

THE EMPTY BENCH: FUTURE LEADERS OF THE ARMY NATIONAL GUARD

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USAWC STRATEGY RESEARCH PROJECT

THE EMPTY BENCH: FUTURE LEADERS OF THE ARMY NATIONAL GUARD

by

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ABSTRACT

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Post September 11, 2001, the United States began the largest mobilization of National Guard Soldiers since World War II. The Army drawdown of the early 1990s and corresponding reduction in commissioning of lieutenants set the stage for 65% manning of the mid-grade officer ranks within National Guard formations. The transformation from a legacy heavy formation to a lighter modular force, a growth in MTOE field grade officer requirements, and attrition of midgrade officers have combined to create unfavorable conditions for high quality mid-grade officers (captains and majors). Even though the Texas Army National Guard (TXARNG) has met 95% (or better) of its mobilizing unit officer requirements, it has not positioned itself to meet the future mid-grade officer requirements. This Strategy Research Project (SRP) explores the current challenges faced by leadership to expand the mid-grade officer corps while simultaneously improving the quality and professionalism of those officers. Absent a shift in emphasis and adjustment of systems to reinforce the change, the quality of the field grade officer corps will continue to suffer, and unit effectiveness, morale, trust, retention, and commitment will continue to be significantly degraded.

THE EMPTY BENCH: FUTURE LEADERS OF THE ARMY NATIONAL GUARD

In short, Army leaders in this century need to be pentathletes, multi-skilled leaders who can thrive in uncertain and complex operating environments... innovative and adaptive leaders who are expert in the art and science of the profession of arms. The Army needs leaders who are decisive, innovative, adaptive, culturally astute, effective communicators and dedicated to life-long learning.

—Dr. Francis J. Harvey
Secretary of the Army¹

Since 2002, Texas Army National Guard (TXARNG) recruiting efforts, combined with continued population expansion (an estimated 35 million by 2040) have increased the state's Army National Guard end strength from 15,959 in 2004 to over 19,756 soldiers.² According to the U.S. Census Bureau, for the first time since the 1800s, Hispanics will surpass all other ethnic groups and become the state's majority population by the year 2020 (see Figure 1, below). Without a major shift in military spending or change in demographics, the TXARNG could grow to 28,795 by the same year.³ This end strength growth and additional force structure, compounded with Army Modularization, has greatly increased the requirements for Army leaders, especially in the officer corps. Consequently, senior leadership in the TXARNG faces many current and future challenges in commissioning high quality lieutenants and assessing and retaining adequate company grade officers. A shortage of highly qualified mid-grade officers could have a direct and significant impact on the effectiveness and long term viability of the TXARNG.

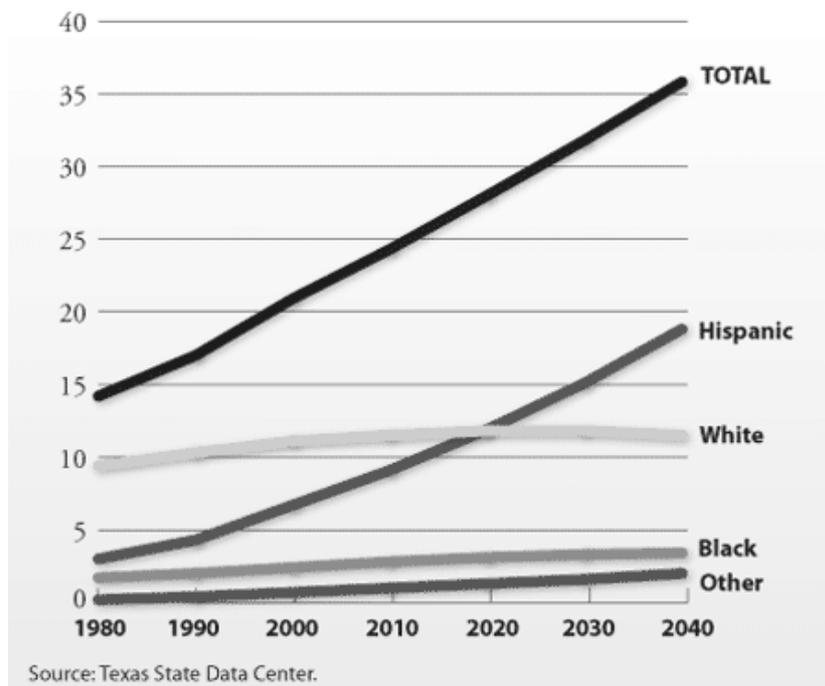


Figure 1. Texas Population Growth, 1980–2040⁴

The purpose of this Strategy Research Project (SRP) is to provide a comprehensive analysis of the challenges associated with commissioning adequate lieutenants who have the knowledge, skills, and abilities to thrive in uncertain and complex operating environments. The recruiting and commissioning of an ethnically diverse officer corps that closely mirrors the State of Texas is critical to filling the current 392 captain and major vacancies in the TXARNG. Although there are three identifiable and significant problems plaguing officer strength in the TXARNG (commissioning of lieutenants, company grade officers accessions from active duty and the USAR, and company grade officer retention), this SRP will address specifically the problem of state OCS program commissioning adequate lieutenants.

This SRP represents the culmination of more than 100 hours of research combined with knowledge gained at the United States Army War College, as well as

personal experience during 20 years of service to the TXARNG. The research studied the regulations, policies, statistical data for both OCS and ROTC, and organizations that govern the execution of officer commissioning and recruiting, with efforts to understand how officer management and accession is performed in the TXARNG today. Site visits and telephone interviews were conducted with the TXARNG Chief of Staff, as well as representatives from the 136th Regional Training Academy⁵, TXARNG G1⁶, Texas Joint Military Forces Education Office⁷, and the TXARNG Recruiting and Retention (R&R) Battalion⁸. These visits and interviews, combined with the author's assignments in the operational forces (OIF Battalion Commander and Infantry Division Chief of Staff) and the generating force (Recruiting and Retention Battalion Commander, Chief of Joint Personnel (J1), and OCS Tactical Officer) in the TXARNG, coupled with the detailed research, have helped develop the options and strategies outlined in the following paragraphs. These will focus on the Texas state OCS commissioning issues by defining the problems, defining the requirements, and providing potential strategies for increasing the quality and quantity of soldiers who begin and are commissioned through the OCS program. Because the challenges associated with the state of Texas are equally applicable to other states across the nation, the discussion of both issues and recommendations are at least in part applicable to the 53 other states and territories that comprise the Army National Guard (ARNG). Due to the importance of the ARNG in national and homeland defense, addressing future challenges associated with manning the officer corps is a nation wide strategic issue.

The Problem

The Center of Gravity for the TXARNG is its mid-grade officer corps (captains and majors). The DOD Dictionary of Military Terms defines Center of Gravity as “the source of power that provides moral or physical strength, freedom of action, or will to act.”⁹ The TXARNG is at risk of losing its freedom of action because it is not commissioning sufficient lieutenants or assessing and retaining adequate company grade officers. This shortage of officers has created a widening gap in capabilities between current force structure and officer manning. General Casey, Chief of Staff of the Army (CSA), shared the following comment after a discussion with General Shy Meyers about the larger Army problem. “I called my predecessor Shy Meyers a while back. Shy Meyers if you remember was the Chief of Staff of the Army who went to Congress in 1980 and said the Army is hollow. I said Shy, tell me about it. How did you get there? What happened? He said, when you start losing your midgrade officers and non-commissioned officers, it takes a decade to bring them back.”¹⁰ The Army and the Army National Guard do not hire senior leadership from other companies; they grow their own.¹¹ Understanding this and considering General Casey’s comment, it is imperative that the proper emphasis and resources are applied to stimulate OCS commissioning and keep the bench full of leaders who will fill the ranks in the future.

