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United States Marine Corps Reserve Officer Manpower Shortage:  
Addressing the Issue at the Company Grade Level in Today's Operating Environment

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## **Executive Summary**

**Title:** United States Marine Corps Reserve Officer Manpower Shortage: Addressing the Issue at the Company Grade Level in Today's Operating Environment

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**Thesis:** Requiring company grade officers exiting the Active Component (AC) to affiliate with a Selected Marine Corps Reserve (SMCR) unit for the remainder of their Military Service Obligation (MSO), as opposed to the current commitment of service in the Individual Ready Reserve (IRR), will further enhance the Marine Corps Reserve's contribution to the Long War.

**Discussion:** From the inception of the Long War, the Marine Corps Reserve has proven to be a force multiplier to the AC as the SMCR has transitioned from its historical function as a strategic reserve to its current-day role as an operational reserve. This success has occurred in spite of no significant changes to the now outdated policies that historically have caused a shortage of reserve officers at the company grade level. Until recently, policies in place did not allow the SMCR to "grow their own" company grade officers, and currently still do not require junior officers exiting active duty to affiliate with an SMCR unit. Traditional "work arounds" have been to fill company grade officer billets with majors (if available and amenable) or Staff Noncommissioned Officers (SNCOs). Although not ideal, prior to the Long War this solution was adequate in a garrison or training environment; however, this is not the case today. Today's SMCR units are activating and deploying at previously unimagined rates with no anticipated relief in sight. In addition to the previous solutions to the problem, currently in many instances the active duty Inspector-Instructor (I-I) or officers on the I-I staff deploy with the SMCR unit, or other active duty or reserve officers from other units join the deploying unit once activated. This stop gap approach is neither an ideal nor a feasible long-term solution. If an SNCO is forced to step into a Platoon Commander's role for example, another junior Marine must fill the SNCO's shoes creating a domino effect. Having an officer join the unit immediately prior to deployment does not allow the unit to "train as a team" or allow for any sense of familiarity prior to deployment. Recognizing this Manpower concern, Marine Forces Reserve (MFR) and Reserve Affairs (RA) have implemented a series of programs and incentives in attempts to ameliorate the problem, but to date these initiatives have not had a significant impact. Now is the time to make the change necessary to update the outdated policies that cause this situation.

**Conclusion:** To sustain the current SMCR operational tempo for the future of the Long War and maximize the capability of the Marine Corps Reserve, requiring junior officers with active duty experience to fill leadership billets in an SMCR unit is critical. Doing so will increase the effectiveness of the unit by providing both experienced SNCO and officer leadership at the right levels while providing an element of stability to the unit as the officers will typically have a two year commitment. A pool of officers is available if, instead of affiliating with the IRR following active duty, company grade officers are required to fulfill their MSO with a drilling SMCR unit. Implementing this policy will improve the SMCR's capability and capacity in the Long War.

DISCLAIMER

THE OPINIONS AND CONCLUSIONS EXPRESSED HEREIN ARE THOSE OF THE INDIVIDUAL STUDENT AUTHOR AND DO NOT NECESSARILY REPRESENT THE VIEWS OF EITHER THE MARINE CORPS COMMAND AND STAFF COLLEGE OR ANY OTHER GOVERNMENTAL AGENCY. REFERENCES TO THIS STUDY SHOULD INCLUDE THE FOREGOING STATEMENT.

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## *Preface*

Having served as an Inspector-Instructor at the company level with Engineer Support Company (ESC), 6<sup>th</sup> Engineer Support Battalion, I have seen firsthand the contributions made by Reserve Marines in the Long War. As with the majority of SMCR units, ESC was successful in their two company activations prior to my arrival and three other partial activations during my tenure. What makes these successes even more impressive are the circumstances under which they took place. Each time the unit deployed it was under a makeshift leadership framework assembled “just in time” for deployment. Seeing this, I realized we as an institution are doing these Marines a disservice by not providing them with the continuity of leadership needed for sustained excellence. As impressive as the SMCR has been in recent years, it has the potential to contribute even more if given the chance through a policy shift. This paper is an attempt to put forth an idea to ensure junior officer leadership is in place to provide continuity and experience to SMCR Marines.

