selected Reserve as mandated by Congress.
- Provide and maintain combat standard equipment for Guard and Reserve units in the necessary quantities; and provide the necessary controls to identify resources committed for Guard and Reserve logistic support through the planning, programming, budgeting, procurement and distribution cycle.
- Implement the approved ten-year construction programs for the Guard and Reserves, subject to their accommodation within the currently approved TOA, with priority to facilities that will provide the greatest improvement in readiness levels.
- Provide adequate support of individual and unit reserve training programs.
- Provide manning levels for technicians and training and administration reserve support personnel (TARS) equal to full authorization levels.
- Program adequate resources and establish necessary priorities to achieve readiness levels required by appropriate guidance documents as rapidly as possible.

signed,

Melvin R. Laird



ASSISTANT SECRETARY OF DEFENSE  
WASHINGTON, D. C. 20301

MANPOWER AND  
RESERVE AFFAIRS

20 AUG 1970

MEMORANDUM FOR Secretary of Defense

SUBJECT: Policy for the Reserve Components of the Armed Forces

As the Department of Defense moves in the direction of diminished dependence on the draft and smaller size active forces, it becomes increasingly important to strengthen and improve the readiness of the Selected Reserve Forces.

During this period of budget reductions and major change in the total force structure, every effort should be directed to insure maximum total force capability through the optimum mix of Active and Reserve Forces.

In addition to our own efforts to promote increased reliance upon and support for reserve forces, Chairmen Stennis and Rivers have urged strengthening and improving the readiness of the Guard and Reserve units.

In order to confirm our publicly stated intent to increase the strength and readiness of the Reserve Forces, we recommend signature of the attached memorandum which will provide specific guidance to the Secretaries of the Military Departments, the Assistant Secretaries of Defense and Department of Defense Agencies.

This memorandum implements previously stated policy on separate budget accounts for Reserve Forces and establishes objectives for improvement of Guard and Reserve Forces that are consistent with Public Law 90-168, the "Reserve Forces Bill of Rights and Vitalization Act." It has been coordinated with Mr. R. F. Froehlke, Assistant Secretary of Defense (Administration); Mr. D. R. Brazier, Principal Deputy, OASD(Comptroller); Mr. B. J. Shillito, Assistant Secretary of Defense (Installations & Logistics); Mr. G. L. Tucker, Assistant Secretary

SPECIAL ASST HAS SEEN

of Defense (Systems Analysis); Mr. R. G. Capen, Jr., Assistant to the Secretary for Legislative Affairs; Major General J. S. Patton, USAF, Military Executive, Reserve Forces Policy Board; Mr. Carl S. Wallace, Special Assistant to the Secretary and Deputy Secretary; and Mr. William J. Baroody, Jr., Assistant to the Secretary and Deputy Secretary. Since it is an implementation of an announced policy, it has not been coordinated with the Military Departments or the Joint Staff. Service representatives were informed of the content of this memorandum at a meeting of the Reserve Affairs Committee.



R. T. Kelley

Attachment



THE SECRETARY OF DEFENSE

WASHINGTON DC 20301

T H I S I S A T R U E C O P Y

AUG 23 1973

MEMORANDUM FOR Secretaries of the Military Departments  
Chairman, Joint Chiefs of Staff  
Director, Defense Research and Engineering  
Assistant Secretaries of Defense  
Director, Defense Program Analysis and  
Evaluation  
Directors of Defense Agencies

SUBJECT: Readiness of the Selected Reserve

An integral part of the central purpose of this Department -- to build and maintain the necessary forces to deter war and to defend our country -- is the Total Force Policy as it pertains to the Guard and Reserve. It must be clearly understood that implicit in the Total Force Policy, as emphasized by Presidential and National Security Council documents, the Congress and Secretary of Defense policy, is the fact that the Guard and Reserve forces will be used as the initial and primary augmentation of the Active forces.

Total Force is no longer a "concept." It is now the Total Force Policy which integrates the Active, Guard and Reserve forces into a homogenous whole.

As a result of this policy, the Selected Reserve has moved towards timely responsiveness and combat capability. Application of this policy has improved equipping, funding, facilities, construction, programming and some training areas.

I recognize and appreciate the great amount of effort that has been made to develop the Guard and Reserve. Progress has been made.

T H I S I S A T R U E C O P Y

T H I S I S A T R U E C O P Y

However, gross readiness measurements (which should be improved) indicate that we have not yet reached a level consistent with the objective response times. It is clear that we should move as much post-mobilization administration as possible to the pre-mobilization period and streamline all remaining post-mobilization administrative and training activities. 2

We must assure that the readiness gains in the Selected Reserves are maintained and that we move vigorously ahead to reach required readiness and deployment response times in areas still deficient.

I want each Service Secretary to approach affirmatively the goals of producing Selected Reserve units which will meet readiness standards required for wartime contingencies. Each Secretary will provide the manning, equipping, training, facilities, construction and maintenance necessary to assure that the Selected Reserve units meet deployment times and readiness required by contingency plans. You will have my support and personal interest in overcoming any obstacles in these areas.

The Assistant Secretary of Defense for Manpower and Reserve Affairs is charged by statute and by Defense policy and Directives with the responsibility for all matters concerning Reserve Affairs. It is my desire that the Assistant Secretary of Defense for Manpower and Reserve Affairs, as a matter of priority, take such actions as are necessary to bring the Selected Reserve to readiness goals. In this respect, the Services, the other Assistant Secretaries of Defense, the Joint Chiefs of Staff, the Director of Defense Program Analysis and Evaluation and other Defense Agencies will provide support on a priority basis. Particular emphasis will be placed on assistance in manning, equipping and training. The Deputy Assistant Secretary of Defense (Reserve Affairs) will continue to function in accord with current statutes and directives.

To emphasize and to strengthen Selected Reserve management, I suggest a civilian Deputy Assistant Secretary for Reserve Affairs in the office of each of the Assistant Secretaries of the Military Departments for Manpower and Reserve Affairs. This Deputy should be supported by an adequate staff and be assigned responsibilities and functions similar to those assigned the Deputy Assistant Secretary of Defense for Reserve Affairs.

