The Army Unit Manning System: In Pursuit of Irreversible Momentum

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PREFACE

The details of near-term unit manning system (UMS) implementation and recommendations for initial changes to policy, regulation, and law are the responsibility of Army’s Unit Manning Task Force. In this paper we attempt to focus on longer-term UMS implementation issues. We thank the Task Force for sharing their work in progress, which enabled us to advance our effort without reinventing the wheel. We particularly appreciate the assistance and counsel of Colonel Mike McGinnis, the Task Force lead, and Lieutenant Colonels Kurt Berry and Paul Thornton. Their emails and insights were rich and thought provoking. Our Army War College mentor, Colonel Ruth Collins’ comments and suggestions offered an invaluable perspective. Dr. Marie Danziger, our writing coach at the Kennedy School of Government at Harvard, encouraged us to stop chattering, sharpen our arguments, and contribute to the long-running unit manning dialogue. Many others shared their time and insights. Among them are Lieutenant General John Le Moyne, the Army G-1, and Lieutenant General (Retired) Robert Elton, one of Le Moyne’s predecessors, as well as Colonel John P. Mikula and Mrs. Deborah Jacobs from the Officer and Enlisted Personnel Management Directorates respectively of the U.S. Total Army Personnel Command. We also appreciate the assistance of Mr. Don Weber, keeper of UMS institutional memory on the Army G-1 staff. The staff of the Kennedy School’s National Security Program, Lieutenant General (Retired) Tad Oelstrom and Mrs. Jean Woodward, provided us resources and offered us helpful advice on both form and content. Our fellow National Security Fellows vetted our ideas and provided useful feedback. Finally, we owe a great debt to our families who recognized our desire to make a small contribution to a much larger undertaking, and sacrificed time with us while we worked on this project.
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EXECUTIVE SUMMARY
The Army Unit Manning System: In Pursuit of Irreversible Momentum

Transforming the Army

Throughout its history, the U.S. Army has continually evolved the way it organizes, trains, and equips units for combat. The centerpiece of the current Army Transformation initiative is development of new capabilities and employment concepts that will result in more deployable, lethal and survivable “units of action.” In part to enable success of the Interim and Objective Force concepts, the Secretary of the Army announced in September 2002 that the Army would pursue a unit manning system (UMS) to replace the current individual replacement system (IRS) as the primary means to man units in the field Army. Unit manning is the practice of assigning soldiers to units and then keeping them together for a predetermined period of months or years. After the unit’s lifecycle is complete, soldiers are reassigned to other duties, perhaps to another forming UMS unit. In contrast, the IRS replaces individual losses in units with individual replacements on a continuous basis. This paper seeks to identify key Army personnel or other management policies and programs that must change, and suggest decision variables senior leaders might consider to promote long-term UMS success. How can the Army achieve the irreversible momentum for unit manning that never materialized when the Army attempted it in the past?

Why Unit Manning?

In the last fifty years, the Army has attempted UMS several times. In general, each experiment was intended to facilitate higher morale, reduce personnel turbulence, promote unit cohesion and combat effectiveness, and reduce costs. To some extent, all previous unit manning efforts were successful at unit level, but all were eventually abandoned Army-wide. Implementation of the next UMS will begin in the Summer 2003, seven years after the most recent unit manning initiative was halted. Why now? We believe the answer is that success of the broader Army Transformation effort—development of the Objective Force—rides on the Army’s ability to reduce personnel turbulence. Reducing personnel turbulence, through unit
manning or other means, would increase the time available to unit commanders to train their soldiers to peak performance levels as a team in order to maximize the potential of the Objective Force’s concepts and technologies. Even after a UMS is completely implemented, we believe the Army will continue to operate an IRS in both peace and war for most high-level staffs and non-divisional units. The Army's challenge will be to implement a UMS widely enough to achieve a critical mass for acceptance and success.

The Way Ahead—Effective Management of Change

Previous UMS disappointments certainly question its future viability, but our experience should not preclude pursuit of a better system. While no previous UMS attempt took root, there were successful elements in each. Previous successes and failures, however, cannot be blindly overlaid on the Army in today's environment. The Army is different in size, shape, and location, and its operational pace more challenging than in recent memory.

Several strategic management requirements loom large as the Army moves toward a UMS in the Objective Force. Previous analyses identified eight generalized requirements to manage Army change effectively: an architect of the future, leadership culture, proponency, consensus, theory, leadership continuity, top-level support, and testing. We believe only the first—the architect—is clearly on track for UMS implementation, and even that aspect is now questionable with Secretary White's resignation in late April 2003. All these management requirements need additional focus as the Army moves forward to ensure success of the unit manning system—to find the irreversible momentum for unit manning that has thus far escaped the Army.

Ensuring Success

Personnel management transformation must reinforce the larger Army Transformation effort, and synchronization established with acquisition, training and fielding milestones for the Interim and Objective Forces. What changes should the Army leadership consider to promote a viable and sustainable UMS for the Objective Force? We conclude they fall into three broad categories:

Force Structure. Regardless of which particular UMS model the Army implements, a disciplined UMS personnel management cycle will require similar discipline enforced in the
Army’s force structure management system. The IRS’s flexibility has long supported a force structure flexibility enabling the Army to create and dismantle units rapidly. No more. The Army must harness force structure and personnel management in tandem to promote long-term UMS success.

**Professional and Leader Development.** While unit cohesion is important for current unit readiness, professional and leader development is important for the Army’s long-term institutional health. Incentive and promotion systems currently support pursuit of individual soldier skills and qualifications. Individual needs similarly drive soldier unit assignments and education decisions. Soldier management policies must be synchronized with unit manning cycles in order to sustain the Army’s ability to recruit and retain a quality force. The Cyclic Regeneration UMS model best supports professional development by providing soldiers more entry and exit points to meet professional development needs.

**Readiness.** The Army currently measures unit readiness against a universal baseline standard: The Army is always ready. That may be true, but for unit manning to succeed the Army must recognize that all units do not need to be ready all the time. Unit manning, by design, must include programmed periods of un-readiness, for example in the lifecycle model during units’ Build and Release phases, or for cyclic regeneration in the regeneration phase. Un-readiness will require Army cultural acceptance, overturning expectations developed over several generations of soldiers. The “lifecycle” UMS model keeps soldiers together longer than the alternative, and better supports Army readiness when the unit is preparing for employment and when it is employed.
# UMS Recommendations Summary

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| Management Process     | • Shift staff proponency from G-1 to G-3 after pilot UMS implementation. Reinforce the linkage between unit rotations and unit manning.  
                          • Explicitly test UMS concepts to determine what works best Army-wide.  
                          • Invest in human and organizational behavioral research to develop the underlying theory. |
| Structure              | • Establish a periodic CSA UMS implementation review process.  
                          • Include UMS impact analysis in TAA 2011 force feasibility reviews.  
                          • Minimize out-of-cycle force structure changes. Withhold approval authority for them to four-star level.  
                          • Fully incorporate UMS considerations in the Army Modernization Plan. |
| Professional Development| • Decentralize selection authority for captains to brigade command level.  
                          • Provide special UMS instructions to selection boards.  
                          • Include UMS “special remarks” in personnel record briefs.  
                          • Limit “branch qualified” assignment requirements across the Army.  
                          • Assign officers and NCOs to UMS units at the right time in their careers.  
                          • Consider offering Operations Career Field officers a second chance at career field designation. |
| Readiness              | • Weave unit manning into the Army Strategic Readiness System.  
                          • Institute better turbulence metrics. Adopt 1999 USAWC Turbulence Study recommendations.  
                          • Refocus the Army on FM 25-100 training standards and discipline.  
                          • Develop an installation readiness template for UMS.  
                          • Perform a rigorous UMS cost analysis.  
                          • Develop incentives to encourage soldiers to stay in UMS units. |
| Institutionalizing the UMS | • Develop a strategic communications plan for the UMS.  
                          • Prepare the Army for the “have and have-not” phenomenon.  
                          • Make it clear to officers that they will participate. |
CHAPTER 1 – WHY UNIT MANNING? WHY NOW?

“It’s The Personnel System, Stupid”

With this comment, Secretary of the Army Thomas White succinctly summarized his view of the key to Army Transformation. Speaking to reporters in September 2002, Secretary White remarked, “If we don’t fundamentally change the personnel system of the Army…then the sum total of the rest of this [Army Transformation] will not be nearly as effective as it could be.”  

Secretary White’s reproach of the personnel system was chiefly directed at the Army’s continued operation of an individual replacement system (IRS) instead of a unit manning system (UMS). The IRS, which favors individual equity over unit cohesion, has been the primary method of populating units for 90 years. Since then, there has been unceasing debate about the relative merits of individual versus unit needs. From time to time, the unit side of the argument has gained favor, and the Army has experimented with unit manning in order to keep soldiers together longer and build more cohesive units.

In 1995, the Army discontinued its most recent unit manning initiative, the Cohesion, Operational Readiness, and Training (COHORT) system. The debate, however, continued. Secretary White ended the debate about “if” and focused the Army on “how” with a verbal directive in Fall 2002 followed by written Terms of Reference in December. In response, the Army G-1 formed a task force to address UMS implementation issues and prepare recommendations to the senior leadership decisions. The 172d Infantry Brigade stationed in Alaska was designated in February 2003 as the pilot UMS unit when it reorganizes as the 172d Stryker Brigade Combat Team (SBCT) in Summer 2003. (See Figure 1.)

Given that initial UMS implementation has already started, the purpose of our research is to take a longer-term view of the viability and sustainability of unit manning in the Army. We seek to identify how the Army can avoid pitfalls of the past to help ensure the new UMS is integrated without again failing or jeopardizing other Transformation initiatives. We seek to identify cultural shifts and recommend functional changes necessary for the Army to embrace unit manning.
In the summer of 2002, the Army planned to field six Stryker Brigade Combat Teams through 2008 prior to fielding Objective Force Units of Action (UA) and Units of Employment (UE). Subsequently, the Army decided to establish a UMS pilot program in conjunction with 172d SBCT fielding in Alaska.

FIGURE 1 – THE ARMY TRANSFORMATION ROADMAP

Although the Army has attempted unit manning several times before, these attempts have never been successful enough or lasted long enough to be institutionalized Army-wide. Chapter Two discusses the common threads that run through previous failures including lack of senior leader support, flawed implementation, and misjudged costs in terms of manpower, readiness, and funding. Despite these failures, what was clear before is clear today: units that form, train, deploy, and fight together are more operationally capable than the “pick-up” team alternative. It is also clear that the Army as an institution has multiple short- and long-term priorities. Today, unit manning is one of many and it must be balanced carefully with all the others.

Reducing Turbulence

Secretary White wants to implement UMS to increase unit cohesion and raise morale and readiness, resulting in an overall increase in unit effectiveness. The key to achieving this is reducing personnel turbulence. Personnel turbulence—frequent soldier moves from job to job—has long existed as an Army readiness irritant both in peace and war. In the years following the post-Cold War force reductions, turbulence generated by transferring individual soldiers back and forth for a one-year tour in Korea became particularly taxing for the entire force. RAND and
Army Personnel Command (PERSCOM) studies in the late 1990s identified four present-day drivers of peacetime personnel turbulence: overseas structure, overseas tour lengths, enlistment lengths, and attrition (soldiers who leave the Army prior to the end of their contractual obligation)."\textsuperscript{8}

Unfortunately, these turbulence drivers are not entirely within the Army's purview:

- The Office of the Secretary of Defense prescribes overseas tour lengths for all services.\textsuperscript{9}
- "National Call to Service" legislation, part of the 2003 Defense Authorization Act, will more than double enlistments for two years or less by FY 2004, from 1.7 percent to 5 percent of the total Army accession target. 5 percent is small in the aggregate, but short-term enlistments are not equally distributed across Army occupational specialties. Specialties with a greater likelihood of assignment to UMS units have a larger share of short-term enlistments.\textsuperscript{10}

- Attrition is the only turbulence driver somewhat within the Army's control. But attrition is, in part, a way in which the Army weeds out soldiers unfit for service, as well as providing a way for soldiers to leave for compassionate reasons.