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*As the demands on our Reserve have grown in support of the Global War on Terror, we have found ourselves with a significant shortage of junior officers in key leadership positions.* <sup>1</sup> - General Michael W. Hagee  
Commandant of the Marine Corps

## **Introduction**

With the inception of the Global War on Terror (GWOT), or the Long War as the current Commandant of the Marine Corps General Conway has referred to it, Marine Forces Reserve (MFR) has transformed from a strategic reserve to an operational one. Manning structures, policies and practices that previously have met MFR's peacetime requirements need to be reexamined to ensure that MFR can continue to meet the country's and Marine Corps' wartime needs.<sup>2</sup> The Reserve Component (RC) was initially designed to facilitate a rapid expansion of the service in a strategic sense for a major war with the Soviet Union; however, increasingly since the mid 1990's the RC has evolved into an essential element of the Marine Corps operational forces, a trend that has been expanded since September 11, 2001.<sup>3</sup> Across the services, RC personnel use has increased from 12.7 million duty days in fiscal year (FY) 2001 to 61.3 million duty days in FY 2006. Since September 11, 2001, reserve personnel have been mobilized more than 597,000 times.<sup>4</sup> This phenomenon has taken a toll on MFR as a whole and has particularly highlighted the historical problem of company grade officer manning in the reserves.

The contributions and successes of MFR in today's conflict are well recognized and unparalleled in terms of impact to mission and duration. From Operation Enduring Freedom (OEF) to Operation Iraqi Freedom (OIF) and in between, the role of MFR has been in the forefront. Whether the mission is combat operations alongside or augmenting Active Component (AC) forces, or providing relief to AC forces from auxiliary missions such as Theater Engagement, MFR has been a constant and reliable presence for the past seven plus

years. MFR has proven to be more than simply a force provider to the AC in the Long War; it has legitimately distinguished itself in combat operations while at the same time providing a much needed respite to the AC in terms of operational tempo. While the performance of Reserve Marines throughout has been central to the Marine Corps' and the nation's achievements thus far in the Long War, the nation remains at war and there is no doubt that MFR will continue to be counted on to provide a similar capability for the foreseeable future. In order to enhance MFR's ability to contribute to the future needs of the total force, fundamental changes are needed in manpower policies. In the words of LtGen Jack Bergman, the Commanding General of MFR, "In the long run, if the Marine Corps Reserve is to remain ready and relevant, we must begin to implement necessary changes to the superseded Cold War Reserve model."<sup>5</sup>

Even though the Long War has more than validated the MFR concept, MFR's current peacetime construct limits its potential as it does not provide a steady source of junior officers to fill critical leadership billets at the company and staff level. Given the expanded current day role MFR plays as a part of the Marine Corps total force concept, it is critical now more than ever for MFR to fill out key junior officer billets with competent and experienced personnel to provide steady leadership to Marines and an element of stability to units. Recognizing this dilemma, MFR through Reserve Affairs (RA) has instituted updated programs, policies and incentives in attempts to remedy historical company grade officer shortages in MFR's Table of Organization (T/O). The programs, policies and incentives introduced thus far are steps in the right direction; however, do not go far enough in providing a solution to the problem by affording a means of tapping into the pool of junior officers exiting active duty with no contractual obligation to affiliate with a unit to serve out their remaining Military Service Obligation (MSO). With the nation at war for over seven years, the time is now for what may be considered a radical change



in policy, but in examining the facts one will realize not only is this “radical” change necessary, it is long overdue. To continue the current level and quality of MFR’s contribution in the Long War, a shift in the current model of officer MSO needs to take place. Currently when exiting the AC following their initial obligation, the only requirement officers have is to serve the remainder of their MSO (typically 3-4 years) in the Individual Ready Reserve (IRR) where they are on the Marine Corps rolls in what can be described as an inactive reserve status, and are not compelled to participate as a member of an MFR unit. Now is the time to change the existing paradigm to one that has been referred to as a “continuum of service,”<sup>6</sup> where a transition takes place from AC service to service as a member of an MFR unit for the remainder of their MSO. This concept will not only benefit MFR by injecting greatly needed junior officers into unit T/Os, but the Marine Corps as a whole will benefit in the long run by having a more robust and capable RC. While benefitting the total force, this model will still allow the officer to pursue life and a career in the civilian sector with a minimal additional commitment that if planned and executed effectively would not impede their ability to fulfill their post-active duty plans. Adopting this idea will leverage the experience of junior officers at a critical time in our nation and Corps history where much already has been asked of and given by Reserve Marines.

### **Current Construct**

The MFR Strategic Plan 2007-2012 lists its mission as follows: “Marine Forces Reserve prepares and provides units and individual Marines to augment and reinforce active forces for employment across the complex spectrum of crisis and conflict.”<sup>7</sup> The Marine Corps Reserve consists of the Ready Reserve, the Standby Reserve, and the Retired Reserve.<sup>8</sup> For the purposes of this discussion, focus will be on the Ready Reserve, in particular the Selected Marine Corps Reserve (SMCR) and the Individual Ready Reserve (IRR) within the Ready Reserve.