T H I S I S A T R U E C O P Y

T H I S I S A T R U E C O P Y

3

At the military level, the Navy has been given specific guidelines for developing the new office of Chief of Naval Reserve. The Air Force and Marine Corps management structure has produced combat readiness and that is the vital test. I expect that the Army's reorganization, with strong command emphasis and good selection of leaders will produce demonstrably visible improvement and I shall follow the results with interest.

The Chiefs of the National Guard and Reserve components will be the staff level managers of the Guard and Reserve programs, budgets, policy, funds, force structure, plans, etc. They will be provided the authority, responsibility and means with which to accomplish their functions effectively. The overall management responsibility of the Chiefs of the Selected Reserve, under the Service Chiefs, will be supported by all other appropriate staff agencies.

In addition to the foregoing emphasis on Reserve Force policy and statement, I am asking my Deputy Assistant Secretary for Reserve Affairs, with your support, to manage a study covering the issues of availability, force mix, limitations and potential of Guard and Reserve Forces.

In summary, strong management with achievement of readiness levels in the Selected Reserve is among our highest priorities -- we must and will accomplish this objective as soon as possible.

(Signed: J. R. Schlesinger)

T H I S I S A T R U E C O P Y



THE SECRETARY OF DEFENSE  
WASHINGTON, THE DISTRICT OF COLUMBIA

FILE COPY

21 JUN 1982

MEMORANDUM FOR MEMBERS OF THE DEFENSE RESOURCES BOARD

SUBJECT: Equipment Shortages in the Guard and Reserve (U)

I would like each of you, as members of the Defense Resources Board (DRB) during the imminent FY 84-88 Program review, to find solutions to the current equipment shortages in our Guard and Reserve units.

The Total Force Policy, enunciated nine years ago by Secretary of Defense James Schlesinger, clearly established that the National Guard and Reserve Forces "will be used" should this country enter into armed hostilities. The policy was a decisive step forward in the effort to provide our nation with a credible, effective and affordable military force structure.

The underlying policy enunciated in DoD Directive 1225.6, is that units that fight first shall be equipped first regardless of component." Therefore, Active and Reserve units deploying at the same time should have equal claim on modern equipment inventories. The DRB must ensure that equipment is distributed regardless of component, in a manner that supports that policy.

Under the Total Force Policy each Service Secretary is responsible for providing the manning, equipment, training facilities, constructions, and maintenance necessary to ensure that Selected Reserve units meet the readiness standards and deployment schedules required by our national contingency plans.

The current imbalance of old and new equipment within, and between, the Active, Guard and Reserve Components must be rectified. The DRB is the responsible body, and must act to ensure that our Defense program will produce compatible, responsive and sustainable combat, combat support, and combat service support forces throughout the Active, Guard and Reserve force and support structure.

CLASSIFIED PARAGRAPH REMOVED

In your deliberations over the next few weeks, the DRB should seek decisions that will swiftly overcome these problems and ensure against their recurrence. Specifically the DRB should:

- (1) address equipment shortages and equipment obsolescences for early deploying/employing Guard and Reserve units. I choose early deploying/employing units as a first priority; eventually we must ensure that all Guard and Reserve units are adequately equipped. (By early deploying, I mean those deploying to overseas theaters by D+60 at the latest under our current plans for Europe, Southwest Asia and Korea. By early employing units, I mean those critical to the early mobilization effort, e.g., training base expansion, physical security of the United States or critical facilities.);
- (2) ensure that the remainder of our Guard and Reserve units have sufficient equipment for training;
- (3) be certain that any funding increments to Service programs intended to rectify equipment shortages decided in our program review can be audited, in subsequent program/budget reviews, to verify that the funds were spent for the intended purpose;
- (4) recognize that fiscal constraints may necessitate trade-offs between our rate of modernization and the procurement of non-modernization items.

Your deliberations should begin with our long range planning goal to equip all units within the Active, Reserve and Guard components to their full wartime levels. Simultaneously, you should carefully consider the distribution of combat, combat support, and combat service support equipment.



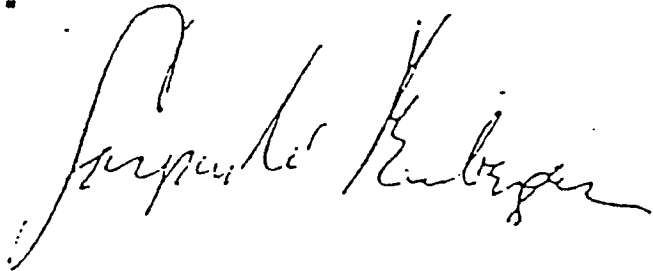
Our equipment distribution procedures should serve to simplify the logistics (supply, maintenance, and transportation) train. Furthermore, equipment distribution procedures must guarantee the interoperability of all assigned units.

I want you to apply all of your talent and expertise toward achieving the interoperable equipping of our Active, Guard and Reserve Components as swiftly as possible. To that end, I have asked the ASD (MRA&L), in conjunction with the DUSD (AM) and the Director (PA&E) to prepare a Guard and Reserve equipment issue paper for your use in reviewing the POM. After you have completed the program review, please submit a report to me on how successful you were in rectifying the problem of Guard and Reserve unit equipment shortages.

Our next Defense Guidance will include more specific statements about the priorities I expect the Service Secretaries and Chiefs to place on Guard and Reserve Component equipping. In the interim I am sending memoranda to each of them setting forth the basic department policy on equipping Active, Reserve and Guard units.

Finally, I believe that we must all keep President Reagan's commitment, stated 6 July 1981, squarely in the forefront of our decision process:

"My Administration is determined that these vital Reserve Forces will be manned, equipped, and trained to meet their full responsibility as a combat-ready element of the Total Force. Only through this Total Force can our nation remain strong enough that no potential adversary will dare attack our nation or endanger our vital interest."

A handwritten signature in dark ink, appearing to read "Ronald Reagan", is written below the quoted text. The signature is fluid and cursive, with a large initial 'R'.