To better understand the importance of this issue, one should imagine that they are a head football coach playing for a national championship. It is the 4th quarter with 2 minutes left to play. You need a touchdown to win, and your quarterback just left the game with an injury. You turn to your offensive coordinator and ask the question for which you already know the answer: “Do we have anybody who can handle this?” There is a long silence, followed by the reply you did not really want: “Nope, the bench is

pretty much empty. All we have is the new guy, but he hasn't faced anything like this before. I hope he can handle it."¹²

Transition this image to a brigade commander conducting combat operations in Afghanistan or conducting Defense Support to Civilian Authorities in Houston after landfall of a major hurricane, and as the commander you are faced with the decision to replace a battalion operations officer or a company commander. Do you want your Executive Officer to tell you, "the bench is pretty much empty. All we have is the new guy, but he hasn't faced anything like this before. I hope he can handle it."?

This vignette illustrates the problem of commissioning adequate lieutenants. The problem is a consequence of three significant shortcomings. First, the TXARNG lacks a state OCS Strategic Communication Plan that addresses the importance of officer accessions and retention. Second, the TXARNG has not transformed the state officer accession and commissioning program to eliminate "soft seams" and "stove pipes" as well as meet the needs of the organization. Third, the organization lacks a transparent web-based knowledge management system designed to track state OCS recruiting, training and commissioning. To put this problem into proper context, it is important to provide additional detail on background, traits, and attributes of future officers and the current mid-grade officer requirements.

Background

Post September 11, 2001, the United States began the largest mobilization of National Guard Soldiers since World War II. The Army drawdown of the early 1990s and corresponding reduction in commissioning of lieutenants set the stage for 65% manning at the rank of captain and major within National Guard formations.¹³ The growth in state

population, coupled with the enormous success of the TXARNG Recruiting and Retention Battalion, established conditions for The Adjutant General (TAG) to request and receive additional force structure. This additional force structure and Army transformation to modular formations created an unexpected dramatic growth in Army Modified Table Of Organization & Equipment (MTOE). This growth greatly increased the requirement for captains, majors, and lieutenant colonels throughout the Army. An example of this change can be seen in the growth of division headquarters under Army modularity. The previous MTOEs had a requirement of less than 10 lieutenant colonels and 20 majors per divisional headquarters. Under the Modular Division Headquarter 8.1 design, both the number of lieutenant colonels and majors more than doubled to 21 and 54 respectively. This increase in major and lieutenant colonel authorization had two major consequences. First, it created a domino effect, promoting many officers to the next grade. Second, because there was not a surge in officers commissioning in OCS or ROTC, it created significant vacancies in the captain and major ranks.

As the wars in Afghanistan and Iraq move into their eight and six years respectively, the TXARNG has maintained good enlisted retention; however, it has struggled with midgrade officers. Second and third deployments have severely impacted the retention of promising mid-grade officers, and has discouraged active duty officers who complete the Reserve Component Transition (RST) program to remain in the TXARNG past their initial service obligation. Even though the TXARNG has met 95% or better of its mobilizing unit officer requirements, current practices may not be adequate to meet the future mid-grade officer demands. "Developing the next generation of leaders is arguably the most important legacy that senior leaders leave to the Army—we

talk it, but don't do it."¹⁴ Absent a shift in emphasis and adjustment of systems to reinforce the change, the officer corps will continue to suffer, and unit effectiveness, morale, trust, retention, and commitment will also continue to be significantly degraded.

To see this issue in its broader context, it is necessary to examine the pipeline that feeds the TXARNG Officer corps. There are currently three methods for commissioning officers: Army Reserve Officers Training Corps (ROTC), Officer Candidate School (OCS), and the Direct Commissioning Program. While the Direct Commissioning Program is important, there are a relatively fixed number of soldiers who qualify for this program and consequently it lacks the flexibility to be surged to meet growing requirements. Therefore this SRP will focus analysis upon ROTC and OCS. Each year these programs add newly commissioned lieutenants to the TXARNG. Although the TXARNG is at 132% (616/464) strength for lieutenants, this is offset by shortfalls in the mid-grade ranks. The TXARNG faces the prospect of being under strength by 240 lieutenants when lieutenants and captains are promoted to fill vacancies at the next higher grade (see Figure 2, below). For example, when the organization moves 392 lieutenants (indicated by the arrow below) to fill the shortages in captain ranks, the organization creates a total shortage of 240 lieutenants.

	LT (02)	CPT (03)	MAJ (04)	LTC (05)	Total
AUTH	464	713	453	145	1775
ASGN	616	477	297	170	1560
ASGN %	132.8%	66.9%	65.6%	117.2%	87.9%
Delta	152	(236)	(156)	25	(215)
Officer serving in higher graded position		392	156		
TRUE SHORTAGE	(240)	0	0		

Figure 2. Current TXARNG Officer Authorizations versus Assignments Chart¹⁵

Reserve Officers' Training Corps (ROTC)

“The National Defense Act of 1916 established the Reserve Officers' Training Corps (ROTC). Its purpose was to professionalize the Officer Corps of the Reserves and National Guard by taking responsibility for all current and future military training programs at land grant colleges and other universities.”¹⁶ In the early 1990s, the United States reduced defense spending and the end strength of the military in what some would call a “Peace Dividend” at the close of a major conflict. Our victory during the Cold War and Operation DESERT STORM demanded a reduction in DOD spending and a reduction in the size of the Army. These reductions atrophied the Army ROTC program, which also decreased the commissioning mission for ROTC graduates assigned to the Army National Guard, placing the burden on an already under-productive state OCS program. Figure 3 illustrates the downward trend in Army ROTC production performance, FY 2000 to 2006, during a time of persistent global conflict. This past performance and DoD intent to grow Army Active Component end strength to 547,400 with a very limited increase in Training and Doctrine Command (TRADOC) generating force units will, at a minimum, flat-line current accession of ROTC graduates to the ARNG.¹⁷ Based on past performance and utilizing current methodologies, Army ROTC programs will most likely not increase production to meet the need for officers for all three components; at least not unless Cadet Command makes significant upgrades to the current program or the Army increases the size of the Generating Force.

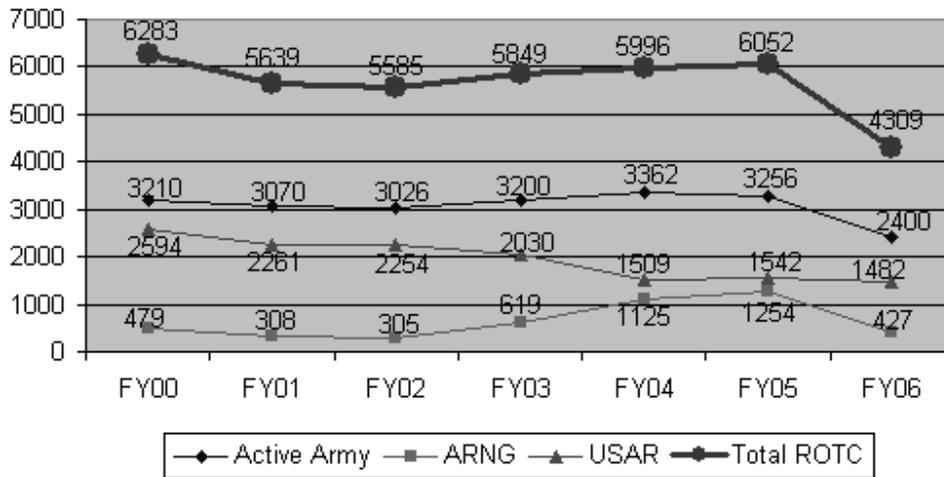


Figure 3. Army ROTC Commission Data, 2000-2006¹⁸

TXARNG Officer Candidate School

The mission of Officer Candidate School (OCS) is to train, educate, and commission officers in order to provide the Army with leaders of character who live by the "Warrior Ethos" and "Army Values".¹⁹ Texas OCS also provides the flexibility to recruit potential Officer Candidates (OCs) to meet the needs of the TXARNG.