The SMCR is structured to mirror the AC in that it has a Division, Wing, Logistics Group, and headquarters, each with subordinate units similar to their AC counterparts. The IRR is a manpower pool of Marines who have previously served in either the AC or the SMCR and have chosen to fulfill the inactive portion of their MSO in the IRR rather than remaining in the AC or SMCR.<sup>9</sup> Marines in the IRR are considered to be in a non-obligor status, as they have completed their required active MSO (either active or reserve depending on the type of contract they signed) and cannot be compelled to return to their previous status, except for an IRR recall in rare and dire circumstances. When AC officers complete their initial MSO, choose to leave the AC and not affiliate with an SMCR unit, they enter the IRR. Once in the IRR, they virtually have no contact or commitment to the Marine Corps unless they chose to. These officers can remain in this status until the inactive portion of their MSO is completed, at which time they may elect to resign their commission and cut their ties to the Marine Corps.

Enlisted Marines can join the SMCR one of two ways. They either enlist to join the SMCR directly, or they may affiliate following the completion of their initial active duty commitment. Until recently the only source of officers for SMCR units was following their initial active duty commitment. This concept created an obstacle that greatly contributed to the junior officer staffing problem as it denied the reserves the ability to directly access junior officers into their units following their commissioning and initial training, resulting in the officers joining the SMCR being either senior First Lieutenants or junior Captains upon joining the reserves following their active duty commitment. While it is not necessarily a problem to have an officer fill a billet either one rank up or down, in reality in the SMCR scenario it is generally beneficial as it is typically a more senior and experienced officer filling a billet one rank down, such as a Captain joining an SMCR unit and filling the billet of a platoon commander. In this instance the

issue is lack of quantity, with not enough officers joining the SMCR to fill the number of billets available.

The central problems associated with the current construct are that the pool of officers available for duty with SMCR units is limited to those exiting the AC following their initial active duty commitment, there is no obligation for them to affiliate or remain affiliated with an SMCR unit, and the Military Occupational Specialty (MOS) of an officer desiring to join an SMCR unit from the AC may not match the billets available at a unit in the officer's geographical area.

Since the early 1990's with the change in augmentation rates for AC officers, the limited pool of officers available for duty with the SMCR has shrunk even further. Previously, Marine Corps manpower planners used augmentation as a force shaping tool, with more officers being recruited than ultimately needed. After 3-4 years of active service, officers competed for a limited number of spots for further active duty service, with those not being selected forced out of the AC of the Marine Corps. Within the population of those forced out, there was a certain percentage of quality officers that still wanted to be affiliated with the Marine Corps and joined the SMCR to continue their service. This has changed in today's Marine Corps with augmentation rates typically being over 90% as opposed to previous rates under 50%. The end results being smaller numbers of officer exiting the AC today, and those who are doing so are exiting largely of their own volition, most with no desire to continue military service in a reserve capacity.

To compound the issue of having a smaller pool of officers to draw from, there is currently no means to require officers leaving the AC to join the SMCR or remain in the SMCR once they have joined. This presents a manpower problem in that in reality there is a significant pool of

experienced company grade officers available for service with MFR, but there is no ability to tap in to the talent and experience resident in it. Additionally, once an officer affiliates with an SMCR unit, there is no contractual obligation requiring that officer to serve with that unit for any specific length of time, which could potentially serve as a source of instability within the unit. Although the vast majority of Marine Corps officers undoubtedly would not intentionally leave a unit in a bad position, there are many variables that can cause the untimely exodus of an officer. One of these variables most certainly is the officer's civilian job. While still a Marine, all must realize the reserve officer has a civilian job that has to be a priority to provide for his family and if that civilian employment changes, it could impede his ability to continue his service. Another reality in the reserve community is the fact that reserve officers are in a sense free agents. Outside of serving in the capacity of a commanding officer and loyalty to one's unit, there is nothing to stop a reserve officer from pursuing another reserve opportunity more attractive in that officer's eyes. Some of these could be opportunities with another unit, a staff position, Individual Mobilization Augmentee (IMA) billets, or simply transitioning to the IRR on one's own accord. One instance of an officer transitioning to the IRR was relayed by a fellow Command and Staff student coming off of Inspector-Instructor (I-I) duty. While serving as the I-I, he had his SMCR company commander drop to the IRR prior to his unit's mobilization, an act which caused the I-I to fill in as the company commander and deploy with the SMCR unit.<sup>10</sup> Although with the exception of transferring to the IRR, in the other instances the officer would still be serving the needs of MFR, there is no getting around the reality that it creates an element of instability within a unit if there is a limited amount of control to counter one's desire to pursue their own agenda.