# FILE COPY

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Caspar W. Weinberger



THE SECRETARY OF DEFENSE  
WASHINGTON, THE DISTRICT OF COLUMBIA

7 APR 1995

MEMORANDUM FOR SECRETARIES OF THE MILITARY DEPARTMENTS  
CHAIRMAN OF THE JOINT CHIEFS OF STAFF  
UNDER SECRETARIES OF DEFENSE  
ASSISTANT SECRETARIES OF DEFENSE  
GENERAL COUNSEL OF THE DEPARTMENT OF DEFENSE  
DIRECTORS OF THE DEFENSE AGENCIES  
CHAIRMAN OF THE RESERVE FORCES POLICY BOARD

SUBJECT: Increased Use of Reserve Forces in Total Force Missions

As the Armed Forces of the U.S. are being drawn down in accordance with our National Security Strategy, we continue to ask the Active components to meet increasingly demanding operational requirements. We need to better leverage our National Guard and Reserve forces, which are well qualified and capable of performing some of these missions. In the Cold War, the emphasis for the Active components was on fulfilling operational requirements, and the focus for the Reserve components was on training for mobilization. We need to reorient our thinking and plan to capitalize on Reserve component capabilities to accomplish operational requirements while maintaining their mission readiness for overseas and domestic operations.

The Assistant Secretary of Defense for Reserve Affairs has briefed me, and many of you, on a concept for increased integration of the Reserve components. Success of this approach is contained in three key elements: better identification of and planning for requirements; flexibility in the training and employment of Reservists; and programming the funding to meet these requirements, including capitalizing on already funded training.

Today the use of Reserve components to perform operational missions varies by Service and mission area. To provide impetus for the expanded use of the Reserve components, and specifically to help reduce Active optempo, I am initiating a pilot program for FY95. I have initiated a reprogramming action to make \$14.2 million in matching funds for projects you nominate. With the approval of this reprogramming, this FY 1995 pilot program will be a half-year program, and will provide a solid basis from which to build on these programs for FY96 and FY97. My goal is to institutionalize the process in the Department's programming and budget cycle. The pilot program funds are intended to pay for the incremental costs of approved programs, and will be administered through the ASD/RA.

The combatant commanders will nominate projects that can be completed by Reserve Component personnel. The Joint Staff with the Services will consolidate and prioritize these projects. Before funding is requested from ASD(RA), the Services will advise which projects can be supported with Reserve assets. The Services must ensure that participating Reserve units accomplish mission readiness and training requirements, while at the same time providing the additional benefit of relieving the stress of high Active operations and personnel tempo.

31625

I have instructed the Assistant Secretary of Defense for Reserve Affairs to publish implementing instructions for the pilot programs in coordination with the Secretaries of the Military Departments.

Increased reliance on the Reserve components is prudent and necessary in future policy, planning, and budget decisions.

William J. Perry



THE SECRETARY OF DEFENSE  
WASHINGTON, THE DISTRICT OF COLUMBIA

SEP 4 1997

MEMORANDUM FOR SECRETARIES OF THE MILITARY DEPARTMENTS  
CHAIRMAN OF THE JOINT CHIEFS OF STAFF  
UNDER SECRETARIES OF DEFENSE  
ASSISTANT SECRETARIES OF DEFENSE  
GENERAL COUNSEL OF THE DEPARTMENT OF DEFENSE  
COMMANDERS OF THE COMBATANT COMMANDS  
DIRECTORS OF THE DEFENSE AGENCIES  
CHAIRMAN OF THE RESERVE FORCES POLICY BOARD

SUBJECT: Integration of the Reserve and Active Components

I want to emphasize the increasing reliance on Reserve components which has occurred since the end of the Cold War and request that DoD leaders recognize and address any remaining barriers to achieving a fully integrated Force. Department policies attempting to integrate the Reserve and Active Components have existed since 1970.

- In August 1970, then Secretary Melvin Laird set this Department on the right course when he directed concurrent consideration of the Total Force, Active and Reserve, in planning, programming, manning, equipping and employing Guard and Reserve Forces. He recognized that the lower peacetime sustaining costs of Reserve force units can result in a larger total force for a given budget. These insights will continue to guide each Service in its planning, programming, budgeting and execution processes.

- In August 1973, then Secretary James Schlesinger directed each Service Secretary to provide the manning, equipping, training, facilities, construction and maintenance necessary to assure that the Selected Reserve units meet deployment times and readiness required by contingency plans. This designation of responsibility continues to be DoD policy. Inherent in this responsibility is setting a common readiness standard for the Active and Reserve components – tailored to the assigned mission – and testing both regularly to this standard.

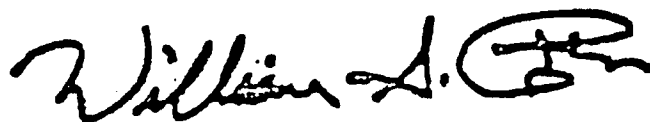
- In June 1982, then Secretary Caspar Weinberger addressed equipment, reiterating that “units that fight first shall be equipped first regardless of component,” and that Active and Reserve units planned for deployment at the same time should have equal claim on modern equipment inventories. Clearly, units that fight together should be equipped compatibly, regardless of component. And so, Active and Reserve component units which have similar contingency missions, and which are planned to be deployed in the same phase of a contingency, should have similar claims to compatible equipment.

- In April 1995, then Secretary William Perry reemphasized that we could make increased use of Reserve components to perform operational missions given “better identification of and planning for requirements; flexibility in the training and employment of Reservists, and programming the funding to meet these requirements.” He noted that, “Increased reliance on the Reserve Components is prudent and necessary in future policy, planning and budget decisions.” Implicit in this statement is the need to work together as a team toward achieving a seamless Total Force.

Today, I ask each of you to create an environment that eliminates all residual barriers – structural and cultural – for effective integration within our Total Force. By integration I mean the conditions of readiness and trust needed for the leadership at all levels to have well-justified confidence that Reserve component units are trained and equipped to serve as an effective part of the joint and combined force within whatever timelines are set for the unit – in peace and war. Only when the following four basic principles are achieved throughout the Department will Total Force integration be a reality.

