

DEPLOYMENT OF THE NATIONAL GUARD: MOBILIZATION IN CONFUSION

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MOBILIZATION IN CONFUSION**

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ABSTRACT

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The current mobilizations of the Reserve Forces of the United States in support of Operation Iraqi Freedom and Operation Enduring Freedom have been attenuated with serious problems caused by a weak and outdated mobilization plan. Historically, American military efforts for large scale mobilization of its reserves and conscript generated forces have never occurred smoothly and resolving the problems have taken considerable time. The current set of mobilizations have fared no better and the problem continues to be solved through multiple adjustments to National and Forces Command policies causing confusion and frustration within both active training units and the reserve forces. This project examines historical mobilization efforts of the latter half of the 20th Century and the most common problems of the current mobilizations; specifically as it applies to the National Guard. The research reveals a definite

disconnect between the U.S. Army's intended mobilization process and end state, and the activities within the states using New York as an example.

DEPLOYMENT OF THE NATIONAL GUARD: MOBILIZATION IN CONFUSION

Mobilization of a strategic reserve is one thing....mobilization of an operational reserve is quite another.

—Major General Joseph J. Taluto¹

The epigraph above captures the concern of a senior National Guard leader over the mobilization process as it exists today. While problems with the mobilization process affect every component it can be argued that any mobilization problem manifests itself most heavily within the Army National Guard.

This purpose of his paper is to offer recommendations to problems existing in the mobilization of the National Guard. In order to lay out the argument that problems do indeed exist and why, this paper will examine why it is now critical to permanently solve the problem of National Guard mobilizations, demonstrate how mobilization efforts have fared historically and finally explore the current mobilization process which initially manifested itself in confusion then responded to emergency repair efforts and reached the current period of efficiency.

The Transformation of the National Guard as an Operational Reserve

The imperative to solve National Guard mobilization problems is a critical step within the requirement of the Department of Defense that the National Guard become an operational reserve. Time will no longer be a resource which the active or Guard components can expend in mobilization yet it is time which the National Guard has historically required. As will be described later in this paper the process of mobilization of the National Guard has never been smoothly performed. The shift to a Strategic Reserve force capable of acting as an Operational Reserve is expensive, complex, and

will not be easily or quickly completed. Nevertheless, America's reluctance to reinstitute a draft makes it plainly obvious that the National Guard will augment the active military and it is essential to make this augmentation successful beyond the current period of conflict. Efficiency during mobilization is the first key to achieving rapid augmentation possible. Neither speed in moving through the mobilization process nor efficiency in manning, equipping or training the National Guard has been the historic hallmark of large scale National Guard mobilizations. Can this transformation survive the post war period of retrenchment which is likely to occur when faced with the anticipated reductions in both the Army's base budget and supplemental budgetary authorizations? Will the struggle to protect critical Army initiatives now underway cause a re-prioritization of the need to re-structure the Guard's transformation? Historic questions and ones which will profoundly alter the National Guard but the nexus between the National Guard and the active Army is the process of mobilization. This nexus, or perhaps better phrased, this gateway, has historically not functioned efficiently.

The Army National Guard is now unquestionably in a profound period of transformation. Not since the mobilization during World War II has the National Guard been afforded (or perhaps forced) to come to grips with the mobilization of the majority of its assigned personnel onto active duty (Title 10, USC). Simultaneously, the National Guard is increasingly required to respond to the growing threat of terrorism within the confines of the 54 states and territories. Both tasks demand serious, if not sweeping modifications to the National Guard's day to day operations and its capability to seamlessly, efficiently, and quickly produce quality results.

The National Guard cannot accomplish these tasks on its own however much it desires to do so. The Guard is only a part of the U.S. Army and the way ahead requires a shared vision, a shared plan, and most importantly, a shared view on the National Guard's worth towards the common overseas "war fight" and the defense of the home land. The legacy of 63 years of relatively low use of the National Guard as an integral asset within the larger U.S. Army during periods of conflict has created a system of high intensity repair for the selected pieces of the Guard mobilized for various conflicts. The manning, training, equipping aspects of the National Guard have, by necessity, evolved differently than the active duty army. Underpinning every activity in the National Guard has been deep constraints in funding vis-à-vis like type units in the active army.

One of the most dramatic shifts has been in the role and the capabilities of the National Guard," he said. "For much of the last century ... the Guard was ... considered a strategic reserve standing by in case of a mass mobilization. It was not a priority for funding and equipment, even though its members had served in every conflict since the Revolutionary War.²

The strategic decision to maintain the National Guard as a Strategic Reserve set the conditions for the posture of readiness shortfalls and unfortunately, a condition of mistrust between the active Army and the National Guard which must now be overcome.