Given limited prospects of reducing turbulence, the UMS Task Force focused on harnessing it. The Task Force intended to establish a manning approach that would improve the predictability of turbulence across the force and synchronize individual gains and losses in units with those units' readiness cycles. In parallel, the Army G-3 led an effort investigating the potential to substitute a rotational unit presence for some Army units permanently based overseas.

In this paper, we seek to identify elements of policy, practice, or culture that require change to make the Unit Manning System sustainable in the long run. Borrowing an analytical framework from General Donn Starry and then-Colonel Huba Wass de Czege, Chapter Three addresses fundamental requirements to implement change in the Army. These eight "constants of change" require the most focus in order to adapt the way the Army thinks and operates.
Assumptions

Certain assumptions must be made in order to examine UMS alternatives. The validity of some these assumptions may ultimately govern UMS success or failure, as will exogenous factors such as the national strategic and geo-political environments.

- 480,000 soldiers remains the authorized active duty end-strength level.
- Congressionally authorized promotion constraints remain in effect, but promotion and other personnel policies may be adjusted to support the UMS.
- Training and Doctrine Command can recruit and train soldiers on a schedule that supports UMS unit readiness cycles.
  - Enlisted recruiting and officer accessions and retention success rates continue.
  - Service contracts may be lengthened and made variable.
  - The length of officer branch details may be adjusted to coincide with unit manning cycles, otherwise branch-detailed officers will not be assigned to UMS units.
  - Active duty service obligations may be extended.
- Units will be initially filled to their authorized level and with each package replacement or regeneration. No further personnel augmentation will be required.
- Soldiers assigned to UMS units will have sufficient service time remaining to complete the unit lifecycle.
- Soldiers will not be withdrawn from units for individual augmentation missions.
- The IRS will continue for the 25-75 percent of the Army that is not under the UMS and in support of UMS units to replace unforeseen attrition.
- Five percent of the soldiers assigned to a unit will be non-deployable at any given time.
- Unprogrammed losses in a UMS unit will vary between seven to 10 percent per year and will be offset by periodically assigned replacements.
• UMS lifecycles can be synchronized with force modernization, institutional training, and soldier professional development cycles.

• Objective Force fielding timelines will not be adjusted to meet UMS changes.

• Army “tiered readiness” is acceptable.

Pursuit of Irreversible Momentum

General Eric Shinseki, the current Army Chief of Staff, has often discussed the need for establishing an “irreversible momentum” for Army transformation. In recent testimony before the House Armed Services Committee, General Shinseki said, “my challenge is how to get as much done in a very short tenure—four years—to get as much momentum and education going at a time when you know that the patience of education is more important than the bumper sticker of marketing. Marketed the wrong way, when a chief leaves at the end of four years, a lot of it will leave with him if you are not careful.” Irreversible momentum is made possible by a shared vision and intellectual resolve to bring about change resulting in a series of procurement, structure, and budget commitments. This chain of commitments will bind the Army to a future course from which it will be difficult to stray.

In Chapter Four we describe and assess the alternative unit manning models currently under consideration. UMS implementation of one of these models or a hybrid will require adjustments to some degree in almost every Army functional area. Three areas require particularly careful attention—force structure, professional development, and readiness. We conclude with 22 recommendations that, if adopted, will support achievement of long-term Army readiness objectives and promote irreversible momentum for Army unit manning.
CHAPTER 2 – LESSONS LEARNED

Historian Stephen Ambrose captured the essence of many soldiers’ opinions with this comment ascribed to a World War II veteran: “When the war is over, I’m going to attend the war crimes trial of the men responsible for this [individual replacement] system. I want to watch them shoot the bastards!” Such harsh views established deep roots in Army conventional wisdom after World War II and became a touchstone for repeated attempts to reform the personnel system by substituting unit manning for individual replacements.

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<th>Manning Initiative</th>
<th>Objectives</th>
<th>Reason for Termination</th>
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<td>1955 - 1959 Europe</td>
<td>GYROSCOPE</td>
<td>Improve morale and cut support costs.</td>
<td>No cost savings; reduced readiness.</td>
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<tr>
<td>1961 Korea</td>
<td>OVUREP</td>
<td>Reduce personnel turbulence and cost and improve cohesion.</td>
<td>Interrupted by Berlin Crisis.</td>
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<tr>
<td>1961 - 1964 Europe</td>
<td>LONG THRUST</td>
<td>Test mobility and augment existing force using prepositioned materials.</td>
<td>High cost; reduced readiness due to personnel turbulence.</td>
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<td>1962 - 1964 Europe</td>
<td>ROTAPLAN</td>
<td>Reduce outflow of gold and dependent family member presence.</td>
<td>Reduced readiness due to personnel turbulence stemming from concurrent LONG THRUST.</td>
</tr>
<tr>
<td>1975 - 1979 Europe</td>
<td>Brigade 75/76</td>
<td>Increase combat force in relation to support force.</td>
<td>Equipment transfers to deploying units degraded readiness of other units.</td>
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| 1981 - 1995 CONUS, Europe, Korea | COHORT | Increase unit cohesion, morale, and readiness | Insufficient like units to sustain program (“Have-Have Not”).
“We-They” between light and heavy units.
U.S. Army, Europe could not absorb personnel from disbanded units. |

TABLE 1 - RECENT ARMY UNIT MANNING INITIATIVES

6
The U.S. Army has attempted unit manning in one form or another several times since World War II, but in each case the Army abandoned these experiments and reverted to individual replacements in both peace and war. Why? Some blame a stubborn personnel management bureaucracy that refuses to change to accommodate the Army’s greater good. Is this true, or were other structural or cultural factors at work? What compelled the Army to cling to an IRS despite the fact that many have long recognized the cohesion benefits that might accrue from unit manning? Many researchers have chronicled the Army’s attempts at unit manning, but not all agree why those attempts failed. To begin with, the word “failure” may be too harsh. Thomas Edison supposedly once remarked, “I’ve never failed; I just invented 9,000 things that didn’t work.” Simply repeating the entire unit manning chronology would not be particularly useful here, although a short chronology is included in the Appendix. Instead, as the Army launches a unit manning initiative once again, it may be instructive to consider the underlying assumptions and lessons of the past to identify insights useful today.

**Personnel Decisions Are Too Important to Leave to the Personnelists**

French Premier Georges Clemenceau is often remembered saying, “War is too important to be left to the generals.” Perhaps the same could be said of military personnel policies and the staff officers who manage them. Throughout recent U.S. military history, the decision to use individual replacements instead of unit manning devolved from command decisions based on strategic and operational necessity. The nameless World War II veteran quoted above might as well have blamed General George Marshall’s decision to limit U.S. mobilization to 90 divisions instead of the 200 originally planned. Or maybe he should have blamed General Dwight Eisenhower for deciding to attack Germany on a broad front. Both decisions contributed to a lack of structural depth necessary to rotate units instead of individuals—Army units were spread too thinly across the globe to attempt unit manning, at least in the European Theater. The staff might take the blame, but ultimately senior commanders were responsible. They still are. *Even if senior leaders profess a desire to institute unit manning, other decisions they make will hinder their staff’s ability to deliver it.*
Significant Structural Change May Jeopardize Unit Manning

While correlation does not necessarily mean a causal relationship, the clear correlation between Army attempts at unit manning and Army structural changes is worth considering. The start and end dates of recent initiatives indicate that unit manning does not easily withstand the stress of rapid structure reduction or growth. For example, the Overseas Unit Replacement Program (OVUREP) in Korea was cancelled as the Berlin Crisis mounted in 1961 and the Army began its ramp up to Viet Nam. Later, COHORT survived throughout the 1980s despite significant internal structural realignment within the Army, but was abandoned amid the 40 percent structure reduction after the Cold War. Structural consideration was certainly among the decision variables considered in COHORT’s cancellation. With a relatively stable aggregate force structure and share of Department of Defense resources in the future, perhaps the current UMS initiative will take have time to take root. If structure and resource assumptions of a steady-state future are wrong, unit manning may not succeed.

FIGURE 2 - ARMY STRENGTH AND UNIT MANNING INITIATIVES

The ebb and flow of Army unit manning implementation closely matches Army structural expansion and contraction.
War’s Length and Intensity—Shorter Is Better for Unit Manning

Is it also coincidence that, despite enduring interest in unit manning, the Army does not introduce it during large-scale wartime mobilization as in Korea and Viet Nam? The Army can successfully accomplish only a limited set of priorities simultaneously. General Mathew Ridgeway and then General James Van Fleet, the Eighth Army commanders in the Korean War, did not support unit manning. They were unwilling to underwrite the cost of training and equipping two units to do the job of one. Similarly, between July 1964 and July 1965, 600 of 800 units shipped to Viet Nam were newly organized. When replacement troops began flowing in, unit commanders opted to mix the fresh troops, who were on a one-year tour, with veterans to leaven their units’ experience base, a policy often criticized since the end of that war.

Nevertheless, policies today should not be prisoners of past analogies. As a measure of intensity, combat deaths have declined considerably in recent wars: a 19.3 percent annualized rate in the World War II European Theater declined to 5 percent in Korea, and then 1.8 percent in Vietnam. Combat casualties and particularly losses from disease and non-battle injuries declined to unprecedented low levels in Operations Desert Storm and Iraqi Freedom. In the future, if wars are not as intense and protracted as those in the past, unit manning may remain viable in wartime.

Unit Manning May Cost More Than Individual Replacements

Several past UMS initiatives sought to save money and were eventually cancelled when savings failed to materialize. The Army found that any savings accrued were offset by unanticipated costs. Today, cohesion, readiness, and predictability for soldiers and their families are the UMS objectives, not savings. Yet the promise of savings is always an attractive proposition when selling a program inside the Pentagon or to Congress. In practice, however, true savings are sometimes elusive. If unit manning is linked to unit rotations, additional prepositioned equipment must be procured and stored overseas or the Army must incur significant transportation costs to move a unit’s own equipment when it deploys. Savings in the permanent change of station accounts in the personnel appropriation are then offset by additional costs in the operations and maintenance appropriation. Similarly, if permanent overseas bases are cut and service members’ families return home, the Army would save overseas infrastructure
and support costs in the long-term, but these savings would be offset, at least in the short run, by additional housing and support costs in the U.S. Promising savings may be tempting, but if it becomes an explicit UMS objective, it may not be a promise the Army can keep, especially if it competes with other high-cost initiatives.
CHAPTER 3 – MANAGEMENT OF EFFECTIVE CHANGE

In a March 1983 *Military Review* article, General Donn Starry proposed seven generalized requirements for implementing effective change in the Army: Architect of the Future, Leadership Culture, Proponency, Consensus, Leadership Continuity, Top-Level Support, and Testing. "This framework, " Starry wrote, "is necessary to bring to bear clearly focused intellectual activity in the matter of any change, whether in concepts for fighting, equipment, training, or manning the force." Colonel Huba Wass de Czege extended the Starry framework a year later by proposing an additional requirement: Theory. A group of researchers used this Starry-Wass de Czege framework in the 1990s to assess several major Army change initiatives since the war in Viet Nam, pointing to the strengths and shortcomings of each.