- Clearly understood responsibility for and ownership of the Total Force by the senior leaders throughout the Total Force;
- Clear and mutual understanding on the mission for each unit – Active, Guard and Reserve – in service and joint/combined operations, during peace and war;
- Commitment to provide the resources needed to accomplish assigned missions;
- Leadership by senior commanders – Active, Guard and Reserve – to ensure the readiness of the Total Force.

Our goal, as we move into the 21<sup>st</sup> century, must be a seamless Total Force that provides the National Command Authorities the flexibility and interoperability necessary for the full range of military operations. We cannot achieve this as separate components. Much progress has already been made. We must continue to work towards the principles of Total Force and achieve full integration of the Reserve and Active components.







THE DEPUTY SECRETARY OF DEFENSE

TAB C

WASHINGTON, D.C. 20301

24 SEP 1998

MEMORANDUM FOR SECRETARIES OF THE MILITARY DEPARTMENTS  
CHAIRMAN OF THE JOINT CHIEFS OF STAFF  
UNDER SECRETARIES OF DEFENSE  
COMMANDANT OF THE COAST GUARD  
ASSISTANT SECRETARIES OF DEFENSE  
GENERAL COUNSEL OF THE DEPARTMENT OF DEFENSE  
COMMANDERS OF THE COMBATANT COMMANDS  
DIRECTORS OF THE DEFENSE AGENCIES  
CHAIRMAN OF THE RESERVE POLICY BOARD

SUBJECT: Anniversary of the Secretary of Defense Memorandum "Integration of the Reserve and Active Components" dated September 4, 1997

One year ago today, the Secretary of Defense asked each of us to create an environment that eliminates all residual barriers – structural and cultural – for effective integration within our Total Force. We have achieved unprecedented progress in our efforts to reach the goal of a seamless Total Force that provides the flexibility and interoperability necessary for the full range of military operations.

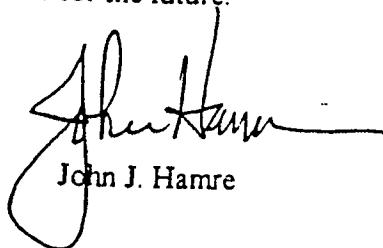
Reservists today are essential players in the Total Force and are vital to our national security. Reserve forces contributed nearly 13 million mandays to Total Force missions and exercises last year. This is equivalent to adding nearly 35,000 personnel to the Active force. Reserve component (RC) Soldiers, Sailors, Marines, Airmen, and members of the Coast Guard are now an integral part of our global presence. Operations in and around Bosnia have been an enormous integration success story.

Structural barriers are being eliminated. The Army plan to use six Army National Guard enhanced readiness brigades to form the core of two new integrated divisions, under active component (AC) commanders, by October 1999 is on schedule. The Air Force has announced plans for the creation of ten Air Expeditionary Forces to respond to current operations. Air Reserve Components are fully integrated into these plans. The Navy has two fully integrated mine countermeasure helicopter squadrons manned with AC and RC personnel with commanding officers selected from either component. The Marine Corps is adding the Light Armored Vehicle Air Defense (LAV-AD) vehicle to its inventory using a new AC/RC integration paradigm. A LAV-AD platoon, manned completely by active-duty Marines, is now assigned to the Reserve 4th Light Armored Reconnaissance Battalion at Camp Pendleton, California. "Team Coast Guard" has integrated all active and reserve personnel into its units at all levels. There are two new general officer National Guard and Reserve positions on the Joint Staff to advise the Joint Chiefs of Staff on RC issues. A major overhaul in the Army's Director of Military Support (DOMS) office has taken place with the appointment of a National Guard

general as the DOMS Deputy Director and up to half of the inter-service DOMS operations enter staff coming from the RC.

Cultural barriers are being eliminated as well. For example, the active Army has established a stronger line of communication with the National Guard and Reserve. The transition to green military identification cards for Reservists began in June 1998 at Fort Dix, New Jersey. The Reserve components are better represented in the Department's management structure than ever before. Active and Reserve component decision-makers now sit side by side at key points in the planning, programming and budgeting process to determine requirements and allocate resources.

Yet, despite our many successes, further actions are necessary before we realize our shared goal of an integrated Total Force. I encourage each of you to use this anniversary of the Total Force Integration Memorandum to assess your progress, take stock of residual cultural and structural barriers, and put in place plans for the future.



John J. Hamre



# NEWS RELEASE

OFFICE OF ASSISTANT SECRETARY OF DEFENSE  
(PUBLIC AFFAIRS)  
WASHINGTON, D.C. - 20301  
PLEASE NOTE DATE

IMMEDIATE RELEASE

September 4, 1998

No. 462-98  
(703)697-5131(media)  
(703)697-5737(public/industry)

## HAMRE ASSESSES "SEAMLESS TOTAL FORCE" ON FIRST ANNIVERSARY

Deputy Secretary of Defense John J. Hamre and other senior officials today commemorated the one-year anniversary of the historic "Seamless Total Force" memorandum signed by Secretary of Defense William S. Cohen on this date last year.

"We have made great progress integrating our active and Reserve forces into one team, trained and ready for the 21<sup>st</sup> century," Hamre said. "Our military leaders are getting the message. Structural and cultural barriers that reduce readiness and impede interoperability between active and Reserve personnel are gradually being eliminated."

"We must now assess the progress we have made, acknowledge those barriers to integration that still exist, and, most importantly, set our plans into motion," he said. "I am heartened by the constructive dialogue we have had this past year and am confident we will build on that momentum."

Cohen's Sept. 4, 1997, seamless Total Force policy memorandum recognized the increased reliance on the nation's Reserve forces since the end of the Cold War. He called on the Department's military and civilian leadership to create an environment that eliminates "all residual barriers," both structural and cultural, to effective integration of the Reserve and active forces. The memorandum builds on the Total Force policy of previous secretaries of defense dating back to former Secretary Melvin Laird, who coined the phrase "Total Force," initiating the integration of active and Reserve components in the 1970s, during the height of the Cold War.