Historical Overview of American Mobilizations (20th Century)

In order to better understand the issues surrounding the mobilization of Reserve units in today's environment it is important to review past mobilizations. Historically, mobilization of the National Guard has been haphazard. The mobilization plans of the Department of Defense over the last 68 years have manifested themselves in standard patterns of inefficiency followed by hard won lessons learned, a period of sustained

efficiency (during each war) and finally a relapse back to stale inefficiency as the war receded with time .

A reading of Colonel Raymond E. Gandy's Strategic Research Project from 1991: "*Are the "Minute Men" Fast Enough, A historical Look at Pre and Post Mobilization*"³ offers a succinct review of mobilization challenges commencing with the mobilization of the United States Army for World War II through the Vietnam conflict. His conclusions indicate that within that period American militia call ups have been marked by confusion which was slowly resolved over one or two years unless the conflict ended sooner. He points out that the National Guard's poor military education, equipment shortfalls and manpower shortages persisted for the post World War II period through Vietnam.

Korea. Although the massive national mobilizations of World War II provided, through painful experience, the road map for large scale mobilization of the reserves, these lessons were quickly forgotten as evidenced in the difficult mobilization of eight National Guard divisions during the Korean War. Those mobilized National Guard divisions arrived for training vastly under strength (some at only 50% of their authorization) and their equipment was in deplorable condition or obsolete. Training was perhaps the most egregious area of concern for those deploying divisions.

They [National Guardsmen] had not been resourced or trained to the same standards expected of them in combat. On top of all this individuals and units activated in the Korean conflict were "speed trained" and sent into combat in far less time than in WWII. Combat losses and unit histories show clearly the results of this training⁴

Berlin Crisis. During the 1961 Berlin Crisis four National Guard Divisions and over 447 other Reserve and National Guard units were activated equaling nearly 45,000 individuals. In this single event, the Army and the National Guard seem to have come

closest to achieving efficiency during mobilization. National Guard units were selected early by the National Guard Bureau. Although these units were not yet federalized they became “highlighted” by the Department of the Army, the National Guard Bureau, and their respective states, for training and resourcing.

The results of this “head start” program show dramatic differences from the Korean call up. The 32d ID and the 49th Armored mobilized on 1 October 1961 at 98.3 percent of war time strength! Compare this to the less than fifty percent of the 40th ID for Korea. In addition, of those mobilized, 97 percent of the personnel were either prior service or had been through six months of active army training⁵

The Berlin Crisis mobilization was the exception to the rule as far as large scale mobilizations in the 20th Century was concerned. Early alerts, training done prior to federalization, and high manning levels indicated a path to success. In large measure, these lessons again fell away over time.

Vietnam. The conflict in Vietnam was arguably the absolute nadir of mobilization efforts in U.S. history. Politics overshadowed nearly every aspect of the alert and mobilization process. Although over 20,000 National Guardsmen and Army Reservists were called to active duty during the Vietnam conflict this equated to only a small fraction of the gross numbers of Soldiers, Airmen, Marines, and Coast Guardsmen who served during the Vietnam era. The strategy used to expand the Army was conscription. For all practical purposes, the National Command Authority abstained from the use of its Strategic Reserve. Further, it is important to recognize that the actual process of mobilization for the few reservists called into active service was grossly mishandled.

The close hold nature of the political climate meant that partial mobilization plans developed during the Berlin Crisis could not be used and Army planners were forced to make it up as they went along. This

also insured that coordination with Continental Command and other staffs at USAR and NGB was poor to nonexistent.⁶

Post Vietnam. Following this unpopular war, senior leaders within the Army assessed that failure to heavily employ the National Guard denied the Army the emotional dynamic of “Main Street America” which large scale mobilization of the Guard brings to war efforts. Although not heavily engaged as a force in Vietnam many Guardsmen of the 1980’s, soldiers who observed the active Army’s miraculous resurrection centered around the All Volunteer Army, realized that removal of conscription as a manning technique by the active force made use of the National Guard and Reserves somewhat more likely.⁷ The opportunity to review the issue of Guard mobilization in an evolving manner did not occur. The Army, to include the Guard, thought only of mobilization of the Guard in the event of war with the Soviet Union. Guard use in limited theater war seemed improbable. The mobilization plans remained essentially as they were written for the next 20 years.

By the early 1990’s the reality of fighting either a single large war or two smaller theater wars with only the active military reinforced by the Guard and Reserves began to cause the most visionary leaders of the Army to begin to rethink the old paradigm for use of the Guard.