The 1990s assessment viewed past initiatives through an historical lens. We cannot assess the ongoing UMS effort with the same near-perfect knowledge of outcomes and implications. Nevertheless, if one believes Starry's argument that such a framework will focus our effort to manage change, its use may help us consider how well the current UMS effort makes the "right" changes, integrates them smoothly, and minimizes negative effects on Army readiness.

**Architect of the Future**

"There must be an institution or mechanism to identify the need and draw up parameters for change, describe clearly what is to be done and how that differs from what has been done before." Unlike some past efforts, the current UMS initiative has clearly enjoyed top-level Army support, at least through April 2003. The Secretary of the Army has been its champion and called Personnel Transformation "the most important thing we are doing . . . the second phase of transformation." Secretary White's resignation announcement in late April 2003 now brings into question the architect aspect of change management. Nevertheless, the effort to describe, "what is to be done" is a work in progress. In many respects, the emerging plans are not significantly different from earlier COHORT models. But significant policy changes are under consideration to enhance the likelihood of success, including enabling commissioned officer
participation in the UMS and synchronizing the UMS with the reduction of permanent force presence in Europe and Korea, meeting these missions with unit rotations instead.

Leadership Culture

"The educational background of the principal staff and command personalities responsible for change must be sufficiently rigorous, demanding and relevant to bring a common cultural bias to the solution of problems."^30

Having served 23 years in uniform, Secretary White's appreciation of Army culture brings particular credibility to his championing the UMS. However, most of the current uniformed senior leaders have been relatively silent on this issue, reserving judgment on unit manning before the outlines of the new program are clear.\(^31\) Whether this silence indicates agreement, ambivalence, or dissent is unclear. One would expect dissent to be communicated in private, but if there were broad agreement, one would expect to notice more clear indications of support for "the second phase of Transformation." For example, in the recently released 2003 Army Modernization Plan, one must search down to page 10 in the personnel annex to find any discussion of unit manning.\(^32\) Were it most important, one would expect it to be addressed up-front and other personnel-related modernization initiatives would flow from it.

At lower levels, the relevant cultural bias among the Army's rank and file is largely based on soldiers' personal experience with an individual replacement system. In the UMS, the "personalities responsible for change" actually exist at every organizational level in the Army hierarchy, not just the top. Most soldiers understand only the training habits and individual expectations that evolved as a by-product of IRS turbulence. These habits and expectations will be difficult to break. For UMS to take root will require a significant amount of individual introspection, leadership to establish and enforce standards across the Army, and sustained effort in our professional education—particularly that of the commissioned officer corps. As one researcher put it, "if you change what the officers think, you will succeed in changing the culture."\(^33\)
Proponency

"There must be a spokesman for change: a person, an institution, or a staff agency."

The Secretary of the Army, through the Army Vice Chief of Staff, tasked the Army G-1 to be proponent for the new UMS. In his 1989 assessment, General Thurman advocated that the Army Deputy Chief of Staff for Operations and Plans (G-3) oversee policy and procedure, with G-1 support, and Army Personnel Command management. Thurman contended that "the UMS has always been viewed as a purely personnel system, losing sight of the meaning of the COHORT acronym. The 'G-3 network', at all echelons, has been largely uninvolved while personnel policy has been pursued aggressively."

The Army Chief of Staff subsequently approved Thurman's recommendation for G-3 proponency, but perhaps too late to save COHORT. Today, the Army G-3 is leading an initiative to consider rotating units overseas, but is not the lead for the UMS. If the past is any guide, the G-3 will not volunteer for UMS proponency, and the G-1 is likely to surrender it grudgingly. In the long run the G-3, who has related proponency for force structure and unit readiness, has the greatest stake in successful unit manning from an Army Staff perspective. In the interest of long-term viability, the Army G-3 should assume UMS proponency shortly after initial implementation, not at the end.

Consensus

"The spokesman must build a consensus that will give the new ideas, and the need to adopt them, a wider audience of converts and believers."

Change of this magnitude needs debate and buy-in, and the views of the Army rank and file remain to be seen. Critical thought and internal debate are among the hallmarks of a profession, and the absence of debate today on unit manning should be unsettling to the Army leadership. This absence is quite likely caused by a host of current pressing operational challenges—a war in Iraq, war against terrorists, and tension on the Korean peninsula. Few have time to think of much else. But perhaps the lack of debate also results from a sense of loyalty and the "can do" attitude that is often an asset but sometimes a weakness of Army professionals. The Army must imbed UMS not only in personnel management policies and procedures, but also in unit
training, readiness, and leadership programs, and in doing so initiate a thoughtful internal debate to renew its professional self-concept. The alternative, blaming “personnel bureaucrats” for past failures, is certainly not a productive consensus-building strategy.38

**Theory**

"Theory constitutes the fundamental key to controlling and integrating change effectively. It reveals the “why” behind past, present and projected conditions, methods and means of war."

The UMS task force’s charter required a review of past unit manning initiatives, but directed the task force not to conduct a new detailed study of these concepts, likely in the interest of meeting implementation timelines.40 Task force recommendations will obviously focus on the “what” of the new unit manning initiative, but early-on the Army must renew its focus on the “why.” Much of the current body of knowledge is dated, and although many human characteristics are timeless, some behaviors and attitudes change as generations pass.41 Significantly, no unit manning-related research is proposed in the Personnel Research and Development (R&D) section of the latest Army Modernization Plan.42

The Army should, of course, avoid unfocused efforts and “paralysis by analysis” that would delay UMS implementation. But without specifically making the case for the “why,” the need for changing the manning system will not be fully inculcated, and the coming generation of Army leaders may not fully appreciate it. Consensus could easily fail to develop, and UMS will again wither. Additional investment in organization and human behavioral research would help develop the theory underlying the unit manning initiative and support its future viability. Since most Manning Program funds pay for soldier entitlements, little is left over for R&D. If UMS is truly the second phase of Army Transformation, it deserves additional R&D funding from outside the Manning Program.
Leadership Continuity

"There must be continuity among the architects of change so that consistency of effort is brought to bear on the process."

Though current Army senior civilian and uniformed leaders appear committed to establishing a viable UMS, eventually priorities will change with the office holders, and so will the strategic, operational and budget environments in which office holders function. Will the next Secretary of the Army and Chief of Staff be as supportive? More important, will the Army senior leaders who follow them be as supportive when the Objective Force is fielded?

General Shinseki’s “irreversible momentum” acknowledges the requirement for leadership continuity. The details of Army Transformation implementation may change, but the overall direction is fixed and straying from the current path will entail significant costs. The key to establishing irreversible momentum for unit manning is linking it to overseas unit rotations. The unit rotation initiative is the forcing function that will enable unit manning’s long-term success. Without the continued demand to rotate individual soldiers overseas and to find assignments for those returning to the United States, the personnel system will be better able to focus on building the units that will rotate instead.

Top-Level Support

"Someone at or near the top of the institution must be willing to hear out arguments for change, agree to the need, embrace the new concepts and become at least a supporter, if not a champion, of the cause for change."

Until Secretary White’s April 2003 resignation, top-level support for the UMS seemed assured in the Army. Unit manning advocates now can only hope for a successor as ardently supportive. The next vital requirement is support by the Secretary of Defense, the President, and Congress. Their support specifically for unit manning is not the issue. More important is their support for the interrelated Army programs of readiness, modernization, and structure on which successful unit manning depends. Sustaining the UMS will be problematic without sustaining the ability of the Army to meet current and projected readiness needs and investing in Objective Force fielding.
Provision of sufficient aggregate force structure is essential if the Army's operational requirements in next decade are the same or greater than the 1990s. Since September 2001, 30,000 Army National Guard and Reserve soldiers have been on active duty on an average day. More have been mobilized for the war in Iraq. The stress on individual citizen-soldiers and the reserve components has been considerable. In the past, the Army used the IRS to adjust to rapid structural fluxes; we sacrifice that flexibility with the UMS. Assuming a six-month deployment standard, a ratio of five units in the United States to every one unit deployed overseas to meet forward presence and contingency requirements might provide soldiers a sufficient break between deployments to accomplish their individual training and education. A 5:1 ratio would also provide the Army sufficient organizational slack to address contingency requirements.

Yet pressure will likely develop from outside the Army to establish a 3:1 ratio in order to trim Army structure to pay for other defense transformation initiatives. In fact, the Army may become a victim of its own success in view of its recent performance in Operation Iraqi Freedom. If structure is cut without reducing the Army’s mission requirements, units and soldiers may live in a perpetual state of preparing to deploy, deploying, or recovering from deployment. Then, if recruiting lags and soldiers with critical skills become harder to retain when the economy rebounds, the UMS may be among the first programs curtailed in order to compensate.

**Testing**

“Changes proposed must be subjected to trials. Their relevance must be demonstrated to a wide audience by experiment and experience, and necessary modifications must be made as a result of such trial outcomes.”

“Our initial strategy was to implement the UMS Army-wide without prior testing” This statement is as true today as when it was written in 1989. There is currently no plan to formally experiment with alternative constructs before establishing a pilot UMS in 2003. A testing plan was considered but rejected in order to move quickly to meet the implementation timeline and because of worldwide operational requirements. Even if the Army wanted to test, implementing UMS for a brigade stationed in Alaska would certainly complicate testing objectivity due to Alaska’s unique environment.
The Army needs to test alternative UMS models to determine which policies and procedures best balance necessary levels of cohesion with the ability of the institution to sustain the new system in the projected strategic, operational, and budgetary environments. In our haste to implement UMS without objective testing we also may reduce debate and consensus building, and thus hinder long-term commitment to unit manning and its sustainability. The Army should create a testing opportunity when it reloads the SBCTs stationed at Fort Lewis, Washington in the coming years.

The Army Needs More Than an Architect

The current UMS initiative has clearly enjoyed a dedicated Architect of the Future. But an architect alone has proved insufficient in the past to sustain change. Army Chief of Staff General Edward “Shy” Meyer was the architect of the High Technology Test Bed (HTTB) initiative in the early 1980s. Yet, despite his unqualified support and the great individual benefit enjoyed by the participants, the HTTB faltered after Meyer's retirement, although remnants of it remain today and the underlying concepts resonate in the vision for the Objective Force. The architect's enthusiasm must be buttressed by top-level support across the Army resulting in a sufficiently resourced effort that fosters broad organizational and intellectual change over time. In the long-term, the current UMS effort could benefit from greater emphasis on research and experimentation to develop the underlying theory and build consensus across the Army.
CHAPTER 4 – ASSESSMENT OF UNIT MANNING ALTERNATIVES

The Unit Manning Task Force, chartered by the Army Vice Chief of Staff, has proposed two courses of action for implementation: Lifecycle Manning and Cyclic Regeneration Manning. Before discussing the relative merits of each and their prospects for long-term sustainment, it is important to outline each one and the unique characteristics associated with each. The first UMS pilot unit, Alaska’s 172d SBCT, will be built using the Lifecycle Manning model and sustained over time with the Cyclic Regeneration Manning model.

**FIGURE 3 – ALTERNATIVE UNIT MANNING MODELS**

**Lifecycle Manning**

A unit manned under the Lifecycle Manning alternative will progress through four phases: Build, Train, Employ and Release. Each ends with an event marking the transition from one phase to another.

The Build Phase refers to all actions resulting in assignment of individuals to the unit. This time is not counted against the life cycle of the unit. The Build Phase concludes with the
Organization day (O-day), which is the day by which all personnel are assigned to the unit and initiates the Train phase.

During the Train phase, the unit focuses on individual and collective training in order to build unit competency for certification. The Train phase concludes with a certifying event. Certification day (C-day) signifies the beginning of the Employ phase.

