Reserve Component Readiness Assessment Methodologies: Is There A Better Way?

A Monograph

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Reserve Component unit readiness is important because the Army cannot operate in any spectrum of conflict without mobilizing reserve forces. Major portions of the Army's support structure reside in the reserves. The current Unit Status Report does not adequately assess unit training readiness using objective data, but relies on commanders' subjectivity. This monograph serves to analyze the current readiness reporting system, identify shortcomings in the system, and recommend solutions. Therefore the study is significant to identifying ways to improve readiness assessment reporting, thus streamlining the mobilization process. The purpose of this monograph is to evaluate the applicability of the current Reserve Component unit readiness assessment process, and determine if other methods of readiness assessment are more effective. The study uses historical references to lay the groundwork for understanding the current assessment system. However, it primarily addresses current readiness assessment methodologies (grounded in regulation and doctrine) as prescribed by Unit Status Reporting (USR) procedures, and Forces Command pre-mobilization training requirements, as outlined in FORSCOM Regulations. Since readiness and mobilization are symbiotic processes, doctrinal concepts from the FORSCOM Mobilization and Deployment Planning System (FORMDEPS) series of regulations will be reviewed when appropriate. The system will be analyzed to determine if USR, post-mobilization training estimates expressed in terms of a latest arrival date (LAD), or a combination of the two is the most appropriate method to assess Reserve Component unit readiness.

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ABSTRACT

Reserve Component Readiness Assessment Methodologies: Is There A Better Way? by Major Gary B. James, United States Army, 46 pages.

Reserve Component unit readiness is important because the Army cannot operate in any spectrum of conflict without mobilizing reserve forces. Major portions of the Army's support structure reside in the reserves. The current Unit Status Report does not adequately assess unit training readiness using objective data, but relies on commanders' subjectivity. This monograph serves to analyze the current readiness reporting system, identify shortcomings in the system, and recommend solutions. Therefore the study is significant to identifying ways to improve readiness assessment reporting, thus streamlining the mobilization process.

Over the last thirty years the Army has gotten smaller, and transferred many critical capabilities in the Reserve Components. Over half of the Total Army's force structure exist in the Reserve Components, including sixty percent of the combat forces, fifty-four percent of combat support, and approximately sixty-eight percent of combat service support forces Certain capabilities, such as civil affairs, reside almost exclusively in the reserves. Therefore, the Reserve Components must be mobilized, at some level, to support Army deployments.

The purpose of this monograph is to evaluate the applicability of the current Reserve Component unit readiness assessment process, and determine if other methods of readiness assessment are more effective. The study uses historical references to lay the groundwork for understanding the current assessment system. However, it primarily addresses current readiness assessment methodologies (grounded in regulation and doctrine) as prescribed by Unit Status Reporting (USR) procedures, and Forces Command pre-mobilization training requirements, as outlined in FORSCOM Regulations. Since readiness and mobilization are symbiotic processes, doctrinal concepts from the FORSCOM Mobilization and Deployment Planning System (FORMDEPS) series of regulations will be reviewed when appropriate. The system will be analyzed to determine if USR, post-mobilization training estimates expressed in terms of a latest arrival date (LAD), or a combination of the two is the most appropriate method to assess Reserve Component unit readiness.

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CHAPTER ONE

INTRODUCTION

…the concept of a militia embodies the idea of an extraordinary and largely voluntary participation in the war by the whole population, with its physical strength, its wealth, and its loyalty. The less the institution resembles this model, the more a militia will become a regular army under another name. It will have the advantages of a regular army, but it will also be lacking the advantages of a genuine militia: a reservoir of strength that is much more extensive, much more flexible, …and whose spirit and loyalty are much easier to arouse. These factors are the essentials of a militia. Its organization must leave scope for participation of the populace. If it does not, any great hopes one may have from it are mere delusions.[1]

Carl von Clausewitz,
On War

Non-regular forces have participated in every conflict fought by the United States, from the War of Independence, to current operations in the Global War on Terror.[2] Untrained and poorly disciplined militia formed the backbone of reserve forces in the early years of the country.[3] The reserve forces of today are professional part-time soldiers. Units are "no longer a force in reserve." Reserve units mobilize and deploy in support of an expeditionary army.[4] However, effective planning for mobilization and deployment in support of an expeditionary army is a complex, continuous task that demands experienced leadership, and time. It requires the orchestration of training, personnel, medical, logistics, and staff activities, by leadership limited to approximately thirty- eight or thirty-nine training days per year.[5] It further requires the

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[1] Carl von Clausewitz, *On War*, trans. and ed. Michael Howard and Peter Peret (New York: Random House, 1993), 445.

[2] GlobalSecurity.org, *Army National Guard History* [database on-line] (Alexandria, VA: GlobalSecurity.org, 2003, accessed 8 April 2004); available from http://www.globalsecurity.org/military/agency/army/arng-history.htm; Internet.

[3], United States Army, *American Military History*, Army Historical Series (Washington, DC: Center For Military History, 1989), 30.

[4] LTG James R. Helmly, Speech to the Reserve Officers Association Mid-Winter Meeting, *The United States Army Reserve – An Army at War for a Nation at War*, [briefing on-line] (Washinton, DC: 2004), available from http://www4.army.mil/USAR/soldiers/docs/27-Jan-04_ROA_CAR-final.pdf, Internet.

[5] When drill weekends and Annual Training days are combined, the Army Reserves trains thirty-eight days per year, and the Army National Guard thirty-nine.

reshaping of individual and collective mental models, developed in the civilian employment sector, to meet the challenges of military service.

The United States Army has never had a traditional answer to effectively preparing, mobilizing, and deploying the Reserve Components. Prior to World War II the United States did not maintain a large standing army or organized reserve, and relied upon mobilizing the untrained civilian reserve to meet emergencies. However, time was not a factor.[6] Units of the Organized Reserve Corps did not mobilize as organizations during the pre-war build up for World War II. Instead the Army mobilized individuals from these units to acquire officers and noncommissioned officers for the Regular Army. By the start of the war these reserve units did not exist.[7] The Korean Conflict saw a change in policy. "Unlike World War II, the Army's policy for Korea was that officers and enlisted personnel would not be stripped out of organized units and sent to Korea as replacements.[8] However, a lack of resources resulted in poor, or nonexistent training, and the bulk of the reserves were not prepared for the war.[9] The next major mobilization of Reserve Component units was for Desert Storm. Post-mobilization training was still required to complete pre-mobilization tasks, even though the Army had taken steps to increase readiness through the Total Army Policy. Many units deployed without required training due to the necessity deploy rapidly.[10]

The Army used the Unit Status Report (USR) to assess readiness by the time of Desert Storm. Training readiness is a subjective judgment of the unit commander in this system. The

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[6] Richard B. Crossland and James T. Currie, *Twice The Citizen: A History of the United States Army Reserve, 1908-1983*, (Washington, D.C.: Office of the Chief of Army Reserve, 1984), 80.

[7] Ibid., 66.

[8] Ibid., 97.

[9] Ibid., 89.

[10] Jeffrey A. *Jacobs, The Future of the Citizen Soldier*, (Lexington, KY: The University Press of Kentucky, 1994), 90.

number if readiness incidents during Desert Storm called the system into question.[11] However, the Army continues to use the USR to determine the deployment readiness of Reserve Component units. A more objective system of assessing unit readiness is required to effectively train, mobilize, and deploy Reserve Component units.

Statement of the Problem

The primary research question is: Is Unit Status Reporting the optimal method to gauge Reserve Component unit readiness? To answer the primary research question, the monograph must answer or address the following preliminary questions:

1. Do the USR requirements accurately assess a unit's METL proficiency?

2. Do the USR requirements assess staff proficiency levels?

3. Does the USR objectively determine post-mobilization training requirements by comprehensively assess the other training factors of A unit?

4. Is LAD determination a more effective means of assessing unit readiness for mobilization?

The purpose of this paper is to evaluate the applicability of the current Reserve Component unit readiness assessment process, and determine if other methods of readiness assessment are more effective. The study uses historical references to lay the groundwork for understanding the current assessment system. However, it primarily addresses current readiness assessment methodologies (grounded in regulation and doctrine) as prescribed by Unit Status Reporting (USR) procedures, and Forces Command pre-mobilization training requirements, as outlined in FORSCOM Regulations. Since readiness and mobilization are symbiotic processes, doctrinal concepts from the FORSCOM Mobilization and Deployment Planning System

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[11] Ibid., 90-91.

(FORMDEPS) series of regulations will be reviewed when appropriate. The system will be analyzed to determine if USR, post-mobilization training estimates expressed in terms of a latest arrival date (LAD), or a combination of the two is the most appropriate method to assess Reserve Component unit readiness.

This paper has four chapters to address the topic. Chapter two defines relevant Army and Forces Command doctrine as it applies to the training readiness of the Reserve Components. Chapter three defines the regulatory reporting requirements of the Unit Status Report as it applies to the training readiness of the Reserve Components. Chapter four answers the sub-questions required to answer the research question. Chapter five gives conclusions and recommendations to improve the readiness assessment system of Reserve Component units.

Specifically, Chapter one will address three areas: the problem statement, a background of the increased significance of Reserve forces, and the limitations of this study.

Significance

Reserve Component unit readiness is important because the Army cannot operate in any spectrum of conflict without mobilizing reserve forces. Major portions of the Army's support structure reside in the reserves. The current Unit Status Report does not adequately assess unit training readiness using objective data, but relies on commanders' subjectivity. This monograph serves to analyze the current readiness reporting system, identify shortcomings in the system, and recommend solutions. Therefore the study is significant to identifying ways to improve readiness assessment reporting, thus streamlining the mobilization process.

The Reserve Components were created to prevent the necessity of drafting large numbers of raw recruits and sending them to war untrained. The role of United States Army Reserve (USAR) and Army National Guard (ARNG) is, as it was then, to provide a trained force to

augment the Regular Army in times of emergency.[12] According to Title 10, the legal basis for reserve forces, "The purpose of each reserve component is to provide trained units and qualified persons available for active duty in the armed forces, in time of war or national emergency, and at such other times as the national security may require, to fill the needs of the armed forces whenever, during and after the period needed to procure and train additional units and qualified persons to achieve the planned mobilization, more units and persons are needed than are in the regular components."[13] The USAR and ARNG have traditionally suffered from a lack of equipment, personnel, and training. The result has been that reserve Component units were generally not prepared to mobilize and deploy timely. This, combined with the political atmosphere, resulted in few Reserve Component units participating in combat actions during Vietnam.[14]

General Creighton Abrams initiated a transformation program of the Army, while serving as the Army Chief of Staff. He did this to make the Reserve Component a relevant, ready, and deployable part of the Army, understanding that employing reserve forces equates to national participation during wart.[15] Secretary of Defense Melvin Laird brought the principle into being by enacting the Total Force Policy in 1970.[16] The purpose was to ensure that all large scale, prolonged wartime deployments would be executed by a "total force" that would ensure the involvement of the American people. Both the Cold War and the Vietnam War played a major influence in the implementation of the doctrine. The basic assumption was that the reserves

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[12]Crossland and Currie, 23-25.

[13] Armed Forces Act, Title 10 U.S. Code, chapter 1003 sec. 10102 (2002).

[14] Jacobs, 1-2.

[15] John R. Groves, Crossroads in U.S. Military Capability: the 21st Century U.S. Army and the Abrams Doctrine, (Arlington, VA: The Institute of Land Warfare, 2001), 2.

[16] Martin Binkin and William Kaufmann, *U.S. Army Guard & Reserve: Rhetoric, Realities, Risks* (Washinton, D.C.: The Brookings Institution, 1989), 24.

would only be deployed for the big war with the Soviet Union.[17] The dismantling of the Selective Service System and the advent of the volunteer army ensured the Reserve Components were the only viable source of immediate augmentation for the Army.[18]

The post Vietnam era, through the 1980s, saw many changes to the Army, all of which were guided by the Abrams Doctrine. This was also a time of constrained by budgets, force structure reductions, and the development and fielding of the Big Five.[19] The Army transferred many Combat Support and Combat Service Support functions into the Reserve structure. The Roundout Program was also initiated. In this program, certain Army divisions consisted of two Active Component Combat Arms brigades (Infantry or Armor), rounded out by a Reserve Component brigade. The roundout brigade mobilized, trained for 30 days, and deployed with its parent division. Over a half of the Army's force structure existed in the reserves by the late eighties.[20] While the Army fielded eighteen divisions, it did so at a cost of transferring a significant portion of Corps level, and Echelon Above Corps level support capability into the Reserve Components.[21] Concept plans for major operations required the mobilization and deployment of the Reserve Components in support, rather than augmentation, of the Active Army.[22]

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[17] Groves, 2.

[18] Roy A. Werner, "The Readiness of U.S. Reserve Components," in *Supplementary Military Forces: Reserves, Militias, Auxiliaries*, ed. Louis A. Zurcher and Gwyn Harries-Jenkins, Sage Research Progress Series on War, Revolution, and Peacekeeping, vol. 8 (Beverly Hills, CA: 1978), 69.

[19] The Big Five weapons systems are the UH-60 Blackhawk, the M1 Abrams Tank, the AH-64 Apache, the Patriot, and the M2/3 Bradley Fighting Vehicle. The development of these systems was initiated by General Creighton Abrams to close the gap with Soviet weapons advances while the United States was focused on Vietnam. Their development occurred simultaneously with doctrinal development that ultimately resulted in the Airland Battle Doctrine. Robert H. Scales, *Certain Victory: The US Army in the Gulf War* (Washington D.C.: Office of the Chief of Staff United States Army, 1993), 19-25.

[20] Ibid., 18.

[21] John L. Romjue, *The Army of Excellence: The Development of the 1980s Army* (Fort Monroe, VA: Office of the Command Historian U.S. Army TRADOC, 1993), 126.

[22] Dallas D. Owens, *AC/RC Integration: Today's Success and Transformation's Challenge* (Carlisle, PA: Strategic Studies Institute, 2001), 6.

The 1990s were also a period of great change for the Army. The decade began with the fall of communism in Europe, soon followed by the collapse of the Soviet Union. The Warsaw pact crumbled. National Security focus shifted from the global containment of communism to regional threats. Long duration, high intensity conflicts were not envisioned. With this change President Bush looked to cut back military forces by twenty-five percent.[23] The spectacular coalition victory over Iraq, spearheaded by the United States, further influenced policy makers that military force structure was too large.

In 1993 Secretary of Defense Les Aspin initiated the Bottom-up Review to determine the appropriate size of the military. The Department of Defense based this review on four probable threats to United States security: regional conflicts, proliferation of weapons of mass destruction, menaces to reform of the former Soviet Union, and threats to the economy. However, the threat of regional conflicts was the most influential in determining the size of the force, in conjunction with the requirement to fight two of these contingencies.[24] The review determined that Active Army strength should draw down to 495,000 in 1996, the Army National Guard to 367,000 in 1997, and the Army Reserves to 208,000 in 1998 (Figure 1). The review determined that the appropriate Army force structure was ten Active Army divisions. It also determined that the National Guard should be reduced to eight divisions and fifteen enhanced brigades (Figure 2)[25]

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[23] Eric V. Larson, David T. Orletsky, and Kristin Leuschner, Defense Planning in a Decade of Change: Lessons from the Base Force, Bottom-Up Review, and Quadrennial Defense Review (Santa Monica, CA: Rand, 2001) 6-12.

[24] Department of Defense, *Aspin Promotes Bottom-up Review, Talks of Changes* [news release on-line] (American forces Information Service, 1993, accessed on 19 January 2004), available from http://groups.google.com/groups?selm=9309252343.AA02480%40afnews.pa.af.mil&output=gplain, Internet.

[25] Congress, Senate and House of Representatives, Committees and Subcommittees, *A Statement on the Posture of the United States Army Fiscal Year 1998*, 105th Cong., 1st sess., February 1997.