Additionally, it is the commissioning source for 40-50% of TXARNG officers. In Figure 4, the rectangle line represents the number of new enlistees that were assessed (enlisted) into the TXARNG using the state Officer Candidate School (OCS) Option²⁰, the triangle line represents the number of soldiers who reported to state OCS, and the diamond line represents the number of officers commissioned. As this figure illustrates, the number of officers commissioned in the state OCS Program has remained stagnant during this period.

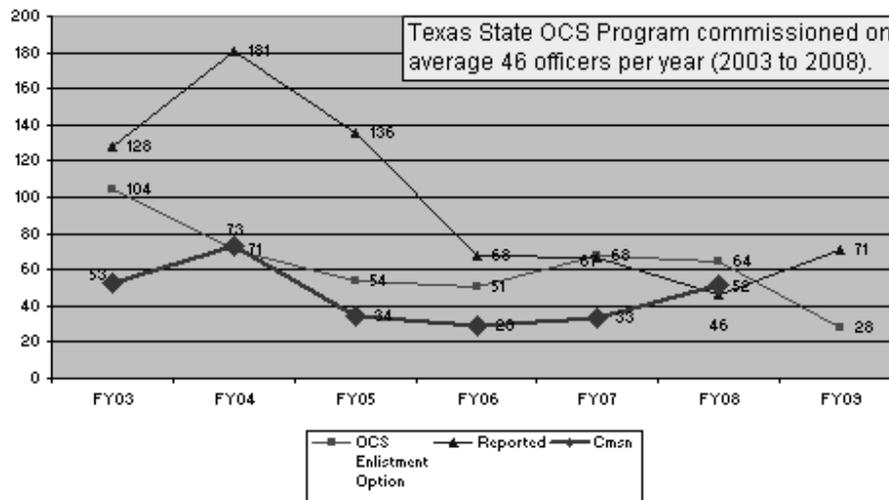


Figure 4. TXARNG OCS Commissioning Totals, 2003-2009²¹

The foundation for commissioning a large number of lieutenants from the state OCS Program is recruiting. OCS recruiting has remained largely unchanged during the past decade, relying on two methods to fill new classes; In Unit Recruiting and the OCS Enlistment Option²².

The In Unit Recruiting option relies on unit leadership to screen unit members who meet the minimum qualifications and then theoretically board only the best and most qualified soldiers to attend OCS. During the past decade, this has been the primary OCS recruiting method. Although it has merit for a limited number of highly qualified soldiers, there are two major disadvantages to the In Unit Recruiting option. First, because units are typically given quotas for each class, some of the soldiers boarded and recommended meet the minimum qualifications but lack the personal commitment to endure the hardships required.²³ Second, this method risks consuming the best mid-grade Non-Commissioned Officers (NCO), ultimately weakening the NCO Corps. The TXARNG should continue to use this method, however, only as a support

effort to the OCS Enlistment Option. Based on the analysis of Figure 4, the current force structure should support 25 to 40 soldiers per class from the In Unit Recruiting method.

The OCS Enlistment Option is executed by the full-time TXARNG Recruiting and Retention (R&R) Battalion. This method has demonstrated the most success because it recruits from a larger pool of potential candidates outside the soldiers assigned to the TXARNG, and quotas can be assigned to recruiting NCOs in recruit-rich environments such as college campuses. Lieutenant Colonel (LTC) Greg Chaney, commander of the Texas R&R Battalion, spoke about the advantages and disadvantages of this method. LTC Chaney said it is a great option for potential recruits whose primary goal is becoming an officer. Currently, this option is less monetarily competitive because it has only a \$10,000 bonus after officers complete Basic Officer Leader Course III, and requires the recruiter to complete additional paperwork to include the individual's security clearance. LTC Chaney said the alternate Course of Action (COA) is to complete a normal enlistment and then track the soldier for OCS. Advantages of this COA include more money during the first year of enlistment, \$15,000 more in bonuses and pay over a four year period, and a reduction in the commitment to enlistment time. The major disadvantage is that it increases the likelihood that the organization will lose track of the soldier's desire to attend OCS.²⁴

Both methods of recruiting potential officer candidates "treat the symptoms rather than the cause" and, as illustrated in Figure 4, are not likely to meet the projected OCS officer production required to sustain formations of the TXARNG. The primary cause for the shortage of mid-grade officers in the TXARNG is the lack of a comprehensive state OCS recruiting program. The TXARNG R&R Battalion review of retention and

accessions data indicates that the TXARNG has a requirement for no less than 100 new lieutenants each fiscal year to sustain the officer requirements for current force structure.²⁵ This SRP will later describe potential strategies that “treat the cause” of current recruiting challenges.

Ideal Attributes of Future Officers?

Recruiting, training, and commissioning the right type of lieutenants with the required traits and attributes are challenges for the TXARNG.²⁶ Before outlining what is needed, it is important to establish what is not needed in future officers. First, the organization does not need soldiers who have been coerced by the chain of command to attend and lack the desire and commitment to complete 18 months of training. Second, for those soldiers who do not have a college degree, it is important to gauge their commitment to finishing their bachelor's degree. Finally, in the words of the former Commanding General of the TXARNG, MG Furlow, “our OCS Program is in the business of building 2nd Lieutenants, not General George S. Patton.”²⁷ This quote is important because sometimes the organization loses sight of the responsibility to develop knowledge, skills, and abilities of Officer Candidates resulting in soldiers with tremendous potential leaving the state OCS program.

What attributes are important to the TXARNG when recruiting future officers? The “Army exists to serve the American people, protect enduring national interests, and fulfill the Nation’s military responsibilities. To accomplish this requires values-based leadership, impeccable character, and professional competence.”²⁸ The Leadership Requirements Model in FM 6-22 outlines three attributes for leaders. These attributes are character, presence, and intellectual capacity.²⁹

Character and presence are both attributes that are very important to the success of the organization and the success of the individual. FM 6-22 defines the attributes as follows:

Character: A person's moral and ethical qualities, helps determine what is right and gives a leader motivation to do what is appropriate, regardless of the circumstances or the consequences.³⁰

Presence: A leader's physical presence determines how others perceive that leader. The factors of physical presence are military bearing, physical fitness, confidence, and resilience.³¹

Both attributes are difficult to measure with a test or through an application process; however, the OCS program is designed to eliminate individuals who lack strong character or the physical presence "to meet the Army challenges in the dangerous and complex security environment we face."³²

FM 6-22 also places great importance on intellectual capacity which can be transitioned to a college degree. Why is a college degree³³ and scholarly attributes important? First, a college degree is required for continued promotion. Second, and most importantly, it usually demonstrates an individual's desire for self-development and potential for progressively more complex and higher – level assignments.³⁴

The final ingredient in building a healthy officer corps is ethnic diversity. "Diversity is not an end, but a means by which we make our Army stronger."³⁵ The TXARNG is not commissioning or assessing sufficient Hispanic lieutenants in order to diversify the force and mirror the Texas population by the year 2020. Currently, Hispanics comprise approximately 4,613 or 23.7% of TXARNG Soldiers.³⁶ As Figure 5 illustrates, the TXARNG does not have an ethnically balanced officer corps.