For the entire Employ phase, the unit is ready to support combatant commander operational requirements. A unit’s training focus shifts to readiness sustainment and improvement. The Employ phase ends with the Release day (R-day) at which time the unit is taken off employable status and enters the Release phase. The small percentage of unprogrammed personnel losses that occur during the Employ phase will be refilled annually with a package of individual replacements.

The Release phase allows the unit to conduct an orderly mission hand-over to the succeeding cohort of soldiers. The Release phase concludes when all soldiers are reassigned and all barracks, equipment, and other assets are turned over to the next unit or appropriate agencies.

The unit lifecycle length may last between 30 to 48 months, most likely 36. However, the specific cycle length for each unit managed under this alternative will be determined by force structure limits and overall Army mission readiness requirements.

Cyclic Regeneration Manning

A unit manned under the Cyclic Regeneration alternative has two phases: Regenerate and Employ. Unlike the Lifecycle Manning alternative, a Cyclic Regeneration Manning unit is mission capable at all times. During several short periodic Regeneration phases the unit implements changes necessary to sustain it.54

Because a unit manned under this alternative is always mission capable, it may be most applicable to units that provide command and control or support other units not manned using the Lifecycle alternative, or for units with missions with high risks associated with non-availability. Soldier assignments to a Cyclic Regeneration unit will be aligned to coincide with a
Regeneration phase. This model is much like the current IRS except that individual arrivals and departures are synchronized to occur at one time instead of spread across the year.

During the Regeneration phase, programmed losses will depart, some soldiers will be reassigned internally, and new external arrivals will be integrated into the unit prior to entering into another Employ phase. Regeneration phase length and the period separating them will be dependent on the unit type, location, echelon, and mission.

Each of the UMS models is a viable alternative in the near-term. And with enough focused effort, the Army can successfully manage anything for a short while. But which model will stand the test of time? For unit manning to succeed in the long run, Army leaders must focus on three primary areas—Force Structure, Professional and Leader Development, and Readiness.

**Force Structure: “The Inescapable Mathematics of Musical Chairs”**

Change is the essence of Army Transformation, but how do we change without self-inflicted institutional wounds? Friction between force structure and personnel management must be addressed for unit manning to succeed within Army Transformation.

The relationship of Army force structure and the soldiers assigned to it may be thought of an enormous game of musical chairs. The music stops and starts every day. Keeping soldiers together in units to enhance their collective effectiveness—the objective of today’s unit manning initiative—solves only half the problem. The Army not only moves soldiers between the chairs, it also simultaneously moves many of the chairs. The personnel system then plays a catch-up game, moving people to chase the chairs. Without more discipline in the management of Army structural change, long-term unit manning success will be problematic

**The Curse of Dimensionality**

The Army’s Force Structure Allowance currently provides about 417,000 chairs—or spaces—in Active Army units. Ideally, in the current system, each space is filled with a soldier at all times. But any soldier cannot occupy any space. Each space is coded for one of 20 pay grades spread among hundreds of job specialties in over 10,000 units worldwide. In addition, some units or individual spaces require special qualifications—parachutists positions, for example— or are designated for male soldiers, like infantry. The dimensionality of the problem
to match "faces and spaces" is considerable and, with over 70,000 soldiers entering and leaving the Army each year, it is a wonder the system works at all.

A 1998 memorandum to the Army Deputy Chief of Staff for Personnel noted that the Army "distribution system is built to fill requirements. As spaces open in high priority units or overseas, we move soldiers from lower priority units or out of the training base to fill them. Each soldier we move causes a ripple effect in filling the demand and then a continuing series of backfills." Within this system, commanders today judge their level of personnel readiness by comparing skills and grades authorized in their units to the numbers of people assigned in those skills and grades. Army policy allows some substitution flexibility; in fact, operational necessity often requires it. But the Army and its commanders have traditionally paid far more attention to the match of faces and spaces and far less to how frequently those faces changed.

**Dynamic Structure Increases Management Complexity**

Difficult as it would be to match and stabilize faces and spaces in a static structure, the Army structure itself continually changes. This dynamic quality adds another dimension to management complexity—one that must be addressed for long-term unit manning success. Army structure continually evolves to meet the changing operational needs of combatant commanders (basing an airborne battalion in Alaska), incorporation of new technology and capabilities (Unmanned Aerial Vehicles), and organizational reconfigurations to accomplish new warfighting concepts (Stryker Brigade Combat Teams).

Total Army Analysis (TAA) is a well-developed process linking organizational change to the department's programming and budgeting cycle. Nevertheless, for a variety of reasons, the Army leaves many of the detailed structure decisions to the last minute—retention of senior leader management flexibility, late-breaking budget decisions, operational contingencies, last-minute disagreements, and decision reversals all contribute. Right or wrong, these "final" decision delays conspire to confound the personnel system's ability to meet personnel readiness requirements.
THERE IS NO SUCH THING AS A FINAL DECISION

As an example, in 1998 the Army embarked on the Change in Non-commissioned Officer (NCO) Structure initiative, known as CINCOS (SINK-ose), to address the widespread belief that the NCO structure had become too top-heavy. Army senior leaders were determined to drive structure down by 2 percent to the level that existed before post-Cold War force reductions. On paper the plan made sense, and the Army Chief of Staff approved CINCOS with buy-in from what was then known as his "board of directors"—the other Army four-star generals.

A year later, and only halfway to its goal, the Army reversed its course and initiated the "CINCOS-Buyback". The buyback decision came after numerous other long-range decisions had been made in Army personnel and training programs to support the original reduced CINCOS structure target, so reversal of the leading decision required reversals of many others. Army soldiers were not as aware of the specific structure decisions as much as they felt the downstream impacts in their own professional lives: assignments, promotions, and education management decisions. Their expectations of education and promotion opportunities were altered with each new set of decisions. The decision reversals must have seemed cold and arbitrary to the noncommissioned officer reading about them in the Army Times, and may have been one of the contributors to the low state of professional satisfaction registered in Army surveys in the late-1990s.

CINCOS—NOT IN MY BACKYARD!

In its simplest form, CINCOS represents the "NIMBY" phenomenon. Early on, acting as an objective "board of directors," senior Army commanders agreed in principle that the NCO structure was too top-heavy. But when the specific impacts on their units became clear a year later, they were simply unwilling to support CINCOS. The CINCOS story is important on two levels. First, it suggests the degree to which personnel decisions are inextricably linked to structure decisions, and second, it demonstrates how Army-level decisions may be reversed later because they are deemed unsupportable by field commanders. Both lessons are important to consider as the Army moves forward with unit manning. Furthermore, memories of CINCOS and similar efforts, like the Officer Restructuring Initiative, may explain why some Army
personnel managers are somewhat skeptical of the Arny's true commitment to sustaining the current unit manning initiative.\textsuperscript{60}

We do not argue that the Arny should remain static; it must continue to change in order to remain relevant in a rapidly changing environment. But disciplining the pace of change in fielding new force designs and organizations, and providing sufficient aggregate structure to support the unit manning system is absolutely critical to its continuance. The IRS exists, in part, as a mechanism to respond to rapid structural change. The IRS permits the Arny to create new units and quickly populate them, or to disband units and send their soldiers elsewhere. With the UMS, the Arny sacrifices much of this flexibility and must adhere to a relatively inflexible unit lifecycle schedule. It remains to be seen whether Arny \textit{commanders} will be willing to underwrite such a cost to their operational flexibility. Regardless of the UMS model adopted, harnessing force structure and personnel management in tandem will be a lynchpin for UMS success.

Unit Manning requires an organizational discipline that the Army has thus far been unable to muster. To be fair, the IRS has been highly adaptive to change. It has forestalled the need to instill additional rigor in the related functions. The basic nature of unit manning requires a predictability and consistency in unit formations that is not currently present.

\textbf{RECOMMENDATIONS TO DISCIPLINE ARMY MANAGEMENT}

\textit{The Arny must not only discipline its Manning function, but also its Organize, Train and Equip functions:}

- \textit{Institute a quarterly or semi-annual Chief of Staff UMS Implementation Review.} Such a process will force UMS and cross-functional issues to be raised and corrective actions proposed for senior leader decisions. Without it, unresolved issues will fester and then burst in a crisis, reducing Arny leader's management flexibility to deal with them, or swept under the carpet, contributing to the UMS's eventual downfall.

- \textit{Include UMS impacts in the Total Army Analysis 2011 (TAA 11) and post-TAA-11 Force Feasibility Reviews.}
• Minimize out-of-cycle force structure changes, and reserve approval for genuinely
required last-minute changes to the Army Chief of Staff or Vice Chief of Staff.

• Fully incorporate UMS considerations in the Army Modernization Plan. SBCT and
Objective Force designs should be implemented in units in concert with UMS lifecycles.

Professional and Leader Development in the UMS

The Army must address the professional and leader development implications of soldiers’
service in UMS units. We must set stabilization conditions that maximize unit readiness while
minimizing perceived and real UMS-related individual equity issues.

The personnel management system is like a spider’s web—touch it in one place and it
vibrates everywhere else. The move from individual replacements to unit manning is more than
a change in one process—it represents a change in the entire cultural web. Today’s Army tends
to accommodate the needs of the individual over the needs of the unit. Lieutenant General
(Retired) Robert Elton, a former Army Deputy Chief of Staff for Personnel, sums it up well:
“Our American desire for efficiency [and] our sense of fairness and equity to the individual as
part of our American ethic . . . have consistently driven us to use the IRS.”

Implementing the UMS establishes the primacy of unit needs over those of the individual.
The Army must also balance unit readiness requirements with the long-term developmental
needs of its members, which to a great degree represent the Army’s future readiness. Some of
the second lieutenants and enlisted soldiers assigned to the 172d SBCT in the summer of 2003
may be battalion commanders and command sergeants major in twenty years. The UMS affords
longer mentoring relationships between leaders and led and will certainly enhance their
professional and leader development. But the Army also needs to provide sufficient time for
institutional training and education over their careers. To accomplish this, the Army must
synchronize the officer and enlisted professional “life cycles” with unit life cycles.

To assess UMS impacts on the Army’s education process we must consider its implications
at the accession, mid-career, and senior levels. The Army’s Officer Education System (OES)
and Noncommissioned Officer Education System (NCOES) are the building blocks of
professional and leader development. Until recently, the Army primarily determined soldiers
school attendance according to individual and institutional needs, with less regard to unit needs. In the mid-1990s, the Army began shifting to greater use of distance learning (DL) applications through internet- and computer-based means or video teletraining. Continuing this Army training transformation will permit future UMS unit commanders greater flexibility to determine the timing of their soldiers' schools attendance, whether in residence or through DL.

**ACCESSION TRAINING**

From an Army management perspective, the most critical UMS Lifecycle phase is at the beginning. The Army must access the right number of soldiers to be trained at the right time in the right specialties so they arrive at their gaining unit within a 30-45 day window. Recruiting seasonality in the enlisted force will require sustaining a viable Delayed Entry Program to smooth the load in the training base.

Synchronizing officer accessions with unit manning will be similarly challenging, since only Officer Candidate School and a few ROTC accessions enter the Army year-round. The rest appear in a late-spring surge when colleges graduate. After appropriate initial qualification training, many lieutenants destined for UMS units will likely require casual duty assignments while they wait for a job, adding to the personnel and structure friction.

Under the Cyclic Regeneration Model, these considerations remain generally the same, but the number of replacements necessary in a given unit regeneration period is smaller.