Finally, another difficulty in sourcing junior officers is the SMCR unique issue of an MOS mismatch. Even though an officer may be available for service with a unit, he may not have the MOS required for the billet. This does not necessarily disqualify him from joining the unit and filling the billet. If the officer is approved to join the unit, the command is required to “take appropriate action to qualify the officer in the MOS within 18 months.”<sup>11</sup> There are a few ways to qualify the officer in the MOS: have the officer attend the full length MOS school, have the officer attend a two week reserve MOS course, or the command can submit an Administrative Action (AA) form to Reserve Affairs (RA) requesting the MOS be granted based on the experience and qualifications the officer has gained through his on the job experience. Of the above scenarios, the most likely is the officer attends the two week reserve course to gain the MOS. In the past, this typically was common practice; however, recognizing this was not a suitable substitute for the full length course and it detracted from the credibility of the officer in the MOS this practice has been phased out.<sup>12</sup> However the officer gets retrained, this is yet another necessary commitment that the officer is not obligated to make and can serve as a deterrent in getting an officer to join a unit.

While MFR attempts as much as possible to mirror the AC mainly to ensure interoperability and legitimacy, at times there are obstacles to doing this. Historically accessing and developing junior officers is one of these obstacles, as the long-time policy of not commissioning officers directly into the reserves leaves the Lieutenant and many of the Captain billets in SMCR T/Os that mirror AC T/Os unfilled. Additionally, until there is some semblance of manpower management controls on the reserve officer community, there will always be an unnecessary extra and counterproductive element of uncertainty in personnel matters. While the current environment is largely by design and acceptable in a peacetime atmosphere where MFR was

previously maintained as a trained force for large-scale strategic employment, today's reality has changed the legitimacy of this approach.<sup>13</sup>

### **Impact of Current Way of Doing Business**

As MFR organization and unit structure mirrors the AC, there are the comparable junior officer billets associated with the units. Not counting pilots and lawyers, there are a total of 727 Lieutenant billets resident in SMCR units. As of December 2008, of those billets there were 589 that were left unfilled. This constitutes 81% of all Lieutenant billets being unfilled. How any organization can be successful given this dearth of manning in key leadership billets is nothing short of amazing. As noted by LtCol Brian Josten in his *Marine Corps Gazette* article, "Therefore, current manning levels of company grade officers (lieutenants and captains) are not sufficient to support Marine Corps Reserve operational and mission requirements and keep the Reserve units fully staffed."<sup>14</sup> The on-going success of MFR throughout the Long War is clearly a testament to the talent and determination of Reserve Marines across the force, and unfortunately is a product of business as usual, as MFR has been operating under these conditions for some time. Operating under the current restrictions has forced MFR units to implement work around policies that have been largely successful as stop gap measures, but are far from being long term solutions. Most anytime a work around is implemented in any environment, it leaves a gap or shortfall in another area. This is absolutely the case in the junior officer manning scenario.

There are three common methods of filling junior officer shortfalls within SMCR units. Each method has for the most part produced positive results in their implementation in recent years based on unit performance while activated, but by no means represent an answer to the problem.

In each method there are positives, but they are out weighted by long term negative impacts. The common methods of dealing with the problem are; filling the junior officer billets with officers of senior rank, filling the junior officer billets with Staff Noncommissioned Officers (SNCO) or Chief Warrant Officers (CWO), and to source officers from other units, active or reserve to fill the gapped billets as a unit gets mobilized.

As stated earlier, it is not necessarily a problem to have a more senior officer fill a more junior billet, but there are negative issues associated with this from both a force and personal growth perspective aside from the mere fact that an officer has to be available to begin with. With no way to compel an officer to affiliate with the SMCR to begin with, the availability of an officer is the first obstacle to overcome. If a more senior officer is available, a major for instance, he may not be willing to fill a company commander billet or similar staff billet that is below his rank and level of experience. Again, if this is the case, there is no way to compel that officer to fill that billet, as he may drop to the IRR. Another issue in this scenario is finding an officer with the right MOS for the billet, or getting that officer retrained in what may be a time constrained situation in the instance of an impending mobilization. An example of a marginally trained senior officer filling a junior billet is provided by a fellow CSC classmate coming off I-I duty. A major with an aviation support background served as the Commanding Officer of an SMCR infantry company during their mobilization and deployment. In the words of the I-I, "he struggled greatly throughout his tour, having only the USMCR 0302 infantry equivalent training."<sup>15</sup> Putting an officer who is volunteering to serve his country and Corps in this situation is unfair not only to the officer, but also to the Marines he leads as they must work harder to make up for the officer's shortfalls in terms of experience. Additionally, when an officer does accept a less senior billet, it could have potential negative consequences in the

growth and progression of that officer's career in MFR. In countless cases across MFR, there have been and currently are many dedicated officers who have answered the call and filled-in under such circumstances. But the upcoming issue revolves around the questions of for how long are these officers going to be willing to sacrifice and put on hold their civilian lives and careers.