Ethnicity	% of U.S. Population	% of Texas Population	% of TXARNG Officer Corps	LTs	CPTs	MAJs
White	66.4%	48.3%	71.8%	65.2%	71.9%	77.1%
Hispanic	14.8%	36.0%	12.8%	16.2%	11.0%	10.4%
Black	12.3%	11.4%	9.7%	9.9%	11.2%	9.8%
Other	6.6%	5.0%	5.7%	8.8%	5.8%	2.7%

Figure 5. U.S, Texas, TXARNG Officer Corps Population by Ethnicity, 2006 & 2009³⁷

As the TXARNG moves toward the year 2020, it becomes more critical that the organization change its culture and take all measures necessary to greatly increase the number of Hispanic officers commissioned. As highlighted earlier in Figure 1 (Page 2), it is estimated that the Hispanic population will become the majority population after the year 2020. With this continued growth in population, the number of Hispanic soldiers in the force could increase by 2,000 to 3,000, and place the number of Hispanic soldiers between 6,000 and 7,000. The growth in the Hispanic population, instability on the border with Mexico, and immigration issues have demonstrated an operational requirement to increase the number of Spanish speaking officers. This fact was highlighted during the 2006 deployment of over 2,500 Texas National Guard soldiers and airmen to assist the U.S. Border Patrol with border security during Operation JUMP START.³⁸ Failure to increase the Hispanic percent of the officer corps puts the organization at risk of not mirroring the state population, reducing relevance and trust in the minds of Texans, and TXARNG growth stagnation.

Requirements

The Merriam-Webster Online Dictionary defines requirement as “something essential to the existence or occurrence of something else.”³⁹ Success in enlisted recruiting combined with the overnight growth of mid-grade officer strength masked the

shortage of captains and majors. Too often, the National Guard Bureau and the TXARNG has had a tendency to measure success by end strength alone. In order to develop a professional and ethnically balanced officer corps, the organizational culture must change, placing as much emphasis on junior and mid-grade officer strength as overall End Strength (ES).

What are the yearly OCS commissioning requirements? The TXARNG has a requirement for no less than 100 newly commissioned officers annually to meet the unit demands.⁴⁰ From FY 2003 to 2008, the state OCS program commissioned an average of 46 lieutenants a year, and the state's Recruiting and Retention Battalion typically adds another 30 to 50 ROTC graduates. Figure 6 below, TXARNG O2 to O4 Officer Strength Projection Model, provides a year by year analysis of O2 to O4 officer strength from FY 2009 to 2020. It assumes that junior and mid-grade officers accessions averages, less state OCS, will remain constant at the seven year average of 90 officers per year. The difference between the dark and light colored Fiscal Year bars is the increase in state OCS program commissioning. The light colored bars (Recommended Program for Officer End Strength) assumes that with the implementation of this SRP's three strategies, the result will be an increase of state OCS production to no less than 100 lieutenants per year in years 2011 to 2020. As one can see, with all other factors remaining the same, the increase in OCS commissioning provides a positive yearly net growth, after 2011, of 59 junior and mid-grade officers a year as well as a total gain of 1140 state OCS commissioned lieutenants over the next 11 years. This change in emphasis provides the TXARNG with the ability to support the officer requirements of

additional force structure after the year 2013 as junior and mid-grade officers end strength would exceed 110% (+172 officers).

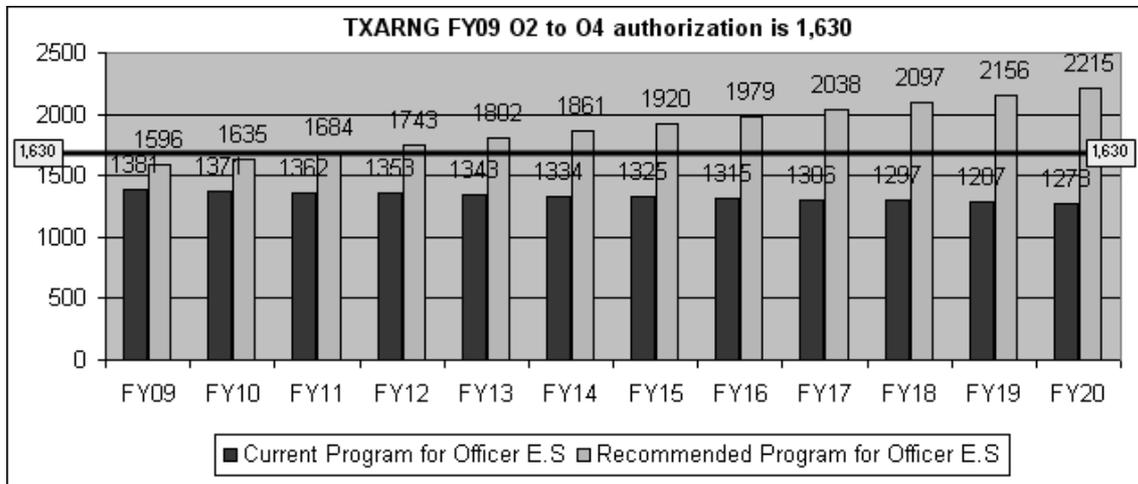


Figure 6. TXARNG O2 to O4 Officer Strength Projection Model⁴¹

Potential Strategies

The TXARNG strategies should codify an adaptive approach that changes organizational culture as well as simplifies and integrates the organization's methodology to state OCS recruiting and commissioning. In the mid 1990s, the TXARNG market share of ROTC commissioned lieutenants was greatly reduced, and in 2007, the second round of major mobilizations for Operation Iraqi Freedom and Operation Enduring Freedom provoked a dramatic decrease in mid-grade officer retention. The ancient Chinese philosopher Sun Tzu observed the following about change: "Just as water adapts itself to the conformation of the ground, so in war one must be flexible; he must often adapt his tactics to the enemy situation."⁴² Although the TXARNG has experienced two major alterations in the primary enablers for officer corps wellness, it has not conformed to the new ground and laid the foundation to develop the next generation of officers for the TXARNG. Following are three strategies intended to

change the organizational culture and increase the number of officers commissioned in the state OCS program as well as meet the following strategic goals: commission 100 lieutenants in the state OCS program each fiscal year; graduate state OCS classes that more closely mirror the diversity of the Texas; and begin each state OCS class with a mix of 76% OCS Enlistment Options and 24% In Unit Recruiting.

Strategy 1 – Creating Organizational Change: Strategic Communication Plan

Recruiting for the OCS program is the foundation for commissioning a large number of lieutenants annually. In the past, the TXARNG lacked a consistent vision and surged emphasis and resources three to four months prior to the start of each OCS class. In order to escape the surge mindset and truly change the organizational culture, the TXARNG should develop a synchronized Strategic Communication and nested bilingual Marketing Plan⁴³. The following paragraphs detail the requirements for creating organizational change through a synchronized Strategic Communication Plan⁴⁴.