**MID-CAREER TRAINING AND EDUCATION**

Junior and mid-career noncommissioned officers attend the Primary Leader Development Course (PLDC), Basic Noncommissioned Officer Course (BNCOC) and Advanced Noncommissioned Officer Course (ANCOC). The impact of UMS on PLDC attendance will be minimal as long as commanders retain the flexibility to send soldiers to school at the right time in their unit's lifecycle. BNCOC and ANCOC are taught at the appropriate training bases for each occupational specialty. Many of these courses are in transition to include a distance-learning module. The Army already allows conditional promotions—promote now and train later—if NCOs are unable to attend school. Conditional promotions are likely to increase in order to allow NCOs to stay in UMS units and attend school while enroute to a new assignment.
after their unit cycle is complete. Alternatively, NCOs may be trained in harmony with their unit’s regeneration phase (under the Cyclic Regeneration model), or at the unit commander’s discretion if a distance learning training option is available.

Mid-career officers attend the Captain’s Career Course (CCC) and Command and General Staff College (CGSC). Officers attend CCC after completing their first duty tour. The CCC is designed primarily to prepare officers to command at their next duty location. Current CCC timing affords officers time to complete a three-year tour with their units prior to attendance, and the opportunity to continue the horizontal bonding with their peers that began in their first units.

CGSC is currently taught on an academic year schedule with 50 percent of Army majors selected to attend. In the near future, universal Intermediate Level Education (ILE) will replace CGSC, with all majors attending shorter resident courses tailored to their career specialty. Until ILE is fully implemented, officers’ attendance CGSC must be linked to the end of unit life cycles. Since UMS unit regenerations will occur every month, only a limited number of officers can be assigned directly from CGSC to a UMS unit or vice versa. The remainder will have to spend a short time in a different assignment until the appropriate time to enter or exit a UMS unit, resulting in additional friction between the personnel and structure systems.

SENIOR LEVEL EDUCATION

Some senior NCOs are selected to attend the Sergeants Major Academy (SMA) offered once at year at Fort Bliss, Texas. Generally, those selected for the SMA are scheduled to attend at the next opportunity. As with other courses, senior NCOs assigned to UMS units will have to wait until the end of their unit’s life cycle to attend, or take the two-year non-resident alternative now primarily used by reserve component NCOs.

Similarly, small numbers of lieutenant colonels are selected to attend the resident Senior Service College (SSC). In UMS units, this only affects the four or five battalion commanders associated with a brigade. Currently, resident SSC is primarily tied to an academic year and a summer rotation. Provisions for UMS officers selected for SSC are similar to SMA-selectees: attend after the unit’s life cycle, attend an off-cycle program, or use the distance education option.
**Professional Experience**

In the long-term, serving in UMS units will change the overall professional experience level, particularly among commissioned officers. By stabilizing soldiers in units, the Army trades a decreased breadth of experience (the number of jobs over a soldier's career) and decreased opportunities (the number of soldiers who serve in those jobs) for an increase in depth (time in a job). In the past, the Army tended to move officers and senior noncommissioned officers after they received an adequate amount of time in the position, assuming they mastered it enough to move on to the next one. The job opening gave someone else the chance to gain the same experience. This assignment philosophy allowed NCOs and particularly officers a broad range of experience, sometimes changing jobs every 12-18 months.

Depth, a thorough mastery of a job, was often sacrificed to provide others opportunities to gain the same experience in order to build a bench of well-qualified candidates for positions of greater authority. Units also sacrificed as a result of rapid leadership turnover. The UMS initiative, together with the recently overhauled Officer Personnel Management System (OPMS III), is aligning career management on more stability in fewer jobs. But in doing so, issues of fairness must be addressed as part of a change in culture.

Those who argue for the primacy of the unit as the Army readiness "coin of the realm" sometimes forget that individual equity and particularly equity perceptions matter a great deal in terms of retention behavior. There will be no ready units if there are not enough soldiers to man them. The Army must strike a balance between the unit and the individual, establishing personnel management policies that offer equitable opportunities for positions, fairness for soldiers in UMS units who will not be allowed to move when they want, and fairness for the units to give them leadership continuity.

As many as six majors might have served as the operations and executive officer in a three year period in a typical battalion in the 1990s. Leadership and staff continuity suffered. Today, under OPMS III, two majors in the Operations Career Field could serve 36 months in those same positions. Limiting the assignments to two officers offer them great developmental experience, but reduces opportunities across the officer corps by as much as two-thirds. The UMS may
further constrain assignment opportunities and require the Army to offer Operations Career Field officers an alternative career field if they are unable to serve in a branch-qualifying position.

**Balancing Long- and Short-Term Benefits**

UMS critics may argue that the Army is mortgaging the future officer and NCO corps and that long-term risks to the profession and institution are not worth the potential immediate unit benefits. They are right on one point: there is risk, and the Army should not gloss over it. However, we believe the overall benefit of more cohesive, less-turbulent units outweighs the career risks of officers and NCOs. The actual risk is manageable. More difficult will be managing negative individual perceptions and related retention behavior.

Others will argue that the Army is establishing a “haves” and “have-nots” in terms of individual opportunity. The UMS Lifecycle Model may offer fewer opportunities in key positions, but again the payoff outweighs the loss of individual opportunity, especially in light of PMS III. For example, the developmental pyramid for battalion command will become narrower, but in the long-term officers serving in UMS units will enter battalion command with more operational experience and better qualified to lead.

**Cyclic-Regeneration Better Supports Professional Development**

Between the alternative UMS models, Cyclic Regeneration appears more favorable for professional development. It is a compromise between the individual and the unit. It offers more entry and exit points for leaders to meet their professional development needs, but minimizes day-to-day turbulence.

**Professional Development Recommendations**

*The Army must minimize potential for individual “collateral damage” associated with assignment to a UMS unit.*

- Decentralize selection authority for promotion to captain from the Department of the Army down to brigade command level. By decentralizing promotion authority to brigade commanders, the potential anxiety associated with fewer job opportunities would be reduced because the officer with promotion authority would be in the lieutenant’s immediate supervisory chain. There will be some risk that brigade commanders will
promote too many and create a budget problem, or promote too few and cause a shortfall of captains across the Army. As long as the Army’s needs for captains allows selection rates of 90% or higher, there is little risk in decentralizing promotion authority. If too many are promoted, pin-on time may be extended. If the future need for captains significantly decreases as we experienced in the early 1990s during the last Army downsizing, selection may be re-centralized with proper planning.

- Provide special instructions to centrally managed selection boards that give special consideration for UMS participation. In serving the needs of the Army, UMS participants may have not been afforded the same assignment flexibility as their peers.

- Include “special remarks” in the enlisted and officer record brief to indicate UMS participation. This will identify UMS participants to personnel managers for follow-on assignment consideration and ensure future selection boards are aware that soldiers have served in UMS units.

- Limit “branch qualified” assignment requirements across the Army. Reducing these requirements will reduce the pressure to reassign soldiers before UMS lifecycles end.

- Assign officers and NCOs to UMS units at the right time in their careers to allow them to serve the full lifecycle term in the unit. This will minimize turbulence while allowing officers and NCOs to compete for appropriate level of schooling and job opportunities at the right time in their careers. This will require a refined level of management at both Army and installation level.

- Consider allowing Operations Career Field officers a second chance at career field designation if they are unable to branch qualify due to UMS opportunity constraints.
Army Readiness Considerations

"No timeout for readiness" is an Army mantra. However, the UMS trades increased readiness in some units for less readiness in others. A new readiness approach to Army readiness is in order.

Military readiness is the capability of forces to fight and meet the demands of the national military strategy. For long-term UMS success, and more importantly to ensure the Army is capable of meeting strategic demands, three aspects of Army readiness are particularly important: readiness of units, installations, and personnel.

UNIT READINESS

Army units periodically report their readiness condition up their chain of command. To establish a reporting condition ranging from C-1 (fully ready) to C-5 (unready because of service-directed resource actions such as new equipment fielding), commanders assess their readiness based on measurements of personnel, equipment on hand, equipment serviceability, and training. In general, Army expectations and resource allocations intended for all units are ready all the time. Unfortunately, the current readiness reporting system is reactive. Reporting lag time leads to the Army viewing readiness through a rear view mirror. The Army's new Strategic Readiness System under development will provide a predictive view of readiness so that the Army can address unit resource shortfalls before they adversely affect readiness.

The Army has decided to wed UMS implementation with the transformation of future SBCT units. Transformation causes units to report C-5, so establishing a UMS linkage should not increase the number of unready units. It is a natural fit. However, after an Army unit has transformed, there will be a continued readiness impact especially if the Army adopts the Lifecycle UMS model. If fully implemented, unit manning will apply to 33 maneuver brigades. At any given time, up to one third of those units could be C-5 while they build and train.

Under the proposed SBCT and Objective Force fielding time lines, a transforming unit is planned to be unready for up to 8-12 months as soldiers arrive, equipment fielded, and the unit initially trains. The Unit Manning Task Force estimated this would enable approximately 74 percent of UMS units to be fully ready at any given time. However, 16 years of experience
fielding Army Apache helicopter battalions suggests that an 8-12 month fielding may be optimistic. Assuming most UMS units have a 3-year life cycle, it seems unlikely that Army commanders will accept more than a year of unreadiness for one third of the force. (Remember the lessons of CINCOS.)

The assumed acceptance of tiered readiness in the Army is a significant departure from past practices and expectations. The Army has viewed tiered readiness as an anathema, the first step down the road to a hollow force. Can the Army meet its worldwide missions with fewer ready units, or will it require additional combat structure? The Army needs to come to grips with these issues early-on in UMS implementation.

INSTALLATION READINESS

There is no question that the UMS will improve predictability for soldiers and their families. Seeing the world and a nomadic lifestyle may be part of Army culture, but research indicates that soldiers and families like stabilization. With the UMS, better spouse employment opportunities, potential home ownership, and more civilian education are more feasible. Vertical and horizontal bonding within unit Family Readiness Groups may also be enhanced.

But from an installation readiness perspective, UMS implementation will be a challenge for installations, especially if the Army adopts the Lifecycle UMS model. Installations will need to plan for and resource sufficient barracks and family housing, establish sufficient capacity to in- and out-process soldiers as units are built and released, and provide additional community support functions. An 8-12 month training surge may require additional ranges, training areas, and maintenance capabilities, and clear usage priorities for them, to enable UMS units to meet their certification dates on schedule.

Here again, from an installation perspective the Lifecycle UMS model appears more manageable. With either model, however, the level of difficulty may be minimized by the new centralized Installation Management Activity, which may consolidate lessons learned by region, and establish a template for other UMS-supporting installations.

From an Army installation management perspective, unit manning comes at an inopportune moment. The Army is attempting to emerge from over a decade of frequent under-funding of
Sustainment, Restoration, and Modernization (SRM) accounts. Last year, 50 percent of Army facilities and infrastructure were rated in poor condition, having an adverse effect on mission accomplishment.\(^7^0\) Although the Army is reengineering its installation management processes, and future SRM budgets are funded at levels intended to halt infrastructure deterioration and improve recapitalization rates, the incremental costs of UMS implementation and anti-terrorism and force protection bills may be difficult to stomach.

**PERSONNEL READINESS**

*The Army must carefully measure and monitor internal and external turbulence within UMS units and throughout the rest of the Army.*

Unit personnel readiness is currently measured in terms of quantity and stability. Until now, quantity has always been the primary focus area. However, personnel turbulence, or the lack of stability, has a significant effect on unit readiness and mitigating it is central to the UMS.\(^7^1\) Turbulence may be categorized two ways: internal (moves within the organization) and external (moves outside the organization).

The unit commander primarily controls internal turbulence, and UMS units will be filled and sustained to minimize the commander’s need to move soldiers internally because of external influences. Unexpected (unprogrammed) losses will occur, however, and must be dealt with on a case-by-case basis. Most of these losses will occur among the most junior soldiers, and when that happens the Army is unlikely to provide another soldier until the next replacement cycle.