The most common method of making up for the junior officer shortfall is to have SNCOs or Chief Warrant Officers fill in the gaps. While CWOs and SNCOs have filled in admirably in numerous instances, again this serves as a disservice to both the Marine filling in the billet and the Marines in the unit. Giving SNCOs and CWOs the added responsibilities inherent in the higher billets is not fair to them in that in many instances they do not have the training or experience needed to succeed on a long term basis. The biggest negative impact of this method is while they are filling a junior officer billet, they are not filling the billet they were trained and groomed for up to that point in their careers. This causes a domino effect where all in the chain of command are asked to step up and assume roles for which through no fault of their own, they are not ready. Aggravating this situation is the fact that similar to the junior officer shortfalls, there are deficits in CWO and SNCO manning across MFR. In some respects there is a competition for personnel. For every SNCO who becomes a CWO, there is one less SNCO in MFR and for every SNCO or CWO who fills an officer billet; a valuable position in the chain of command is left to be filled by a less experienced and likely not fully trained Marine.

When the previous described methods are not possible and the SMCR unit is still short of leadership billets, "a nation-wide search is necessary to find enough officer volunteers from other units to fill the deploying unit's company grade officer shortfalls."<sup>16</sup> This solution to the issue presents many problems. The first of which is that it contradicts the fundamentals of training as



a team and knowing your personnel. Both of which are violated when last minute additions are made to unit T/Os prior to mobilizing for duty in a combat environment. Unit continuity is disrupted as the new personnel are added to the unit who have trained as a team for an extended period of time and must adjust sometimes just weeks out from deployment during intensive pre-deployment training at the initial location (ILOC). With the stakes literally being life or death in these circumstances, this solution is unacceptable. While it may get the unit through the deployment, it adds to the always present state of change a unit undergoes following a deployment and detracts from continuity as in most cases the personnel brought in for the deployment disappear following the deployment as suddenly as they appeared, leaving the unit to start over again.

Although progress has been made in filling the manning shortfalls through new initiatives, there is still a long way to go. With the Marine Corps reliance on and employment of MFR to varying degrees on a constant and consistent basis throughout the Long War, the role of MFR has transitioned past the point where its company grade officer personnel shortfalls can be sourced from other units by “robbing Peter to pay Paul” for a one-time occurrence. Under the current construct this shell game has a limited self life given the narrow pool of officers to draw from and the self imposed restrictions to junior officer procurement.

### **Recent Initiatives Implemented and Their Results**

Recognizing the critical nature of junior officer shortfalls in SMCR units, Manpower and Reserve Affairs (M&RA) was tasked with developing a systematic and long-term solution to the matter.<sup>17</sup> In response to this tasking, M&RA developed a series of reserve officer commissioning programs and monetary incentives aimed at increasing junior officer manning. The programs currently in place have met with varying levels of success, with some showing

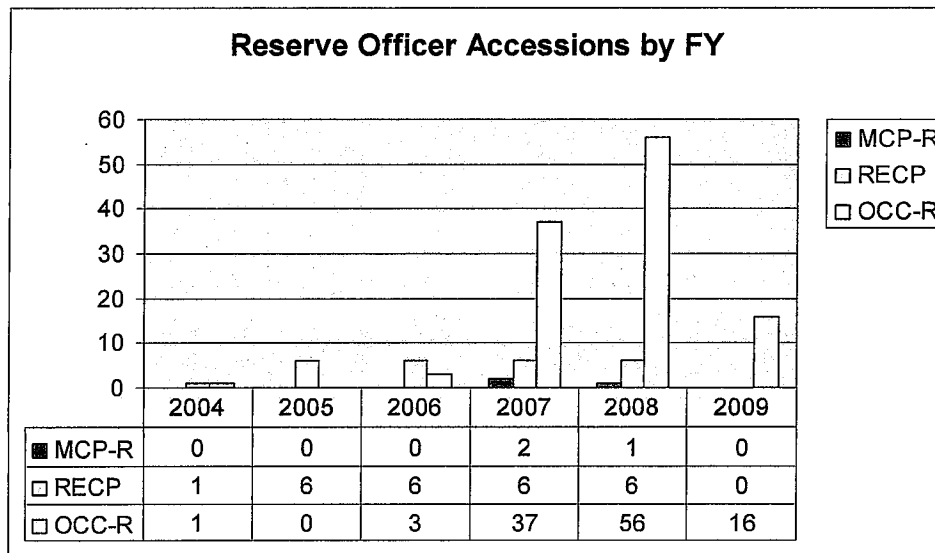
positive results in increasing junior officer manning and represent a positive step in the right direction. The commissioning programs and a brief description are included below:

- Reserve Enlisted Commissioning Program (RECP) – Open to both RC and AC Marines Corporal or above, with a four year college degree, minimum of 12 months Time in Service (TIS), will receive a commission as a 2<sup>nd</sup> Lt in the SMCR, 48 month obligation in the SMCR from the date of commissioning<sup>18</sup>
- Meritorious Commissioning Program – Reserve (MCP-R) – Open to both RC and AC Marines, possess either an Associate Degree, or 75 hours of college credits, minimum of 12 months TIS, will receive a commission as a 2<sup>nd</sup> Lt in the SMCR, 48 month obligation in the SMCR from the date of commissioning, cannot be promoted past 1stLt without obtaining a 4 year degree<sup>19</sup>
- Officer Candidate Course –Reserve (OCC-R) – Open to qualified civilian college seniors or graduates who may apply for a reserve commission, will receive a commission as a 2ndLt in the SMCR, 48 month obligation in the SMCR from the date of commissioning<sup>20</sup>

The above programs approach the issue in a uniformed and directed manner. Each of the programs require the applicant to attend the 10 week Officer Candidates Course (OCC) in order to gain their reserve commission, followed by required completion of the Basic School (TBS) and full length MOS school, both alongside their active duty peers. Additionally each of the programs is ground focused, in that they do not include lawyers or aviators. The programs are directed, as the prospective officer candidate chooses a currently open billet(s) in an SMCR unit which they will fill upon completion of their training. During the MOS assignment process at TBS, the possibility of MOSs for that officer to be assigned is limited to those commensurate with the openings at the SMCR unit they are to be assigned to. This targeted approach ensures that needed shortages are being filled. By following the Force Generation Model (FGM), a planning tool used by MFR which forecasts SMCR unit mobilizations and deployments, M&RA can further target units in the most immediate needs and schedule applicants training to match them with the deployment cycle of the unit they are to join. An added benefit to the programs is the availability of funding for an additional 12 months of active duty training for the new

commissioned reserve officers with their reserve units.<sup>21</sup> This option provides the opportunity for the officers to be mentored alongside their AC I-I counterpart and staff, and also provides an opportunity for further schooling or training to ensure the unit receives the best product possible from the commissioning programs.

As evidenced by the table below, the OCC-R program by far has met with the most success thus far, accounting for 113 of the 141 reserve officers who have been accessed through the reserve commissioning programs.



**Figure 1 M&RA as of 9 Dec 08**

With the reserve commissioning programs targeting both current AC and RC enlisted Marines, as well as civilians, the monetary incentive programs developed by M&RA targets officers currently in the IRR, those transitioning from the AC, and participants in the OCC-R program by offering various bonuses for their affiliation with SMCR units. An overview of the programs is as follows:

- **SMCR Officer Deferment Bonus** – Instituted in June 2006, it offers a 24 month deferment to officers transitioning from the AC to an SMCR unit who have completed a combat tour in the 12 months prior to their End of Active Service (EAS), these officers are also eligible for a \$3,500 bonus if they agree to remain affiliated for three years.<sup>22</sup>

- SMCR Officer Loan Repayment (OELRP) – Will reimburse up to \$30,000 of qualifying student loans for reserve officers accessed through the OCC-R program, who remain affiliated with an SMCR unit.<sup>23</sup>
- SMCR Officer Affiliation Bonus (OAB) – Offers a \$10,000 bonus to prior service company grade officers with less than a four year break in service and no prior affiliation with an SMCR unit. Eligible officers must fill a vacant billet in an SMCR unit commensurate with grade and MOS, retraining is available to gain the MOS. Officers incur a three year obligation.<sup>24</sup>
- SMCR Officer Accession Incentive (OAI) – Offers a \$4,000 bonus to those participating in the OCC-R program that choose the 0302 Infantry Officer MOS and fulfill the stipulations associated with the OCC-R program.<sup>25</sup>

