

# **MORS Special Meeting Terms of Reference**

## **DoD Force Structure Analysis Way Ahead**

***24-27 January 2011***  
***TASC Heritage Conference Center, Chantilly, VA***

### **DRAFT Version**

#### **1. Purpose**

a. Problem Statement: How can the analytic community best identify and assess force structure elements required to achieve the national security objectives called for in current national security documents given a complex and dynamic security environment?

b. This workshop will describe a way ahead for force structure analysis by:

1. Developing recommendations for improving force structure analysis processes, tools, and products, and

2. Expanding the understanding of force structure analysis data, assumptions, procedures, and applications for workshop participants and the community of force structure analysis participants and customers.

#### **2. Background**

a. The 2010 Quadrennial Defense Review (QDR) outlined a strategy to meet a broad array of security challenges. However the ability of the QDR to suggest quantitative force structure adjustments was inhibited by the demands of the current fights and the complexity and uncertainty of the future environment. Given the near term disengagement of forces in Iraq and the expected responsible withdrawal from Afghanistan starting in 2011, the Joint Staff, at the direction of the Secretary of Defense, conducted the Operational Availability Study 2010 (OA-10) to determine force availability of currently stressed forces in the near to midterm. This study provided valuable insights as to the constraints on these forces, but was limited in scope to the units analyzed and in scale to a baseline of current operations.

b. Looking forward, we can expect that eliminating the Overseas Contingency Operations (OCO) budget and a return to more normal resourcing activities will require a comprehensive examination of force structure to ensure we properly match the programmed and funded force to the national security strategy demands. For the near term, the question for the Department is, "How best to prioritize to reset and reconstitute the force?"

c. That means the Joint Staff and the Department of Defense must find ways to improve how we analyze the structure required for the joint force after next, and ensure that our current strategy and structure maps to this force in as seamless a manner as possible. The proposed Force Structure Workshop will examine our analytical methods to collect the proper data, establish metrics, and develop and apply tools to determine an appropriate force structure to meet national security objectives in the near, mid, and long terms.

### **3. Proponent Interest (DRAFT)**

The Force Structure, Resources, and Assessment Directorate, J-8, is the lead proponent for this workshop. They have supported the concept behind this meeting from its inception. Another prime proponent of this meeting is the Office of the Secretary of Defense, Capability Assessment and Program Evaluation (CAPE). Both organizations have had meaningful input into the shaping of this workshop. Each of the services will have a significant role in these discussions and have expressed a strong interest in this workshop. We anticipate that each service will also provide input to shape this workshop moving forward.

### **4. Approach**

The event concept is a hybrid of a mini-symposium and workshop focused on developing recommendations for improving force structure analysis processes, tools, and products. In order to most efficiently use the attendees' time, the workshop will be broken down into the four functional working groups and one synthesis working group. The format of the working groups acknowledges that major personnel and equipment changes to force structure are unlikely in the near term, however mid-term and long term force structure analysis need to consider personnel and equipment factors.

Each Working Group will develop individual Terms of Reference specific to the assigned topic, but the following questions are common across all functional working groups:

- What are the data requirements?
- What data is available? Where does it come from?
- How is data assessed? Who does the assessments?
- What Analyses are currently being performed?
- What Analyses should be performed?

- What tools & models can be used in your analysis?
- What are the prioritized gaps of these Analyses?
- What are the best practices for these Analyses?
- What is the way ahead?

The plan for each Working Group is to intersperse topical paper presentations with round table discussions of current issues in that Working Group's focus area. The discussions should lead to the exchange ideas, to the development frameworks for analysis, to address the questions above and any other questions and issues developed within the Working Group.

Working Group sessions can begin with an introductory presentation from the Working Group leadership or from a senior leader with cognizance in the focus area. That stakeholder will present the Working Group with a set of challenges that they face on a daily basis. In the ensuing sessions, the Working Group may conduct discussions of these topics and map out a way ahead to address them, reinforced by the paper presentations.

Presentations in these Working Groups should emphasize tools and methods, algorithms, historical and current data sources, on-going analysis, and opportunities for collaboration on future analysis and tool development. Successful projects, available data sources, and Operations Research "lessons learned" presentations are especially valuable. Of equal value are presentations that provide the audience insights into the challenges and opportunities that face decision makers—insights that may map to quantitative techniques and operations research methods to provide needed information to those decision makers.

A short out brief Thursday afternoon will conclude the Workshop at which Working Groups and the Synthesis Group will share finding and recommendations from their respective groups. On Friday morning, Working and Synthesis Group Chairs and Workshop Chairs will meet for a wrap-up session and to document the Workshop. Following the meeting, and as schedules allow, the Meeting Chair along with special representatives from the meeting and from MORS will conduct a Senior Leader Out-brief in the Pentagon summarizing the findings.