When a unit loses a key leader, the commander must consider the trade between cohesion and turbulence.\(^7^2\) For example, if a first sergeant is lost unexpectedly there are two options: wait for the Army to provide a new first sergeant in next replacement window, or move a platoon sergeant up to the first sergeant position. The second option would then require a squad leader to replace the platoon sergeant, a fire team leader to replace the squad leader, and junior soldier to replace the team leader. In this case, the loss of one first sergeant might generate four internal moves, breaking some of the cohesive bonds within the unit. But since these moves are internal, they may not damage cohesion as badly as when an outsider is assigned.
External turbulence is caused by losses of soldiers leaving the service at the end of their contract, or when soldiers are reassigned to a different unit or installation. The unit’s higher headquarters or PERSCOM controls these reassignments. Under the UMS, unit members will be assigned with separation or reassignment dates synchronized with the unit’s lifecycle, or fenced from reassignment or separation until the regeneration phase of the Cyclic Regeneration model. If the Army can minimize the number of exceptions to this disciplined system, external turbulence should be minimal.

The temptation to make exceptions will be driven by increased turbulence rates in non-UMS units throughout the rest of the Army, the “have and have-not” phenomenon that harmed COHORT implementation. If, at steady state, about 100,000 soldiers are assigned to UMS units, over 300,000 will remain under the IRS. UMS units will be fenced from short notice individual reassignments and augmentation tasking, and the rest of the Army will suffer a greater burden with a smaller pool on which draw. The Army needs to be able to measure actual unit turbulence and compare turbulence between units.

Operating Strength Shortfall

\[
\left[ \frac{\text{# Days Vacated}}{\text{# Days Possible}} \right] + \left\{ \frac{\text{# Personnel Losses}}{\text{# Personnel Assigned}} \right\} - \left[ \frac{\text{# Gains} - \text{# Losses}}{\text{# Assigned}} \right] \right\] = \text{Turbulence Rate}

FIGURE 4 – THE USAWC RECOMMENDED TURBULENCE METRIC

In 1999, a U.S. Army War College (USAWC) Turbulence Study chartered by the Army Chief of Staff recommended several well thought-out personnel readiness metrics. Among them was a combined measurement of unit operating strength and turbulence shown above that

33
would also enable a comparison of units across the Army. None of the USAWC metrics were included in the revised Army readiness reporting regulation, AR 220-1, published in 2001. It is time to implement them.

ADJUSTING TO A NEW READINESS PARADIGM

Those who disagree with the UMS concept will argue that the readiness costs are too high. They will argue that 75 percent readiness in a resource-constrained Army is unsustainable in the long term. There is certainly some validity to this concern. Will the Office of the Secretary of Defense support this readiness level? Will Congress? Each of the other armed services has successfully adopted a form of rotational readiness: the Marines deploy Marine Expeditionary Units, the Air Force rotates Air Expeditionary Forces, and the Navy rotates Carrier Battle Groups. When an aircraft carrier returns to port after deployment, there is no expectation that the ship will be combat ready for months. For the Navy tiered readiness is perfectly acceptable. Will similarly tiered readiness states in the Army be acceptable outside it, particularly given continued external pressure to reduce force structure to pay for other defense initiatives? We do not know the answer.

READINESS RECOMMENDATIONS

The preceding analysis suggests both promise and pitfalls for the long-term prospects for Army unit manning from a readiness perspective. While both UMS models under consideration have advantages and disadvantages, neither model has an overwhelming advantage. Each can be effective in the right type of unit with the proper support. However, there are steps that can be taken to ensure long-term success regardless of the UMS model adopted.

- *Weave unit manning into the new fabric of the Army Strategic Readiness System.* Under the UMS, units periodically are expected to fall below a fully ready status. Initially, because of their competitive nature, unit commanders will try to game the system. Culturally, it will be difficult to change their attitudes and the tendency to be “less unready” will be great. Commanders must enforce discipline on the system and learn to expect and accept “white space” on their training calendars.
• **Institute better turbulence metrics.** The Army should adopt the USAWC Turbulence Study recommendations.

• **If the Lifecycle Model is adopted, Army policies must clearly state the activities allowed during the build and regeneration phases.** During this period, limit the amount of training a UMS commander may do to prevent overtaxing the unit while it regenerates.

• **Return to the focus and discipline of training fundamentals established in FM 25-100, “Training the Force.”**

• **Develop an installation readiness model that synchronizes resources to maximize support to UMS units.** Examples include in-processing activities during a unit's build phase, and range utilization during a unit's train phase.

• **Perform a rigorous UMS cost analysis.** UMS may cost more than the IRS. If so, the Army should know that before full implementation. Additional installation infrastructure, soldier “man-years,” and institutional training costs may compete for limited Army resources.

• **Develop incentives to encourage soldiers to remain in UMS units past the unit life cycle.** These soldiers will form a cadre for the new unit while maximizing the personal readiness benefits of UMS. The traditions and culture that grow over the three-year units life cycle will start up again quickly as the next UMS unit starts the build phase.

Institutionalizing the UMS

*If the Army is committed to UMS for the long haul, it must establish “buy-in” throughout the organization through a comprehensive communication and training program.*

The current UMS initiative clearly requires additional “buy-in” within the Army. Secretary White's mandate and endorsement of the UMS sent a message that the Army needs to change the way it mans units in order to be more effective and relevant. This message, however, was not underpinned with any new analytical support, nor was the message clearly echoed by other senior Army leaders. The officer corps' backing is particularly key to UMS success. Developing support may be difficult, however. Individualism is a core national value, and resistance to
change is an inherent human trait, especially in a tradition-based institution like the Army. Garnering support may be even more difficult given the success of IRS-manned Army units in recent operations such as “Iraqi Freedom.” A compelling case for change must be developed and support established at the highest levels within the Army and the Department of Defense.

In order to embrace change, soldiers and their leaders have to “buy-in” to the logic behind that change. Without buy-in, subtle resistance and friction at each level will translate into intransigence of the organization as a whole. This is particularly important with this initiative since it fundamentally changes the way a significant portion of the Army is managed. Changes that affect people’s lives so profoundly are difficult to instill and even more so to cement. For many, the IRS status quo works just fine.

When OPMS XXI (now called OPMS IIII) was adopted in 1998 it caused a great deal of anxiety in the officer corps. Many thought the Army was fixing something that was not broken. Anticipating this concern, the Army wisely developed a “chain-teaching” campaign of briefings, instructive CDs, articles, and on-line information. This information, to the point of overload, helped reduce the uncertainty among officers who were unsure of the impact of this new program. It also established why it was a badly needed change. The same type of campaign is needed for UMS.

The scale of this campaign must be much broader, however, since it may affect all soldiers, not just officers. The campaign must include products designed to communicate the need for change to every level. Senior leaders need to know the core reasons behind the changes and the organizational implications; the newest recruits need to know how the changes might affect their career ahead.

- Develop a plan to communicate the changes UMS requires, its benefits and drawbacks, how it may affect each soldier personally, and what safeguards will be established for soldier and unit well being. When the Army’s comfort level increases, so will the odds of long-term UMS success.

- Prepare the Army for the “have and have-not” phenomenon. UMS and IRS units will be treated differently. Implementing the UMS may be easier for the participants than for the
rest of the Army. There will be some friction and an associated cost of doing business. Priorities set by commanders will go a long way to reducing the potential for hard feelings between UMS and non-UMS units.

- Make it clear to officers that they will participate. UMS plans currently envision including commissioned officers in the unit manning cycle. In the COHORT era, officers rotated through UMS units, but stabilization rules that applied to enlisted soldiers did not apply to officers. Officers were exempt from stabilization primarily to enable them to meet their individual development and educational needs. However, this exemption also resulted in a perceived double standard and reduced vertical bonding in UMS units. Leaders did not always have the same commitment as the soldiers they led. In the future, there may be a temptation to allow similar officer stabilization exemptions. For long-term UMS success, this temptation must be resisted.

Conclusion
In his 1989 COHORT assessment cover letter, Maxwell Thurman urged the Army Chief of Staff to persevere with unit manning: "Cohesion, readiness and unit effectiveness are worthy objectives. They must be pursued!" Thus, while the Army’s previous UMS disappointments certainly question its future viability, our experience should not preclude pursuit of a better system. While no previous UMS effort took root, there were successful elements in each and these should be considered as the current effort proceeds.

Clearly, the Army must attend to more than one of Starry’s and Wass de Czege’s eight "constants of change." Only the architect has been safely on track, and even that aspect is now questionable with Secretary White’s April 2003 resignation. Other management issues also need additional focus as the Army moves forward to ensure success of the unit manning system. In this paper we have identified 22 recommendations that will contribute to its long-term success—in pursuit of the irreversible momentum for unit manning that has thus far escaped the Army.
## Issue Recommendation

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| Management Process| • Shift staff proponency from G-1 to G-3 after pilot UMS implementation. Reinforce the linkage between unit rotations and unit manning.  
• Explicitly test UMS concepts to determine what works best Army-wide.  
• Invest in human and organizational behavioral research to develop the underlying theory. |
| Structure         | • Establish a periodic CSA UMS implementation review process.  
• Include UMS impact analysis in TAA 2011 force feasibility reviews.  
• Minimize out-of-cycle force structure changes. Withhold approval authority for them to four-star level.  
• Fully incorporate UMS considerations in the Army Modernization Plan. |
| Professional Development | • Decentralize selection authority for captains to brigade command level.  
• Provide special UMS instructions to selection boards.  
• Include UMS "special remarks" in personnel record briefs.  
• Limit "branch qualified" assignment requirements across the Army.  
• Assign officers and NCOs to UMS units at the right time in their careers.  
• Consider offering Operations Career Field officers a second chance at career field designation. |
| Readiness         | • Weave unit manning into the Army Strategic Readiness System.  
• Institute better turbulence metrics. Adopt 1999 USAWC Turbulence Study recommendations.  
• Refocus the Army on FM 25-100 training standards and discipline.  
• Develop an installation readiness template for UMS.  
• Perform a rigorous UMS cost analysis.  
• Develop incentives to encourage soldiers to stay in UMS units. |
| Institutionalizing the UMS | • Develop a strategic communications plan for the UMS.  
• Prepare the Army for the “have and have-not” phenomenon.  
• Make it clear to officers that they will participate. |

**TABLE 2 – UMS RECOMMENDATION SUMMARY**
APPENDIX – A BRIEF HISTORY OF ARMY UNIT MANNING

The U.S. Army has attempted numerous forms of unit manning since World War II, but in each case, the Army abandoned these experiments and reverted to individual replacements in both peace and war. Why? Some blame these failures on an entrenched personnel management bureaucracy that refuses to change its ways to accommodate the Army’s greater good. Is this true, or were there other structural or cultural factors that have constrained the Army to maintain an individual replacement system despite the fact that many in the Army have long recognized the cohesion benefit that might accrue from unit manning?

World War II

More than one historian has damned the U.S. Army’s World War II replacement practices, in particular the practices in the European Theater of Operations (ETO). In the Pacific, geography provided units a periodic respite from combat between island hopping and enabled a more deliberate system of casualty replacements. But in the ETO, soldiers were treated as spare parts, rushed into combat as casualty replacements, and their lack of combat experience and acclimatization routinely resulted in their own quick addition to the casualty lists. “Had the Germans been given a free hand to devise a replacement system for ETO, one that would do the Americans the most harm and least good, they could not have done a better job,” wrote historian Stephen Ambrose. Since World War II, such harsh views have become entrenched in Army conventional wisdom and used as part of the rationale to reform the personnel system by substituting unit manning for individual replacements.