Of the four incentive programs, two (OELRP and OAI) serve as a complement to the current OCC-R program and two (Deferment Bonus and OAB) are aimed at the untapped population of company grade officers either exiting active duty or already in the IRR. The scope of these programs is limited, with caps put on the number of each of the incentives that are able to be offered. Thus far these programs have met with limited success since their inception. As of 3 February 2009 of the ten \$3,500 SMCR Officer Deferment Bonuses available, none have been issued. The same holds true for the OAI, of the 20 \$4,000 bonuses available none have been issued. The poor performance for the Deferment Bonus is understandable, as it is unlikely any officer would knowingly put himself in a situation where he joined and trained with a unit, only to stay back while the rest of the unit deployed. As for the OAI, the numbers would seem to show that it takes more than \$4,000 to have a prospective officer candidate agree to become an infantry officer. Of the 100 \$10,000 OAB authorized, as of 3 February 2009 27 have been issued. This is encouraging as it puts 27 additional junior officers in SMCR units where they are needed most for a period of three years, thus creating an element of stability in the unit. The \$30,000 OELRP bonus has thus far had seven takers out of the 20 bonuses authorized.<sup>26</sup> It is difficult to gauge the relative success of this program, as there is no data to ascertain whether or

not any of the seven would have participated in the OCC-R program without this added bonus. In the final analysis for all of the money offered through the incentive program, 27 prior service officers have been affiliated to SMCR units at a cost of \$270,000 in bonus money. While this may seem to be a relatively insignificant amount when taken in the context of an overall service budget, it is \$270,000 that did not have to have be spent if service in MFR were an obligated part of an officer's service agreement.

### **Recommended Policy**

The surest and fairest way to ensure a steady pool of junior officers in MFR is to change the current and long time service policy where officers exiting the AC following their initial MSO are not obligated to serve any time in the SMCR. Requiring all officers exiting the AC to affiliate with an SMCR unit would not only fix the junior officer staffing issue, it would also strengthen the total force by lessening the divide between the AC and MFR. Had this policy been put into practice earlier, MFR would not be in the situation it is today.

Based on Title 10, Chapter 37 – General Service Requirements, the services have the ability to make this policy change. In subsection (a) the statute simply states that anyone who becomes a member of the armed forces is subject to serve “for a total initial period of not less than six years nor more than eight years...” It concludes by specifying personnel released from active duty “be transferred to a reserve component of his armed force to complete the service required by subsection (a).”<sup>27</sup> The Marine Corps, along with the other services have specified that the reserve component in which the remainder of a service member's obligation is served in is the IRR, where the member is available for recall in what amounts to a national emergency wartime situation. While the concept of the IRR has served the Marine Corps well in previous eras, today the country and the Marine Corps are faced with a challenge unimagined at the time the present

day policy was enacted. The concept that needs to be adopted in today's era is one of a continuum of service as addressed by then Commandant General Hagee in a 2005 White Letter.<sup>28</sup> Although the Marine Corps certainly does get its money worth out of officers during their 3-4 year initial active duty commitment, in today's operating environment, it needs to get more. The Marine Corps needs to retain the knowledge, skill and ability of these officers as part of the total force in more than an IRR capacity.<sup>29</sup> Under the present day construct, the officer transitioning from the AC changes the character of his service from an active to a reserve status. Under a continuum of service construct, the only difference would be that a certain higher level of reserve participation would be required out of the officer for the remainder of his MSO. This can take place without a significant cost to the Marine Corps or the individual officer and represents a better and more productive way of sustaining the total force.

While it is true that there are more officers exiting active duty on a yearly basis than there are billets for them to fill in the SMCR, this should be looked upon as a potential advantage as opposed to a potential problem. This excess of available officers ideally would ease the transition of the officer into the civilian world. A central component in the concept of a continuum of service would be the implementation of a substantially more robust transition and career management process for reserve officers to include a dedicated officer Prior Service Recruiter (PSR) presence at each major base and station, and the creation of a viable manpower management system for reserve officers. With these two concepts in place, an officer exiting active duty would be more knowledgeable regarding SMCR opportunities and be able to better plan his transition, ideally avoiding the likelihood of having to deploy in an SMCR status immediately following his transition.

As part of the move to a continuum of service construct, the OCC-R program should be scaled back and eventually discontinued. While initially it has shown to be relatively successful, it should only be viewed as a “bridge” to get from the current dire situation to a more stable one when the policy change to continuum of service is implemented. Once the change is implemented, it would be 3-4 years until the first officers contracting under the continuum of service concept are exiting active duty. During this period the OCC-R program would be scaled back and ultimately discontinued in anticipation of the coming influx of officers from the AC. This would continue to provide the SMCR with some stability in the interim. Even as the OCC-R program serves a purpose, it is a reserve unique program that serves to put up another unneeded wall or distinction between the active and reserve component. Also, while the program does its best to train the reserve officers, there is no substitute for the experience an officer gains (regardless of MOS) serving for a 3-4 year period in the AC.