Figure 1

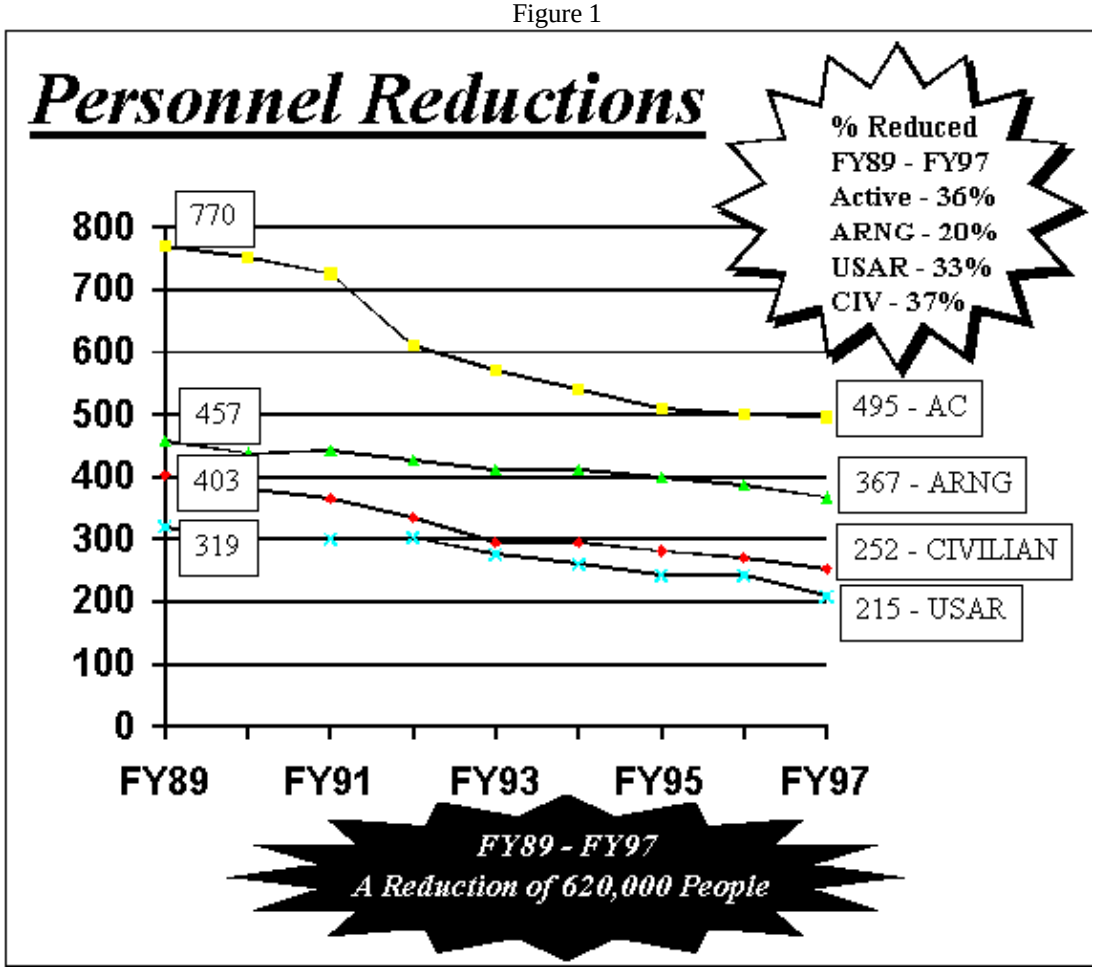
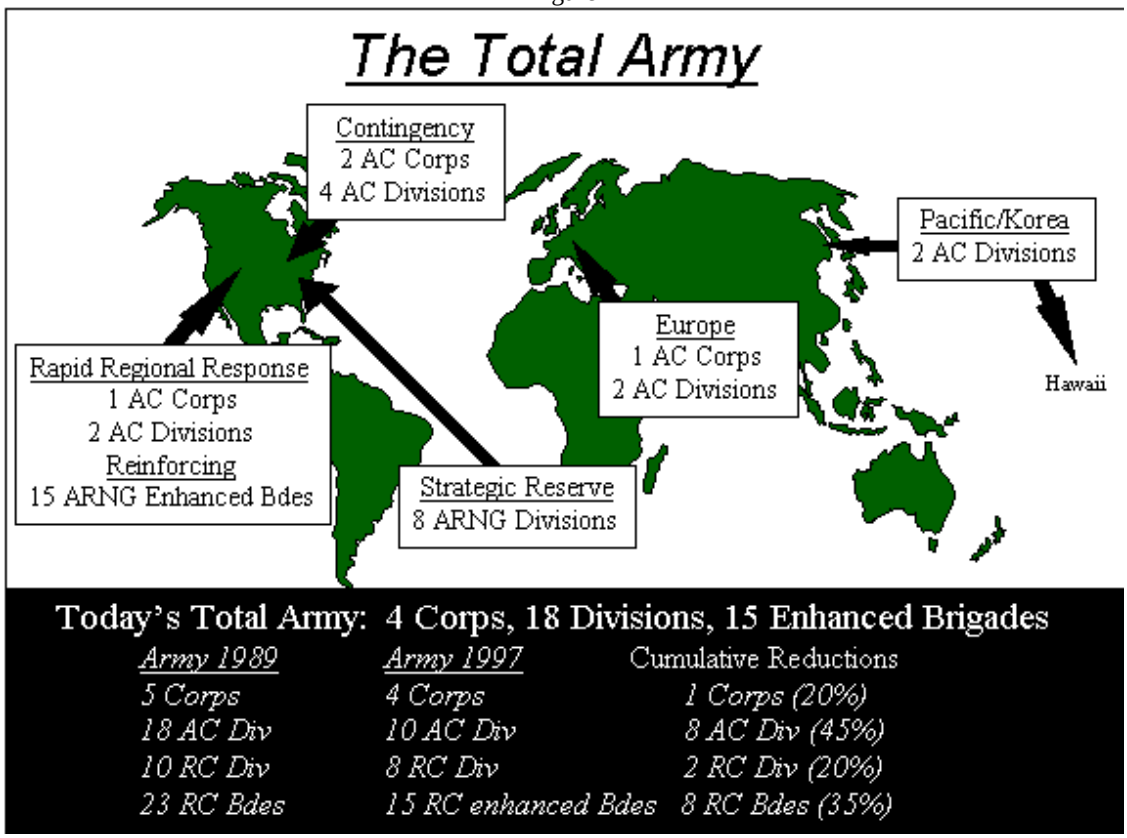
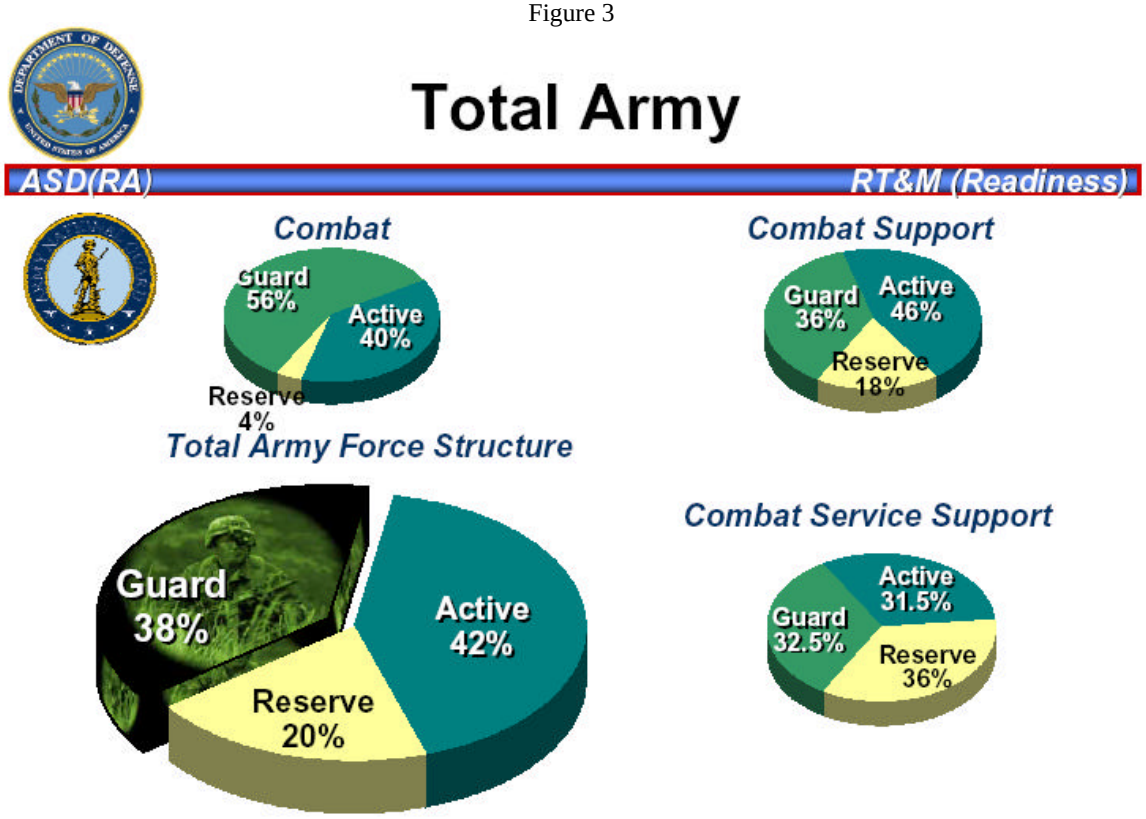


Figure 2



As the Army shrank, the Reserve Components became more important to the Total Force. By 2003 fifty-eight percent of the Total Army force structure existed in the Reserve Components, including sixty percent of the combat forces, fifty-four percent of combat support, and approximately sixty-eight percent of combat service support forces (figure 3).[26]

Figure 3



Further, "The Army reserve components provide all or significant portions of many of the Army's support functions, including one hundred percent of the forces that provide fresh water supply, over ninety-five percent of the civil affairs units, about eighty-five percent of the medical brigades, about seventy-five percent of the chemical defense battalions, and about seventy percent

[26] Department of Defense, Assistant Secretary of Defense for Reserve Affairs, *Total Force Briefing* (Washington, D.C.: 2003), .26.

of the heavy combat engineer battalions."[27] These factors necessitate a trained, ready, and rapidly deployable Reserve Component. The Army has implemented a series of training support initiatives to meet this challenge.

Evolution of Training Support

Just as the Reserve Component force structure and relevance to the Total Army have evolved, so have the ways of providing trained and ready units. The Army has utilized a series of programs to increase the readiness posture of Reserve Component units, throughout the evolution of the Total Force. These programs ranged from affiliation with Active Army units, to integration initiatives.

The Affiliation Program, one of the first programs, coupled high priority reserve units with counterpart active units. The purpose of the program was to improve the readiness of these high priority units through interaction with the active unit it would deploy to combat with. Since there was an expectation of wartime deployment, active units were expected to have a vested interest in the readiness level of their reserve counterparts. Members of the associated units would regularly meet to plan, coordinate, and execute training under this arrangement. The Roundout /Round – up (RO/RU) Program was a major subdivision of the Affiliation Program, using reserve combat units to fill out active divisions. By 1985 five active divisions included a reserve brigade, and four others were dependent on reserve battalions to achieve full strength. The Affiliation Program further expanded to include units that did not have a RO/RU affiliation in 1980, when the Active Component/Reserve Component Partnership Program was instituted.

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[27] Congress, Senate, The Subcommittee on Readiness, Committee on Armed Services, *United States General Accounting Office Testimony on DOD Reserve Components: Issues Pertaining to Readiness*, Testimony 03/21/96, GAO/T-NSIAD-96-130, 21 March, 1996.

This program partnered unaffiliated reserve units active units in close proximity, or with similar capabilities.[28]

A major expansion of the Affiliation Program occurred with the advent of the CAPSTONE Program. This program organized and integrated active and reserve forces to meet wartime requirements, based on approved operational plans.[29] The goal was to ensure that units knew their wartime chain of command, both superior and subordinate, and where they would fight. This established a wartime command relationship during peacetime training. The program also instituted a directed training relationship between units with wartime command relationships. In this relationship, Active units provided training support and equipment to their affiliated reserve units, and evaluated their performance. The Army also attempted to transpose the wartime command relationships into the peacetime chain of command through this program.[30]

CAPSTONE improved the overall readiness of the Reserve Components; however there were serious problems with the command and control relationship. The wartime command relationship was invalid during peacetime with respect to the National Guard. The state governors command the National Guard during peacetime. The Army chose not to enforce the command relationship with the Army Reserves, and to do so properly would have required changes to the organizational structure of the reserves. The expected command relationship in reality became nothing more than an informal information exchange, and coordination relationship that hinged on voluntary cooperation. However, it forged a closer relationship between the Active and Reserve Components by formalizing reserve participation in war plans.[31] It also focused reserve unit training programs by tying the units to a Major Theater War or

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[28] Binkin and Kaufmann, 80.

[29] GlobalSecurity.org, *WARTRACE* [database on-line] (Alexandria, VA: GlobalSecurity.org, 2003, accessed 7 January 2004); available from **http://www.globalsecurity.org/military/agency/army/wartrace.htm**; Internet.

[30] Jacobs, 16-18.

[31] Ibid., 18-19.

contingency, with training guidance from a wartime chain of command.[32] This provided battle focus to a unit's Mission Essential Task List (METL).

Congress also took action to improve Reserve Component readiness. In Title V of the *National Defense Authorization Act for Fiscal Years 1992 and 1993* Congress mandated that 2000 active Army officers be assigned to positions as advisers Reserve Component units. A major objective of the program was to improve the readiness of the Reserve Component by assigning these soldiers in a full time duty status to organize, administer, instruct, and train the units.[33] Congress expanded the program by an additional 3000 soldiers the following year. Further, Title XI of the *National Defense Authorization Act for Fiscal Year 1993* required the Secretary of the Army to focus pre-mobilization training on individual training, collective training at platoon level (and below), and multi-echelon staff training for battalion and larger headquarters.[34] The Army instituted the Bold Shift program to meet these requirements.

The Army instituted the Bold Shift initiative in 1992, because of readiness problems within the Reserve Components that arose during Desert Storm and to fulfill Congressional mandates. The Army expected that most reserve units would only require a short post-mobilization training period, based on unit improvements realized through the CAPSTONE program. However, many units arrived at the mobilization station unprepared to execute their METL. Bold Shift implemented several training and readiness measures to improve CAPSTONE. It instituted operational readiness exercises to comprehensively gauge a unit's ability to perform its wartime mission. It further focused unit training by setting realistic pre-mobilization collective training goals. It also stressed training with wartime chains of command,

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[32] Ibid., 112.

[33] National Defense Authorization Act for Fiscal Years 1992 and 1993, Public Law 102-190, U.S. Code, vol. 1, sec. 414 (1991).

[34] *National Defense Authorization Act for Fiscal Year 1993*, Public Law 102-484, U.S. Code, vol. 2, secs. 1119, 1132 (1992).

reinforcing the CAPSTONE training philosophy with Directed Training Affiliation Programs. Reserve staffs were trained as well, and participated in constructive simulations. Also, reserve participation in National Training Center, and Joint Readiness Training Center rotations increased, including opposing forces missions. The additional support received from active units in providing resources and planning allowed reserve commanders to focus on training, rather than administrative distracters.[35] To meet Congressional mandates the Army established Resident Training Detachments, teams of officers and noncommissioned officers constructed by functionality, at selected high priority reserve units to assist them in planning, coordinating, and executing training. The Resident Training Detachments reported to the reserve unit's wartrace division headquarters, unlike the Readiness Groups who reported to the CONUSAs.[36]

WARTRACE replaced CAPSTONE in1994 reinforcing the established planning and training alignments. However, it did not fix the problems of CAPSTONE. The WARTRACE Program did increase the integration of the Active and Reserve Components by creating opportunities for reserve units to participate in collective, and overseas training exercises with their wartime units.[37] The Resident Training detachments remained in place to support the new program.

The Resident Training Detachments had several problems that hindered effective support of the reserves. First, "The legislation establishing the program termed the active Army personnel assigned "advisers," and the 1992 Army Memorandum of Instruction on the program stated that the RTD staff would focus on assessing training (identifying and resolving problems)

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[35] Dwight D. Oland and David W. Hogan, *Department of the Army Historical Summary: Fiscal Year 1992* (Washington, D.C.: U.S. Army Center of Military History, 2001), 63-65.

[36] U.S. General Accounting Office, National Security and International Affairs Division, *Army National Guard: Combat Brigades Ability to Be Ready for War in 90 Days Is Uncertain* (Washington, D.C., 1995), 31.

[37] Department of the Army, *Army Regulation 11-30 Army WARTRACE Program* (Washington, D.C.: 1995), 2.

as well as assisting in training. However, a 1993 Army assessment stated that the program was set up specifically as a training support, not an adviser, program. According to the assessment, the advisers' duties centered around training, training support, and training management."[38] This ambiguity confused both the reserves and the advisers of what was the actual mission and role of the Resident Training Detachments. Another major problem was the failure of the active and reserves to fully understand, and communicate, the established training standards. "Many advisers and brigade officials (reserve) said that they either did not know Bold Shift's goals or were uncertain about them. Once they were made aware of the goals, many brigade and active Army officials, including the advisers, believed that some goals were unrealistically high and could not be achieved. As a result of the confusion and disagreement, some brigades did not attempt to train to the proficiency level sought by the strategy."[39] Lastly, the effectiveness of the Resident Training Detachments was degraded due to the adverse relationship between the Reserve Components and Active Army that materialized during the mobilization for Operation Desert Storm.[40]

The next step in the evolution of training support was to emplace an organizational framework to alleviate the problem between the concepts of advising, assisting, assessing, and evaluating the reserves. To accomplish this, the Army instituted the Ground Forces Readiness Enhancement Program, using the 5000 soldiers mandated by Congress to provide the manpower.

The new organization allowed the Resident Training Detachments to function as advisers, and assisters. Other elements of the new organization functioned as assessors, and evaluators. On the active Army side, the cornerstone of the program was the Regional Training Brigade. Each brigade consisted of an ad hoc set of Regional Training Battalions, including combat arms,

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[38] *Army National Guard: Combat Brigades Ability to Be Ready for War in 90 Days Is Uncertain*), 31.

[39] Ibid., 30.

[40] Ibid., 34-35.

support, and service support battalions, depending on the mix of reserve units in the region. Their mission was to provide Observer Controllers, and evaluators, for reserve unit annual training periods. They also completed reserve unit Training Assessment Model evaluations during the same timeframe. On the Reserve side, Divisions (Exercise), composed of Field Exercise Brigades, augmented the Regional Training Brigades, by providing lanes training exercises during units' annual training. The Divisions (Exercise) also had a Simulation Brigade that provided constructive simulation exercises for battalion and brigade level staffs.[41]

By 1997, when the Ground Forces Readiness Enhancement Program reached full implementation[42], the Army had built a disjointed training support system of multi-component units. It had been developed in a reactive manner, without analysis, to correct the problem of the time. Each element of the system had a distinct mission, and reported to a separate headquarters. To streamline the system and training support process, the Army launched Training Support XXI (TS XXI) in 1999.[43]

The TS XXI organization combined the Readiness Groups, Regional Training Brigades, Resident Training Detachments, and the Reserve Component Field Exercise Brigades under the singular umbrella of a Training Support Brigade. Training Support Brigades became tri-component organizations (consisting of Active Army, Reserve, and Army National Guard), providing training support to all reserve units in a geographical area. The Training Support Brigades are subordinate to a Training Support Division, constructed from the old Division (Exercise), which works for a Continental United States Army (CONUSA).[44] This organization

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[41] U.S. Army Forces Command Memorandum, dated 3 January 1996, Subject: Ground Forces Readiness Enhancement (GFRE) Implementation Plan, 3-9.