From a small unit perspective, the individual replacement policy may have seemed idiocy, but stepping back and looking at it from a higher level, it is apparent that the Army left itself little choice. In 1941, Army planners envisioned mobilizing over 200 divisions for the war, and such a large-scale mobilization might have provided enough units to enable unit rotations in combat. However, after War Department staff studies in 1943 and 1944, the Army Chief of Staff, General George C. Marshall, decided prior to the Normandy invasion to limit the Army’s total mobilization to 90 divisions in order to minimize the impact on the nation’s industrial
Instead of quantitative superiority, according to Marshall, Allied success in Europe would rely instead “on our air superiority, on Soviet numerical preponderance, and on the high quality of our ground combat units.” The die was cast.

The replacement dilemma was further aggravated when, after the Normandy breakout in the summer of 1944, General Eisenhower chose to attack Germany on a broad front. Eisenhower’s operational decision coupled with Marshall’s earlier strategic gamble provided scant opportunity to rotate fresh units to relieve those already committed in the ETO. One third of the Army’s ground force was committed in the Pacific, and the remainder was stretched thin between Italy and Northern Europe. By the end of the war, the Army had committed all but two of its divisions to combat. Without additional divisions, there was no structural flexibility to enable unit rotations, and in fast-paced operations over a broad front “the replacement stream became in effect the reserve of the ground combat forces.”

More recently, some less discouraging views of the World War II replacement system have emerged. While the strategic and operational decisions to prosecute the war in Europe afforded little time for individual assimilation in units, one researcher argues that, at least for one unit, “the American system of individual replacement sustained battle worthiness by ensuring infantry units never dropped below the point where organizational structure suffered and the replacement system possibly facilitated long-term cohesion, rather than hampering it.” Without enough combat units to sustain an operational tempo demanded by the nation’s strategic and operational decisions, an individual replacement system—flawed as it was in the details of its execution—was the best they could do.

The Korean War

The nation’s demobilization after World War II left the Army unprepared in both structure and readiness for another high tempo war. Army active duty strength shrunk from over 8 million in 1945 to 600,000 in June 1950, and then grew to 1.5 million by June 1951. As war progressed in Korea, neither General Mathew Ridgeway nor his successor as 8th Army commander, Lieutenant General James Van Fleet, supported using unit manning. They were
unwilling to underwrite the readiness implications of training and equipping two units to do one job.\textsuperscript{84}

Again, in the aftermath of the Korean War, historians wrote disparagingly of the individual replacement system's negative impacts on small unit cohesion, and more recent critics of the system have carried this theme forward. The favorite negative comparison is the spectacle of Army soldiers "bugging out" under pressure with the more cohesive U.S. Marines on the opposite side of the Chosin Reservoir during the retreat from North Korea in November and December 1950.\textsuperscript{85} This perception of disgrace and the inevitable condemnation of an Army system that permitted such a thing to happen has become part of Army institutional memory.

It took 50 years to set the record straight. In 2000, the bravery and self-sacrifice of the American soldiers in 31	extsuperscript{st} Regimental Combat Team (RCT) at the Chosin Reservoir was recognized with a Presidential Unit Citation. The 31	extsuperscript{st} RCT "fought itself to death protecting the flank of the Marines" from being overrun by the advancing Chinese Army.\textsuperscript{86} The 31	extsuperscript{st} RCT may have been manned with poorly equipped and trained conscripts, but lacking cohesion under fire? Perhaps their brave performance represents the task cohesion—achieving the group's goal—which sociologists associate with enhanced unit performance, rather than social cohesion—the bonds of friendship—that contributes less to mission accomplishment, and in some cases, can be detrimental to unit performance.\textsuperscript{87}

**Attempts at Unit Manning in the 1950s and 1960s**

Between the end of the Korean War and its large-scale deployment to Vietnam, the Army experimented several times with unit manning. After the Korean cease-fire, the Army again demobilized and entered an era in which land power was de-emphasized under the nuclear umbrella of the Eisenhower Administration's *New Look* strategy. Seeking strategic relevance and attempting to compensate for dwindling resources, the Army redesigned its divisions into "Pentomic" structures, and sought to institute new manning concepts, one of them called Operation Gyroscope.

Gyroscope was intended to improve unit morale and cohesion, reduce the Army's support costs in Europe, and provide training opportunities for mass overseas deployments. In 1956, the
Army began rotating divisions to Germany on a three-year cycle. Later, smaller units were rotated until 1959 when the experiment was cancelled. Gyroscope failed in the end because the Army was unwilling to underwrite the operational readiness gap between incoming and outgoing units, and it failed to save money.\textsuperscript{88} Divisions rotating in Gyroscope were manned with two-year draftees who could not serve the entire overseas rotation and officers continued rotating in and out of units. Because the Army in the U.S. was under-strength, some units had to be flushed in order to fill others to full-strength for deployment.\textsuperscript{89} In the end, Gyroscope created more turbulence than it solved.

Other experiments followed in the early 1960s. In the Overseas Unit Replacement System (OVUREP), from 1961 through 1962, the Army rotated battalions to Korea on a 12-month basis after eight months' training in the United States.\textsuperscript{90} Apparently, although OVUREP met its objectives its implementation was interrupted during the Army expansion after the 1961 Berlin Crisis and then not restarted as America's military focus shifted to Viet Nam—an example of unit Manning unable to withstand rapid change in force structure levels.\textsuperscript{91} In 1963 and 1964, the Army executed Long Thrust, rotating battalions to Europe for rapid deployment training using pre-positioned equipment. This experiment suffered from a one-to-two month period of lowered operational readiness during the three-month rotation. In the end, the U.S. Army, Europe recommended continuing battalion rotations for training, but recommended continuing rotating individuals as the standard method of replacement.\textsuperscript{92}

The last pre-Vietnam experiment was ROTAPLAN in 1963 and 1964 in which units were rotated for 179 days to Germany. The objectives now sound familiar—increased readiness and reduced gold outflows to Europe—and so is the result: ROTAPLAN was cancelled because it "generated considerable turbulence and did not produce the hoped for reduction in spending dollars abroad."\textsuperscript{93} The "flush and fill" trend continued as well: Participating units in the United States were stripped of soldiers with more than 8 months time remaining in service in order to fill deploying units with soldiers who could complete the rotation.\textsuperscript{94} Again, as with Gyroscope, ROTAPLAN created more turbulence than it solved.

It is important to note that from the end of World War II to the end of the Cold War, 40 percent of the Army was based in the U.S. and 60 percent overseas. The failure of all three pre-
Viet Nam unit-manning initiatives might be attributed to this imbalance. There was simply not enough structure in the United States to support an extended overseas rotation scheme.

**Viet Nam and Introduction of the All-Volunteer Force**

The Army's conduct of personnel replacements in Viet Nam has been debated as intensely as World War II and Korea. Given the then-recent experience with rotating units, it is uncertain whether or not the Army would have tried it in Viet Nam. However, President Johnson's decision not to mobilize the Reserve Components to fight a major war, while maintaining full-strength active forces in Europe ready to fight the Soviet Union, made unit manning in Viet Nam a moot point. To offset the loss of the Reserve Components, the Army again suffered the strains of rapid growth, from 965,000 in 1964 to over 1,500,000 in 1968. This rapid growth meant that many units organized from scratch were directly deployed to fight. From July 1964 to July 1965, 600 of the 800 units were shipped to Viet Nam were newly organized. When they arrived, soldiers served a one-year combat tour, which damaged unit cohesion. And in a reprise of thinking in World War II and Korea, unit commanders were apt to mix the newly arrived soldiers with those already experienced in theater. "When Delta companies arrived in country as a battalion's fourth rifle company, the vast majority was broken up so that there was a leavening of old veteran hands in each company. Senior commanders thought it better to have veterans in an organization instead of one that had trained together but had no combat experience."

In 1973, the U.S. Armed Forces crossed a significant milestone as it transitioned to an all-volunteer force—an entirely different model for Army personnel management. Instead of a conscript-based force, with the junior members serving two-year enlistments, the Army was faced with managing a standing volunteer professional Army. It was thus faced with an even more compelling need to satisfy the professional aspirations of its members.

Experiments with unit manning continued with Brigade-75 and Brigade-76 between 1975 and 1977. Brigade headquarters and the brigade support battalion were stationed in Germany and supported by company-level rotations from the United States every six months. The objectives were the same as previous attempts, but, in a now-familiar refrain, the "evidence soon suggested that the rotation of brigades improved neither cost effectiveness nor readiness."
The Unit Manning System and the Thurman Assessment

The Army implemented the UMS in 1981 to specifically counter the turbulence-induced unit readiness decay caused by the IRS. The UMS was intended to enhance combat readiness of tactical units by keeping soldiers and leaders together longer as well as improving the linkage with the reserve components, reducing impacts of specialization, and promoting a regional focus for units and soldiers. During implementation, the concept evolved into two separate, but mutually supporting systems: The Regimental System and the COHORT System.98

Regimental affiliation and homebasing to maintain unit and family stability were at the core of the Regimental System and were intended as long term Army readiness enhancements. However, the system was never fully implemented, and in 1985 both affiliation and homebasing essentially became voluntary. The system’s ceremonial aspects were intended to enhance soldier identification with units and remain effectively implemented today by some units, such as the 82nd Airborne Division, on a decentralized basis as the last vestiges of this system.

COHORT’s essence was individual stabilization that would provide opportunities to improve and sustain collective training proficiency, supported by unit movements to sustain the OCONUS force. But COHORT did not follow a single path. At different times and in different units, the Army attempted numerous COHORT models—some worked and some did not. Present-day individual recollections and perceptions of COHORT are normally biased by the individual’s experience with only one or two models, and whether our unit was a readiness beneficiary or bill-payer.

COHORT was not without its detractors. One command sergeant major, recalling his COHORT battalion’s training deployment to the Joint Readiness Training Center (JRTC) in Louisiana, complained that cohesion did not offset his unit’s 76 percent strength: “JRTC-induced casualties rapidly decreased numbers to the point of one company with an attached platoon making the battalion main attack with only 63 soldiers! And companies fighting at such reduced strength, no matter how well trained or veteran, could not accomplish missions expected
of full-strength units, and possibly suffered higher casualties than they would have if operating at full strength.\textsuperscript{99}

In 1988 the Army Chief of Staff directed the Army Training and Doctrine Command (TRADOC) assessment the progress of the UMS. Delivered several months before the Berlin Wall fell, General Maxwell Thurman’s 1989 report documents the TRADOC assessment and his recommendations for the program’s future.

GEN Thurman held that COHORT implementation:

- Lacked focus and suffered from random proliferation of UMS units.
- Created perceptions of "have-have not" between COHORT and non-COHORT units in the same parent unit, and "we-they" between heavy and light forces.
- Was poorly timed with Division 86 (heavy force) reorganization and viewed as a management burden and readiness detractor, but had long term potential for improving heavy force readiness.
- Suffered from a lack of focus and consistency in Department of the Army-level proponency and TRADOC evaluation processes.

Thurman recommended continuing COHORT with better long range planning, concept articulation, and field evaluation. But he warned that enhanced readiness would not automatically accrue from stabilization. He argued that leaders who understand the dynamics of group cohesion must exploit stabilization. He also warned that the two most promising COHORT models were being phased out, and the one offering the least stabilization potential (a 4-month Package Replacement System) was proliferating.\textsuperscript{100} The 4-month COHORT model was little better for cohesion than individual replacements.