To address the significant issues related to Force Structure analysis, the Working Groups will be structured as follows:

#### **Working Group One: Near Term force structure analysis.**

This working group will examine how we currently analyze our force structure in the near term (next 5 years) to ensure we are properly tailoring the current force to accomplish near term objectives, and provide recommendations on how we can improve. Key questions include:

How should DoD analyze how to optimize the reset of the force?

How should DoD analyze how rapidly to reengage the force in new missions?

### Working Group Two: Personnel.

This working group will examine how we currently analyze our personnel requirements for DoD in the mid and long terms to ensure it is the correct size and mix of force to accomplish national security objectives and provide recommendations on how we can improve. Key questions include:

- Are we delivering a force that is properly sized to succeed in any likely future?
- Are we delivering a force with right mix of capabilities?
- Is the force properly balanced between AC and RC?
- What are the consequences of past and current operations on the future force?

### Working Group Three: Material and Acquisition.

This working group will examine how we currently analyze our equipping requirements for DoD in the mid and long terms to ensure it is the correct size and mix of force to accomplish national security objectives and provide recommendations on how we can improve. Key questions include:

- Are we delivering a force that can succeed in any likely future?
- Are we developing the right technologies?
- Are we building the right mix of capabilities?
- Are we promoting a joint architecture across the force?

### Working Group Four: Linking Current to Future force structure analysis.

This working group will examine how we optimize the force structure over time to ensure the trajectory of the current force structure aligns with the required force structure in the future. Key questions to examine include:

- What tools do we have to ensure service programs complement each other over time?
- How do we avoid gaps (or rapid changes) in capabilities (personnel and equipment)?

### Synthesis Working Group:

This working group will take the outputs of the 4 functional working groups and create a consolidated summary of the findings and recommendations of each group. The Synthesis Group (SynGrp) will have a member in each working group to identify those nuggets in the papers and discussions that reveal analysis lessons learned. The SynGrp will categorize lessons learned in the following three classes.

- The “Constants” – These are the lessons of analysis that were learned in previous force structure analysis and have been re-learned in subsequent contingencies, including the most recent.
- The “Trends” – These are lessons based on observations of something new, at least in emphasis, which promise to extend beyond the present.

Some will reflect advancing technology and others will reflect changes in policy or global security conditions.

- The “Variables” – These are conditional lessons for force planning conducted in conditions like the present conflicts.

## 5. Pre-conference Session (DRAFT)

Tutorials TBD

## 6. Workshop Planning and WG Chairs

### Proponents:

- The Office of Force Structure, Resources, and Assessment Directorate, J-8
- The Office of the Secretary of Defense, Capability Assessment and Program Evaluation (CAPE).

### Program Chairs:

- Colonel Peter With (USA), J8, [peter.with@js.pentagon.mil](mailto:peter.with@js.pentagon.mil), 703-695-3705
- Mr. James Stevens, OSD, [james.stevens@osd.mil](mailto:james.stevens@osd.mil), 703-699-1702

### Administrative Coordinators:

- Ms. Krista Paternostro, Chief Executive Officer, MORS, [krista@mors.org](mailto:krista@mors.org), 703-933-9070
- Ms. Jordan Fischer, MORS Meeting Planner, [jordan@mors.org](mailto:jordan@mors.org), 703-933-9070
- Mr. Timothy Hope, MORS Special Meeting Chair, [thope@wbbinc.com](mailto:thope@wbbinc.com), 703- 448-6081 x279

### MORS Bulldog:

- Dr. Michael Kwinn, ASA/ALT, [michael.kwinn@us.army.mil](mailto:michael.kwinn@us.army.mil), 703-697-2653

### Working Group Chairs:

#### *WG1: Near Term force structure analysis*

Chair:

- TBD

Co-chair:

- TBD

### *WG2: Personnel*

Chair:

- Ms. Ronda J. Syring, JHU/APL, [ronda.syring@jhuapl.edu](mailto:ronda.syring@jhuapl.edu), 240-228-2712

Co-chair:

- Mr. Scott Flood, USAMAA, [scott.flood@us.army.mil](mailto:scott.flood@us.army.mil), 703-805-1176

### *WG3: Material and Acquisition*

Chair:

- TBD

Co-chair:

- TBD

### *WG 4: Linking Current to Future force structure analysis*

Chair:

- TBD

Co-chair:

- TBD

### *Synthesis Group*

Chair:

- TBD

Co-chair:

- TBD

Recorder:

- TBD

### *Sponsor/Service Reps*

- Army: COL Chris Hill (Center for Army Analysis)
- Navy: Mr. Herb Cupo (OPNAV N81)
- Air Force: Dr. Clay Bowen (Air Force HQ/A-9)
- Marines: Lt Col Brian Zacherl (MCCDC Studies and Analysis)
- Joint Staff: Lt Col Benjamin Koudelka, Jr., (J8)
- OSD: Mr. Jim Bexfield, FS (CAPE)
- DHS: Mr. Ervin Kapos (S&T)