The battlefield of the future will be an affair of sophistication, complexity, and intensity little understood and never before experienced. We can anticipate little or no prior warning before the conflict begins which dictates that RC units will be deployed essentially in a come-as-you-are posture with relatively little, if any, post mobilization time to train.⁸

The introduction of the come-as-you-are mobilization combined with the policy of tiered-readiness reinforced the condition for continued disparity between the active and reserve forces as a normal situation. The active Army began a period of direct

competition with the Army National Guard for dwindling resources. The end of the Cold War exacerbated this situation and, in fact, stimulated debate as to the efficacy of a continued need for a large National Guard.

Gen, Carl Vuono, chief of staff of the Army (1987-1991) as the Cold War ended, presided over the first phase of post-Cold War force reductions. Vuono believed the Cold War's strategic reserve – the National Guard – was no longer needed after the Soviet Union collapsed and he argued the Guard should be drastically reduced.⁹

During this 20 year period, few, in or out of the Guard, doubted the hollowness and lack of readiness of the Guard. The Guard was sick and any objective review of the Guard saw this fact plainly. Unit Status Reports for strength were exaggerated, training evaluation reports conducted by active evaluators were candidly critical, and many Guard leaders were bluntly (if privately) honest – the Guard was not ready.

Desert Storm. During the mobilization of three “Round Out” brigades for Operation Desert Storm in 1990, all three brigades became mired in controversy that lingered until Operation Enduring Freedom (OEF) and Operation Iraqi Freedom (OIF) in 2003. None of the three brigades deployed. All achieved certification for deployment but only after an unexpectedly long train-up period following mobilization.

On the basis of our work, we concluded that the pre-mobilization training plans developed by the three round-out brigades were based on unreliable readiness ratings. Specifically, Second Army and III Corps officials were skeptical of the accuracy of the brigades' reported readiness ratings, even after these ratings were revised following mobilization. Key officials involved in the training of the three brigades believed that the readiness reports fell far short of capturing the true status of the brigades' combat proficiency.¹⁰

The active Army pointed to its metrics accumulated over years of work with the brigades and declared that the facts spoke for themselves. Controversy existed between the active Army and the National Guard over the accuracy and fairness of the process of

mobilization but the fact remained clearly evident for everyone in the Guard; its formations did not deploy and readiness shortfalls were the cause.

Training Support Brigades and their Impact. A critical aspect of the pre-mobilization process was the function of the Training Support Brigades detailed to the National Guard by the 1st United States Army. Mandated to conduct training readiness oversight and evaluations the TSB's did not gel with their supported units. The TSB's were heavily focused on the Round-out brigades who were designed to fill active duty divisions to their full authorization. Combined with the support and evaluation teams provided by the active duty divisions the TSB's did not achieve their goal of making the critical Round-out brigades interoperable with their active duty counterpart units.

The new advisor program's efforts to improve training readiness have been limited by factors such as (1) an ambiguous definition of the advisors' role; (2) poor communication between the active Army, advisors, brigades, and other National Guard officials, causing confusion and disagreement over training goals; and (3) difficult working relationships. The relationship between the active Army and the state-run Guard is characterized by an "us or them" environment that, if not improved, could undermine prospects for significant improvement in the brigades' ability to conduct successful combat operations.¹¹

The TSB's dedicated to provide Training Readiness Oversight (TRO) to the Guard were a little appreciated asset by those Guard units receiving their assistance. A spirit of suspicion stemming from a realization that each entity had a different agenda prevailed. The Guard was painfully aware of its shortcomings and the TSB was determined to expose them without offering resources (except trainers) to fix them. However, the National Guard directly and even profoundly benefited by the presence of the TSB's. The crux of the problem of seamless training oversight was command authority. The National Guard did not (and still do not) wish active Army officers to rate their officers and without rating authority the active Army TSB leaders could do no more

than advise. If the TSB had command authority over their TRO units they could have both identified problems and would have been responsible to provide resources to fix those problems. This vital link between the active Army, essentially its eyes within the Guard, could do little more than criticize. This situation remains in effect today.

Post Desert Storm. In the ten years following the Persian Gulf War little changed to alter the fundamental landscape of the relationship between the National Guard and the active Army nor were critical steps advanced to resolve mobilization processes experienced by the National Guard during Operation Desert Storm. Nevertheless, the documentation of National Guard deficiencies continued. Mandatory evaluations clearly captured the Army's critical observations of National Guard training; most tellingly during rotations to the Joint Readiness and National Training Centers. Although disputed by National Guard leaders, it was these reports which became official records of readiness and led to the United States General Accounting Office report to Congressional Committees in 1995 expressing deep concerns over the ability of Guard brigade's ability to move through the mobilization process in the allotted 90 day time frame.¹²

Unit Status Reports (USR's) were submitted by National Guard commanders from battalion level and up depicting the state of readiness throughout the National Guard on a quarterly basis. Creative accounting methods, in some cases outright falsehoods were submitted by small numbers of Guard officers under steep pressure to depict their units as healthy in strength. Not officially sanctioned and certainly punishable if discovered, "fudging" USR numbers became a game of "cat and mouse" which the agencies responsible for insuring accuracy failed to correct it. Ostensibly,

payroll records were kept, metrics on strength and equipment readiness were developed and reported upon and training results were published by the TSB's on nearly all National Guard units. What should have been a fully assessed component ready for mobilization was, in fact, a tangle of units of varying capability, profoundly low strength, and, at best, weak equipment readiness levels.