-MORE-

"We have seen examples of the elimination of structural barriers, such as the Army's plan to form six National Guard enhanced readiness brigades into two integrated divisions under active Army leadership," said Rudy de Leon, undersecretary of Defense (Personnel and Readiness). "A major cultural barrier was removed in June, when we started issuing the Total Force green identification cards to Reserve and National Guard members. The one-year anniversary of Secretary Cohen's memorandum is certainly a most appropriate time to recognize our achievements and further Total Force integration."

"Without the daily contributions made by our Reserve forces around the world, we simply could not accomplish our missions and protect our national interests," said Charles L. Cragin, principal deputy undersecretary of Defense (Personnel and Readiness). "Total Force integration is not a luxury - it is a vital necessity."

For news representatives who want more information, please call the office of the assistant secretary of Defense for Reserve Affairs, Lt. Col. Terry Jones at (703) 695-3620.

The text of a Sept. 4, 1998 memorandum from the deputy secretary of Defense to the senior civilian and military leaders emphasizing continued progress in integrating the active and Reserve forces follows.

-END-



THE SECRETARY OF DEFENSE  
1000 DEFENSE PENTAGON  
WASHINGTON, DC 20301-1000

JAN 4 2001

MEMORANDUM FOR SECRETARIES OF THE MILITARY DEPARTMENTS  
CHAIRMAN OF THE JOINT CHIEFS OF STAFF  
UNDER SECRETARIES OF DEFENSE  
ASSISTANT SECRETARIES OF DEFENSE  
GENERAL COUNSEL OF THE DEPARTMENT OF DEFENSE  
COMMANDERS OF THE COMBATANT COMMANDS  
DIRECTORS OF THE DEFENSE AGENCIES  
COMMANDANT OF THE COAST GUARD  
CHAIRMAN OF THE RESERVE FORCES POLICY BOARD

SUBJECT: Progress on the Integration of the Reserve and Active Components (RC and AC)

Three years ago, I asked you to create an environment free of all barriers to effective Total Force integration. Today, we cannot go to war, enforce peace agreements or participate in humanitarian missions without calling on Guard and Reserve forces. Recent examples include Operation ALLIED FORCE and Bosnia command and control over multinational ground forces. Reservists support contingency operations in Kosovo and Southwest Asia; humanitarian assistance in Africa and Central America; counter drug operations in South America; joint exercises in the Pacific; and firefighting in the western U.S. RC forces contributed nearly 13 million duty days to Total Force missions and exercises last year – the equivalent of adding nearly 35,000 personnel to the AC.

The Total Force concept is now a fundamental principle guiding the restructuring and reorientation of our nation's military forces. Over the last three years, RC leaders' participation in DoD's planning, force structure, programming and budgeting processes was higher than ever. We implemented Total Force initiatives optimizing RC capabilities and core competencies to support current requirements.

There are four areas we must address, however, before we can realize our goal of a seamless Total Force.

- Quality of life programs are needed to recruit and retain RC forces. We must work together to address employers' concerns and provide family support programs.
- Our laws, policies, systems, structures, and processes must support a Total Force.
- We must simplify our ability to employ RC forces when and where they are needed.
- Commanders need personnel, readiness, training, equipment, maintenance, and construction resources for flexibility and interoperability in joint/combined operations.

Recognizing that we will continue to rely on RC, and that the lower peacetime sustaining costs of RC units and individuals can result in a larger Total Force for a given budget, we must continue our unequivocal commitment to building the seamless Total Force of the future.



U12735-00



THE SECRETARY OF DEFENSE  
1000 DEFENSE PENTAGON  
WASHINGTON, DC 20301-1000



JUL 9 2003

MEMORANDUM FOR SECRETARIES OF THE MILITARY DEPARTMENTS  
CHAIRMAN OF THE JOINT CHIEFS OF STAFF  
UNDER SECRETARIES OF DEFENSE

SUBJECT: Rebalancing Forces

The balance of capabilities in the Active and Reserve components today is not the best for the future. We need to promote judicious and prudent use of the Reserve components with force rebalancing initiatives that reduce strain through the efficient application of manpower and technological solutions based on a disciplined force requirements process.

To that end there are three principal objectives that I want to achieve. They are:

- Structure active and reserve forces to reduce the need for involuntary mobilization of the Guard and Reserve. Eliminate the need for involuntary mobilization during the first 15 days of a rapid response operation (or for any alerts to mobilize prior to the operation). Structure forces in order to limit involuntary mobilization to not more than one year every 6 years.
- Establish a more rigorous process for reviewing joint requirements, which ensures that force structure is designed appropriately and which validates requests for forces in time to provide timely notice of mobilization.
- Make the mobilization and demobilization process more efficient. When Reservists are used, ensure that they are given meaningful work and work for which alternative manpower is not readily available. Retain on active duty only as long as absolutely necessary.

I consider this a matter of the utmost urgency. I expect each of you to tailor the actions in the attachment to your specific organization and report back to USD (P&R) by memo on your assessment and plan for implementation NLT July 31, 2003. Follow up actions may be reviewed at a future SROC as necessary.

Attachment:  
As stated

cc: Combatant Commanders

U10510-03



U.S.D.

7/9/03

## Attachment

### Actions for Force Rebalancing

#### Rebalance Forces:

- Rebalance AC/RC Forces. Services submit Program Change Proposals to correct imbalances that result in lengthy, repeated, or frequent mobilization of RC individuals and units by changing force structure and/or mix, using contractors or civilians, or mitigating shortfalls through technology. Specifically address capabilities that reside exclusively or predominantly in the RC and are in high demand because of on-going operations and the Global War on Terror, capabilities that are required for homeland defense missions, and capabilities critical to post hostilities operations. (August 03)
- Reduce Early Dependence on Involuntarily Mobilized RC. Services submit Program Change Proposals or undertake policy changes in order to reduce dependence on involuntary mobilization of reservists needed early in an operation. (August 03)
- Revise Requirements Review Process. CJCS, in coordination with USD (P), USD (P&R), USD (C) and the Services will revise the requirements review procedure to ensure appropriate force structure is available and validate Combatant Commanders' request for forces. (August 03)
- Determine RC Role in Homeland Defense. ASD (HD), in coordination with NORTHCOM, PACOM, USD (P&R), the Services and Joint Staff, determine Total Force requirements for Homeland Defense and Military Assistance to Civil Authorities (September 03). Based upon the established DoD requirements, ASD (RA) prepare a report on Reserve Component Contributions to Homeland Defense and Civil Support that will recommend the appropriate roles, force mix, priorities, command relationships, and resources required for conducting these missions. (December 03)

#### Encourage Increased Volunteerism

- Establish Prototype Programs. Services submit Program Change Proposals or undertake policy changes to establish prototype programs that expand the use of RC volunteerism at both the individual and unit levels, through techniques that allow for varying amounts of Reserve participation. (August 03)
- Resources. Services ensure that sufficient military pay is programmed to support the utilization of volunteer RC units and individuals.