[42] Stephen E. Everett and L. Martin Kaplan, *Department of the Army Historical Summary: Fiscal Year 1993* (Washington, D.C.: U.S. Army Center of Military History, 2002), 77.

[43] U.S. Army Forces Command Memorandum, dated 15 July 1998, Subject: Training Support XXI Implementation Plan.

[44] Ibid.

fully integrated the training support community into a Total Army organization, with streamlined command and control.

The purpose of the new organization was to provide a "one stop shop" for Reserve Component units to coordinate all of their training support needs. This allows for the synchronization of training support requirements throughout the CONUSA area of responsibility, optimizing assets to provide additional training opportunities for reserve units. The mission of the organization is to provide "Lane Training (both Pure and Integrated in larger exercises), Training Assessment Model (TAM) Evaluations, Gunnery Evaluation, Staff Training, Branch Assistance, and Functional Assistance."[45] This provides the evaluation piece missing from previous methods. The goal of the program is to increase the readiness of the Reserve Components, by accomplishing as much METL training as possible prior to mobilization, using a Combat Training Center methodology, to reduce post-mobilization training time.[46]

At this point in the evolution of training support to Reserve Component units, the Army has the organization and doctrine emplaced to provide objective evaluation, and assessment of a unit's readiness. TS XXI has definitely streamlined training support. It has also expanded training opportunities, and focused Reserve Component units on accomplishing mission essential combat tasks. However, TS XXI has no linkage to provide formal, objective feedback directly to the Army's readiness reporting system. Lanes Training take home packages (Appendix 1), just as with the Combat Training Centers, are provided to the evaluated unit commander, and go no higher. Training Assessment Model evaluations (Appendix 2) are provided to the unit commander, and archive copies are maintained at the Training Support Brigade and CONUSA, neither of which is responsible for readiness compliance. That mission falls directly on the Chief

[45] Ibid.
[46] Ibid.

of the Army Reserve, and the Director of the Army National Guard.[47] It is a paradox that these two leaders are directly responsible for the readiness of units they do not command. The result is continued training readiness problems identified during post-mobilization training, which were not identified in the subjective Unit Status Reporting process.[48] A more objective method of measuring Reserve Component unit readiness is required.

The remainder of this monograph will present doctrinal training concepts, directed training, and assessment requirements per Forces Command regulations, and Unit Status Reporting requirements. The two will be compared using the preliminary questions as criteria to determine which provides the greater level of objective assessment. To conclude, recommendations will be presented to improve the system.

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[47] *How the Army Runs: A Senior Reference Handbook 2001 – 2002*, (Carlisle, PA: U.S. Army War College, 2001), 7-14 – 7-15.

[48] The experience of the author, which can be backed up by First Army Situational Reports, in mobilizing reserve units for both Balkans, and Global War on Terror missions from, 2000 to 2001, is the basis of this statement. This experience includes mobilizing units for deployment at Forts Benning, Rucker, McClellan, Knox, Dix, Bragg, and Bliss. This statement has been corroborated by TSB mobilization assisters from other TSBs as well. While lack of unit readiness eas also noted in the areas of personnel, medical, maintenance, and supply, the most prevalent indicator of low training readiness witnessed by the author was the amount of individual training (weapons qualification, NBC training, CTT training, etc) units required during post-mobilization training, and duty MOS qualification shortfalls, both of which affect a units ability to conduct collective training.

CHAPTER TWO

DOCTRINAL CONCEPTS AND TRAINING REQUIREMENTS

Every soldier, noncommissioned officer (NCO), warrant officer, and officer has one primary mission—to be trained and ready to fight and win our Nation's wars. Success in battle does not happen by accident; it is a direct result of tough, realistic, and challenging training. The Army exists to deter war, or if deterrence fails, to reestablish peace through victory in combat wherever U.S. interests are challenged. To accomplish this, the Army's forces must be able to perform their assigned strategic, operational, and tactical missions. For deterrence to be effective, potential enemies must know with certainty that the Army has the credible, demonstrable capability to mobilize, deploy, fight, sustain, and win any conflict. Training is the process that melds human and materiel resources into these required capabilities. The Army has an obligation to the American people to ensure its soldiers go into battle with the assurance of success and survival. This is an obligation that only rigorous and realistic training, conducted to standard, can fulfill.[49]

FM 7-0

Doctrinal Training Concepts

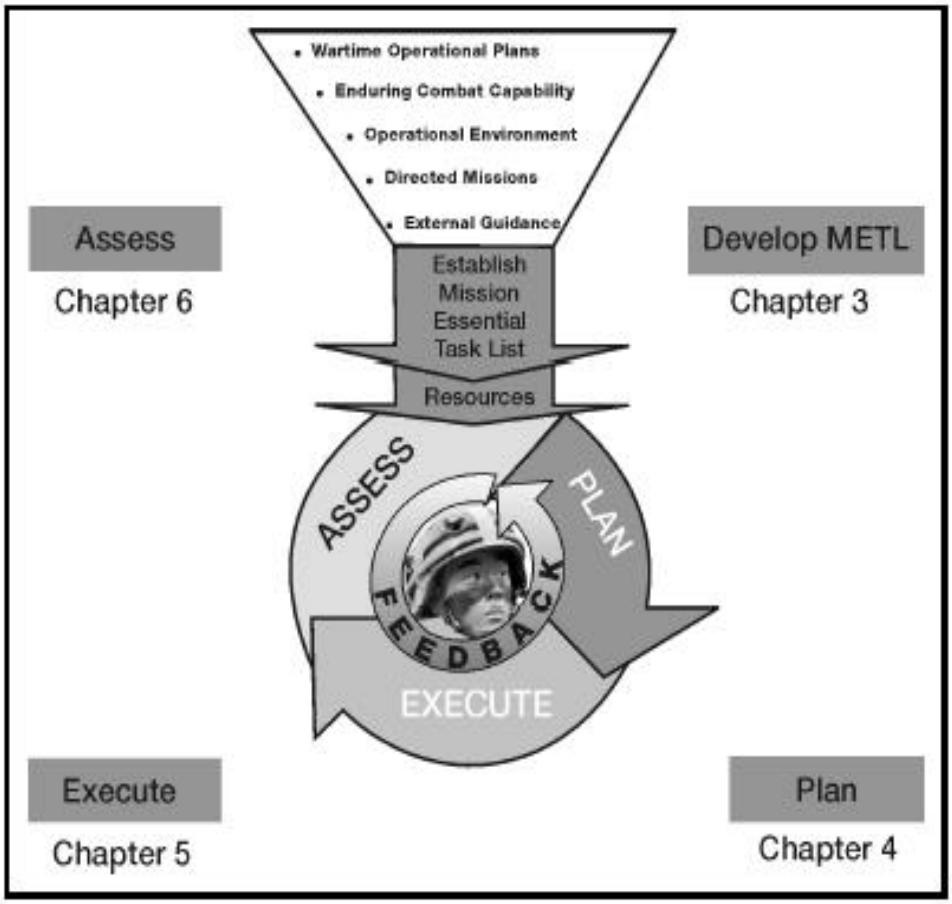
"Training is WHAT we do, not SOMETHING we do."[50] It is the key to readiness. Units in the Army train for war, whether reserve or active. The training support system established through TS XXI uses the core concepts founded in Field Manuals 7-0, and 7-1 as the basis for planning, executing, and assessing training for reserve units. The Reserve Components also adhere to these concepts, though they have extremely limited time to train.

The bottom line principle is that Commanders are responsible for training their units, and ensuring they are ready to mobilize and deploy. They are the linchpin of unit training and readiness. They ensure their unit is trained and ready by planning and executing realistic and challenging training, based on established army standards. The Army Training Management Cycle (figure 4) provides the commander a framework to continuously plan, execute, and

49 Department of the Army, *Field Manual 7-0 Training the Force* (Washington, D.C.: 2002), 1-1.
[50] Ibid,. 1-14.

assesses his unit's training status. The cycle also provides a framework for developing the unit's Mission Essential Tasks List (METL), establishing priorities, and allocating resources.[51]

Figure 4



The METL is the cornerstone of a unit's training program. It delineates those priority tasks with which an organization must be proficient to accomplish its wartime operational mission. Since there are not enough time and resources available to achieve proficiency in every task, commanders must identify those tasks that are essential, and focus his METL. In this way

[51] Ibid., 2-1.

he focuses the unit training plan on those things that critical to accomplishing the wartime mission.[52]

The Active and Reserve components share the same METL development process (figure 5). However, the Reserve Components must consider that they much less training time than their Active Component counterparts. Therefore, it is even more critical for Reserve Component commanders to focus their METL on only the most critical training requirements. Reserve Component units generally do not work for their wartime chain of command, unlike most Active Component units. Therefore, their METL approval process is different. "The associate AC chain of command assigns missions, provides wartime mission guidance, and approves METLs. The state adjutant general or regional support groups review and coordinate Reserve Component METLs. They resource training and ensure that mission training tasks are executed and evaluated. Continental U.S. Armies (CONUSAs) approve the METL for selected Reserve Component units (ARNG divisions, enhanced separate brigades, roundout units, reinforcing aviation units, and force support package units with latest arrival dates less than D+30). The peacetime chain of command approves the remainder of Reserve Component unit METLs (Figure 6)." However, Reserve Component commanders, like their Active Component counterparts, identify those critical and supporting collective and individual tasks for each METL task, and their associated conditions and standards of performance.[53]

The major difference between Active and Reserve Component training programs is that the reserves parcel portions of required training to pre and post-mobilization periods. This is because of the greatly diminished training time available to the reserves during the pre-mobilization phase. It is critical that appropriate levels of METL training occur during pre-mobilization to ensure proficiency, and reduce post-mobilization training time.

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[52] Ibid., 3-2.
[53] Ibid., 3-5 – 3-11.

Figure 5

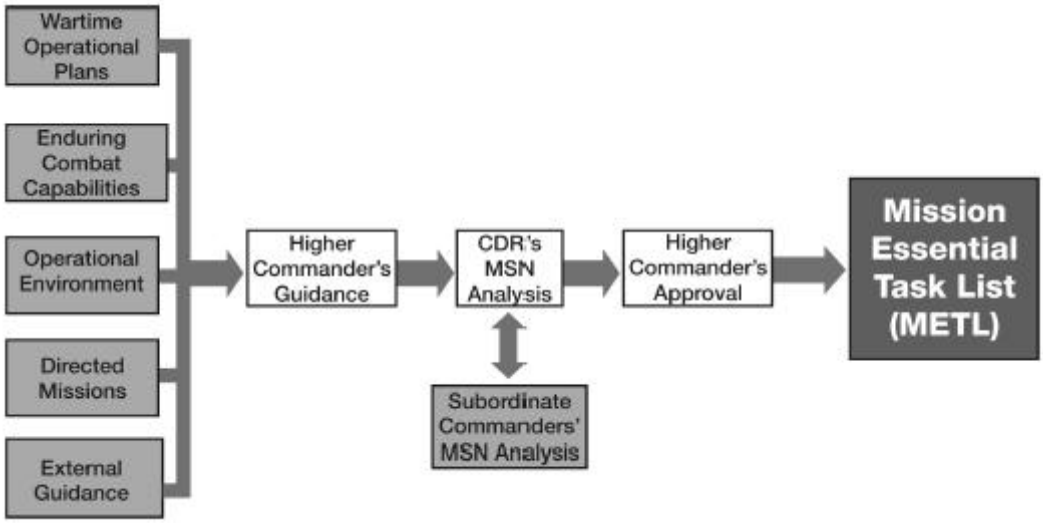

Figure 6

Table 3-1. RC Training Management Roles

RC Unit Category/Composition	*AC Associate Unit*	*YTP Approval*	*METL Approval*
ARNG Division	CONUSA	AC Associate	AC Associate
eSBs, Typical	CONUSA	AC Associate	AC Associate
eSBs, Integrated Division	Integrated Division	AC Associate	AC Associate
FSP GO Commands	Third Army, Eighth Army, Corps, CONUSA, ASC	AC Associate	AC Associate
Multiplecomponent, AC	Commander*	Commander	Commander
Multiplecomponent, RC	Third Army, Corps	AC Associate	AC Associate
FSP & LAD ≤ 30 (except GO Cmd)	TSB**	AC Associate	AC Associate
Multiplecomponent, AC	Commander*	Commander	Commander
Multiplecomponent, RC	TSB	AC Associate	AC Associate
Roundout (AC Division)	Parent Division	AC Associate	AC Associate
Reinforcing Aviation (AC Division)	Supported Division	AC Associate	AC Associate
Other MTOE Units	N/A	RC Chain of Command	RC Chain of Command
TDA Organizations	N/A	RC Chain of Command	RC Chain of Command

* Unit commander at brigade (colonel) level or higher is AC associate per Section 1131, Title XI for assigned RC elements. Where the unit commander is below brigade level, TSB commander executes.
** Selected FSP and LAD ≤ 30 units associated with Third Army and USACIDC.

Since pre-mobilization training is directly linked to the time required during post-mobilization, pre-mobilization training must be focused on those tasks which are achievable, and proficiency must be sustained.[54] Forces Command Regulation 350-2 is the document that codifies these concepts.

Forces Command Established Requirements

First published in 1995[55], Forces Command Regulation 350-2 is the cornerstone mandate for Reserve Component Unit Training. It synthesized the doctrinal, policy, and legislative requirements that transpired throughout the period of evolution of training support, and encapsulated them into one seminal document. The current 350-2 prescribes the baseline levels for pre-mobilization training requirements, and the proficiency levels that must be achieved and sustained. It also delineates TS XXI responsibilities, and informs Reserve Component units about the level of training support they can expect to receive from the TS XXI organization, based on their priority.[56]

The regulation identifies the symbiotic link between pre-mobilization and post-mobilization training. It instructs commanders to limit pre-mobilization training to that which is achievable, and sustainable training requirements to focus unit training. It further establishes general pre-mobilization baseline requirements as: enlisted duty military occupational skill qualification, and noncommissioned and commissioned officer professional development at 85 percent of assigned strength; collective maneuver proficiency for Combat Arms units (Infantry, Armor, and Cavalry) at the platoon level; all other Combat Arms, Combat Support, and Combat

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[54] Department of the Army, Field Manual 7-1 Battle Focused Training (Washington, D.C.: 2003), 1-12 – 1-13.

[55] U.S. Army Forces Command, FORSCOM/ARNG Regulation 350-2 Reserve Component Training In America's Army (Fort McPherson, GA: 1995), 1.

[56] U.S. Army Forces Command, FORSCOM/ARNG/USAR Regulation 350-2 Reserve Component Training (Fort McPherson, GA: 1999), 1.

Service Support units collective training proficiency at the company, or equivalent, level; and for battalion and larger units, command and staff proficiency accomplished at the level organized.[57]

More specifically, Forces Command Regulation 350-2 specifies that all priority unit (Forces Command Regulation 350-4 identifies the following units as priority units: Force Support Package units, Divisional Roundout units, AH-64 units, units with a latest arrival date less than 30 days, and the Enhanced Separate Brigades[58]) training must focus on the METL, and be multi-echelon in nature when proficiency allows. The minimum training requirements for priority units is: 1) Annual lane training event during Annual Training 2) Gunnery: in accordance with the Standards in Training Commission (STRAC); 3) Each battalion and brigade level headquarters conducts quarterly staff training, and one battle staff exercise annually; 4) Training Support Brigade supported Inactive Duty Training (IDT) including Mobile Training Team support, functional assistance training, and lane training (separate of the Annual Training event); 5) Annual Training Assessment Model (TAM) evaluation conducted by the Training Support Brigade, during the unit's Annual Training.[59]

All Other units, those considered to be non-priority, must complete established minimum training requirements as well. Their training must also focus on the unit's METL. However, their requirements are not as comprehensive because they are not expected to mobilize and deploy early. Other units must accomplish the following: 1) Biennial lane training event conducted every other Annual Training period; 2) Gunnery: in accordance with the STRAC; 3) Each battalion and brigade level headquarters conducts quarterly staff training, and one battle

[57] Ibid., 12.
[58] U.S. Army Forces Command, FORSCOM/ARNG Regulation 350-4 Active Component (AC)/Reserve Component (RC) Partnerships (Fort McPherson, GA: 2003), 16.
[59] Ibid., 13.

staff exercise triennially; 4) TAM: Triennially; 5) Conduct a ten-day field training exercise every Annual Training period.[60]

The TS XXI structure supports all of these training events, whether for priority or other units. Every Training Support Brigade's responsibility is to schedule, synchronize, and conduct training support for the Reserve Component units in its area of operations. The Training Support Divisions oversee Training Support Brigade operations, and cross level unsupportable missions to other brigades. First and Fifth Armies, the CONUSAs, oversee all training support activities for Forces Command.

Training Assistors from the Training Support Brigade construct, and conduct lanes training exercises. They also evaluate the Reserve Component units during exercise execution, using the appropriate Mission Training Plan. The unit commander receives objective performance feedback through after action reviews, and a comprehensive take home package, which includes Task Summary Sheet assessments, and copies of the Training and Evaluation Outlines from the Mission Training Plan. IDT Lanes capture objective feedback in the same manner.[61]

Training Assessment Model evaluations, generally conducted by the Training Support Brigade, are similar, but more formal because they are submitted to Forces Command to fulfill Title XI requirements. The Training Assessment Model is considered to be a tool to provide commander's a framework for planning training programs, and assessing training readiness. It evaluates current training readiness, and provides the commander a basis to modify current training plans, and revise post-mobilization training plans. It further provides the commander

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[60] Ibid., 13-14.