Pre OIF/OEF Mobilization Doctrine and Policy. The process which has guided National Guard mobilization preparedness has been the FORSCOM regulation Series 500, Forces Command Mobilization and Deployment Planning System. The regulation most familiar to National Guard commanders and their staff is FORSCOM Regulation 500-3-3, the Reserve Component Unit Commanders Handbook (RCUCH).¹³ This document was essentially the "bible" for mobilization preparedness in the National Guard in the decades prior to the 21st Century. The RCUCH is a five phase plan which begins with pre-alert activities and ends with the activities required at the port of embarkation. The most current version, published in 1999 is still in force. This document and the activities it directs are "inspectable" items in any National Guard unit and poor performance or willful disregard were cause for punitive actions against the responsible commander.

A National Guard unit's mobilization preparedness has historically flowed from its superior commanders Mission Essential Task List (METL) and Yearly Training Guidance (YTG). If a National Guard unit was also a high "tiered" unit and had a corresponding high Force Activity Designator (FAD) it would receive additional guidance through its FUSA advisor unit although many National Guard units were designated a FAD too low to receive regular interface with 1st United States Army advisors.

The active Army did not require mobilization exercises of the National Guard with the exception of observing their movements to annual training once a year. In essence, mobilization readiness was a Guard problem to solve; one among many and arguably one of the less pressing in the decade preceding OIF and OEF. Problems considered serious enough to warrant a commanders undivided attention in the 1990's were unit strength, constructive attendance, efficient expenditure of allocated funds which supported unit training, maintenance, armory appearance, and rapid responsiveness to "Aid to Civilian Authorities" missions.

There was little time for a "Traditional Guard" commander and staff to accomplish even those activities to standard although all worked tirelessly to perform those missions.

Historically, the policy of "tiered readiness" means that, in a resource-constrained environment, where there is insufficient funding to resource all units simultaneously with the latest equipment and training, those units expected to deploy first receive the newest equipment and funding. This resource allocation strategy ensures that the first units to deploy can do so immediately, without delays for receipt of newer equipment, additional people, and/or training. Consequently, the reserve components, which were expected to have more time to get ready, have received less funding, less training, and less modern equipment than their active component counterparts. RC forces make up over 54 percent of the total force; yet receive less than 11 percent of the Army's budget.¹⁴

Although funding for the National Guard can be legitimately and honestly argued from multiple perspectives, the simple fact, daily made obvious to nearly all Guardsmen was that they lacked enough funding to do anything but the basics in training and equipping themselves. As small as even the issue of appearance might seem, simply finding funds to buy paint for rolling stock, perform critical maintenance on every type of equipment or conduct truly essential training was hard to the point at which it sapped morale of soldiers at all grades.

Mobilization preparedness was paid creative lip service and was the proverbial “can kicked down the road”. In fact, really no one knew what right should look like for mobilization preparedness. Units trained, maintained, recruited, and administered themselves with remarkably little oversight and mentorship. The period between the end of Operation Desert Storm and the cataclysmic event of September 11, 2001 was a period of lassitude within the National Guard in which readiness and mobilization preparedness was not truly the priority. Strength maintenance and recruiting consumed the energies of Guard units. The recognition that unit survival hinged on strength drove commanders at all levels to that end above all else. Training, maintenance, and mobilization readiness simply could not compete with gaining and maintaining strength yet in many units strength continued to fall. This condition became a downward spiral which sapped morale, efficiency, and readiness.

Mobilization Process in Early OIF/OEF (2003-2005)

As National Guard units received their alert orders for OIF many states either placed their calls to FUSA (or received them) with confusion as to what would occur next. Did the practices and policies of RCUCH fully apply? No one seemed to know for sure what the policies were and so began a process of adaptation, crisis learning, and continual discovery. The commander of the 42nd Infantry Division had direct visibility on the process of mobilization prior to OIF/OEF as a then brigadier working within the FORSCOM HQ's:

The Mob process has been studied and studied during peacetime. I can say that with credibility as a 43 year full time National Guardsman. In 2002 a serious mob study was undertaken at FORSCOM. I was working there at the time, but frankly, even the study did not address what our needs are and what we are doing today...¹⁵

The 42 Infantry Division, New York Army National Guard, After Action Review (AAR) provides numerous insights into the confusion experienced by major units deploying in 2004.