Attachment

Actions for Force Rebalancing (continued)

Innovative Management

- Establish Prototype Programs. Services submit Program Change Proposals (August 03) to implement innovative management techniques such as those described in the *Review of Reserve Component Contributions to National Defense* to include the design and test of innovative RC affiliation programs for individuals with specialized skills, for military retirees, and for civilian volunteers. (December 03)
- Use RC for Rotational Overseas Presence. Services submit Program Change Proposals to allow RC capabilities to meet predictable, long lead-time missions such as rotational overseas presence and experimentation. (August 03)
- Increase the Use of Reachback. USD (P&R), in conjunction with USD (I) and ASD (NII) develop CPG language regarding the importance of Combatant Commanders' utilization of reachback and chair a reachback GOSC to determine the road ahead (July 03). Services submit Program Change Proposals to enhance RC use in support of CONUS-based operations intended to provide reachback capabilities for forward forces, thereby reducing footprint in theater. (August 03)
- Improve the Mobilization Process. Working within the JFCOM effort on mobilization process improvements, the USD (P&R), in coordination with JFCOM, the Joint Staff, the Services and other OSD offices as appropriate, undertake "Quick Win" opportunities to improve policy or process changes that can be implemented within the next three months, to improve the mobilization process. Issue guidance as appropriate. (September 03).





THE SECRETARY OF DEFENSE  
1000 DEFENSE PENTAGON  
WASHINGTON, DC 20301-1000

JAN 19 2007

MEMORANDUM FOR SECRETARIES OF THE MILITARY DEPARTMENTS  
CHAIRMAN OF THE JOINT CHIEFS OF STAFF  
UNDER SECRETARIES OF DEFENSE

SUBJECT: Utilization of the Total Force

For several months, the Department has been assessing a number of options on how best to support global military operational needs. A significant question addressed by the review has been whether we have the right policies to govern how we utilize members of the Reserve, National Guard and our Active Components units. Based on this assessment and the recommendations of our military and civilian leadership, I am making the following changes to Department policy:

First, from this point forward, involuntary mobilization for members of the Reserve Forces will be for a maximum one year at any one time. At service discretion, this period may exclude individual skill training required for deployment, and post-mobilization leave.

Second, mobilization of ground combat, combat support and combat services support will be managed on a unit basis. This will allow greater cohesion and predictability in how these Reserve units train and deploy. Exceptions will require my approval.

Third, the planning objective for involuntary mobilization of Guard/Reserve units will remain a one year mobilized to five years demobilized ratio. However, today's global demands will require a number of selected Guard/Reserve units to be remobilized sooner than this standard. Our intention is that such exceptions be temporary and that we move to the broad application of the 1:5 goal as soon as possible. Continue to plan your force structure on that basis.

The planning objective for the Active Force remains one year deployed to two years at home station. Today, most active units are deploying for one year, returning home for one year, then redeploying. Just as we are asking the active forces to do more in this time of national need, so we must ask more of our Reserve components.

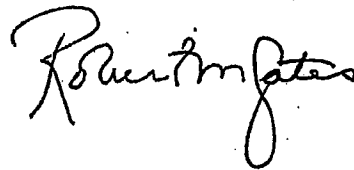


Fourth, given this reality, I am directing the establishment of a new program to compensate or incentivize individuals in both the active and Reserve components who are required to mobilize or deploy early or often, or to extend beyond the established rotation policy goals.

Fifth, I am also directing that all commands and units review how they administer the hardship waiver program to ensure they are properly taking into account exceptional circumstances facing military families of deployed service members.

Sixth, use of Stop Loss will be minimized for both active and Reserve component forces. Submit to me by February 28, 2007, your plan for minimizing use of Stop Loss.

The Under Secretary of Defense for Personnel and Readiness will update existing guidance on Reserve mobilization to reflect these principles.

A handwritten signature in dark ink, appearing to read "Robert M. Gates". The signature is fluid and cursive, with the first name "Robert" and last name "Gates" clearly legible, and "M." as a middle initial.

# TAB C

**ACTION MEMO**

**FOR:** UNDER SECRETARY OF DEFENSE FOR PERSONNEL AND READINESS

**FROM:** MG John B. Hashem, USAR, Reserve Forces Policy Board HASHEM.JOHN.B Digitally signed by HASHEM.JOHN.B ARRY.1017847038 Date: 2022.08.25 21:26:24 -04'00'

**SUBJECT:** Reserve Forces Policy Board Secretary of Defense Recommendations on Duty Status Reform efforts and Reinstatement of Reserve Component General and Flag Officer Exemptions

- **Purpose.** Request your signature on the memorandum next under to forward to the Secretary of Defense (SECDEF) the two Reserve Forces Policy Board (RFPB) ACTION Memos recommendations on Duty Status Reform efforts and Reinstatement of Reserve Component General and Flag Officer Exemptions at TAB B and C.
- **Background.** Under Secretary of Defense for Personnel and Readiness is the DoD sponsor for the RFPB as such per DoD Instruction 5105.04 (TAB D) and is involved in coordination on the RFPB's recommendations being forwarded to the SECDEF.
- These recommendations have been deliberated by the Joint Staff, throughout OSD, and the RFPB in past and are being re-emphasized following NDAA deliberations. The RFPB's recommendations are below:
- Recommendation: The Department continue to fully support the ongoing Duty Status Reform efforts led by the Under Secretary of Defense for Personnel and Readiness to actively engage OMB to coordinate proposed duty status' with the required benefits. Support Duty Status Reform as a top tier NDAA 2024 legislative proposal (TAB B).
- Recommendation: The Department fully support Joint Staff Legislative Proposal to reinstate the exemptions for 18 Chairman's Reserve Positions that were eliminated as part of the 2017 NDAA, Section 526, Title 10, U.S.C. (TAB C).
- **RECOMMENDATION:** Sign the memorandum next under.