A Strategic Communication Plan serves as the center piece to developing the TXARNG into an organizational culture that places as much emphasis on junior and mid-grade officer strength as it does overall end strength. John P. Kotter, a leading organizational change expert, developed an “Eight-Stage Process of Creating Major Change”⁴⁵. Although all eight stages are important in creating organizational change, three are critical to the short term Strategic Communication Plan. Step 1: Establishing a Sense of Urgency, Step 2: Developing a Vision and Strategy, and Step 3: Communicating the Change Vision.⁴⁶

The first step to organizational change is establishing a sense of urgency. “Establishing a sense of urgency is crucial to gaining needed cooperation. With

complacency high, transformation usually goes nowhere because few people are even interested in working on the change problem.”⁴⁷ The unprecedented success in enlisted recruiting masked the shortage of mid-grade officers leading individuals in the organization to believe there is no crisis with mid-grade officers. To create a sense of urgency, senior leaders must acknowledge the mid-grade officer situation. To achieve this understanding, this SRP recommends a five to seven minute video narrated by the Commanding General. This video should have three goals. First, remind TXARNG senior leaders that the mid-grade officer corps is the organization’s Center of Gravity, and that failure in this area could have major long term strategic impact. Second, establish the following strategic officer commissioning goals.

- Commission 100 lieutenants in the state OCS Program each FY.
- Graduate state OCS classes that more closely mirrors the diversity of Texas (see Figure 5, page 14).
- Begin each state OCS class with a mix of 76% OCS Enlistment Option and 24% In Unit Option.

Finally, provide a positive message with the appropriate command emphasis in order to create the sense of urgency required to close the capability gap between current force structure and mid-grade officer manning.

The second step to organizational change is to develop a Vision and Strategy. FM 3-0 defines Commander’s visualization as “the mental process of developing situational understanding, determining a desired end state, and envisioning the broad sequence of events by which the force will achieve that end state.”⁴⁸ The continued population expansion in Texas and the potential growth in TXARNG force structure

should be addressed in a Commanding General's vision of what the officer corps should look like in the year 2020. This vision coupled with the three strategic officer commissioning goals will motivate leaders to take action.⁴⁹ This vision also serves as the foundation or commander's intent⁵⁰ for the development of a detailed multi-year Strategic Communication Plan and the yearly state OCS Operations Order⁵¹. The yearly state OCS Operations Order is the commanding general's vehicle to communicate short term course corrections to the 2020 officer corps vision. This Operations Order should also direct implementation of the two additional strategies in this SRP, development and execution of a bilingual, English and Spanish, OCS Marketing Plan, as well as yearly updates to the execution of the state OCS Program.

The Strategic Communication Plan is the final step in communicating the organizational change vision. John P. Kotter, in his book *Leading Change*, explains the "Key Elements in the Effective Communication of Vision".⁵² By initially focusing on three of the seven elements presented, Simplicity, Multiple Forms, and Repetition⁵³, the organization can realize immediate success communicating the OCS recruiting change vision. Target markets such as college campuses, must receive the external message that stresses the opportunity to serve as an officer in the TXARNG. "Running a successful organization is not like a field of dreams; you can build it but they might not come. Marketing is all about letting people know about the product or service you offer, and persuading them to buy or use it."⁵⁴ The internal message must sustain the organizational culture changes and stress the three strategic officer commissioning goals. Both the external and internal organization messages must be repeated

throughout the year to ensure that it crosses the cultural barriers that previously may have limited participation by minority population groups.

Strategy 2 – Transformation of the State Accessions & Commission Force

The Chief of Staff of the Army announced in October 1999 that the Army was developing plans to transform its current Cold War organization and equipment to a lighter, more strategically responsive force to fill what it sees as a strategic gap in current warfighting capabilities.⁵⁵ This announcement began the largest reorganization of the Army since War World II. However, for the most part, it did not impact or address the changes needed in the Army's generating force⁵⁶. As with the rest of the Army, the TXARNG benefited greatly from General Shinseki's plan for transformation, however, like the Army, little has been done to transform the state OCS recruiting and commissioning program.

As stated above, the OCS commissioning sources must provide no less than 100 new lieutenants each fiscal year, but these numbers do not appear to be feasible given the current operations of the existing R&R and OCS battalions. Therefore, these organizations must change so that they are designed to meet the stated strategic goals. Recommendations are provided below to accomplish these objectives.

Before describing proposed organizational changes to develop a TXARNG Recruiting and Retention Brigade with the Mission Essential Tasks (METL) of recruiting, accessions, and branching the TXARNG officer corps, background must be provided on the structure of the current organizations. Currently there are three organizations involved in the recruiting, commissioning, accessions, and branching of officers for the TXARNG. These are; the Recruiting and Retention Battalion; the 2nd Battalion 136th

Regional Training Institute (RTI); and the TXARNG Deputy Chief of Staff for Personnel (G1). These three organizations, all with a different O7 or O6 commander, are not organized for unity of effort and inherently create “soft seams” and “stove pipes” that decrease the efficiency of our junior grade officer management.

A single brigade commanded by an Active Guard Reserve (AGR) colonel will consolidate efforts, creating an all personnel generation force organization. The organizational chart in Figure 7 visually depicts the proposed Force Generation Brigade and its subordinate battalions, as well as additional organizations of significance.

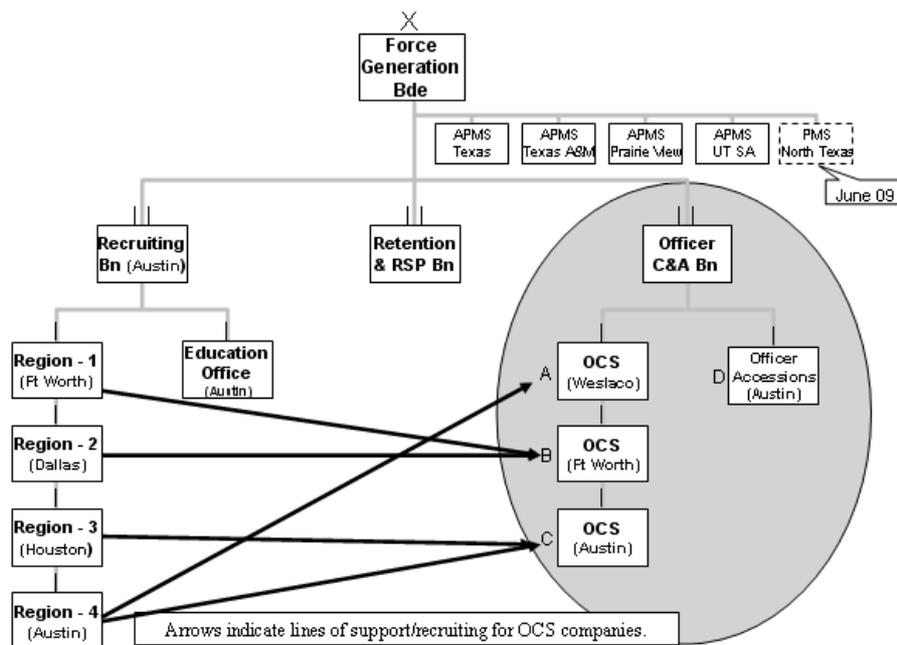


Figure 7. Proposed TXARNG Personnel Force Generation Brigade

Although these organizational changes with the brigade headquarters and the R&R Battalion are important and will increase mid-grade officer accessions and retention, it is most important to focus on the organizational changes involved in reassignment of the Officers Commissioning and Accessions Battalion, highlighted in the circled area above, to the Force Generation Brigade.