[61] 3rd Brigade (Training Support), 87th Training Support Division, *Observer/Controller/Trainer Handbook* (Camp Shelby, MS: 2000), 10-1 – 10-12.

feedback for use in Unit Status Reporting.[62] Units receive an external Training Assessment Model evaluation during the Annual Training period, but participation in a constructive simulation or a Combat Training Center rotation is equivalent. Like a lanes training exercise, the unit is evaluated on its ability to accomplish Mission Essential Tasks. The objective feedback is provided to the unit commander on Forces Command Form 1049-R. While 220-3 alleges that a formal link exists between the evaluation and the USR, it exists only with the unit commander, who uses the data as part of his personal assessment of the unit's METL proficiency.[63] Primary in this capacity, the commander annotates in block 9a of the 1049-R the number of days required to accomplish the pre-mobilization requirements identified in 350-2. In block 9b, he identifies the total number of days required to achieve full METL proficiency (pre-mobilization training time + post-mobilization training time). These should match the information submitted on the USR. However, this is still a subjective assessment. If the evaluator disagrees, he must annotate this in his beliefs in the evaluator's narrative.[64] This disagreement does not get entered into the USR.

Post-mobilization Training Support Requirements

While they may not provide direct input into the USR, all of the training requirements, and assessment methods, identified above do provide input into developing the post-mobilization training plan. Every unit commander must identify his post mobilization training requirements, as part of the FORSCOM Mobilization and Deployment Planning System (FORMDEPS) requirements. These are annotated on the Post-mobilization Training Support Requirements

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[62] U.S. Army Forces Command, FORSCOM Regulation 220-3 Reserve Component Training Assessment (Fort McPherson, GA: 2001), 5

[63] Ibid., 10-11.

[64] Ibid., 44.

(PTSR), Forces Command Form 319-R (Appendix 3). Training Assistors aid commanders in this process.

The purpose of the PTSR is to provide a routine, standardized method for consolidating and submitting post-mobilization training, and resource, requirements. These requirements are sent through the unit's associated State Area Regional Command or Regional Support Command.[65] to the Mobilization Station. The PTSR is also updated and hand carried to the Mobilization Station when a unit is mobilized. On the PTSR a unit identifies its additional training requirements for deployment, and informs the Mobilization Station the level of support it must provide the mobilizing unit.[66]

Section B of the PTSR is the post-mobilization Training and Support Plan. It is here that the unit commander articulates the specific training requirements deferred to post-mobilization, and those tasks not accomplished to proficiency during pre-mobilization. Each task to be trained, identified in the appropriate Mission Training Plan, is listed and the specific support requirements to accomplish the task identified (support includes number of trainers, training areas and ranges, ammunition and supplies, and other equipment). Section B is completed for each week of projected post-mobilization training, and culminates with the production of the post-mobilization training schedule. The PTSR process identifies the most important aspect of mobilization, the time required for post-mobilization training.[67]

The training readiness status of a unit determines the amount of post-mobilization training required for it to deploy. The time associated with post-mobilization training assists in

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[65] These are the area headquarters responsible for administrative control, funding, and readiness of Army National Guard, and Army Reserve units respectively. They are not part of the wartime chain of command

[66] U.S. Army Forces Command, FORSCOM Regulation 500-3-3FORSCOM Mobilization and Deployment Planning System, vol. 3, Reserve Component Unit Commander's Handbook (Fort McPherson, GA: 1999), 114.

[67] Ibid., 114-115.

determining a unit's latest arrival date (LAD). It is impossible to effectively determine the post-mobilization timeframe without input from the aforementioned sources.

Using the training standards outlined in Forces Command regulations provides a baseline assessment of pre-mobilization training requirements for Reserve Component units. Objective assessment of training execution is provided through Training Assessment Model evaluations, CTC rotations, Battle Staff Simulation Exercises, and Lanes Training Exercises. All of these events are conducted with Active Component Observer Controllers who provide objective feedback. The Army readiness system should use this information to gauge unit readiness, while commanders should use this feedback to modify existing pre-mobilization and post-mobilization training plans. However, no formal system exists to capture this feedback for readiness assessment, outside of the unit commander

CHAPTER THREE

UNIT STATUS REPORTING (USR) FOR RESERVE COMPONENTS

While our unit status reporting system is comprehensive and valid, it does not capture the entire picture.[68]

General David Bramlett

Traditionally, the USR has provided the doctrinal basis for readiness assessment. According to Army Regulation 220-1, "The Army's unit status report (USR) is a part of the Global Status of Resources and Training System (GSORTS). GSORTS is an internal management tool for use by the Chairman, Joint Chiefs of Staff (CJCS), the Joint Staff, the Services, the unified commands, and the combat support agencies. GSORTS is the single automated reporting system within the Department of Defense that is the central registry of all operational units … As a unit readiness system, GSORTS indicates the level of selected resources and training required to undertake the mission(s) for which a unit was organized or designed."[69] The regulation further discusses training assessment. "The training status of the unit (that is, the T-level) based on the commander's assessment of unit training proficiency on mission-essential tasks and the commander's estimate of the number of training days required to achieve or sustain full mission-essential task list (METL) proficiency. For selected squads, crews, teams, and systems, commanders at all levels determine and report the number of these elements/systems that meets established standards and criteria for manning and qualification and for information and analysis at higher levels."[70]

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[68] Congress, House of Representatives, Armed Services Committee, Testimony on Military Readiness, 105th Cong., June 1998.

[69] Department of the Army, *Army Regulation 220-1 Unit Status Reporting* (Washington, D.C.: 2002), 1.

[70] Ibid.

General USR Concepts and Procedures

Unless otherwise specified by the Department of the Army, Units required to submit unit status reports are Table of Organization and Equipment (TO&E) battalions, separate companies, and units of equivalent size that are identified by a unit identification code (UIC) ending in "AA." This includes divisional, nondivisional, and Special Operations units, whether active, reserve, or multiple component. Also, all deployable Table of Distribution and Allowances (TDA) units must submit a USR.[71]

Reporting channels

Active Army units submit their USR through their chain of command to the installation or division level. The installation or division consolidates the subordinate unit reports and forwards them to the responsible Major Command (MACOM). Army National Guard units forward USRs through their state chain of command to the state adjutant general, who consolidates, and forwards the reports to the National Guard Bureau (NGB). Army Reserve units forward USRs through their reserve chain of command to the Regional Support Command, who consolidates and forwards the reports to the United States Army Reserve Command (USARC) (Figures 7 and 8). These headquarters submit the USRs to the Department of the Army, and the Joint Chiefs of Staff.[72]

The Active Army, submits USRs through the wartime command and control headquarters to the Department of the Army, and the Joint Chiefs of Staff (Figure 7)[73]. This is not the case with the Reserve Components, who function under different chains of command during peacetime and war. The NGB and USARC are responsible for operations, training, and readiness

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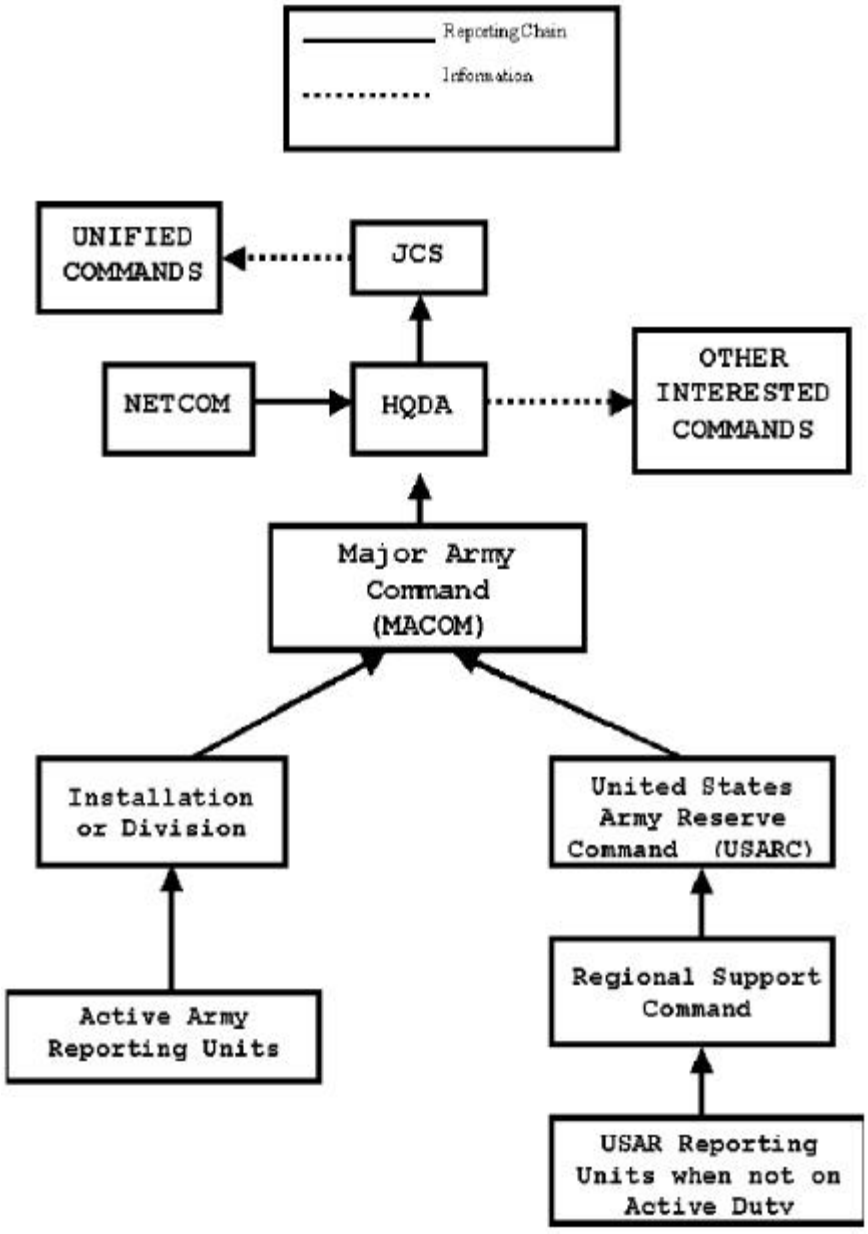
[71] Ibid., 5-6.
[72] Ibid., 9.
[73] Ibid.

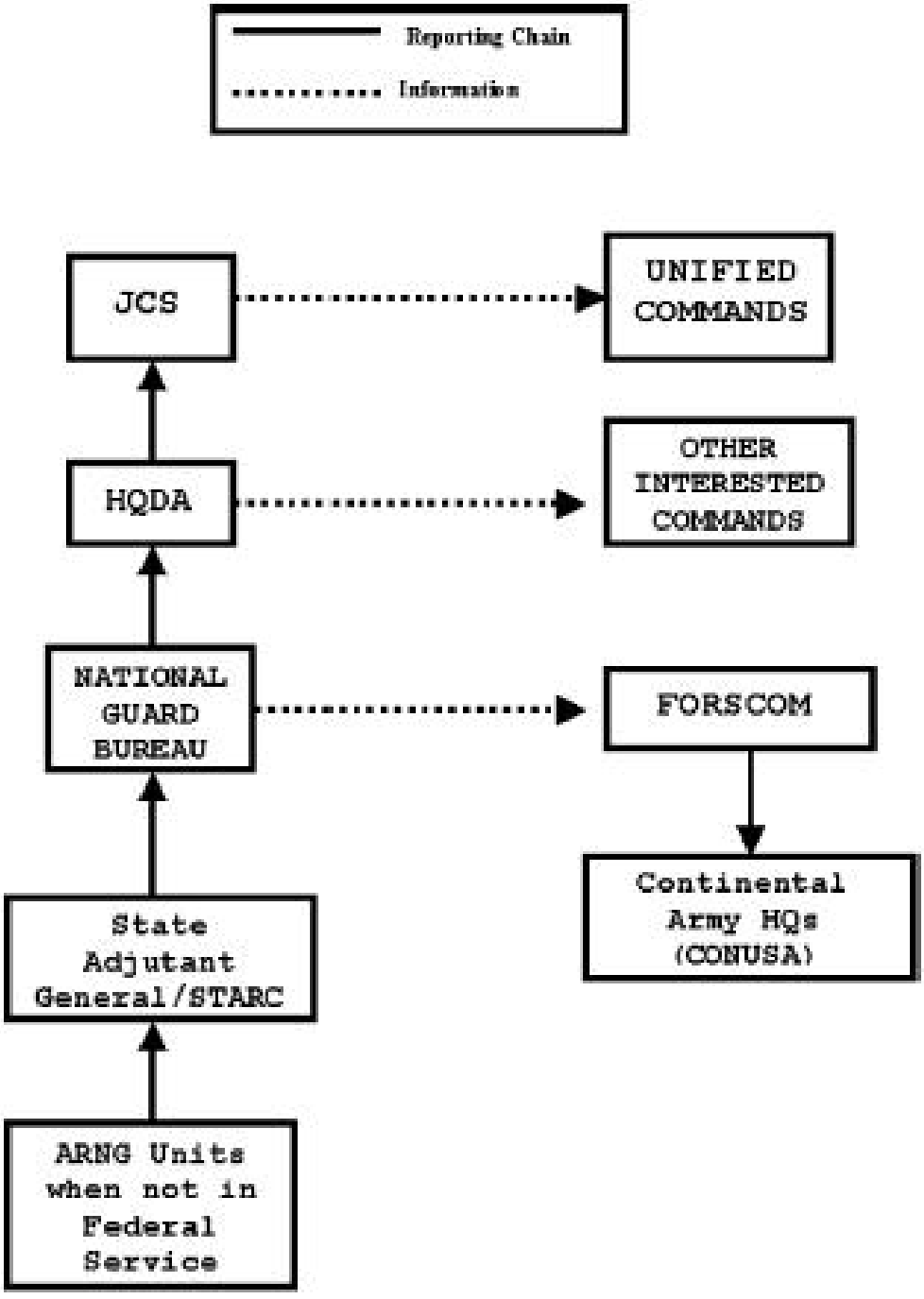
of National Guard and Army Reserve units, during routine peacetime operations. However, they are not in the wartime chain of command, but are administrative headquarters.[74] The current USR reporting channel completely removes the wartime chain of command from readiness oversight responsibility. This is a major disconnect in the system.

Figure 7
USR channels, Active Army, and USAR (when not on active duty)



[74] Jacobs, 113.

Figure 8
USR channels, ARNG when not in Federal Service



Training Data Reporting

USR reporting includes readiness data on personnel, equipment, and training. Commanders use objective, hard data from multiple systems to determine the unit's readiness status of personnel and equipment. Data for individual training is objective, hard data as well. However, the METL assessment process is dependent on the commander's ability to determine his unit's status based on current year evaluations and assessments, in relation to wartime training guidance.[75]

Chapter seven of Army Regulation 220-1 delineates the process to determine the training readiness status reported in the USR. To simplify categorization, the training readiness status expressed as a training level (T-1, T-2, etc). "The unit T-level indicates the commander's evaluation of the current ability of the unit to effectively employ its systems and equipment to perform those critical tasks required by the wartime missions for which the unit was organized or designed. The commanders of reporting units determine their units' T-levels." Two sets of metrics are used to determine the T-level.[76]

The first metric, called T–METL, reflects the percentage of the METL with which unit personnel have trained. Commanders determine their units' ability to execute the METL by assessing the demonstrated proficiency of the unit's subordinate elements, leaders, and soldiers. As part of this process, the commander determines if the units is trained (T), practiced (P), or untrained (U) on each METL task. The basis for this assessment includes, "in-depth analysis" of individual and collective tasks, in accordance with the MTP, performed under realistic combat conditions.[77] METL focused lanes exercises, supported by the TSB, are a primary means of collecting this data. The commander compares this data with the unit's wartime mission

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[75] *Army Regulation 220-1*, 61.
[76] Ibid.
[77] Ibid., 61-62.

requirements, established by the wartime chain of command, with the unit's current level of training proficiency. "For Reserve Component units, this assessment process may be less formal during months when regular reports are not submitted; however, it must be accomplished in sufficient detail to enable the commander of the reporting RC unit to confirm that no changes to the T-level have occurred during the reporting period."[78]

The commander enters the data into Personal Computer-Army Status of Resources and Training System (PC–ASORTS) to calculate T–METL percentage, upon determining the unit's proficiency level on each METL task. The methodology for determining T–METL uses weighted values to represent the level of training proficiency for each METL task: T equals a weight of three, P equals a weight of two, and U equals a weight of one. [79] PC-ASORTS then calculates the T–METL status level as follows:

> (1)The number of tasks evaluated as "trained" is multiplied by 3 to obtain a weighted "T-factor" (weighted Tfactor=# tasks "trained" X 3).
> (2) The number of tasks evaluated as "needs practice" is multiplied by 2 to obtain a weighted "P-factor" (weighted P-factor=# tasks "needs practice" X 2).
> (3) The number of tasks evaluated as "untrained" is multiplied by 1 to obtain a weighted "U-factor" (weighted Ufactor=# tasks "untrained" X 1).
> (4) The weighted T-factor, the weighted P-factor, and the weighted U-factor are then added to obtain the weighted "TPU-factor" (weighted TPU-factor=weighted T-factor + weighted P-factor + weighted U-factor).
> (5) The total number of METL tasks is multiplied by 3 to obtain the METL weight, which is also the total points possible (TPP) (METL weight or TPP=# METL tasks X 3).
> (6) The weighted TPU-factor is then divided by the METL weight (or TPP) multiplied by 100 to determine the T–METL percentage; (T–METL percentage=weighted TPU factor divided by METL weight (or TPP) X 100.[80]

The T–METL percentage is then translated into an overall status rating: Eighty-five (85) percent or greater equals T–1, sixty-five (65) to eighty-four (84) percent equals T–2, fifty (50) to sixty-four (64) percent equals T–3, and less than fifty (50) percent equals T–4. This becomes the

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[78] Ibid.
[79] Ibid., 63-64.
[80] Ibid., 64.

tentative T-Level.[81] The commander's next step it to determine the number of days (T-Days) required to achieve METL proficiency.