**COHORT in Hiatus**

In 1990 the Army implemented some of General Thurman’s recommendations, but the Cold War ended and downsizing began. The Army was already divided over the worth of the UMS, and, as with OVUREP, further COHORT implementation was not flexible enough to survive the challenges of significant force structure changes. In April 1993, the 18th Airborne
Corps commander, Lieutenant General Gary Luck, requested an end to COHORT asserting that non-COHORT turbulence was too great to justify continuation. He cited non-commissioned shortages in the 101st Airborne Division as an example of high priority units paying the readiness bill for lower priority COHORT units. Significantly, LTG Luck argued that as the Army transitioned to a CONUS-based force it should be able to achieve better personnel stability even without COHORT. In 1995 the Army Deputy Chief of Staff for Personnel ended the COHORT unit manning system, placing it “in a hiatus status” pending further evaluation in the late 1990s.

In the 1990s, the Army's official view towards UMS schemes was generally negative. However, the Army remained more turbulent than ever. The promise of better stabilization in a more CONUS-based force failed to materialize since the force that was reduced was serving in relatively stable long tours of duty in Europe. The one-year short tour in Korea became the driver of Permanent Change of Station (PCS) turbulence.

Today, nearly half of Army enlisted PCS moves overseas are to and from Korea. 22 percent of personnel turnover in U.S.-based units is driven by the requirement to man Korea, and inevitably the combat units in the U.S. Army Forces Command pay the bill. PERSTEMPO (temporarily deploying units or individuals for operations or training) is also a significant turbulence driver. Significant growth in requirements for individual augmentation and “flushing and filling” units with deployable soldiers to support peacetime contingency deployments to the Balkans created an environment which makes it difficult for commanders to maintain unit integrity long enough to train their units and maintain training proficiency. This is the environment in which Secretary White demanded that unit manning come out of its "hiatus status."
ENDNOTES


2 Lisa Burgess, “White Says Army Will Waste Billions If Individuals, Not Units, Are Rotated,” European Stars and Stripes, 1 November 2002. “If the Army doesn’t stop shifting soldiers from post to post and start keeping them together in the same units, the billions of dollars the service is spending on new fighting equipment will go to waste, according to the service’s top civilian leader. If we don’t move the Army from its current individual replacement system to some sort of unit manning configuration, there will be a limit to the effectiveness that we can achieve with our transformation,” said Army Secretary Thomas White. On Thursday, White raised the stakes, calling the pending shift to cohort manning ‘the most important thing we’re doing,’ now that Army leaders have settled on the ‘transformational’ technology that they believe will win future wars.”


4 Colonel (retired) Neill H. Alford, Jr., the father of one of the authors, relates the following: In 1946, upon his return from World War II service as an infantryman in Europe, Alford paid a courtesy call on General Charles Summerall, then President of The Citadel, the Military College of South Carolina. Summerall remained devoted to the Army after retiring in 1930 as Army Chief of Staff. The first question Summerall asked was: “Do you prefer individual or unit replacements?”


7 Adapted from United States Army Deputy Chief of Staff For Operations and Plans (G-3), “Senior Service Fellows Operations Update,” briefing slides, Washington, D.C., 1 August 2002.


11 Adapted from Unit Manning Task Force, “Unit Manning Assumptions,” briefing slides, 16 September 2002.


20 Rush 18-19.


22 Rush 16.


27 Starry, 23.


30 Starry, 23.

31 *European Stars and Stripes* “Interview With General Montgomery C. Meigs,” 1 December 2002. (Note: A March 11, 2003 search of http://www.dtic.mil/armylink, the Army Public Affairs web site, revealed no references to “turbulence,” “unit manning,” or similar terms in publicly issued Army speeches or news releases in the last six months, other than those attributed to the Secretary of the Army.)


34 Starry, 23.

35 General Maxwell R. Thurman “TRADOC Assessment of Unit Manning” memorandum for Chief of Staff Army, Fort Monroe, VA, 4 March 1989, 49, 61.

36 Starry, 23.


38 Army Times, “Total Army Transformation,” 6 January 2003, p 8. “The [anonymous Army] spokesman said the Army’s personnel bureaucrats were the chief opponents of unit manning. ‘...for some reason, it’s the people inside of the personnel bureaucracy that seem most opposed to it.’ Other Army officials have made the same observation, but now say that the personnel bureaucracy’s resistance to unit manning appears to be softening.”

39 Wass de Czege, 38.

40 Vice Chief of Staff, Army, “Unit Rotation and Personnel Management Task Force Charter,” memorandum for Deputy Chief of Staff for Personnel, 18 October 2002.


42 The 2003 Army Modernization Plan, E-11, 12.

43 Starry, 23.

44 Starry, 23.
45 Chief of Staff, Army 12 February 2003 HASC Testimony, 2.


47 Starry, 23.


49 Kurt M. Berry, <kurt.berry@hoffman.army.mil>Army Unit Manning Task Force electronic mail message to Eli Alford <eli_alford@harvard.edu> “Testing,” 7 March 2003.

50 One of the authors served in the 9th Infantry Division in the early 1980s as part of the HTTB. See also Morris, et al., “Initial Impressions Report.”


53 “Unit-manning Options,” Issue paper.

54 “Unit-manning Options,” Issue paper.


56 “PERSCOM Stabilization Study”.

57 Deputy Chief of Staff for Operations, U.S. Total Army Personnel Command, “Update on NCO Restructure Initiatives” briefing papers, 12 April 1999, 3.

58 “Update on NCO Restructure Initiatives”, 4.


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GLOSSARY

Attrition – Personnel losses to the Army and units under consideration due to medical, indiscipline, or separation.

Bonding – The process of molding a group of soldiers and their leaders into a cohesive, synergistic combat force. Bonding is a function of stability, shared experience, mutual confidence, trust and common values.

Build Phase – The requisite activities accomplished over a period of time in a Unit Lifecycle model that leads to the assembling of all personnel at the appropriate time and location to form a unit. The build phase concludes with Organization Day.

Career Field – A grouping of functionally related commissioned officer, warrant officer, civilian and enlisted positions under a single agent for life cycle personnel management purposes.

Certification Day (C-day) – The day the capstone certification event concludes and the unit is certified as “ready”, this event ends the Train phase and begins the Employ phase.

Change in Non-commissioned Officer (NCO) Structure initiative (CINCOS) – 1998 Initiative to reduce the number of senior NCOs in the Army and to reduce the amount of overall force structure.

Cohesion, Operational Readiness, and Training (COHORT) system – Program implemented in 1981 designed to increase individual stabilization that would provide opportunities to improve and sustain collective training proficiency, supported by unit movements to sustain the OCONUS force.

Cohesion – The subjective knowledge and experiences gained by a group who have bonded which allows them to operation in a more efficient and effective manner. Members of a cohesive group anticipate actions of other members or of the collective group with less need for direct communication.

Cyclic Regeneration - A unit manning alternative that has two phases: Regenerate and Employ. Unlike the Lifecycle Manning alternative, a Cyclic Regeneration Manning unit is mission capable at all times. During several short periodic Regeneration phases the unit implements changes necessary to sustain it.

Deployment – The process by which a unit departs its home installation to accomplish an assigned mission as part of a planned unit rotation or in response to an operational requirement.
**Employable** – A unit that has achieved a high level of readiness (i.e., C-1) and has been certified capable of performing its Mission Essential Tasks.

**Employment Phase** – The period of time in a Lifecycle Model that the unit is combat ready and available for deployment to meet Army worldwide mission requirements.

**Friction** – A measure of inefficiency in the assignment of personnel to force structure.

**Individual Replacement System** – A personnel replacement mechanism which allows an individual to be assigned to a unit at any time in order to bring the unit back to a target percent fill.

**Lifecycle Model** – A unit manning process that takes both the unit and its assigned soldiers through four phases: Build, Train, Employ, and Regenerate. The duration and policies that govern each phase may vary by unit and mission. The Build Phase encompasses the process by which soldiers and leaders are individually developed and collectively assigned to the unit. The Build Phase concludes with the Organization Day (O-day) event. The O-day marks the beginning of the Training Phase. During this phase, the unit focuses on training the collectively. The Training Phase concludes with a capstone training event that certifies the unit is ready for employment (or not). The conclusion of the certifying event is called the Certification day (C-day). Upon certification, the unit enters the Employ Phase, during which time the unit focuses on sustainment training and is mission capable as necessary by higher headquarters. The Employ Phase concludes with the Release Day (R-day), the day the unit is pulled off mission status to disestablish as a unit. The Release Phase, which begins with R-day, concludes when all soldiers and leaders have been either reassigned or separated from the unit and all property turned over.

**Non-Commissioned Officer Education System (NCOES)** – System consisting principally of the Primary Leadership Development Course (PLDC), Basic Non-Commissioned Officer Course (BNCOC), the Advanced Non-Commissioned Officer Course (ANCOC), and the Sergeant’s Major Academy (SMA). The system is designed to fulfill the professional education requirements of the enlisted soldier.

**Objective Force** – The Objective Force is our future full spectrum force: organized, manned, equipped and trained to be more strategically responsive, deployable, agile, versatile, lethal, survivable and sustainable across the entire spectrum of military operations from Major Theater Wars through counter terrorism to Homeland Security. (From Objective Force Website)

**Officer Education System (OES)** – System consisting principally of the Officer Basic Course (OBC), Officer Advanced Course (OAC), Combined Arms Staff and Service School (CAS3), Command and General Staff College (CGSOC), and the Army War College (AWC). The
system is designed to fulfill the professional education requirements of the commissioned officer.

**Officer Personnel Management System (OPMS) III** - Previously OPMS XXI. System that assigns officers into specific functional areas in order to better focus careers, increase specialization, stabilize careers, and align officer requirements with inventory.

**Organization Day (O-Day)** - The day during Unit Lifecycle when all assigned personnel arrive and the unit is ready to begin individual and collective training resulting in unit proficiency.

**Package Replacements** - A personnel replacement mechanism in which a number of individual replacements are provided to a unit at a single time to bring the unit up to desired strength.

**Pilot** - A test of a complete system or model in order to validate feasibility and identify problems. A pilot tests a prototype, which generally results from prior experimentation. Successful prototypes are typically developed for wider use.

**Readiness** - Capability of the unit to perform its assigned mission based on all components of equipment, personnel, and training.

**Release Day (R-day)** - The day during a Lifecycle Unit manning model that denotes the end of the Employ Phase and initiates actions necessary in the Release Phase.

**Release Phase** - The process of reassigning or separating some or of all the soldiers assigned to a Lifecycle Model Unit.

**Replacement Mechanisms** - The processes by which losses are replaced within the unit under consideration. The three mechanisms considered for this study are Individual Replacements, Package Replacements or Plug Replacements.

**Soldier Lifecycle** - The progression of an individual through the eight lifecycle functions of structure, acquisition, individual training and education, distribution, deployment, sustainment, professional development and separation.

**Stabilization** - The process of assigning soldiers and leaders to a unit and keeping them together for a specified period of time in order to set necessary conditions for bonding and high performance.

**Stryker Brigade Combat Team (SBCT)** - A brigade-sized mobile, lethal, and survivable network-centric combat formation. A transitional organization that fills the existing near term “capability gap” between the Army legacy force and objective force.
Turbulence – A measure of the rate individuals are reassigned from their assigned duty positions.

- External Turbulence – Movement of an individual from their assigned duty position due to actions or processes beyond the control of the unit commander.

- Internal Turbulence – The movement of an individual from his assigned duty position due to actions or processes under the control of the unit commander.

Turnover – The loss of an individual to a unit. Attrition is a subset of turnover.

Unit Managed Readiness – The readiness of the unit tied to the phase or cycle of unit under a Unit Manning paradigm.

Unit Manning System– System designed to decrease turnover, increase unit readiness, and provided soldier stability.

Unit Manning Task Force – Task Force established by the Army G-1 to study, plan, and implement the Secretary of the Army’s Unit Manning directive.

Unit Rotation – A process through which a unit periodically assumes a mission away from home station.
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