The first major change to organizational structure of this battalion is the addition of two OCS companies; one located in the Dallas Ft. Worth Metroplex, and the second in the Rio Grande Valley. As seen in Figure 8, adding these two companies, as well as creating OCS recruiting regions, would create several opportunities to achieve the organization's objectives. First, it takes advantage of the current and projected population centers as well as colleges and universities. The focusing of recruiting efforts to three OCS companies rather than only one would create conditions allowing the TXARNG to recruit a Phase 0 class that begins with approximately 80 OCs and commissions no less than 35 lieutenants per company, achieving the strategic goal of 100 lieutenants commissioned through state OCS each fiscal year. In addition to providing a higher student to instructor ratio, it would shorten the travel distance for OCs to attend IDT weekends. Third, having an OCS Company in the Rio Grande Valley would greatly increase the potential to recruit Hispanics because of the high population density.

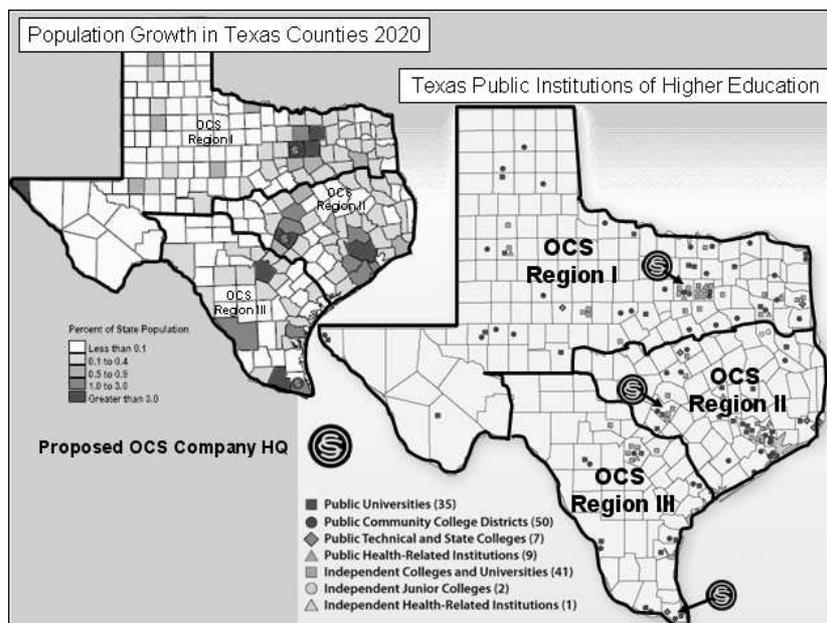


Figure 8. Proposed OCS Recruiting Regions⁵⁷

Strategy 3 – Knowledge Management

Currently the TXARNG officers commissioning and management program lacks transparency required for leaders at all levels to make informed decisions and recommendations. Knowledge management⁵⁸ is a key vehicle in addressing this lack of transparency. The United States Army is a world leader in Knowledge Management and the use of technology to increase Warfighting effectiveness and information dominance. Through the structuring of people, technology, and knowledge content, the core problem can be broken down into two areas: leader situational awareness and organizational stove pipes.

The TXARNG can capitalize on technology that encourages leaders, officers, and officer candidates participation and interaction in the officer management process. This capitalization would create a common operating picture, ensuring leader situational awareness and eliminate organizational stove pipes. The technology boom of the mid 1990s has provided tools to collaborate and share knowledge on a level unprecedented in history. Unfortunately, a knowledge management process or set of principles has not been integrated into officer commissioning and recruiting programs. It is hard enough to fight the enemy; the future OCs or unit commander should not have to fight the bureaucracy too.⁵⁹ According to Colonel Orlando Salinas, Brigade Commander of the 136th Regional Training Institute, the number one reason that soldiers do not complete State OCS is that “OCPC Phase 0 is problematic due to packet preparation.”⁶⁰ In other words, the future Officer Candidate and his leadership are potentially defeated by the application process before they have a chance to begin.

In order to correct this lack of a common operating picture, this SRP recommends the 2nd Bn 136th RTI (OCS Bn) contract to develop a remotely accessible

website to track current and future OCs. A Web-based collaborative information system should be designed to assist OCs with packet preparation, studies, and future events. An information system such as this would increase the ease and efficiency of OCs, families, OCS Instructors, and unit commanders interacting with each other and with historical class information.⁶¹ An excellent military example of a web-based collaborative information system is the Carlisle Barracks Remote Access website and United States Army War College (USAWC) Education On-line System website.

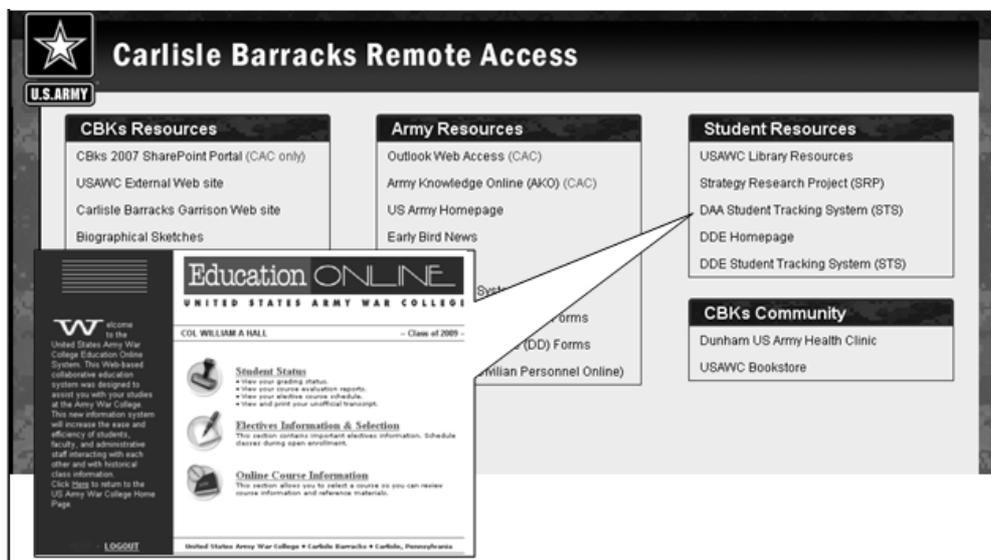


Figure 9. Carlisle Barracks Remote Access with USAWC Education Online link open⁶²

As Figure 9 illustrates, these types of websites eliminate the “soft seam” and “stove pipes” that currently exist between the organizations that influence the State OCS program, as well as link current and future OCs together much like the social networking websites Facebook and MySpace.

Conclusion

The Center of Gravity for the TXARNG is its mid grade officer corps (captains and majors). Mid-grade officers are critical to the future development of the organization

and are “the source of power that provides...freedom of action, or will to act.”⁶³ The TXARNG is at risk of losing its freedom of action because it has not made the organizational changes required to commission sufficient lieutenants through the state OCS Program. As we approach the year 2020 and the state’s population continues to grow, the TXARNG will shoulder an increased burden for the defense of our Nation. Proverbs 29:18 states “Where there is no vision, the people perish.”⁶⁴ The leadership for the TXARNG is at a decisive threshold in implementing strategies to close the gap between current force structure and mid-grade officer manning. Without a vision for this strategy, the quality and quantity of the mid-grade officer corps will continue to deteriorate, and soldiers will be led by marginal officers.

This Strategy Research Project has provided a comprehensive analysis of the challenges associated with commissioning adequate lieutenants who have the knowledge, skills, and abilities to thrive in uncertain and complex operating environments. The recruiting and commissioning of an ethnically diverse officer corps is critical to filling the current 392 captain and major vacancies in the TXARNG. With a shift in emphasis, resources, and lasting organizational cultural change, the TXARNG can meet its three strategic officer commissioning goals and have a bench filled with qualified mid-grade officers that mirrors the Texas population by the year 2020. Absent this shift in emphasis and adjustment of systems to reinforce the change, the officer corps will continue to suffer, and unit effectiveness, morale, trust, retention, and commitment will also continue to be significantly degraded.