The commander identifies the tasks, and associated subtasks that require additional training during the T-METL assessment process. He uses this as the basis to estimate the number of training days required to train these tasks and achieve full METL proficiency. Once all tasks are identified, the commander develops a training plan in sufficient detail to determine the number of days required to train each task, with only the internal assets available to the unit. The sum of these days equals the T-Days required to achieve full METL proficiency, exclusive of any higher headquarters directed training requirements. T-Day requirements are translated into an overall status rating as follows: zero to 14 estimated training days equals T-1, 15 to 28 days equals T-2, 29 to 42 days equals T-3, and 43 or more days equals T-5. The overall ratings from T-METL and T-Days are compared, and the worst case is identified as the unit's T-Level for USR.[82]

Reserve Component Reporting

Commanders of Reserve Component units use the same procedures identified above to determine training readiness status. Unlike Active Component units who report their status based on full METL proficiency, Reserve Component unit's report their status based on pre-mobilization training readiness (These requirements were identified in Chapter 2). Commanders use the unit's pr-mobilization training status to form a presumptive estimate of the number of training days required to conduct the unit's wartime primary mission.[83] While both rating levels

[81] Ibid., 64.
[82] Ibid., 66.
[83] Ibid., 77.

are reported, only the pre-mobilization T-Level is used in determining the overall readiness status.[84]

The commander assesses the unit's proficiency in the pre-mobilization tasks set to determine the unit's status in pre-mobilization training. To calculate the pre-mobilization training readiness level the commander uses the T-Days model to determine the number of training days required to achieve the pre-mobilization training level. As part of this process, the commander must also review his training strategy, and assess the resources available to support unit training. Once the assessment is accomplished, the commander estimates the number of days required to achieve the established pre-mobilization training goals. The commander then uses the same process to assess the number of training days required for the unit to be fully proficient in all METL tasks.[85]

As an example, a Reserve Component battalion has just completed annual training. The MACOM training guidance directs the unit to attain and maintain proficiency at the platoon level. The focus of annual training for the maneuver units was platoon level tasks. The commander determines that his or her maneuver platoons achieved a 90-percent level of proficiency and estimates that seven additional days of training are required by the platoons to become fully proficient. Additionally, in accordance with paragraph 7–3 [Army Regulation 220-1], the commander estimates that 40 days of training are required by the battalion to achieve full METL proficiency for the battalion's wartime mission and that, in accordance with paragraph 7–5 [Army Regulation 220-1], the battalion's training level is T-3.[86]

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[84] Ibid., 82.
[85] Ibid., 77.
[86] Ibid.

Training Events Execution Review – The Disconnect Between USR and the TSB

The most important process in determining an accurate status of current training proficiency is the Training Events Execution Review. It is also the most time consuming. This process provides the basis for METL assessment. Commanders use this process to verify the unit's T-level. In this process the commander reviews the unit's yearly training plan (for Reserve Components), and identifies what training was accomplished, and what training was not accomplished but planned. This is then compared to appropriate doctrinal templates, such as STRAC and Combined Arms Training Strategy (CATS), and to regulatory training requirements, such as Forces Command Regulation 350-2 for Reserve units. "The events in the CATS and STRAC are the common building blocks for the commander's plan. The thread running from training strategies, to training resources, through training execution and then to training readiness are the critical training events found in the CATS and DA Pam 350–38 [STRAC]."[87] For Reserve Component units the pre-mobilization floors established in Forces Command regulations apply proportionately. More specifically, input from externally evaluated lanes training exercises, and the Training Assessment Model provide the bulk of data required by Reserve Component commanders.

In accordance with Field Manuals 7-0 and 7-1, commanders assess the unit's ability to accomplish its METL. He then develops, or refines, the yearly training plan to achieve, or sustain, METL proficiency. Reserve Component commanders brief their training plans annually. With few exceptions, the TSB approves the plan. The TSB has a primary responsibility to assist Reserve Component units in the doctrinal process of both constructing, refining, and executing

[87] Ibid., 72

yearly training plans.[88] The Army created this training support arrangement to mitigate the lack of time Reserve Component commanders have to focus on planning and executing training. How can these same commanders be expected to possess the time and skills required to properly assess the readiness of their units, when they do not have the time to construct the plans.

According to Army Regulation 220-1, the Training Events Execution Review is a five step process:

> (1) Step 1: Identify applicable training events. Commanders will utilize the training events from their training plan briefed at the QTB [YTB for Reserve Components]. Training events from the current reporting month [quarter for Reserve Components] and the previous quarter will be utilized.
> (2) Step 2: Commanders of reporting units will use the unit's training records to determine whether each training event requirement selected during Step 1 was actually executed.
> (3) Step 3: Confirm the T–Rating determination. If all training events were executed, there are no further actions required.
> (4) Step 4: If there were planned training events that were not executed, determine the impact on unit readiness.
> (5) Step 5: Take appropriate actions. If all events were not executed, the unit T–Rating was originally determined to be less than T–1, and the commander determines there is no additional impact on readiness then no further action is required. If all events were not executed, the unit T–Rating was originally determined to be T–1, and the commander determines there is no additional impact on readiness, (The unit remains at T–1), then commander's comments are required. These comments must address the events that were planned but not executed, and the reasons the commander feels the unit's training readiness level should remain T–1. If all events were not executed, the unit T–Rating was originally determined to be T–1, and the commander decides he or she cannot confirm that rating given unexecuted events, the commander downgrades the unit's T-rating. [89]

Steps one and two are part of the primary assistance mission of the TSBs. Steps four and five are also a primary assistance mission of the TSB during a unit's quarterly TAM review. However, the TSB has no authority to participate in any of these steps as part of a unit's USR process. Further, the TSB, who provides the objective evaluation of Reserve Component training, has no responsibility for readiness oversight. This responsibility falls on the administrative chain of command of the Reserve Components.

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[88] Ibid.
[89] Ibid., 72-73.

CHAPTER FOUR

FEASIBILITY OF CURRENT READINESS REPORTING REQUIREMENTS

At this point, the ground work has been laid to understand how the role and significance of the Reserve Components have evolved as part of the Total Army. Also, presented was how the training support program to ensure the proficiency of Reserve Component units matured over time. Lastly, the basics of reporting the training readiness status for USR were presented. Understanding that the Army can no longer deploy without augmentation from the Reserve Components, is the USR the optimal method to gauge Reserve Component unit readiness? To answer this question, the six sub questions presented in Chapter One must be addressed.

METL Proficiency

The first sub question is, do the USR requirements accurately assess a unit's METL proficiency? The answer is no. While objective data is collected on Reserve Component unit training during external evaluations, METL assessment is the subjective call of the commander. This process is established by doctrine in current Army training manuals, and carried over into the USR. In 1997, the General Accounting Office identified this as an Army wide problem.

> The C-rating for training is based on a commander's *subjective assessment* [emphasis mine] of how well a unit is trained based on his personal observation and various internal and external evaluations. A commander may subjectively change his unit's overall C-rating, based on experience, to reflect a broader perspective of the unit's ability to perform its wartime missions. Thus, concerns about degradation in readiness in one area may diminish in relation to the commander's confidence about the overall state of readiness.
>
> It may be that a commander's informal statements of concern over readiness, apart from SORTS, are a signal of an impending change that may eventually show up in SORTS reports. However, we have been told by a variety of military leaders that some commanders may view the SORTS reports they prepare as scorecards on their capabilities and performance with the potential to affect their promotion potential. Thus, they are reluctant to report degraded readiness. We have also been told that the reluctance to cite degraded readiness is indicative of a "can do" spirit of optimism. Whatever the cause, *the fact is that significant differences*

> *can and do exist between official SORTS reports, other data, and professional military judgments* [emphasis mine].[90]

While the General Accounting Officer questions the ethics of commanders, it does not consider two important factors that affect Reserve Component commanders more than their Active Component counterparts: time, and experience.

There is never enough time for an Active Army commander to accomplish his goals; this problem is magnified for the Reserve Component commander. On average, Reserve Component commanders have thirty eight to thirty nine days of training to accomplish the myriad of tasks directed by Forces command. Add to this the maintenance, and administrative requirements to keep a unit functioning, and the commander has about fifteen days a year to actually train.[91] Of those fifteen days available per year, an average of eleven days is available to conduct multi-echelon collective training, all of which occur during the fourteen day Annual Training period.[92] Lieutenant Colonel Gary C. Howard, a Reserve Component officer, put it like this:

> Army Reserve company commanders and first sergeants are where the training rubber meets the proverbial road. For soldiers to train hard every month, commanders must be able to focus their attention on the planning, conduct and evaluation of that training. Reserve commanders bear many administrative responsibilities never seen by their active counterparts. In addition to the responsibility for training and care of soldiers, reserve commanders are responsible for recruiting and training non-qualified soldiers, pay, and personnel files. Reserve commanders have less than 15 percent of the paid time of an active commander, and these administrative duties can easily overwhelm them and restrict their ability to plan and conduct the effective training that will improve readiness and retain soldiers.[93]

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[90] U.S. General Accounting Office, National Security and International Affairs Division, Military Readiness: Improvements Still Needed in Assessing Military Readiness (Washington, D.C., 1997), 4-5.

[91] Binkin and Kaufmann, 98.

[92] Jacobs, 70.

[93] Gary C. Howard, "Individual Soldier Qualification and Retention in the Army Reserve: The 85 Percent Solution," Army Magazine, July 2002 [magazine on-line]; available from http://www.ausa.org/www/armymag.nsf/(searchresults)/37ABF00990D11E5A85256BDE00511278; Internet; accessed 14 March 2004.

Related to time is experience. According to the Army's leadership manual, experience is a key factor in developing judgment. Judgment is a critical element to effective problem solving and decision making.[94] The American Heritage Dictionary defines judgment as, "The mental ability to perceive and distinguish relationships; discernment. The capacity to form an opinion by distinguishing and evaluating. The capacity to assess situations or circumstances and draw sound conclusions."[95] A Reserve Component commander spends much less time both with his unit, and doing Army activities than his Active Army counterpart. Therefore, the ability of a Reserve Component commander to make judgment calls on the training proficiency of his unit is greatly diminished, and comes into question.

Staff Proficiency

The second question is whether USR reporting requirements assess staff proficiency levels? Battle staff proficiency directly relates to a unit's ability to analyze complex problems, determine courses of action during planning, and provide command and control. It also relates to a staff's ability to synchronize battlefield operating systems, while executing operations, both horizontally and vertically throughout the organization. The proficiency of the staff directly influences a unit's ability to accomplish its wartime mission, and preparatory training. According to Field Manual 7-0, "A well-trained battle staff is a combat multiplier."[96] The flip side is that a poorly trained staff results in failure. As important as staff proficiency is to a unit's success, USR reporting requirements do not directly assess staff proficiency.

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[94] Department of the Army, Field Manual 22-100 Army Leadership: Be, Know, Do (Washington, D.C.: 1999), 2-13.

[95] *American Heritage Dictionary of the English Language*, 3d ed., "judgment" [CD-ROM] (Boston, Houghton Mifflin Company, 1996).

[96] FM 7-0, 5-6.

The USR includes staff proficiency assessment within the framework of METL assessment, for units above company level.[97] This allows the commander to subjectively assess the staff's proficiency for reporting purposes. However, while staff proficiency may not need to be reported as a separate item for Active Army units that function daily, several factors necessitate separate reporting for the Reserve Components. First, Reserve Component units only train thirty-eight or thirty-nine days a year. They only average eleven days of multi-echelon training. Thus a Reserve Component staff does not train enough per annum to attain or sustain proficiency. Second, Forces Command Regulation 350-2 prescribes Reserve Component units to complete an externally supported constructive battle staff simulation exercise annually. The executing agency collects objective data on staff proficiency during the simulation. TSBs also assess staff proficiency during lanes training exercises, and Combat Training Center rotations.

Determination of Post-mobilization Training Time

The next question to determine the validity of the USR relates to post-mobilization training requirements. Does the USR objectively determine post-mobilization training requirements by comprehensively assessing the other training factors of unit? Again the answer is no.

USR reporting ties the determination of post-mobilization training to the METL assessment. While the process of developing and refining the yearly training plan and PTSR should comprehensively identify post-mobilization training requirements, including time, Commanders do not necessarily use these tools. In many instances commanders do not complete the PTSR. This area is a primary assistance responsibility for the TSBs, and a perfect area for their involvement in the USR.

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[97] AR 220-1, 90.

The next question is concerned with determination of the latest arrival date (LAD). Is LAD determination a more effective means of assessing unit readiness for mobilization? As an isolated entity, LAD determination is not a more effective method of determining readiness. There are factors outside of a unit's sphere of control that influence LAD determination, such as strategic transportation schedules, and mobilization station resource availability. However, a unit's prime responsibility is construction of the PTSR, which provides a tentative post-mobilization training schedule. Mobilization Stations can use this schedule to estimate the mobilization timeline, and determine when a unit may be ready to deploy. The PTSR should provide primary input into the USR.

CHAPTER FIVE

CONCLUSION AND RECOMMENDATIONS

The country can no longer endure the luxury of ill-prepared reservists on M-day. As the departing Deputy Assistant Secretary of Defense for Reserve Affairs said, the reserves are "not a joke. The survival of our country depends on them, and the margin for error's gone.[98]

Is Unit Status Reporting the optimal method to gauge Reserve Component unit readiness? The answer is no. The USR does use objective data to accurately assess unit readiness in the areas of personnel and equipment. However, collective training readiness is the subjective call of the commander. The USR does not accurately assess a unit's METL, or staff proficiency, since subjectivity and personal bias come into play. The USR does not provide a means to objectively determine post-mobilization training requirements because the commander's subjectivity can distort the assessment. The commander's lack of time and experience compounds this problem in the Reserve Components. LAD determination in and of itself is not a more effective means of assessing unit readiness for mobilization. Unit readiness status is part of determining the LAD. There are ways to improve the system though.

The purpose of this paper is to evaluate the applicability of the current Reserve Component unit readiness assessment process, and determine if other methods of readiness assessment are more effective. Readiness determines a unit's ability to mobilize, deploy, and conduct its wartime mission. Planning for the mobilization and deployment of Reserve Component units is a complex, continuous task. It requires the orchestration of training, personnel, medical, logistics, and staff activities, by leadership limited to less than forty training days per year. However, the Reserves are an integral part of the Total Army, and will continue to mobilize in large numbers to support wartime missions.

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[98] Werner, 69.

As the Total Force has evolved, the Reserve Components have become a more critical component of the Army. In current Army structure the Reserve Components provide a substantial portion of the Army's Combat Support, and Combat Service Support capability. The Army can no longer deploy, and fight without the Reserves. This necessitates a trained and ready reserve force that can rapidly deploy.

Training support to the Reserve Components has evolved as well. The initiation of Training Support XXI has established has established an effective structure to assist and evaluate Reserve Component units. These units now have a "one stop shop" to coordinate all of their training support needs. In addition to centralized training assistance, the TSBs provide necessary, and objective, evaluation of Reserve Component units. While TS XXI has streamlined training support, expanded training opportunities, and focused Reserve Component units on accomplishing mission essential combat tasks, it has no link to provide formal, objective feedback directly to the Army's readiness reporting system. The Army must better utilize these assets better.

Any attempts to improve the readiness assessment process must come from a holistic perspective, to ensure long-term success. Changes must occur in all elements that feed, or oversee the process. Therefore, the following recommendations include changes to the current Reserve Component command and control organization, TS XXI responsibilities, and reporting procedures. It is understood that structural and organizational changes are a zero sum gain in relation to end strength.

Reserve Component command and control resides with administrative, not wartime headquarters, during peacetime. These headquarters are responsible for the administrative, fiscal, and training readiness of Reserve Component units. They will never employ these units on the battlefield. While wartime chains of command provide guidance, and input into unit training plans, they are not responsible for training them to deploy and fight, nor do they have the authority to enforce their guidance. This is an absurd disconnect in the system that places an

administrative commander in the position of enforcing guidance he does not issue, for units he will ultimately not command. They have no vested interest in unit readiness.

Therefore, Reserve Component units should be placed under the command of their gaining wartime headquarters. The headquarters should be given responsibility for all of the command and control, and administrative functions normally exercised for assigned Active Army units. They would be responsible for readiness compliance, and assist Reserve Component units in completing USR, being the honest broker in the process. This will align the responsibility for oversight of unit readiness with the authority to enforce guidance and standards necessary to achieve wartime requirements. This would also increase contact between the Active and Reserve Components, facilitating integration.

The Reserve Component administrative structure should be realigned to support the wartime commands. Army National Guard State Area Regional Commands should be maintained to accomplish state mission requirements. The Army Reserve Regional Support Commands could be maintained to support and advise the wartime commands. They could also maintain their roles in providing administrative and logistical support. The National Guard Bureau and United States Army Reserve Command should be maintained in an advisory capacity to the Secretary of the Army and Chief of Staff. They are the spokesmen for the Reserve Components, and ensure fair play between all components of the Army.

Current TS XXI structure should be maintained. Under the Continental United States Armies, and Training Support Divisions, the TSBs should continue to provide training support and evaluation to Reserve Component units. However, they should provide feedback directly to unit wartime chains of command. Take Home Packages from lanes exercises, and TAM evaluations should be provided directly to wartime headquarters. This provides objective feedback to the chain of command.