Prior to the 42ID being mobilized there was no existing template to mobilize an ARNG Division. The Division Commander and Brigade Commanders are responsible for training their units. The 42ID Commander was given the authority by CG, HQ1A to determine necessary training. However, the ARNG BCT Commanders were not afforded this opportunity. This resulted in uncoordinated training across the command. The mobilization spanned 29 states and included over 14,000 RC/ARNG personnel. The complexity of the mobilization of a Division headquarters required command relationships with all subordinate elements to fully synchronize post-mobilization training efforts. One example of this breakdown involved the Division's contact with the 116 BCT. Headquarters, 42ID was under 1st Army. The 116 BCT was under 5th Army. As a result, 42ID did not have DIRLAUTH (direct liaison authorization) with the 116 BCT. Command relationships also created challenges with funding for schools, TDY, and PDSS. Additionally, HQ1A retained control of all funding until the Division left CONUS.¹⁶

Simply assembling the division was an area of complexity that no agency within the mobilization process had addressed prior to the 42nd ID's alert. This is clearly evident from a review of the manning, equipping, and training functions.

Manning the Force; Early OIF/OEF (2003-2005). Many National Guard units were now faced with the challenge of filling themselves to their authorized strength. Within the 42nd Infantry Division, the division G1 struggled to adjust its existing Army of Excellence (AOE) MTOE to mirror active Army MTOE's. Sections such as the G8, G6, G2X/G2 Fusion Cell, G1/G4 LNO augmentation, G5 Plans, G6 Plans, a Liaison Section, Safety Section, and a PAO Section did not exist in the MTOE of the 42nd and had to be created, manned, and trained during the pre-deployment phase of the operation.¹⁷ The area of Soldier Readiness Checks (SRC) continues to be among the most controversial aspects of any National Guard mobilization. Few National Guard leaders who

experienced SRC's of their units in 2003-2005 would fail to offer observations of confusion both within their states and at their mobilization stations and each side offered regular criticism towards the other. In 2004 the 42ID experienced different SRC processes at the two different mobilization stations used by 1st Army. Fort Drum did their SRC process one way while Fort Dix did it another. This caused division staff officers to move between the two mobilization stations to provide oversight.¹⁸ No major Guard formation has mobilized without significant strength challenges as the states from which they come cannot provide fillers to those units without taking them from the non deploying units. Again, this problem has not been fully solved.

Equipping the Force; Early OIF/OEF (2003-2005). While manning and organizing the force were distinct challenges in the early mobilizations of 2003-2005, the issues of equipping and training caused the most serious angst among leaders and soldiers. The equipment issues of the early mobilizations have changed but not gone away.

In the early mobilizations the problems caused by tiered readiness caused National Guard units to deploy to their mobilization stations with MTOE property which was often outdated. Major end items such as M35 "Deuce & a half's" and M113A2 armored personnel carriers were entrained and moved to the mobilization stations to the surprise and dismay of the active duty 1st Army training teams and the installation material managers¹⁹.

Much of this equipment, deemed not necessary by both the 42nd ID and the 1st United States Army, was redeployed, at considerable effort in time away from training, back to the states from which this equipment had been provided.²⁰

The “come-as-you-are-war” and tiered readiness issues of these vehicles generated a negative perception by the American public of the National Guard well beyond the battlefield reality.²¹ Many National Guard after action reviews (AAR’s), refer to equipping issues in tremendous detail. The fact that some active units also deploy with older equipment and serious shortfalls is not well known to most Guard soldiers who see themselves as perennially at the end of the equipment pipeline. Regardless, most of those under resourced active units were not combat units whereas the Guard formations were. The corrective curve at the mobilization stations was immense.

Training the Force; Early OIF/OEF (2003-2005). Training the National Guard formations at the mobilization stations during the early years of OIF/OEF was the area of greatest concern to Guard soldiers and their families. The 42nd Infantry Division’s AAR is again informative:

Issue: Relevancy of Tasks for Training Certification

Discussion: Many of the individual tasks trained at the mobilization stations were not relevant to the current environment in Iraq. For example, some of the mandatory tasks were self-extraction from a minefield, land navigation and react to NBC attack. These were not relevant tasks in OIF III. More instruction was required for example in Rules of Engagement (ROE), specifically those related to convoy movement. Many Soldiers in OIF III lacked discipline when engaging targets on convoy movements. TF Liberty had to publish FRAGO 211 detailing ROE regarding warning shots and use of graduated force. This type of training was far more relevant than many of the tasks that were required for certification.²²

Training plans, when transposed into a calendar format were referred to as a “Horse Blanket”. Units arriving at the mobilization station were surprised to learn that 1st United States Army expected them to develop their own training plans and horse blankets. These units were provided small TSB teams who would advise them on how to best translate the lists of required training into manageable training days but with few

exceptions were left to figure the process out as best they could. For the vast majority of the training the unit provided their own “trained-trainers”.