Endnotes

¹ U.S. Department of the Army, *Army Leadership, Competent, Confident, and Agile, Field Manual 6-22* (Washington, DC: U.S. Department of the Army, October 2006), 7-1.

² LTC Greg Chaney, Commander Recruiting and Retention Battalion, TXARNG, e-mail message to author containing data from the TXARNG Standard Installation/Division Personnel System (SIDPERS) Database, March 16, 2009.

³ Adapted from LTC Greg Chaney, e-mail message to author containing data the TXARNG Population Growth Model, March 16, 2009.

⁴ Texas in Focus - Demographics, Exhibit 8: "Texas Population Growth, 1980–2040," January 2008, <http://www.window.state.tx.us/specialrpt/tif/population.html> (accessed October 14, 2008).

⁵ The mission of the 136th Regiment (Combat Arms) (Regional Training Institute), is to train soldiers in technical, tactical, and leadership skills, strengthening state and national readiness; provide regional coordination for combat arms training within Total Army School System (TASS) Region F; and help field commanders meet individual training requirements. The unit also provides professional leadership and development training for the Texas Army National Guard through conducting: Armor, artillery, and infantry MOS qualification (MOSQ) programs; Noncommissioned Officer Education System (NCOES) courses; Officer Candidate School (OCS); and specialty courses as required. *Global Security.org*, <http://www.globalsecurity.org/military/agency/army/136rti.htm> (accessed March 22, 2009).

⁶ The TXARNG G1 (Chief of Personnel) Section manages the majority of officer and warrant officer actions after he/she is accessed into the TXARNG. This section develops policy and monitors implementation of officer and warrant officer: selection boards (promotion, schooling, and command), reduction boards, separations, evaluations, retention and loss management, branching and rebranching, and selective continuation and retirement. This description is from personal experience of the author while assigned as the Texas Military Force J1 in 2006-2007.

⁷ The Texas Joint Military Forces Education Office services the soldiers and airmen of the Texas Military Forces. This office assists soldiers and airmen from the initial entry level education counseling stage all the way to successful completion of a masters or professional degree. Along with counseling, the office provides funding to pay for soldiers and airmen education through both federal and state tuition assistance programs, as well as helping with VA educational benefits earned as members of the Texas Military Forces. The TXJMF education Office provides professional and timely assistance to soldiers and airmen in pursuit of a higher education. *The Texas Joint Military Forces Education Office Home Page*, http://www.agd.state.tx.us/education/education_files/Page1713.htm (accessed March 22, 2009).

⁸ The Recruiting and Retention Battalion is the TXARNG Commanding General's full-time recruiting and retention force. This organization is responsible for recruiting enlisted soldiers (non-prior service and prior service), officers and warrant officers, and special branched officers (medical, JAG, etc). They have primary responsibility for retention of soldiers from the point of entry until they have completed training and retention (technical oversight) for soldiers after initial entry training. This description is from personal experience of the author while assigned as the Recruiting and Retention Battalion Commander (2002-2004).

⁹ U.S. Department of Defense, *DOD Dictionary of Military and Associated Terms*, "Center of Gravity," August 26, 2008, <http://www.dtic.mil/doctrine/jel/doddict/data/c/00874html> (accessed October 14, 2008).

¹⁰ The Brookings Institution, "Maintaining Quality in the Force: A Briefing by General George W. Casey Jr.," December 4, 2007, http://www.brookings.edu/~media/Files/events/2007/1204_casey/20071204casey.pdf (accessed October 14, 2008).

¹¹ Stephen G. Yackley, *Leader Development for a Transforming Army*, USAWC Strategy Research Project (Carlisle Barracks, PA: U.S. Army War College, March 15, 2006), 1 <http://www.strategicstudiesinstitute.army.mil/pdf/files/ksil550.pdf> (accessed March 18, 2009).

¹² Adapted from Wally Adamchik, "The Empty Bench," *ForConstructionPros.com*, July 8 2008, <http://www.forconstructionpros.com/online/Employee-Matters/The-Empty-Bench-/15FCP9156> (accessed January 3, 2009).

¹³ LTC Darrell Dement, e-mail message to author containing data from the TXARNG Standard Installation/Division Personnel System (SIDPERS) Database, December 22, 2008.

¹⁴ Thomas Weafer, *Averting the Train Wreck of Captain Attrition—A Leadership Solution*, Strategy Research Project (Carlisle Barracks, PA: U.S. Army War College, April 2001), 10.

¹⁵ LTC Darrell Dement, e-mail message to author containing data from the TXARNG Standard Installation/Division Personnel System (SIDPERS) Database, December 22, 2008..

¹⁶ Mark H. Johnson, *Army ROTC's Challenge: Providing Lieutenants for the Objective Force*, USAWC Fellowship Research Project (Carlisle Barracks, PA: U.S. Army War College, April 2, 2002), 6.

¹⁷ Adapted from Dr. John Bonin, "Army Structure Challenge POM 10-15 Brief," briefing slides, Carlisle Barracks, PA, U.S. Army War College Seminar 17, February 24, 2009, Slide 32.

¹⁸ Author completed chart from data provided from the U.S. Department of Defense, *Population Representation in Military Service* (Washington DC: U.S. Department of Defense, 2006) http://www.defenselink.mil/prhome/PopRep_FY06/download.html (accessed December 12, 2008)

¹⁹ *The United States Army Infantry School OCS Home Page*, <https://www.infantry.army.mil/ocs/> (accessed January 23, 2009).

²⁰ U.S. Army National Guard, *FY07 Enlistment Criteria* (Washington, DC: U.S. Army National Guard, 1 October 2006, Change 1), 80, https://www.nh.ngb.army.mil/Recruiting/Tools_files/FY-07%20ECM.pdf (accessed January 22, 2009).

²¹ COL Orlando Salinas, Brigade Commander, 136th Regional Training Academy, TXARNG, e-mail message to author, December 16, 2008 and January 23, 2009.

²² The intent of the state OCS enlistment option is to attract applicants to the ARNG and provide an additional source of potential candidates for OCS. U.S. Army National Guard, *FY07 Enlistment Criteria*, 80.

²³ LTC Armando M. Santos, "Pre-Commissioning Course & OCPC Concept Brief," briefing slides, Camp Mabry, TX, 2nd Battalion 136th Regional Training Institute, December 9, 2008, Slide 6.

²⁴ LTC Greg Chaney, Commander Recruiting and Retention Battalion, TXARNG, telephone interview by author, January 23, 2009.

²⁵ Ibid.

²⁶ Johnson, *Army ROTC's Challenge: Providing Lieutenants for the Objective*, 2.

²⁷ MG John F. Furlow, former Commanding General TXARNG, telephone interview by author, December 19, 2008.

²⁸ U.S. Department of the Army, *Army Leadership, Competent, Confident, and Agile*, 2-3, 2-4.

²⁹ Ibid. 2-4.

³⁰ Ibid. 4-1.

³¹ Ibid. 2-4.

³² Ibid. Forward.

³³ The minimum educational requirement to receive a commission through state OCS is 90 college credits. Commissioning officers without degrees is a short term gain but a long term challenge, as a large percent of officers who do not earn college degrees are either reduced or discharged from the National Guard. Currently, the TXARNG has 7% or 113 officers without degrees. LTC Darrell Dement, e-mail message to author containing data from the TXARNG Standard Installation/Division Personnel System (SIDPERS) Database, December 22, 2008.