Another option is to maintain the organizational status quo. However, there are several changes that should be made to ensure accuracy of unit readiness reporting. First readiness

compliance should be transferred from the administrative Reserve Component headquarters to the Continental United States Armies. Through the TSBs, they have much better visibility of Reserve Component unit readiness. The TSBs should be intricately involved in readiness reporting. While units submit USRs, as they have always done, the TSBs should also submit a report based on their data from lanes exercises and TAMs. Under Lieutenant General John Riggs, First Army developed the Unit Readiness Estimate Report (URER) (Appendix 3). Unit Training Assistors from the TSBs assessed Reserve Component unit readiness using input from the training events they conducted with the unit. Training events included annual training lane exercises and TAMs, drill weekend training events, and Training Assistor observations during routine unit visits. These reports This report could be adapted, and formalized as part of the USR process. At a minimum lane exercise take home packages, and TAMs should be maintained with the USR at the Department of the Army. This will ensure that some type of objective feedback exist in the system. Reserve units should also submit a copy of their PTSR with the USR, to provide a realistic picture of post-mobilization requirements.

APPENDIX 1

LANES TRAINING EXERCISE TAKE HOME PACKAGE

Appendix 1 is and an excerpt from the *3rd Bde, 87th Div (TS) Observer Controllers Handbook* that instructs lane evaluators on how to construct a Take Home Package. The Take Home Pack Provides a unit commander objective feedback for assessing unit proficiency in the tasks evaluated.

Take Home Packages

Take Home Packages (THP) provide evaluated RC units with detailed, written feedback on tasks which were observed by OC/Ts. They contain necessary information to assist the unit with its self-assessment of METL and supporting battle tasks, and in planning and preparing for future training.

THPs are ideally provided to the RC unit prior to the unit departing Camp Shelby, or if OC/Ts are TDY at the training location, prior to OC/T departure from the training station to return to Camp Shelby. There are occasions, particularly during IDT periods, when limited available time will require the THP to be forwarded or mailed to the evaluated unit shortly after completion of training.

If the THP is not provided prior to the break in OC/T coverage, the THP will be forwarded/mailed to the RC unit NLT 96 hours after completion of training. As a courtesy, a copy of the TSS will be faxed to the unit within 24 hours after completion of training.

THPs are broken down into three major sections:
1. Executive Summary (EXSUM)
2. Task Summary Sheets (TSS)
3. Training & Evaluation Outlines (T&EO)

Executive Summary (EXSUM)

The EXSUM is the cover memorandum for the Take Home Package, and it is signed by the TSBn commander. It is a typed memorandum addressed to the commander of the RC unit which received OC/T support. The lowest level of addressee for the EXSUM is company commander:

The EXSUM format is as follows:

(*Letterhead, Office Symbol & Date*)

MEMORANDUM FOR Commander, *(Specify RC Unit)*

SUBJECT: Executive Summary for Lane Training, *(Training Dates)*

1. Enclosed is the take home package from the lane evaluation conducted for your unit by the *(TSBn)* during *(training event),* from *(training dates),* at *(training event location and state).* Collective tasks that support your Mission Essential Task List (METL) were evaluated.

2. Description of Training Planned and Conducted.
(Provide a brief description of the overall tactical scenario. Identify the general task organization, if not organic, including attachments. Describe the general sequence and flow of the training event from exercise start (receiving the mission) to exercise end (mission completion).)

The following tasks were evaluated:

a. *(List all collective tasks, by MTP task title/description, at each level of the organization which was trained/evaluated.)*

3. The following areas were demonstrated as strengths.

a. (*For each collective MTP task listed in para. 2 that is a "T" or "P", list the MTP task description/title and why the task is listed as a unit strength*.)

4. The following areas were noted as needing improvement and are recommended as areas to emphasize in future training plans.

a. (*For each collective MTP task listed in para. 2 that is a "U" , list the MTP task description/title and why the task is listed as needing improvement*.)

5. The following systemic trends were noted.

a. (*Comment on any positive or negative trends observed in the unit. Trends are usually related to but do not have to specifically address an evaluated collective MTP task. Leader and individual tasks can be discussed*.)

6. Force Protection and Safety.

a. (*Discuss force protection and safety shortcomings observed in the unit.*)

7. Recommended Training Strategy. (*Discuss a training strategy and methods of training the unit should consider to improve their performance. Consider individual, leader and collective tasks. Consider both tactical, functional and support areas*.)

8. (*Closing paragraph with POC and telephone number*.)

(5 spaces)

(TSBn Cdr's Name)
LTC, (TSBn Cdr's Branch)
Commanding

Encls – 2

1. TSS
2. T&Eos

Task Summary Sheet (TSS)

The TSS provides RC unit leadership with specific performance and proficiency assessments of the tasks trained and evaluated by OC/Ts. It is a synopsis of T&EO assessments. The TSS is typed in memorandum format and addressed to the RC unit commander. The lowest level of addressee for the TSS is company commander.

The TSS can be signed by either the TSBn Commander or the OC/T Team Chief. The TSS Format is as follows:

(*Letterhead, Office Symbol & Date*)

MEMORANDUM FOR Commander, *(Specify RC Unit)*

SUBJECT: Task Summary Sheet for Lane Training, *(Unit, Training Dates)*

1. Evaluate Unit Information:

   a. Unit Identification: (*Plt/Co/Bn-Rgt designation*)
   Composition of Unit: (*Organic or Composite*)

   b. Personnel - Authorized (Off/WO/Enl)
   Assigned (Off/ WO /Enl)
   Present for Training (Off/WO/Enl)
   Percent Present for Training (Off/WO/Enl)

2. Unit Conducting Evaluation: (*Team ID, TSBn*), 3rd Bde, 87th Div (TS)
   Senior OC/T: CPT (*Last Name*)

3. Collective Task Evaluation/Assessment:

Lane Description:					
Date of Execution:					
MTP Number & Date:					
Task/Drill Title:	**Task/Drill Number:**	**Iteration Assessment (T/P/U/Go/No Go)**			
		1	**2**	**3**	**4**

(*Iteration Assessment Abbreviations: T = Trained, P = Needs Practice, U = Untrained, Go, No Go, N/E = Not Evaluated, N/A = Not Applicable, N/O = Not Observed*)

4. Summary.

a. Collective Task Proficiency.

(1) Sustain.

(a) (*Should be tasks assessed as "T" or "P." List the task title/description and why the task should be sustained*.)

(2) Improve.

(a) (*Should be tasks assessed as "U." List the task title/description and specifically why the task needs improvement*.)

b. Leader Task Proficiency.

(1) Sustain.

(a) (*Should be tasks assessed as "T" or "P." List the task title/description and why the task should be sustained*.)

(2) Improve.

(a) (*Should be tasks assessed as "U." List the task title/description and specifically why the task needs improvement*.)

c. Individual Task Proficiency.

(1) Sustain.

(a) (*Should be tasks assessed as "T" or "P." List the task title/description and why the task should be sustained*.)

(2)Improve.

(a) (*Should be tasks assessed as "U." List the task title/description and specifically why the task needs improvement*.)

d. Safety.

(1) Sustain.

(a) (*Should be tasks assessed as "T" or "P." List the task title/description and why the task should be sustained*.)

(2)Improve.

(a) (*Should be tasks assessed as "U." List the task title/description and specifically why the task needs improvement*.)

5. POC is (*Name of the Senior OC/T*), (*Team ID*), Phone: *###-###-####.*

(5 Spaces)

(*Full Name*)
(*Rank, Branch*)
(*Duty Position*)

CF:
S3, 3rd Bde, 87th Div (TS)
Cdr, Evaluated Unit

Training & Evaluation Outlines (T&EOs)

All T&EOs found in applicable MTPs have the same basic format:

1. Element
2. Task (title)
3. Iteration
4. Commander/Leader Assessment
5. Conditions
6. Task Standards (overall)
7. Subtasks (sometimes called Task Steps)
8. Performance Measures (sometimes called Standards) – these apply to the specific subtask under which they are listed and are the measure by which each subtask/task step is assessed a Go or No Go.
9. Task Performance Summary Block
10. Supporting Individual Tasks (not in all MTPs)
11. OPFOR (Counter-) Tasks and Standards (not in all MTPs).

<u>Guidance on Completion of T&EOs</u>

1. Ensure the unit designation/identification is written on each page of the T&EO.
2. Ensure the Iteration number is circled.
3. Thoroughly read the overall Task Standards. If the unit failed to achieve any single one of the overall task standards, circle the "U" in the Assessment portion of the T&EO. In the margin, write a brief statement/narrative of why the task was assessed as a "U" referencing the specific overall task standard failed.
4. Ensure you thoroughly understand the standards for a Go or No Go on subtasks/task steps. The standards are not the same across the board. In some MTPs, failure of a single performance measure/standard results in a No Go on the subtask/task step. In other MTPs, a percentage rule applies on performance measures/standards & subtasks/task steps.
5. Before you place a check mark for Go or No Go beside each subtask/task step, ensure you assess the unit's performance on each performance measure/standard for that subtask/task step. If the subtask/task step is marked as a "critical" subtask/task step, usually indicated with an asterisk, a No Go assessment on the subtask/task step results in a overall task assessment of "U"
6. For every "No Go" check marked for either a subtask/task step or performance measure/standard, a very brief but very specific comment on why it was a No Go must be written immediately below the typed line or in the margin immediately beside it.
7. Ensure you complete the Task Performance Summary Block. In most cases, the T&EO states "subtasks & standards evaluated." Regardless, count only subtasks/task steps Go and No Go. Do not count every performance measure/standard.

8. A “T” assessment on a task means that unit correctly and successfully performed and completed all overall task standards, sub-tasks/task steps, and performance measures/standards. There are no “No Gos” annotated on the entire T&EO.

APPENDIX 2

TRAINING ASSESSMENT MODEL (TAM)

Appendix 2 is and an excerpt from *Forces Command Regulation 220-3 Training Assessment Model*. It demonstrates that the TAM also focuses on objective evaluation of METL training. This appendix also includes First Army's instruction memorandum to TAM Evaluators.

Part III- Evaluator Assessment

(c) Part III- Evaluator assessment; all "I/Improve", "N/Not Trained", and "O/Not Observed" entries will be addressed. If the evaluator disagrees with the number of days required to reach the FORSCOM pre-mobilization training goals (Ref:Block 9) he will comment upon this fact.

(d) Part IV-METL and Supporting Collective Tasks/drills; evaluator will comment upon all tasks scheduled for training that are rated "S/Sustain", "I/Improve", "N/Not Trained", and "O/Not Observed", in Part IV, to include suggestions for improvement.

(e) The evaluator will include general comments regarding the strengths and weaknesses of the unit with recommendations for next year's training plan and post-mobilization plan.

(6) Submit the completed 1049-R (e-TAM) with the TCE/SCE name blocks completed to the CONUSA upon approval from the TCE/SCE as directed in Appendix D.

c. Performance to Army standards is the only evaluation criteria. Evaluations must reflect the unit's performance as measured against standards. Render a fair and honest evaluation. Tell it like it is-both strengths and weaknesses.

PART III - EVALUATOR ASSESSMENT

UIC: WZZZAO

1. PLANNING ADEQUACY	PREPARED		APPROVED		BATTLE FOCUSED		MEETS PRE-MOB GOALS		AVAIL FOR EVALUATOR	
If NO, address in narrative comments	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO
YEARLY TRAINING PLAN	Y		Y		Y		Y		Y	
ANNUAL TRAINING PLAN	Y		Y		Y		Y		Y	
MISSION ESSENTIAL TASK LIST	Y		Y		Y		Y		Y	
STAFF METL										
AT TRAINING SCHEDULE	Y		Y		Y		Y		Y	

2. TITLE XI RESPONSIBILITIES

a. YEARLY TNG BRIEF CONDUCTED	YES	[X]	NO	[ ]	(IF NO, ADDRESS REASONS IN NARRATIVE COMMENTS)
b. USR REVIEWED BY AC ASSOC. UNIT	YES	[X]	NO	[ ]	(IF NO, ADDRESS REASONS IN NARRATIVE COMMENTS)
c. UNIT COMPATIBLE WITH AC FORCE	YES	[ ]	NO	[X]	(IF NO, ADDRESS REASONS IN NARRATIVE COMMENTS)

d. IDENTIFY MAJOR END ITEM SHORTAGES (ERC-A/ERC-P/SUBSTITUTES) IN NARRATIVE COMMENTS.

e. IDENTIFY THE TOP THREE KEY PERSONNEL SHORTAGES BY 5 DIGIT MOS AND CRITICAL POSITIONS NOT FILLED IN NARRATIVE COMMENTS

f. IDENTIFY ANY ADDITIONAL RESOURCE SHORTFALLS THAT AFFECT THE UNIT'S ABILITY TO DO ITS WARTIME MISSION IN THE NARRATIVE COMMENTS (FACILITIES, TRAINING AREAS, FUNDS, RANGE REQUIREMENTS, TADSS, ETC) IF THE SHORTFALL IS TEMPORARY AND IS IN THE PROCESS OF BEING RECTIFIED, SO STATE AND GIVE AN ESTIMATED TIME/DATE THE SHORTFALL WILL BE CORRECTED

3. TRAINING FOCUS — Check as many blocks as required

a. LOCATION		b. TYPE TNG		c. ENVIRONMENT	
[X] FORSCOM INST	[ ] DEPOT	[ ] CTT	[ ] GUNNERY	[ ] SCHOOL	[ ] DAY
[ ] TRADOC INST	[ ] HOME STATION	[ ] EXERCISE	[ ] SUPPORT	[ ] ADMIN	[ ] NIGHT
[ ] USARC INST	[ ] OOT	[X] MANEUVER	[ ] TECHNICAL	[ ] GARRISON	[X] 24 HRS
[ ] SEMI-ACTIVE INST		[X] LANE	[ ] NBC	[X] FIELD	
[ ] STATE OWNED INST		[ ] ORE (COMP. PHASE)		[X] TACTICAL	

FUNCTIONAL AREA	EVALUATOR'S RECOMMENDATION: SUSTAIN	EVALUATOR'S RECOMMENDATION: IMPROVE	N/O
4. LEADERSHIP, DISCIPLINE, AND PHYSICAL CONDITIONING			
a. PHYSICAL CONDITION	S		
b. ADEQUATE LEADER SUPERVISION	S		
c. APPEARANCE	S		
d. PERSONNEL ACCOUNTABILITY	S		
e. DISCIPLINE	S		
5. FIELD OPERATIONS			
a. OPERATE FROM TACTICAL CONFIGURATION		I	
b. SAFETY	S		
c. FIELD CARE OF SOLDIERS	S		
d. SECURITY	S		
e. FIELD SUSTAINMENT	S		
f. NBC DEFENSE	S		
6. MAINTENANCE AND LOGISTICS			
a. PMCS		I	
b. MAINTENANCE MANAGEMENT		I	
c. SUPPLY MANAGEMENT	S		
d. MAINTENANCE OPERATIONS	S		
e. SUPPLY OPERATIONS	S		
f. ACCURATE OPERATIONS READINESS MAINTENANCE	S		
g. 80% OPERATIONAL READINESS RATE		I	
7. PERSONNEL MANAGEMENT			
a. SIDPERS MAINTENANCE	S		
b. PERSONNEL OPERATIONS	S		
8. UNIT TRAINING			
a. FULL USE OF TIME	S		
b. TRAINING TO STANDARD	S		
c. AFTER ACTION REVIEWS	S		
d. TRAINING MEETINGS	S		
e. ANNUAL TRAINING PLANS	S		

9. MOBILIZATION PLANNING	
a. CDRS ASSESSMENT OF THE NUMBER OF DAYS TO ACHIEVE ASGD PRE-MOB TNG GOAL	30
b. NUMBER OF DAYS REQUIRED TO COMPLETE TRAINING AT LEVEL ORGANIZED	67

Evaluator's Comments

Task Force 2-212 IN conducted Annual Training 1999, from 31 July - 15 August 1999, at Fort Stewart, GA. Collective Tasks that supported the Task Force's Mission Essential Task List (METL) were evaluated. Company/Team lanes were conducted which included: Movement to Contact, Deliberate Attack, and Defense. Dismounted Infantry, Mortar Section, and Scout Reconnaissance and Screen STX were also conducted. All company/team lanes were fully integrated with fire support, engineer, scout, medical, and maintenance assets. Additionally smoke and GSR were integrated into specific lanes. The Task Force arrived on 31 July 1999 and deployed to the field on 1 Aug 1999. Initially, A/1-234 AR and B/2-212 IN deployed to Company/Team lanes while C/1-485 AR and A/2-212 IN conducted gunnery training. On 6 Aug 1999, these rotations were completed and the companies conducted maintenance and retraining. On 8 Aug 1999, the units rotated to either gunnery or Company/Team lanes. This rotation concluded on 12 Aug 1999, at which time the Task Force redeployed to the cantonment area to prepare for homeward movement.
Part I; Block 8: The Unit Commander along with the First Sergeant and USR personnel maintains a roster of those soldiers that are Non-DMOSQ and requests training slots through Battalion HQs for these individuals. Whether that MOSQ shortfall is a result of a new recruit or as a result of a MOS transfer, that soldier is identified as a priority for training.

Part II: Block j: The Unit Commander is aware of the damaging effects of crew turbulence on crew qualification. Battle rosters are kept and crews are specifically managed to maintain crew discipline and unity. If there is a reason for a crew member to be removed from the crew, stringent steps are in place to insure that that replacement has sufficient time to train for the annual crew qualification training.

Part III, Block 1: N/A

Part III. Block 2, a,b,c. A "No" was entered in line c "Unit Compatible with AC force". Reason for the "No" check is as a result of the unit not being equipped and trained on the Sincgars family of radios. There is training scheduled for this event.

Part III, Block 2d. The unit is not experiencing any major end items shortages.