All individual training was conducted in this fashion. The same units and soldiers who were evaluated by the TSB’s prior to OIF/OEF as deficient during training evaluations were now fully expected to (in large measure) train themselves. The TSB stepped in to train a small number of critical blocks of collective training but often few of these soldiers had yet seen combat and were only able to teach what they believed was tactically sound. Soldiers knew of the emerging threat in Iraq and paid strict attention to these trainers. Later, many soldiers came to question why they were not exposed to training which reflected the current situation in theater and complained that some of the training they had received was wrong. Exacerbating this problem was the fact that subordinate brigades below the 42ID trained at different mobilization stations with different training standards. Extracted from the 42ID’s AAR, the division G3 highlighted the problem succinctly:

An evolving battlefield environment generating new doctrine and TTP’s requires continuous situational awareness to ensure relevant training is conducted. The TSB Commander rewrote his training plan based on observations from the first PDSS (pre-deployment site survey). As the training program matured, the Fort Drum MOC (mobilization operations center) and TSB relinquished most of their responsibilities to the Division staff particularly in the management of TDY, schools, and eventually post-mobilization training. The feedback the 42ID received from the 116 BCT and 278RCT Commanders was that the same process did not occur within their commands. Upon return from the PDSS, the 116 BCT and the 278 RCT Commanders were not afforded an opportunity to adjust their training program based on their in-theater observations. Consequently, their training programs failed to reflect the evolving operational environment.²³

Training on New Equipment; Early OIF/OEF (2003-2005). To add to the already enormous complexities of selecting which training National Guard formations should conduct in preparation for a changing theater of war nearly all National Guard units also

found themselves forced to divert major periods of precious time to training leaders, staffs and Soldiers on the new equipment suddenly flowing into their units. In 2003-2005 most of this equipment was fielded at the mobilization station. From the sudden storage and transportation challenges placed on soldiers as they struggled to keep up with the flood of new uniforms and equipment to the much more difficult demands of mastering complex new command and control (C²) systems and becoming licensed on new vehicles, the National Guardsmen found themselves nearly overwhelmed. Unsaid throughout the turbulent process of new and demanding training and managing the new equipment was the demand on leaders at all echelons. From generals to privates everyone was learning skills ranging from how to wear new body armor all the way up to the nearly impossible task of commanding large formations in the new “contemporary operating environment (COE) of an insurgent Iraq or Afghanistan.

Current Mobilizations (2006- Present)

As in past major mobilizations, the entire system is now settling down into a sustainable period of efficiency. A number of major adjustments have occurred that have reduced the swirl of unknown challenges and have brought order, predictability and relative calm to the mobilization process. There are countless day to day problems that every deploying unit and 1st United States Army seek to solve and it is unrealistic to expect that this situation will ever be alleviated even under the most efficient of mobilization systems but as a whole it is effective. However, there remain a small number of significant challenges to mobilization which have yet to be completely solved; MTOE mismatches, manning stability, equipment shortfalls, and pre-mobilization training within the states. This last item is critical because the 1st United States Army

now considers the notification of sourcing (NOS) (up to 2 years prior to mobilization day) to be the start point of mobilization. A brief examination of these systemic problems is warranted, first, it may be beneficial to examine what is now working well.

What is Working? The process of mobilization has now proceeded sufficiently within this current set of conflicts to have settled into a period of mobilization efficiency. Historically, this was to be expected. Despite a cumbersome and difficult to use FORSCOM doctrine both the active Army training and equipping community and the National Guard have evolved substantive fixes to the current set of challenges and have reached a state of sustained unit throughput. Large Guard units are now being alerted, mobilized and deployed to the Combatant Commander's area of responsibility in a timely manner and are entering the war fight sufficiently manned, trained, and equipped to be of value without the earlier problem of continuing the repair of those units while in contact with the enemy. Five significant changes led to this period of success and equilibrium.

The Guard has performed sufficient deployments to have learned its own mobilization and war fighting lessons and has brought those lessons home. Not least of this effect are the maturation of the Family Readiness Program and the overall harmonization of Guard families into the mobilization process.

1st Army has processed hundreds of Guard units through the mobilization process, has streamlined its processes and has issued clear and effective execution orders (EXORDS) to the Guard to codify this process.