**Attachments:**

TAB A – USD P&R SECDEF Memo

TAB B – Duty Status Reform Recommendation

TAB C – Reserve Component General & Flag Officer Exemptions Recommendation

TAB D – DoD Instruction 5105.04

# TAB D



## DEPUTY SECRETARY OF DEFENSE

1010 DEFENSE PENTAGON  
WASHINGTON, DC 20301-1010

DEC - 3 2020

### MEMORANDUM FOR SENIOR PENTAGON LEADERSHIP (SEE DISTRIBUTION) DEFENSE AGENCY AND DOD FIELD ACTIVITY DIRECTORS

SUBJECT: Requiring the Use of Fully Burdened and Life Cycle Personnel Costs for all Components in Total Force Analysis and for Budgetary Purposes

This memorandum directs the use of fully burdened and life cycle personnel costs for all Components in Total Force analysis and for budgetary purposes. The Department will take timely and significant steps to achieve comprehensive fully burdened personnel cost estimates. To accomplish these important Department objectives, I direct the following:

- The Director of Cost Assessment and Program Evaluation (CAPE) will update the policies in Department of Defense Instruction (DoDI) 7041.04, "Estimating and Comparing the Full Costs of Civilian and Active Duty Military Manpower and Contract Support," to include Reserve Components. This activity will recognize the progress achieved and maintain consistency with the Department's legislative and regulatory efforts to reform Reserve Component Duty Status.
- The Under Secretary of Defense (Comptroller)/Chief Financial Officer (USD(C)/CFO) will provide, on a continuing basis, actual cost and forecast budgetary data required for computing fully burdened military personnel costs for the Total Force, including the Reserve Components, to support the DoD objective to provide the most effective mix of forces, equipment, manpower and support attainable within fiscal constraints.
- Following the update of DoDI 7041.04, CAPE, in coordination with the USD(C)/CFO and the USD for Personnel and Readiness, will lead an effort to develop a Fully Burdened Life Cycle Cost model which includes the Reserve Components. This model will reflect the progress and anticipated approval of the Department's continuing Duty Status reform efforts.

cc:  
Chairman, RFPB



OSD002543-20/CMD014330-20

**DISTRIBUTION:**

Chief Management Officer of the Department of Defense  
Secretaries of the Military Departments  
Chairman of the Joint Chiefs of Staff  
Under Secretaries of Defense  
Chief of the National Guard Bureau  
General Counsel of the Department of Defense  
Director of Cost Assessment and Program Evaluation  
Inspector General of the Department of Defense  
Director of Operational Test and Evaluation  
Chief Information Officer of the Department of Defense  
Assistant Secretary of Defense for Legislative Affairs  
Assistant to the Secretary of Defense for Public Affairs  
Director of Net Assessment

# TAB E





# RESERVE FORCES POLICY BOARD

## **Requiring the Use of Fully Burdened and Life Cycle Personnel Costs for all Components in Total Force Analysis and for Budgetary Purposes**

### **Update Report to the Secretary of Defense**

**September 10, 2019**

RFPB Report FY19-01



CHAIRMAN

OFFICE OF THE SECRETARY OF DEFENSE  
RESERVE FORCES POLICY BOARD

5113 Leesburg Pike, Suite 601  
FALLS CHURCH, VA 22041

OCT 10 2019

INFO MEMO

FOR: SECRETARY OF DEFENSE

FROM: MajGen Arnold L. Punaro, USMCR (Ret), Chairman, Reserve Forces Policy Board

SUBJECT: Report of Reserve Forces Policy Board on Requiring the Use of Fully Burdened and Life Cycle Personnel Costs for all Components in Total Force Analysis and for Budgetary Purposes

- 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, 2019 and voted to make three recommendations to you concerning policy changes needed to assure that you and your senior officials have better data about the financial costs of your Active and Reserve Component forces (TAB A).
  1. Establish DoD policy/guidance for computing fully burdened Military Personnel Costs for the Total Force, including the Reserve Component.
  2. Calculate and report cost element figures annually using budgeted and actual costs.
  3. Develop a model to calculate and compare Active and Reserve Component fully burdened life cycle costs.
- As required by the Federal Advisory Committee Act, the recommendations were deliberated and approved in an open, public session. Also consistent with the Act, a copy of this report will be posted to the RFPB web site at <http://ra.defense.gov/rfpb/reports>.
- The project team consulted with Cost Assessment and Program Evaluation as well as the Office of the Under Secretary of Defense (Comptroller) on these matters.

COORDINATION: NONE

Prepared by: MG Blake C. Ortner, 703-681-0600

## EXECUTIVE SUMMARY

Senior Department of Defense (DoD) officials, Congressional leaders, think tanks and subject matter experts acknowledge the fully burdened and life cycle cost growth trends of the All-Volunteer Force continues on an unsustainable basis. Further, major military manpower decisions over the last several decades continue to be less than fully informed regarding real, present and future costs. The Reserve Forces Policy Board (RFPB) concluded both in its 2013 Fully Burdened and Life Cycle Cost Report, and again in this 2019 update, that DoD lacks appropriate policy requiring a complete and consistent costing methodology to identify the true fully burdened and life cycle costs of military manpower. Consequently, using FY 2018 data to update the 2013 Fully Burdened and Life Cycle Cost Report, the RFPB makes the following three recommended updates and proposes specific cost elements that should be included in them:

1. Establish DoD policy/guidance for computing fully burdened Military Personnel Costs for the Total Force, including the Reserve Component.
2. Calculate and report cost element figures annually using budgeted and actual costs.
3. Develop a model to calculate and compare Active and Reserve Component fully burdened life cycle costs.