## 7. Attendance

Attendees will include those who work in the force structure and requirements area for all services, the Joint Staff and the Department of Defense. There will likely be implications to the Department of Homeland Defense and the Department of State as we develop an interagency approach to this analysis. To that end, participation will include experts from OSD, all Services, the Joint Staff, University Affiliated Research Centers, Federally Funded Research and Development Centers, operational commanders, DoD contractors, Department of Homeland Security, the Department of State and others. This will be a US only meeting and it is anticipated that the discussions may rise to the Secret classification level. This Workshop can reach out to a large audience of decision-makers, operators, and analysts to bring to bear analytical capabilities to address force structure challenges and potential analytical gaps.

Working Groups will be led by a Chair and up to three Co-Chairs. This leadership group will be comprised of members of MORS and Subject Matter Experts (SME). The responsibilities of this team include:

- Chair:
  - Dynamic individual who is a SME in the WG topic
  - Solicits analysts and operators in the focus area to participate in the WG
  - Guides the WG during the Workshop
  - Challenged to provide the “substance” of the special meeting WG
  - Develops the WG’s final product
- Co-Chair:
  - Individual interested I the WG topic
  - Assists the Chair in WG membership
  - Provides perspective during the Workshop
  - Assist Chair as needed/requested

Another key group of individuals during the Workshop is the Synthesis Group. This group will provide representation to each of the WGs and assist the Workshop Chairs in consolidating the Working Group results and develop overall assessment/recommendations from the analysis community.

## 8. Deliverables

Products generated from the workshop will include:

- A presentation to senior leaders in DoD, on the Joint Staff, within all services and the Department’s of Homeland Security and State shortly following the meeting.
- An Executive Summary in the form of a text document or scripted briefing for the MORS Proponents and other invitees as appropriate addressing the workshop objectives, findings, conclusions, and recommendations

- A proceedings document containing summaries of all sessions and annotated copies of appropriate briefing slides and presentations
- An article summarizing the Workshop and its findings will be produced and submitted to *PHALANX* in time for the next deadline after the meeting
- A general session presentation for the 79th MORS Symposium at the Naval Postgraduate School in Monterey, CA.

## 9. Administrative

Name: *DoD Force Structure Analysis Way Ahead*

Dates: 24-27 January 2011 with Tutorials on Monday

Location: TASC Heritage Conference Center  
4803 Stonecroft Boulevard  
Chantilly, VA 20151

Registration Fees/Tuition:

Entire Workshop

*Non-Government/Non-Member:* \$???

*Non-Government/Member:* \$???

*Government/Non-Member:* \$???

*Government/Member:* \$???

Plenary Only

*All/Non-Members:* \$???

*All/Members:* \$???

Classification: Secret, US Only. Post-workshop products such as the PHALANX article, the Working Group and Synthesis Group out-briefs that are unclassified and cleared for public release may be posted on the MORS web site. Other products, such as the Senior Leader out-brief, the Sponsors' out-brief, and MORSS presentation may be classified, as necessary.

## **11. Agenda (Tentative)**

### **Monday**

1200-1700 Tutorials  
1700-1730 WG Chair Warm-up session

### **Tuesday**

0700 Workshop registration and Continental Breakfast  
0800 MORS President's Welcome  
0810 Facility Host Welcome  
0820 Sponsor's Welcome  
0830 Keynote Address  
1000 Break  
1015 Plenary Address,  
1100 Charter to the Working Groups  
1130 Breakout to Working Groups  
1200 Lunch  
Mid-afternoon Break (as directed by Working Group Chairs)  
1630 WG Chair Summary Brief  
1700 Adjourn to Mixer

### **Wednesday**

0700 Continental Breakfast  
0745 Synthesis Group Summary brief to WG chairs  
0800 Working Group Sessions  
Mid-morning Break (as directed by Working Group Chairs)  
1200 Working Lunch  
Mid-afternoon Break (as directed by Working Group Chairs)  
1700 WG Chair Summary Brief

### **Thursday**

0700 Continental Breakfast  
0745 Synthesis Group Summary brief to WG chairs  
0800 Working Group Sessions (Prepare Working Group Outbriefs)  
Mid-morning Break (as directed by Working Group Chairs)  
1200 Working Lunch  
1300 Working Groups Chairs present Outbriefs, (25 minutes per WG + Synthesis)  
1600 Recognitions and Sponsor's Concluding Remarks

### **Friday (Working Chairs/Program Leadership Only)**

0800 Working Group and Workshop Chairs Wrap-up and Discussions reference  
*PHALANX* Article and Workshop's Proceedings/Final Report  
Senior Leader Out-Brief (Pentagon time and location TBD)