The Army budget has provided sufficient funds to the mobilization process to permit every actor within the mobilization process the resources necessary to overcome the most egregious manning, training, and equipping problems.

The ARFORGEN process has begun to work. Predictability in the rotation schedule has permitted the Guard enough alert time to set units up for success. ARFORGEN has permitted the invention of the Notification of Sourcing year which has allowed the Guard to advance countless man/train/equip functions heretofore unachievable until mobilization. The complete list of advantages is long.

The States have constructed their own efficient mobilization processes and have become active partners with 1st Army in a “design through launch” mobilization process. The Adjutants General of the States retain certification authority of all training required to be performed prior to arrival at the mobilization station. This partnership, and the collegiate manner in which it has evolved, has done much to eliminate friction between deploying units, the TSB’s, and the States. It must be sustained.

The paragraphs listed above barely scratch the surface of the often small improvements that have cumulatively overcome the nearly insurmountable inertia experienced from 2003 to 2005. A great concern must be that these adjustments will remain in place only as long as OIF/OEF demands the current level of force flow from the National Guard but will never be included in the FORSCOM mobilization doctrine.

What’s not Working? Although the section above may indicate the worst is behind us, systemic problems continue to accompany most mobilizations. As stated above, each of the four critical areas of mobilization: MTOE mismatches, manning

stability, equipment shortfalls and in-state training support requirements continue to manifest themselves in many mobilizations and generate serious problems.

National Guard units mobilized and deployed to missions significantly outside their MTOE design strain those Guard units disproportionately as compared to active units. Within the constraints of time imposed by the mobilization process most Guard units struggle to man, train, and equip under the best of circumstances. Guard units, by their very nature, are ill prepared to rapidly transform themselves into non standard formations. Simple geography while at home station means that most units have sub units scattered across an entire state. Efficient leadership and detailed planning are critical in the execution of transformation. Those enabling functions along with the synchronization of training and equipping a new force structure are so complex as to be nearly beyond the capacity of a Guard IBCT with a span of control of many hundreds of miles. Lastly and often lost on the active Army, the Guard is a community based organization so completely centered on home town pride and family involvement that stripping away unit identity or employing sections of a Guard unit below battalion level profoundly damages the identity and spirit of a Guard unit. This issue may sound trite but nevertheless, it resonates deeply across the Guard community.

Manning stability is the cornerstone of the Guard. Commanders continue to be faced with the stark reality of finite numbers. Each commander has what he has and when under receipt of a NOS he has to begin to make fair, hard choices concerning who can and should be deployed. AAR comments of the 39th IBCT from their deployment in 2008 clearly indicate that the need to stabilize the brigade upon alert is essential to subsequent operations.²⁴ Soldiers continue to leave formations after alert

despite “stop-loss” as they gain release due to SRC, family, and work conflict problems. Additionally, the new replacements force the unit to redo blocks of training again and again which slows the tempo of training completion; both great concerns to the states and 1st Army. Of perhaps greatest concern to both the Army and the Guard is the impact on “feeder” units supplying either Soldiers as individual replacements or whole unit entities taken from one command to plug into the deploying formation in order to bring it to no less than 100 percent of its authorized strength. “Breaking” units has been and will continue to be a plague on Guard mobilizations.²⁵

Equipment shortfalls are both a blessing and a curse; a blessing in that many Guard units were so poorly equipped prior to mobilization that almost all of their current deployment property had to be fielded during deployment and is now “state of the art” rather than “good enough” to accomplish the mission. The curse has been the demands on Soldiers, staffs, and commanders forced to deal with this problem at the expense of training. Under tiered readiness many Guard Units received “hand-me-down” older equipment after the active forces received newer items. Secretary Gates has directed that the problem be resolved.²⁶ Currently however, Guard units continue to move equipment throughout their states and periodically across state lines in order to equip their deploying formations as per the Mission Essential Equipment Lists (MEEL) provided from the Combatant Commanders.

An outgrowth of the welcomed requirement of the states to train and certify their own formations prior to arrival at the mobilization stations was the need to create a state built force of trained-trainers with the mission of overseeing the training and documentation which led to the ability of the Adjutants General of each state to

accurately certify deploying units. 1st United States Army, NGB, and the states worked to slowly develop the concept of the now in place Part Time Training & Evaluation elements (PTAE) which are (ostensibly) scalable to meet the needs of any sized unit the state is tasked with deploying. This element was absolutely critical to the success of the 27th IBCT in 2008.²⁷ These elements provide much the same capability of the TSB's which have been drawn off to the mobilization stations and are vital assets which needs to be retained beyond OIF/OEF.