The primary purpose of these recommendations is to ensure senior DoD leaders receive accurate analytical products that are based on current, complete and consistent data. The Board believes that the establishment of a standard costing method for determining complete individual component costs is essential when exploring Active Component (AC)/Reserve Component (RC) force mix and mission alternatives in a fiscally responsible environment. The Director of Cost Assessment and Program Evaluation (CAPE) must take the lead for the Secretary of Defense in determining the cost methodology ground rules for the military departments and other DoD entities. The DoD should also know and implement a comprehensive, fully burdened life cycle cost policy for all of its personnel for informed decision making.

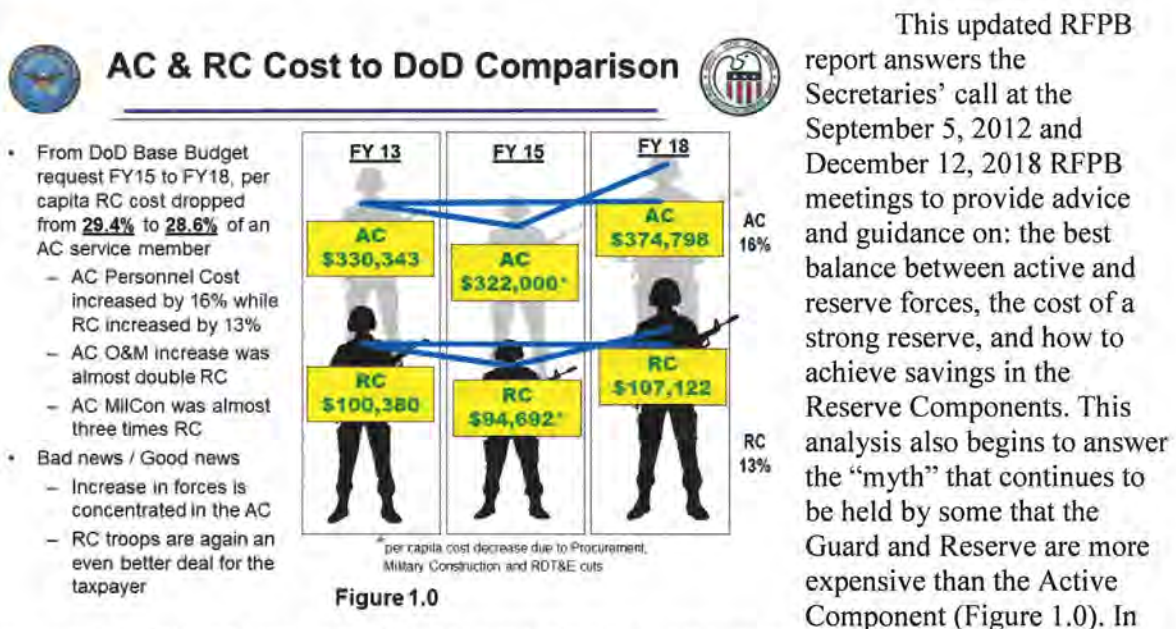
The Director of CAPE committed to address each of the recommendations from the 2013 RFPB report in an Information Memorandum dated 15 March 2013 (Appendix D). The RFPB applauded the willingness of CAPE to pursue their review. However, in the six years since, CAPE has only addressed four of the six recommendations, and only in part. In its FY 2015 Military, Civilian, and SES Manpower Rates for the Cost Guidance Portal, CAPE specified the cost elements that must be included when computing the fully burdened cost to DoD for military manpower in accordance with recommendations from the 2013 report (Appendix C). Those elements are specified in Appendix E. However, CAPE did not include major costs from the 2013 RFPB report associated with Procurement, Military Construction and Research Development Test and Evaluation (RDT&E). These are clearly essential and very large elements of the fully burdened cost to DoD.

The current CAPE policy and Full Cost of Manning (FCoM) tool provide updated cost figures annually and provide a model to possibly calculate and compare life cycle costs. However, they do not address RC costs and only address a single annual cost for Active Duty



service members and civilians, and do not calculate a fully burdened or life cycle cost for Active Duty service members.

In this 2019 update the RFPB staff team pursued a “top-down” quantitative analysis of the Fiscal Year 2018 federal budget request as detailed in DoD’s “Green Book” and related budget materials. The FY 2018 data is the most recent FY for which full-year data is available. The RFPB project team held a significant number of meetings over the past year including the RFPB and key DoD stakeholders for substantive discussion and metric examination. These meetings provided further validation of fully-burdened values for various cost elements used in the original report, confirming that the cost of a RC service member, when not activated, remains less than one third that of their AC counterpart. According to RFPB analysis of the Fiscal Year 2018 budget request (Appendix B), the RC per capita cost ranges from 28% to 32% of their AC counterparts’ per capita costs, depending on which cost elements are included. These calculations remain consistent with DoD, think tanks, Federally Funded Research and Development Centers (FFRDC), commissioned studies, and the independent statutory *Commission on the National Guard and Reserve* conclusions comparing active and reserve component costs since the advent of the All-Volunteer force.



This updated RFPB report answers the Secretaries’ call at the September 5, 2012 and December 12, 2018 RFPB meetings to provide advice and guidance on: the best balance between active and reserve forces, the cost of a strong reserve, and how to achieve savings in the Reserve Components. This analysis also begins to answer the “myth” that continues to be held by some that the Guard and Reserve are more expensive than the Active Component (Figure 1.0). In

some cases, this is based on a refusal to account for the real estate, facilities, utilities, infrastructure, training and other costs required to support personnel who are on active duty 365 days per year. The RFPB intends to examine these areas in detail in a subsequent report. Therefore, the RFPB again recommends mandatory inclusion of specific cost factors for computing the fully-burdened and life-cycle costs of military manpower. This is essential to accurately compare the costs of Active and Reserve Components in present and future DoD force structure decisions.