### **Transition and Training Considerations**

For the proposed concept to be successful, the key aspect is ensuring the officer exiting the AC is afforded the opportunity for a smooth and informed transition to the next phase of their military service that benefits both the officer and the SMCR to the fullest extent. An officer PSR station manned at each of the Marine Corps major installations (Camp Lejeune, NC, Camp Pendleton, CA, Quantico, VA, and Okinawa) would be responsible for educating officers exiting the AC on their opportunities, placing those officers in open SMCR billets, and setting up MOS training as necessary. Once an officer completed his transition to the SMCR, a reserve officer monitor section would continue to track and advise the officer throughout his SMCR career.

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Inherent in the continuum of service construct is the requirement for the officer to be informed earlier, throughout their career, and more in depth on the Marine Corps Reserve. By

the time the officer elects to leave active duty they would already have an understanding of the RC beginning with their initial contact with the Officer Selection Officer (OSO) and continuing throughout their career in the mentoring process. The role of the PSR in educating the officer at the point of their transition would be to ensure they are aware of, comply with, and are able to take advantage of current policies and benefits in place for transitioning officers. Ensuring a seamless transition is crucial to ensure the officer makes an informed decision and enters the SMCR with a positive outlook on the new aspect of their service.

While the officer PSR can and should serve the needs of the transitioning officer, the ultimate purpose is to serve the needs of the Marine Corps, in this case specifically the SMCR. Having visibility of current openings in SMCR units and understanding the transitioning officer's post active duty plans, the PSR will place the officer in a billet and unit that best fits the officer's transition to the civilian world while serving the needs of the Marine Corps. Certainly this is easier said than done, but given the fact the number of reserve units across the country, a number of different ways to serve, and the officer understands that there is still a service requirement to be fulfilled, an amiable solution is very probable. Decisions should be made to fit around the transitioning officer's plan, as opposed to the officer making post active duty decisions based on where the PSR places him. While there still may be certain difficult to fill units or billets, this proposed solution is eminently better than what is currently in place. Additionally, a limited continuation of the OCC-R program may be a viable option under this scenario.

Understanding that there will not always or even often be a perfect MOS fit with the officer and the unit he is to join, MOS training will be an essential element of the proposed solution.

Again through continuous education on an officer's service commitment throughout his career this will not come as a surprise to the transitioning officer. In some instances, this will be looked



at as a benefit to the transitioning officer, as it may give them the opportunity to switch to an MOS more appealing to them. As the transitioning officer is placed in an SMCR unit, if MOS training is needed to qualify them to fill the open billet, this training will be coordinated by the PSR. The requirement would be for the officer to complete the full length MOS training school prior to affiliating with the unit. This will ensure the unit receives a trained officer, who will have active duty experience even though it may not be in that specialty as opposed to the OCC-R concept where the unit gains a trained officer with no active duty experience.

Instituting a more robust manpower management system in the reserves is the last step in the transition process and will continue to serve the SMCR officer throughout their career. Once the officer is transitioned by the PSR, he will be “picked up” by the monitor. Outside of the proposed continuum of service construct, this is a piece that is missing in the SMCR. Currently, SMCR officers do not have a dedicated monitor system similar to the AC to manage their career progression. This is a disservice to the dedicated officers who choose to continue service. The benefits of a reserve monitor are numerous. Currently SMCR officers use word of mouth, guidance from colleagues, and their own understanding of the SMCR to ensure their career progression. Having the services of a monitor available would enable the officer to be aware and take advantage of opportunities that may otherwise be unknown. Ultimately this ideally would produce a more experienced and well rounded officer motivated to serve in challenging billets based on a logical path of career progression.

### **Conclusions**

While there is no mistaking the fact that MFR has performed exceedingly well in the Long War, one cannot dispute the fact that there is room for improvement in reserve junior officer staffing. The current MFR construct that has served the Marine Corps’ needs for decades has

been rendered outdated given the realities of today's operational commitments. The incredible success of MFR is even more impressive given the current institutional disadvantages it operates under. Implementing the construct of a continuum of service for officers from active duty to a more tangible reserve commitment will go a long way in remedying the current situation.

Staffing junior officer billets in SMCR units more fully will enhance the proficiency of the units by providing experienced and trained officers in the ranks, allowing SNCOs to be SNCOs and CWOs to be CWOs instead of forcing them to fill officer billets. Ensuring the right mix of leadership at the right levels will benefit the total force beginning with the most junior Marine who will benefit from the leadership of an NCO who is not forced to fleet up to a more senior billet as a result of a domino effect. SMCR units will also benefit from an added element of stability provided by an officer's obligated commitment to serve in the SMCR. Given the added leadership and stability provided by the continuum of service construct, the opportunities for MFR to contribute to the total force are greatly expanded and given the opportunity to contribute more, MFR will undoubtedly continue to provide superb service to country and Corps.

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