What must also be recognized is that it takes a substantial force of Soldiers, well beyond the PTAE, to provide the myriad training support requirements needed by an IBCT. The 27th IBCT engaged in the equivalent of three annual training periods for the majority of Soldiers as well as a tailored block of specialty training provided by 1st United States Army. The training support package necessary to properly train the 27th IBCT included overall training site C² provided by the 42ID staff, opposing forces (OPFOR) provided by multiple battalions of non-deploying units, and considerable other logistic supporters both within the state training areas and also at the mobilization stations. The end result was a "best" prepared deploying unit and multiple non-deploying units that had had their Yearly Training Plans (YTP) and their Annual Training Plans completely disrupted. These units were also part of the overall ARFORGEN model and did not accomplish those tasks required of the year of the cycle they were within. There can be no doubt that providing the deploying brigade this resource was beneficial and perhaps critical to their successful preparation but it came at a large cost to the non-deploying units.

Shifting deployment training earlier on the calendar, “to the left” as horse-blanket managers usually refer to the process, most certainly comes at a cost to many units and agencies. As discussed earlier, success is made possible through full funding of new initiatives. This fact cannot be overstated. Deploying large National Guard units is expensive. The burden of training these units at home station is new. Other than the few federal installations available, training has to be performed in the existing state training areas which are not normally fully equipped to support such involved and large scale efforts. In the case of an IBCT the unit will always cover large geographical areas of the state. Simply gathering the brigade together is a considerable expense. When it is decided to conduct training as small units, across a state, it requires that the trainers and certifiers move to each armory or training area. This plan also incurs considerable expense.

There are many hidden expenses in this new process but all can be overcome with a quick and effusive outlay of funds. Any failure to commit funds in the future as have been dedicated in the recent past will severely and negatively impact on any large scale pre-mobilization effort.

Conclusion

The lessons in mobilization from WWII to the present period speak to the nature of National Guard mobilizations as a process of learning and forgetting. In fairness, if “forgetting” is the wrong word then failing to update mobilization plans and policies is irrefutable. America’s unspoken decision to refrain from employing a conscript army places a new demand on the readiness of the National Guard and Reserves. More immediately, the transition from a Strategic Reserve to an Operational Force (an

Operational Reserve when the nation is not in conflict) poses resource challenges which will only grow larger as this process continues. We are now moving quickly towards the oft stated condition of the “come as you are” war fight for the National Guard. Unlike in decades past, when that phrase meant the Guard might be expected to deploy in a condition of questionable readiness it now implies that these formations must deploy in exemplary condition. Today’s mobilization process must be efficient, short, and deliver dependable forces with nearly seamless interoperability to a combatant commander who has no time and resources to fix Guard units in theater. We no longer have the time to sort out mobilization processes.

Historically, the Guard experienced mobilization confusion, inefficiency, and staggering ineptitude in the early months (and even years) of each war of the 20th century and the first one of this century only to resolve itself through painful evolution and extraordinary local and national efforts. Mobilization doctrine and policy, while voluminous, was demonstrated to be out of date, difficult to adjust, and not adequate for contemporary conflict.

The long standing condition of tiered readiness, with its implications for wide ranging equipment and training standards has shown itself to be nearly unsupportable in the eyes of American parents (of either active or Guard soldiers) who find it unacceptable to send their sons and daughters to combat with anything less than the best equipment and training.

The contorted evolutions of the mobilization process currently underway have indeed evolved to a point where endless formations of National Guardsmen are now efficiently moving through the mobilization pipe line and into theater. However, it took

nearly 4 years to resolve the most disrupting factors and achieve this level of efficiency. Few would argue that the National Guard mobilization efforts supporting OIF and OEF went as designed. The plan designed in the FORSCOM Reg. 500 series was heavily modified. The vision of 1st U.S. Army, the National Guard Bureau and the offices of the Adjutant's Generals of the 54 states and territories was altered by new challenges with each new unit entering the mobilization process.

The emphasis of the Army's mobilization planners must now shift to redesigning the mobilization plan. Unit After Action Reviews, comments by Guard and 1st US Army commanders, lessons learned by mobilization stations and state planners must all now be collected, synthesized, and re-formulated to become the new mobilization policy. There are countless lessons learned by senior and mid-grade officers in both the active Army and the National Guard which are accessible only as long as those officers remain in their current positions. As they move away from those positions the institutional memory they built to overcome the endless set of problems encountered in 2003-2005 and truthfully even today will be lost. The Army must act quickly to capture these lessons, rebuild policy, reallocate resources, and set the conditions for tomorrow's mobilization. That mobilization, when it comes, will determine if both the active Army and the National Guard of today worked hard enough for tomorrow's young warriors.

Endnotes

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¹⁸ Ibid, 5.

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