Part III, Block 2e. The unit does have key personnel shortages in the following areas:

3 each 12B30
3 each 19K40
2 each 19K20

Part III, Block 2f. The unit is adversely affected by being forced to use equipment that is over-utilized and poorly maintained. This has its greatest effect during Annual Training when training has to be haltered or at best altered as a result of equipment malfunctions both in the maneuver and gunnery arena. While funding is not an issue, time is always a factor insofar as its impact on the ability of the unit to do all of the tasks required in the time allotted.

Block 5.A
During the operation tank crews were created from down vehicles in the UMCP. These crews were then formed into a consolidated platoon for the mission. Rarely were the same crews together even for a single day and the company's reported manpower compared to what was present on the lane left the majority of the company's strength somewhere other than the mission.

Block 5.E
The company was essentially a reinforced mechanized platoon (with only one fire team). The commander was able to exercise only twenty percent of his assets. While the unit performed well, the lack of equipment and personnel made command and control easier. It is essential that the entire unit is present for training to establish the proper tempo for operations and sustainment.

Block 6.A
Technical knowledge of the M1 needs improvement. Basic troubleshooting for crews and mechanics needs emphasis. Crews need to use the issued TM's to assist in troubleshooting basic mechanical problems. The maintenance sergeant needs to come forward to supervise maintenance operations, not remain in the UMCP.

Block 6.G
The company arrived at lane training combat ineffective. During the rotation efforts were made to repair vehicles or bring vehicles forward that were mission capable but not FMC. This effort never achieved significant results. Crews were also withdrawn within thirty minutes of execution time to return to the UMCP for some maintenance operation.

Part III, Block 9a, b. N/A.

PART IV, See attached take home packet.

Recommended Training Strategy.

AFKA-TR-ATD (350)	4 January 2000

MEMORANDUM FOR FORSCOM Provided Training Assessment Model (TAM) Evaluators

SUBJECT: TAM Evaluator Responsibilities

1. Your selection as a Training Assessment Model Evaluator of Annual Training (AT) performance provides you with an opportunity to significantly contribute to the readiness of a Reserve Component (RC) unit.

2. As an evaluator, your role is two-fold. First, you must provide a detailed and impartial evaluation of how well the unit plans and executes its training in relation to the doctrinal standard. Second, and no less important, your mission is to provide the unit commander assistance relating to RC training management based on doctrine.

3. Annual Training is the culmination of an RC unit's yearly training program. It is the commander's best opportunity to evaluate and assess the effectiveness of the training program over the past year, as well as the unit's ability to plan and execute mission-oriented, collective training.

4. In order to best execute your duties as a TAM Evaluator, you must be prepared both personally and professionally. Ensure that you know the Army training management system as established in FM 25-100/101. Also, review and be familiar with the following regulations:

a. FORSCOM Regulation 350-2, Reserve Component Training, 27 Oct 1999 (located at: http://www.forscom.army.mil/pubs/Pubs/350-2signed27oct99.doc).

b. FORSCOM Regulation 220-3, Reserve Component Training Assessment, 1 June 1998 (located at: http://www.forscom.army.mil/pubs/Pubs/reg220-3.doc).

c. Additional information will be posted on the First Army web site (located at: http://www-first.army.mil/).

5. The following are specific actions expected of you as an evaluator.

a. Contact the evaluated unit as early as possible, preferably at least 30 days prior to AT. Request a copy of the unit's TAM and their AT Training Plan. If you have problems contacting the unit, or they identify a training site/date discrepancy, contact one of the POCs in paragraph 10 for assistance. If you are performing an evaluation where First U. S. Army has established an evaluation headquarters, they will contact you and send additional information. The training sites with evaluation headquarters will be posted on the First U. S. Army web site.

b. Be organized and have a definite plan (Evaluation Matrix) for your evaluation effort. Upon arrival at the AT site, confirm that the unit commander has completed his portion of FORSCOM Form 1049-R (TAM), IAW FORSCOM Regulation 220-3. Review the unit's training guidance and AT plan.

c. Be objective and render an honest evaluation. Explain both strengths and areas needing improvement. When the unit fails to meet standards, provide assistance to help meet the standard Never penalize a unit for retraining on a task to reach the required standard.

d. Be technically and tactically proficient. Review and be familiar with the appropriate ARTEP/MTP and soldiers manuals, and how to interpret the conditions and standards specified in them.

e. Review the unit's IDT training schedules for the year in preparation for AT. Determine if training being conducted during AT was trained during IDTs; was there a logical, focused training process. If not, comment as appropriate concerning the unit's lack of understanding of the trainin methodology - crawl, walk and run.

f. Conduct quality After Action Reviews at key intervals during training such as at the conclusion of a pure lane or at appropriate points during integrated lanes. You must ensure that AARs are accomplished in conditions that facilitate learning. This means avoiding inclement weather conditions. It does not mean a requirement for a fixed site with massive infrastructure support. As a basic principle, the AAR site should be as near to the exercise training area as possible. Incorporate the use of training aids to increase the effectiveness of AARs. Training aid can vary from detailed terrain models to map boards, butcher pads, or sketches. The point is that visual perceptions help. When the time comes for AARs, do them by the book, whether under a tree or in a theater (i.e., each AAR contains all the key components).

g. Be a full time evaluator. You are expected to be with the unit whenever training is being conducted. Evaluate the entire AT period, from the unit's arrival to departure. Do not let the administrative requirements of report preparation and processing cause you to shortcut your evaluation. Ensure that as much of the chain of command as possible, from battalion staff down t platoon sergeant, is present at your After Action Review and TAM out briefing.

6. During the AT period, you will probably come in contact with personnel from the Brigades (Training Support). Their mission is to provide training support and assistance to the unit and train the trainers, not to command. Personnel from these brigades coach, mentor and assist units through external lane training and evaluation. Their distinct missions do not in any way diminish your role as TAM Evaluator. The Observer Controllers/Trainers (OC/Ts) from the Bdes (TS) are branch qualified officers and NCOs that generally work with the respective units year-round. These OC/Ts can provide excellent insight into the unit strengths and areas needing improvement. Their desires are the same as yours, to help the unit improve as much as possible while ensuring

the unit gets a thorough evaluation. Keep them informed of areas for improvement through your daily After Action Review and TAM out briefing.

7. During the preparation of your final narrative, pay particular attention to some common pitfall Some evaluators appear hesitant to give a unit less than a perfect score, thus neglecting to give a true evaluation of the unit's performance for common unit functional items such as Leadership, Discipline and Physical Condition. Also, evaluator comments typically do not fully address areas needing improvement. The ARTEP/MTP task standards and "S" Sustain/ "I" Improve criteria in FORSCOM Regulation 220-3 define the standards for successful performance. If the Bde (TS) is conducting lane training for the unit, the Bde (TS) will provide you detailed T&EO Summary Sheets on the collective tasks and battle drills. This input should be carefully considered when developing your final input for the TAM. You must also review the unit's YTP for the next year and recommend changes based on performance during this AT. These recommended changes to the YTP should be included in the narrative portion of the TAM.

8. The Army mission is clear: prepare soldiers and units to mobilize, deploy, fight and win on today's battlefield. Readiness is built on a foundation of good training. Our primary objective is to produce soldiers, leaders, and units that are technically and tactically proficient in the executio of their specific wartime missions.

9. First U.S. Army appreciates your contribution to Reserve Component readiness and wishes you a personally and professionally rewarding tour.

10. POCs are MAJ Shaver (7474) or CPT Stansel (7782) at DSN 797- or Comm (404) 362-. The Fax number is 3033. E-mail can be sent to shaverj@gillem-emhl.army.mil or stanselj@gillem-emhl.army.mil.

FOR THE COMMANDER:

//original signed//
DANNY R. MCKNIGHT
Colonel, GS
Deputy Chief of Staff,
Training

CF:
DCGs, First U.S. Army
Commanding Generals, Divisions (Training Support)
Site Chief Evaluators

APPENDIX 3

POST MOBILIZATION TRAINING SUPPORT REQUIREMENTS (PTSR)

Appendix 3 is and an excerpt from *Forces Command Regulation 500-3-3 Reserve Component Unit Commander's Handbook*. It describes the purpose of the PTSR, and how to determine requirements. The form is included for review.

Annex D: (Postmobilization Training) to RC Unit Commander's Handbook

Section I Postmobilization Training and Support Requirements (PTSR)

D-1. GENERAL.

a. The concept for Postmobilization Training and Support Requirements (PTSR) is to provide for collection and submission of essential information in a standard format to identify what the unit needs from the MS to prepare it to meet deployability criteria once mobilized. The report will be prepared as of 30 September and forwarded, through channels as directed by the STARC/RSC, to arrive at the Mobilization Station assigned by MOBPLANS by 15 December. Also, a copy is updated and hand carried to the MS by the unit's advance party upon mobilization. FORSCOM Form 319-R is available in automated form (Formflow).

b. The purpose of the PTSR is two fold: 1) to allow the unit an opportunity to express its unfulfilled needs, and 2) to give the MS a heads-up on what support it will be expected to provide to the mobilized unit. It is a snapshot in time. The PTSR is designed primarily for deploying units. Requirements should be based on what is needed to bring the unit to the highest level of readiness in all areas. The PTSR will be reviewed at the unit's triennial MS visit.

D-2. REPORT

a. General. As stated previously, Reserve Component (RC) units will prepare the report at least annually, as of 30 September to arrive at the assigned mobilization stations by 15 Dec. Updates are required within 45 days after a major MTOE change/reorganization, significant change in training readiness or change of mobilization station. All blocks should be filled in, either with data, none, or N/A, except those exempted in the following instructions.

b. Instructions for Completion of FORSCOM Form 319-R. Most items are self explanatory. Instructions/clarification are provided for selected items as follows:

1. Section A - General information.

Item 6 - List all sub-units of your AA UIC that are included in this PTSR. If units with sub-UICs are submitting their own PTSR, they should not be listed here.
Item 7 - Troop Program Sequence Number (TPSN). Units are exempt from reporting this item under the manual system.

2. Section B - Training and Support Plan. Information provided in this section will be based on the unit's approved post-mobilization training plan. It should reflect requirements necessary to achieve proficiency in all tasks on the training plan. These tasks will be those that were deferred for post-mobilization as well as any pre-mobilization tasks in which the unit is not proficient. Prepare a separate section B page for each week of training at the MS ; Critical Individual Tasks, List requirements for critical tasks, Equipment Required. List devices, GTAs, films, audiovisual equipment, etc., needed to complete training. Use Army-wide numbers (DA Pamphlets 25-37, 25-90, 350-9 and 350-100; TRADOC Pamphlet 71-9) to identify requirements. Ammunition Required. Project ammunition required for post-mobilization training only. This ammunition is managed through training channels. Assistance Required. List other training requirements. Be specific and describe clearly. Ranges/firing points. List requirements for ranges/firing points/firing tables. Training areas. List ground maneuver areas, and other training areas. Issues or Assumptions Affecting Training. Use to amplify or to continue requirements listed above.

Section II Post-mobilization Training Schedule

D-3. General

Based on the approved training and support plan and the support provided from the MS as a result of the PTSR, the unit will develop the training schedule to be followed at the MS. This is the next progression in accomplishing the training necessary for the unit to be declared validated for deployment.

D-4. REPORT

The post-mobilization training schedule will be refined upon arrival at the mobilization station. The schedule format will be IAW guidance from the MS. Upon arrival at the MS, the unit commander should be prepared to thoroughly articulate his unit's training requirements/shortfalls to the MS commander and his staff.

Appendix 1 to Annex D (PTSR)

POST MOBILIZATION TRAINING AND SUPPORT REQUIREMENTS (PTSR) (FORSCOM Reg 500-3-3)			*Requirements Control Symbol* AFOP-366(R5)
SECTION A - GENERAL INFORMATION			
1. UNIT NAME	2. UIC	3. DATE a. As Of	b. Of Last Report
4. STARC/MUSARC POC *(Name, Grade, Tel No)*	5. a. MTOE/TDA *(No/date)*	b. ALO	
6. DODAAC LIST OF ALL UNITS MOBILIZING UNDER AA UIC			
UNIT NAME	UIC	DODAAC	ADDITIONAL DODAAC
7. TPSN			
8. HOME STATION (HS) ADDRESS *(Street, City, State, ZIP Code)*		9. MAILING ADDRESS *(If different from HS Address)*	
10. TEL NO *(List All)* COMMERCIAL	DSN	11. MAILING ADDRESS *(TAG/MUSARC)*	
12.			
a. TRAINING SUPPORT BRIGADE (TSB) POC *(Name, Grade, Tel No)*		b. TSB POC VERIFICATION SIGNATURE	
13. MOBILIZATION LOCATION *(Station, Army Area, State)*		14. COORDINATING INSTALLATION *(Mobilization)*	
15. SUPPORTING INSTALLATION *(Mobilization)*		16. MILEAGE *(HS to Mobilization Location)*	
17.			
COMMANDER'S NAME, GRADE, TEL NO		SIGNATURE	DATE

FORSCOM FORM 319-R, 1 DEC 97 EDITION OF 1 NOV 97 IS OBSOLETE. 8½x11

Appendix 1 to Annex D (PTSR) Cont'd

SECTION B - TRAINING AND SUPPORT PLAN	
1. UNIT	2. WEEK NUMBER OF TRAINING
3. PRIORITIZED COLLECTIVE TASKS	
4. CRITICAL INDIVIDUAL TASKS	
5. EQUIPMENT REQUIRED	
6. AMMUNITION REQUIRED	
7. ASSISTANCE REQUIRED	
8. RANGES/FIRING POINTS	
9. TRAINING AREAS	
10. ISSUES OR ASSUMPTIONS AFFECTING TRAINING	

2

APPENDIX 4

UNIT READINESS ESTIMATE REPORT (URER)

AFKA-OP

MEMORANDUM FOR

Commander, 78th Training Support Division, ATTN: AFKR-TNJ, 91 Truman Drive, Edison, NJ 08817-2487
Commander, 85th Training Support Division, ATTN: G3-PS, 1515 W. Central Road, Arlington Heights, IL 60005-2475
Commander, 87th Training Support Division, ATTN: AFRC-EAL-OP, 1400 Golden Acorn Drive, Birmingham, AL 35244-1295

SUBJECT: Memorandum of Instruction (MOI) for Unit Readiness Estimate Report (URER)

1. References:

a. FORSCOM Reg 220-3, 7 Apr 00, Reserve Component Training Assessment.

b. FORSCOM Reg 500-3-3, 15 Jul 99, Reserve Component Unit Commander's Handbook.

c. FM 25-101, 30 Sep 90, Battle Focused Training.

d. FM 101-5-1, 30 Sep 97, Operational Terms and Graphics.

2. First U.S. Army conducted a Unit Readiness Estimate Report (URER) metrics development workshop on 29-30 January 2001. Representatives from each Training Support Division (TSD) were present for this workshop. The purpose of the URER metrics development workshop was to establish objective standards as much as possible in the way that Training Support Divisions (TSD) personnel determine green, amber, red or black URER ratings for the RC units that they visit. Specifically, objective standards were developed in order to provide standardization of all TSB URER ratings.

3. As result of this workshop, the following URER guidance is provided in order to achieve standardization of URER evaluations and to increase the objectivity of the input.

4. Purpose: To maintain an unclassified, concise graphic representation of a unit's ability to mobilize and deploy in support of CINC requirements. The report is based on first hand observation of the unit and unclassified information from the Status of Resources and Training System (SORTS) located on the Global Command and Control System (GCCS).

5. General:

a. Commander, First U.S. Army has designated DCSOPS First U.S. Army as the proponent of the URER. First U.S. Army staff will have read permission on all data contained in the URER. Training Support Divisions (TSDs) will have read permission on units within their area

of operation. Training Support Brigades (TSBs) will have read/update permission on units within their area of operations.

b. Information regarding training readiness is currently contained in the Unit Status Report (USR), Training Assessment Model (TAM), Post Mobilization Training and Support Requirement (PTSR), and other records maintained at unit level. The URER is a tool designed to provide commanders and staffs at all levels the ability to view unclassified data from numerous sources in one place and identify problems not apparent in other reporting systems.

c. The URER is a Web based data entry system designed to capture demonstrated performance during IDT, AT, and exercises.

6. Responsibilities:

a. First U.S. Army DCSOPS.

(1) Will be responsible for unit data fields from SORTS as follows: UIC, UNR, BR, UNIT, LOCATION, ST, SRC, FAD, COMPO, MOB STATION, TPSN, ALO, REQUIRED OFFICERS, AUTHORIZED OFFICERS, REQUIRED WARRANT OFFICERS, AUTHORIZED WARRANT OFFICERS, REQUIRED ENLISTED, AUTHORIZED ENLISTED, REQUIRED TOTAL, MISSION PRIORITY, TSD AND TSB.

(2) Generation and distribution of user IDs and passwords.

b. First U.S. Army DCSIM.

(1) Maintain URER program on the First U.S. Army Local Area Network.

(2) Provide programming and technical support to DCSOPS.

(3) Maintain password protection and data access rights based on passwords and user ids provided by DCSOPS. No access granted without prior approval of DCSOPS.

(4) Maintain the communications links necessary for accessing the URER program and provide technical assistance on communications problems.

c. TSDs. Monitor requirements of assigned TSBs and provide assistance as required.

d. TSBs. Commanders, TSBs are responsible for entering and maintaining information on the URER for the following fields: Per, Tng status, MTOE Eqpt, Maint, AT TY__, IDT TY__, TAM TY__, SIMEX TY__, Overall, Cdr, ASSIGNED OFFICERS, Off DMOSQ, WO DMOSQ, ASSIGNED WARRANT OFFICERS, ASSIGNED ENLISTED, ASSIGNED TOTAL, Enl DMOSQ, Total DMOSQ, Last Mob Deployment, Last ODT, Optimal Focus, Call Forward, Positive Force, METL Approval, YTP Approval, AT Type, Training Priority, and Comments. TSB personnel will, upon receipt of this MOI, update the URER immediately after a TAM

evaluation or upon receipt of new or additional information. The URER is **UNCLASSIFIED.** No USR or other classified data will be entered on the URER.