³⁴ U.S. Department of the Army, *Leaders Development for America's Army*, DA pamphlet 350-58 (Washington, DC: U.S. Department of the Army, October 13, 1994), 14, http://www.army.mil/usapa/epubs/pdf/p350_58.pdf (accessed February 16, 2009).

³⁵ U.S. Department of the Army, Deputy Chief of Staff G1, "Army Diversity," June 12, 2007, <http://www.armyg1.army.mil/hr/ado.asp> (accessed January 23, 2009).

³⁶ LTC Darrell Dement, e-mail message to author containing data from the TXARNG Standard Installation/Division Personnel System (SIDPERS) Database, February 10, 2009.

³⁷ Texas in Focus - Demographics, Exhibit 8: "Texas Population Growth, 1980–2040," January 2008, <http://www.window.state.tx.us/specialrpt/tif/population.html> (accessed October 14, 2008); and LTC Darrell Dement, e-mail message to author containing data from the TXARNG Standard Installation/Division Personnel System (SIDPERS) Database, January 9, 2009.

³⁸ Operation Jump Start was the 2006 to 2008 deployment of National Guard soldiers and airmen along the United States–Mexico border in the states of Arizona, California, New Mexico,

and Texas. The essential tasks were to support the U.S. Border Patrol with observation posts, vehicle inspections, administrative support, and engineering projects. Assuming responsibility for these areas allowed the Border Patrol to place more agents into field assignments. Neither soldiers nor airmen were involved in law enforcement activities. This definition is from personal experience of the author while assigned as the Texas Military Force J1 in 2006-2007.

³⁹ Merriam-Webster's, "Requirement" *Merriam-Webster Online Dictionary*, <http://www.merriam-webster.com/dictionary/requirement> (accessed October 10, 2008).

⁴⁰ LTC Greg Chaney, Commander Recruiting and Retention Battalion, TXARNG, telephone interview by author, January 23, 2009.

⁴¹ Adapted from LTC Greg Chaney, e-mail message to author containing data from the Army Recruiting Information Support System (ARISS) software Database, February 18, 2009.

⁴² Sun Tzu, *The Art of War*, trans. Samuel B. Griffith (New York: Oxford University Press, 1963), 43.

⁴³ Marketing Plan. Product specific, market specific, or company-wide plan that describes activities involved in achieving specific marketing objectives within a set timeframe. A market plan begins with the identification (through market research) of specific customer needs and how the firm intends to fulfill them while generating an acceptable level of return. It generally includes analysis of the current market situation (opportunities and trends) and detailed action programs, budgets, sales forecasts, strategies, and projected (proforma) financial statements. See also marketing strategy. BusinessDictionary.com, "Marketing plan," <http://www.businessdictionary.com/definition/marketing-plan.html> (accessed January 19, 2009).

⁴⁴ Strategic Communication. Focused United States Government efforts to understand and engage key audiences to create, strengthen, or preserve conditions favorable for the advancement of United States Government interests, policies, and objectives through the use of coordinated programs, plans, themes, messages, and products synchronized with the actions of all instruments of national power. U.S. Joint Chiefs of Staff, *Dictionary of Military and Associated Terms*, Joint Publication 1-02 (Washington, DC: U.S. Joint Chiefs of Staff, April 12, 2001, as amended through 17 October 2008), 522, http://www.dtic.mil/doctrine/jel/new_pubs/jp1_02.pdf (accessed January 11, 2009).

⁴⁵ John P. Kotter, *Leading Change* (Boston, MA: Harvard Business School Press, 1996), 21.

⁴⁶ Ibid.

⁴⁷ Ibid., 36.

⁴⁸ U.S. Department of the Army, *Operations*, Field Manual 3-0 (Washington, DC: U.S. Department of the Army, February 2008), 5-5.

⁴⁹ Kotter, *Leading Change*, 68-69.

⁵⁰ The commander's intent is a clear, concise statement of what the force must do and the conditions the force must establish with respect to the enemy, terrain, and civil considerations

that represent the desired end state. U.S. Department of the Army, *Operations*, Field Manual 3-0 (Washington, DC: U.S. Department of the Army, February 2008), 5-10.

⁵¹ Operation Order — A directive issued by a commander to subordinate commanders for the purpose of effecting the coordinated execution of an operation. Also called OPORD. U.S. Department of Defense, DOD Dictionary of Military and Associated Terms, “Operations Order,” October 17, 2008, http://www.dtic.mil/doctrine/jel/new_pubs/jp1_02.pdf (accessed March 19, 2009), 401.

⁵² Kotter, *Leading Change*, 90.

⁵³ Ibid.

⁵⁴ Susan Ward, “The Key to Marketing: The Marketing Plan,” *About.com*, <http://sbinfocanada.about.com/cs/marketing/a/marketingplan.htm> (accessed January 19, 2009).

⁵⁵ U.S. General Accounting Office, *Military Transformation: Report to Congressional Committees* (Washington, DC: U. S. General Accounting Office, November 2001), 7, <http://www.gao.gov/new.items/d0296.pdf> (accessed January 19, 2009).

⁵⁶ The Generating Force. The primary mission of the generating force is to generate and sustain operational Army capabilities. This mission and the generating force’s capabilities to execute it are more fully described in the Army War College publication, *How the Army Runs: A Senior Leader Reference Handbook*. The generating force also possesses operationally useful capabilities. However, the Army does not organize the generating force into standing organizations with a primary focus on specific operations. Rather, when generating force capabilities perform specific functions or missions in support of and at the direction of joint force commanders, it is for a limited period of time. Upon completion of the mission, the elements and assets of those generating force capabilities revert to their original function. U.S. Department of the Army, *Generating Force Support for Operations*, Field Manual 1-01 (Washington, DC: U.S. Department of the Army, April 2, 2008), 1-2.

⁵⁷ Texas in Focus - Demographics, “Texas Population Growth, 1980–2040,” January 2008, <http://www.window.state.tx.us/specialrpt/tif/population.html> (accessed October 14, 2008); and Windows on State Government, “Texas Public Institutions of Higher Education,” <http://www.window.state.tx.us/specialrpt/tif/higher.html> (accessed February 22, 2009).

⁵⁸ The Army defines Knowledge Management as “the art of creating, organizing, applying, and transferring knowledge to facilitate situational understanding and decisionmaking. U.S. Department of the Army, *Knowledge Management Section*, Field Manual 6-01.1 (Washington, DC: U.S. Department of the Army, August 28, 2008), 1-1.

⁵⁹ U.S. Congress, House Committee on Armed Services, Panel on Roles and Missions, *Initial Perspectives*, (Washington DC: U.S. Congress, House, January 2008), 7, <http://armedservices.house.gov/pdfs/Reports/HASCRolesandMissionsPanelReport.pdf> (accessed February 7, 2009).

⁶⁰ COL Orlando Salinas, e-mail message to author, December 16, 2008.

⁶¹ Adapted from *Carlisle Barracks Remote Access Website*, <https://www.remote.carlisle.army.mil/> (accessed March 7, 2009); and *USAWC Education Online Website*, <https://www.remote.carlisle.army.mil/daasts/eol/cgi/start.cfm> (accessed March 7, 2009)

⁶² Ibid.

⁶³ U.S. Department of Defense, *DOD Dictionary of Military and Associated Terms*, "Center of Gravity,".

⁶⁴ BibleGateway.com, "Proverbs 29:18 (King James Version)," <http://www.biblegateway.com/passage/?search=Proverbs%2029:18;&version=9> (accessed October 10, 2008).