6. URER access and User Instructions.

a. To access the URER you must have 128-bit encryption loaded on your Internet Explorer. If your IMO doesn't have MS128.exe, contact POCs below and we will e-mail the file to you. In the address line type the following: https://160.136.113.9. This will bring up the warning screen. Click continue. You are now on the First U.S. Army Intranet Site. On the left side you will see the URER banner, click on this. This is where you enter your user ID and password furnished by DCSOPS. Both user ID and password are **case sensitive!** Once data is entered click the send button. One user ID and password will be issued to each TSD/TSB. Personnel in the TSD/TSB will all use the same user ID and password. This user ID and password **WILL NOT** be given to anyone outside the TSD/TSB respectively. User ID and passwords will be mailed to each TSD/TSB.

b. Your next screen is the Search Form. This screen allows you to view units in a variety of ways. You can select by Unit Type, State, TSD, TSB, COMPO, SRC, Overall Indicator, UIC or any combination of the fields on this form. You can go directly to a unit by entering the UIC. Fields SRC and UIC will allow you to enter the first portion of the entry, example UIC = WXYZ (WXYZ is a Bn with subordinate companies/detachments) leaving off the last two characters would display all subordinate units. You should always narrow the search as much as possible to reduce the size of the file coming back to you. Selection of a search with more than 2,000 records will normally time out on you. TSDs can only view the records for their TSD and TSBs can only view/update records for their TSB.

c. Enclosed are instructions for filling in the URER worksheets.

6. POCs for the URER at First U.S. Army as follows:

- Mr. Rickles, Comm 404-362-7769, DSN 797-7769, e-mail charles.rickles@gillem-emh1.army.mil
- Ms. Arwanna Rogers, Comm 404-363-5169, DSN 797-5169, e-mail arwanna.rogers@gillem-emh1.army.mil.
- Ms. Lee Davis, Comm 404-363-5420, DSN 797-5420, e-mail euarl.davis@gillem-emh1.army.mil.

FOR THE COMMANDER:

Encl
as

DANNY R. MCKNIGHT
Colonel, GS
Chief of Staff

DEPUTY CHIEF OF STAFF OPERATIONS

URER METRICS DEVELOPMENT
29-30 JAN 01

DEPUTY CHIEF OF STAFF OPERATIONS

URER METRICS DEVELOPMENT WORKSHOP GOAL

THE CG, FIRST U.S. ARMY WANTS TO ESTABLISH METRICS FOR THE URER. THE PURPOSE OF THE URER METRICS DEVELOPMENT IS TO ESTABLISH OBJECTIVE STANDARDS IN THE WAY THAT TSB PERSONNEL DETERMINE BLACK, RED, AMBER OR GREEN UNCLASSIFIED URER RATINGS FOR UNITS THAT THEY VISIT. SPECIFICALLY, OBJECTIVE STANDARDS NEED TO BE DEVELOPED IN ORDER TO PROVIDE STANDARDIZATION OF ALL TSD URER RATINGS.

DEPUTY CHIEF OF STAFF OPERATIONS

URER FACTS / ASSUMPTIONS

- THE URER IS AN UNCLASSIFIED AUTOMATED SUMMARY OF INFORMATION DERIVED FROM AT, TAMS, LANES, ETC. (NO USR DATA)
- THE URER PROVIDES LIMITED VISIBILITY OVER HIGH PRIORITY UNITS IN THE FIRST ARMY AOR.
- PROVIDES A SYNOPSIS OF INFORMATION ALREADY ON FILE AND UPDATED BY TSB PERSONNEL.
- SHOULD BE TRANSPARENT TO THE UNIT.

DEPUTY CHIEF OF STAFF OPERATIONS

URER FACTS / ASSUMPTIONS

- TSBs NEED TO PROVIDE STANDARDIZED URER INPUT ACROSS FIRST ARMY.
- INCREASE URER OBJECTIVE ASSESSMENTS IMPROVES STANDARDIZATION.
- PROVIDE BETTER UNIT ASSESSMENTS. (BASED ON FM 101-5-1)
- URER SUBJECTIVE ASSESSMENTS BASED ON PROFESSIONAL EXPERIENCE.
- URER IS A SNAPSHOT IN TIME.

DEPUTY CHIEF OF STAFF OPERATIONS

URER METRICS DEVELOPMENT MILESTONES

- 29-30 JAN: URER WORKSHOP AT FIRST ARMY WITH TSB REPRESENTATIVES
- 30 JAN - 6 FEB: STAFF URER GUIDANCE WITH TSDs & FIRST ARMY STAFFS
- 7 FEB: RECEIVE INPUT FROM TSDs & FIRST ARMY STAFFS
- 14 FEB: BRIEF FIRST ARMY DCSOPS & CHIEF OF STAFF
- 15 FEB: DECISION BRIEF FOR CG, FIRST ARMY

DEPUTY CHIEF OF STAFF OPERATIONS

URER WORKSHOP RECOMMENDATIONS

BLOCKS 1 THROUGH 9

REQUIRE GREEN-AMBER-RED-BLACK ASSESSMENTS

EACH RATING IS DETERMINED ON A QUANTIFIABLE SCALE DERIVED FROM THE FOLLOWING METRICS:

- **FM 101-5-1 APPENDIX C-1, PAGE C1 AND C4**
- **FC REGULATION 220-3 (TAM)**
- **UNCLASSIFIED SOURCES**
- **COMMON SENSE**
- **PROFESSIONAL KNOWLEDGE**

ASSESSMENT CATEGORIES

FULLY MISSION CAPABLE (FMC): TRAINED, SUSTAIN: (GREEN 85-100%) UNIT IS FULLY CAPABLE OF MEETING MISSION REQUIREMENTS TO STANDARD WITHIN A CONTINUOUS OPERATIONS (24 HOUR) ENVIRONMENT

MINOR PROBLEMS: PRACTICE, OR IMPROVE: (AMBER 70-85%) UNIT HAS THE CAPABILITIES TO DO THE MISSION FOR LIMITED DURATION OR MINOR DIFFICULTIES THAT CAN BE FIXED WITHIN MISSION TIME CONSTRAINTS

MAJOR PROBLEMS: UNTRAINED OR IMPROVE: (RED 50-70%) THE UNIT HAS TRAINING AND RESOURCE CONSTRAINTS THAT WILL DECREASE THE PORTION OF THE MISSION THE UNIT CAN ACCOMPLISH WITHIN A CONTINUOUS OPERATIONS (24 HOUR) ENVIRONMENT WHILE ACCEPTING RISK IN SUSTAINED MISSION ACCOMPLISHMENT OR FORCE PROTECTION

NOT MISSION CAPABLE (NMC): - (BLACK <50%) UNIT REQUIRES SIGNIFICANT ADDITIONAL RESOURCES OR TRAINING BEFORE BEING ABLE TO PERFORM ITS WARTIME MISSION IN CONTINUOUS OPERATIONS

BLOCK 1 PERSONNEL

THE IMPACT OF PERSONNEL ON THE UNITS ABILITY TO MOBILIZE, DEPLOY, AND PERFORM WARTIME MISSION

- THE UNIT HAS THE AVAILABLE PERSONNEL TO MOBILIZE, DEPLOY, AND PERFORM WARTIME MISSION
  GREEN AMBER RED BLACK

- THE UNIT HAS KEY PERSONNEL IN ORDER TO MOBILIZE, DEPLOY, AND PERFORM WARTIME MISSION
  GREEN AMBER RED BLACK

- THE PERSONNEL ARE QUALIFIED (DMOSQ)
  GREEN AMBER RED BLACK

ASSESS OVERALL URER RATING FOR PERSONNEL
GREEN AMBER RED BLACK

BLOCK 2 TRAINING STATUS

INDICATE THE UNIT'S OVERALL TRAINING STATUS USING THE COLOR-CODED LEGEND BASED ON PERSONAL OBSERVATIONS, TAM DATA, IDT AND AT LANE RESULTS, AND THEIR ESTIMATED DAYS TO TRAIN TO STANDARDS ON TASKS WITHIN THEIR UNIT METL

- THE UNIT HAS THE INDIVIDUAL TRAINING PROFICIENCY TO MOBILIZE, DEPLOY AND PERFORM WARTIME MISSION (WPNS QUAL, APFT, CTT)
  GREEN AMBER RED BLACK

- THE UNIT HAS THE TECHNICAL TRAINING PROFICIENCY TO MOBILIZE, DEPLOY AND PERFORM WARTIME MISSION (TAM, IDT & AT LANES)
  GREEN AMBER RED BLACK

- THE UNIT HAS THE TACTICAL TRAINING PROFICIENCY TO MOBILIZE, DEPLOY AND PERFORM WARTIME MISSION
  GREEN AMBER RED BLACK

ASSESS OVERALL URER RATING FOR TRAINING STATUS
GREEN AMBER RED BLACK

BLOCK 3 MTOE EQUIPMENT

THE IMPACT OF EQUIPMENT SHORTAGES ON THE UNIT'S ABILITY TO MOBILIZE AND DEPLOY. ALL OF THE UNIT'S MTOE IS REPORTABLE. REFER TO THE UNIT MTOE TO DETERMINE THE CATEGORY OF EACH ITEM OF EQUIPMENT AND REQUIRED QUANTITY

- THE UNIT HAS THE REQUIRED EQUIPMENT TO MOBILIZE, DEPLOY AND PERFORM WARTIME MISSION
  GREEN AMBER RED BLACK

- THE UNIT HAS KEY MTOE EQUIPMENT OR APPROVED SUBSTITUTES
  GREEN AMBER RED BLACK

ASSESS OVERALL URER RATING FOR MTOE EQUIPMENT
GREEN AMBER RED BLACK

BLOCK 4 MAINTENANCE

THE IMPACT OF EQUIPMENT MAINTENANCE ON THE UNIT'S ABILITY TO MOBILIZE AND DEPLOY

- THE MTOE EQUIPMENT IS OPERATIONAL
  GREEN AMBER RED BLACK

- THE UNIT HAS A MAINTENANCE PROGRAM (PMCS, UNIT LEVEL MAINTENANCE 10/20)
  GREEN AMBER RED BLACK

ASSESS OVERALL URER RATING FOR MAINTENANCE
GREEN AMBER RED BLACK

BLOCK 5-AT LANE

ENTER THE YEAR OF THE LAST COMPLETED AT LANE (IF ANY) AND USING THE COLOR CODED LEGEND MAKE AN ASSESSMENT OF HOW WELL THE UNIT PERFORMED THE AT LANE TASKS

- THE UNIT CAN SUCCESSFULLY PERFORM ITS AT LANE TASKS (SELECTED METL TASKS) TO STANDARD

  GREEN AMBER RED BLACK

BLOCK 6-IDT LANE

ENTER THE YEAR OF THE LAST COMPLETED IDT LANE (IF ANY) AND USING THE COLOR CODED LEGEND MAKE AN ASSESSMENT OF HOW WELL THE UNIT PERFORMED THE LANE TASKS

- THE UNIT CAN SUCCESSFULLY PERFORM ITS IDT LANE TASKS (SELECTED METL TASKS) TO STANDARD

  GREEN AMBER RED BLACK

BLOCK 7-TAM

ENTER THE YEAR OF THE LAST COMPLETED EXTERNAL TAM AND USING THE COLOR CODED LEGEND MAKE AN ASSESSMENT OF HOW WELL THE UNIT PERFORMED THE TASKS EVALUATED

- THE UNIT CAN SUCCESSFULLY PERFORM ITS EVALUATED PRE-MOBILIZATION TASKS TO STANDARD

GREEN AMBER RED BLACK

BLOCK 8-SIMEX

ENTER THE YEAR OF THE LAST COMPLETED SIMEX (IF ANY) AND USING THE COLOR CODED LEGEND MAKE AN ASSESSMENT OF HOW WELL THE UNIT PERFORMED THE SIMULATION TASKS

- THE UNIT CAN SUCCESSFULLY PERFORM ITS SIMULATION TASKS TO STANDARD

GREEN AMBER RED BLACK

BLOCK 9-OVERALL

TSB COMMANDER'S OVERALL MISSION ACCOMPLISHMENT ESTIMATE OF THE UNIT'S ABILITY TO MOBILIZE, DEPLOY AND PERFORM WARTIME MISSION REQUIREMENTS

GREEN AMBER RED BLACK

BLOCKS 10-25

- DOES NOT REQUIRE A RATING 1-5
- DATA SOURCES VARY (I.E. TAMS, DEPLOYMENTS AND EXERCISES)

BLOCKS 10, 11 & 12

BLOCK 10. ENTER THE DATE THAT THE URER IS BEING UPDATED

BLOCK 11. ENTER THE UNIT COMMANDER'S RANK AND FULL NAME (FIRST NAME, MIDDLE INITIAL, LAST NAME) AND THE DATE HE ASSUMED COMMAND (MM/DD/YY)

BLOCK 12. LAST MOB DEPLOYMENT - ENTER DATE OF LAST MOB DEPLOYMENT (MM/DD/YY). IF NONE LEAVE BLANK

BLOCKS 13, 14, & 15

BLOCK 13-ODT. INDICATE THE DATE (MM/DD/YY) THAT THE UNIT'S COMPLETED ITS LAST OVERSEAS DEPLOYMENT TRAINING.

BLOCK 14. OPTIMAL FOCUS - ENTER DATE OF LAST OPTIMAL FOCUS (MM/DD/YY). IF NONE LEAVE BLANK.

BLOCK 15. CALL FORWARD - ENTER DATE OF LAST CALL FORWARD (MM/DD/YY). IF NONE LEAVE BLANK.

BLOCKS 16, 17 & 18

BLOCK 16-POSITIVE FORCE - ENTER DATE OF LAST POSITIVE FORCE (MM/DD/YY).

BLOCK 17-OFF DMOSQ - ENTER NUMBER OF OFFICERS WHO ARE BRANCH QUALIFIED AND CURRENT IN PROFESSIONAL DEVELOPMENT.

BLOCK 18-WO DMOSQ - ENTER THE NUMBER OF WO WHO ARE QUALIFIED THROUGH THE FIRST FOUR DIGITS OF THE MOSC

BLOCKS 19, 20, & 21

BLOCK 19-ENL DMOSQ - ENTER THE NUMBER OF ENLISTED SOLDIERS WHO ARE QUALIFIED THROUGH THE FIRST THREE DIGITS OF THEIR MOSC

BLOCK 20-TOTAL DMOSQ. ADD THE TOTALS OF BLOCK 17, 18, 19 AND ENTER IN BLOCK 20.

BLOCK 21-METL. MARK (YES/NO) WHETHER THE UNIT'S METL HAS BEEN APPROVED BY THE METL APPROVAL AUTHORITY LISTED IN APPENDIX B TO FORSCOM REG 350-2 AND THE DATE APPROVAL WAS GRANTED

BLOCKS 22 & 23

BLOCK 22-YTP. MARK (YES/NO) WHETHER THE UNIT'S YTP HAS BEEN APPROVED BY THE YTP APPROVAL AUTHORITY LISTED IN APPENDIX C TO FORSCOM REG 350-2 AND THE DATE APPROVAL WAS GRANTED

BLOCK 23-AT. INDICATE THE YEAR AND TYPE OF ANNUAL TRAINING PROGRAMMED/CONDUCTED FOR THE CURRENT AND THE TWO PREVIOUS TYS. FOR EXAMPLE DURING TY00, LIST TYS 00/99/98, IN THAT ORDER. FOR TYPE OF TRAINING, LIST ONE OR MORE OF THE FOLLOWING: LANE/TAM/CTC/ ODT/ JCS EX /USARC/ EX/INCREMENTED TNG/YEAR ROUND TRAINING (YRT) OR OTHER (SPECIFY)

BLOCKS 24 & 25

BLOCK 24-TRAINING PRIORITY. INDICATE IF THE UNIT IS FSP, RO, LAD<30, ESB, ARNG DIV, OR "ALL OTHERS." APP B & C TO FC REG 350-4 ARE THE SOURCE FOR PRIORITY UNIT LISTINGS

BLOCK 25-COMMENTS. EXPLAIN THE OVERALL ASSESSMENT STATING THAT THE "UNIT IT PREPARED TO MOBILIZE AND DEPLOY AND ACCOMPLISH THEIR WARTIME MISSION". IF THEY ARE NOT PREPARED, ADDRESS WHY THEY CANNOT ACCOMPLISH THE MISSION AND WHAT IT WILL TAKE TO GET THERE

ALSO ENTER COMMENTS WITH DATE OF ASSISTANCE MISSION AND ASSESSMENT OF TRAINING SUPPORT CONDUCTED. NEXT NEW ENTRY WOULD BE ADDED UNDER THE PREVIOUS COMMENT DATE, THUS ALLOWING A SEQUENTIAL LOOK AT THE TRAINING READINESS PROGRESS OF THE UNIT, AMOUNT OF TRAINING SUPPORT PROVIDED THROUGHOUT THE YEAR AND ANY SPECIAL ITEMS OF TRAINING INTEREST THAT REQUIRED CLOSURE.

CARE MUST BE USED WHEN ENTERING SEQUENTIAL DATED COMMENTS DUE TO THE FACT THAT IF THE DATA IS OVERWRITTEN ALL PREVIOUS COMMENTS ARE LOST.

ISSUES

QUESTIONS?

QUANTITATIVE / QUALITATIVE ASSESSMENTS

COLOR	QUANTITY	T-P-U	S-I
GREEN	85-100%	T	S
AMBER	70-85%	P	
RED*	50-70%	U	I
BLACK*	< 50%		

*REQUIRES NARRATIVE COMMENTS

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