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MEASURES OF EFFECTIVENESS AND PERFORMANCE

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Exercise Solo Flight

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EXERCISE *SOLO FLIGHT* – EXERCICE *SOLO FLIGHT*

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Maj H. Pedwell

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MEASURES OF EFFECTIVENESS AND PERFORMANCE

INTRODUCTION

Throughout the history of Canada, the “militia” or “reserve” has played a key role in defending the country. Indeed, before confederation, Canada’s defence was reliant on the British Army and the militia. With the British withdrawal following confederation, Canada raised a small regular force military for garrison and training purposes but almost solely relied on the militia and reserves to maintain its defence. This state of affairs existed up until the end of the Second World War. The “Cold War” brought about a different threat environment for Canada. The constant risk of conflict with the Soviet Union and the need to deploy soldiers to Korea and to support NATO forced the Canadian military to expand and become much more reliant on its small professional regular force military than it had in the past. The effect of this was to deemphasize the reserve with the result that the reserve gradually became a smaller part of the larger Canadian Military. With the end of the Cold War, Canada took a peace dividend and reduced its regular military. Global instability, however, continued to rise and Canada was forced to deploy troops on peacekeeping and stability operations in the former Yugoslavia and Africa in the 1990s and in support of the U.S. lead “War on Terror” between 2002 and 2014. The Canadian Armed Forces (CAF) Primary Reserve (reserve) played a key supporting role in all operations since the 1990s. Today, as the CAF moves forward and prepares itself to fight the next conflict, the role and functions of the reserve are again being examined in order to right size and right enable the reserve to fulfill its roles. In this paper I will review reserve effectiveness, provide an overview of comparable ABCA reserve forces and present three broad recommendations for

improving reserve effectiveness in order to better enable the force to meet the Army's future needs.

EFFECTIVENESS

Throughout this paper, I refer to reserve effectiveness. From my perspective, effectiveness has two aspects. First and foremost is a professional and competent organization capable of fulfilling its roles. Second, is an organization that is robust enough in size to achieve its roles. These measures are outlined in the 2011 Interim Report of Standing Senate Committee on National Security and Defence¹ and the 2008 Canada First Defence Strategy.² Specifically, the roles of the Canadian primary reserve are to provide the framework for mobilization, sustain and augment the regular force and act as a link between the military and civilian communities.³ Target reserve strength is 30,000 trained soldiers.⁴ Based on my assessment, the Canadian forces reserve is drifting away from being as capable as possible and is falling far short of meeting its strength requirements.

ABCA RESERVE FORCE OVERVIEW

Before making recommendations on changes, it is of value to review reserve force composition amongst similar nations. In doing this, I have reviewed the three largest of our ABCA⁵ (American, British, Canadian, Australian and New Zealand) allies. These entities are very similar in military philosophy and background to Canada and their

¹ Canada. "Answering the Call: The Future Role of Canada's Primary Reserve." Interim Report of Standing Senate Committee on National Security and Defence. December 2011.

² Canada. "Canada First Defence Strategy." Department of National Defence. 12 May 2005. <http://www.forces.gc.ca/en/about/canada-first-defence-strategy.page> . 15.

³ Ibid. "Answering the Call: The Future Role of Canada's Primary Reserve." 11.

⁴ Ibid. "Canada First Defence Strategy." 4.

⁵ ABCA. "American, British, Canadian, Australian and New Zealand Armies Program: Optimizing Coalition Interoperability." Last accessed 20 June 2015. <http://www.abca-armies.org/>,

review shows some interesting similarities and differences of approach to their reserve forces. The key differences that exist between the reserves are in the contractual obligations of reservists versus regular force members and the deployment / employment model of reservists versus regular force members. The key similarities that exist are the heavy reliance of each of the countries on reservists to maintain prolonged missions and the need to either maintain or improve reserve training to match that given to the regular force members. The ABCA forces are very similar in nature and some of the changes being made in these forces and their current / future capabilities are things that the Canadian Armed Forces should seriously be examining if it intends to make the reserves more effective.

1. The United States – Army National Guard⁶



⁶ Information in this section comes from two primary sources: (a) National Guard Bureau. “2014 National Guard Posture Statement: Sustaining an Operational Force.” Last accessed 7 June 2015. http://www.nationalguard.mil/features/ngps/2014_ngps.pdf. (b) National Guard Bureau. National Guard Website. Last accessed 7 June 2015. <http://www.nationalguard.mil/>

The U.S. Army National Guard (“Guard”) is the U.S.’s Strategic Military Reserve. As of 2014 the Guard’s estimated troop strength was 358,200 soldiers. The Guard’s mission is twofold. Guardsmen answer to the State and the State Governor can call out the Guard to respond to domestic emergencies. Guardsmen also answer to the Federal Government and can be called out by the President for domestic operations as well as peace keeping and war fighting operations outside of the United States. Guardsmen are under contract to serve and once they sign on they are contractually obligated to: a) train one weekend per month and two weeks per year; and b) liable for individual or unit call up at the State or Federal level. The Guard is an experienced force which is well trained, equipped and lead. Over the past decade, the Guard has been called up numerous times to serve overseas. Since the terrorist attacks of September 11th 2001, Guard members have deployed over 750,000 times in support of U.S. operations in Iraq, Afghanistan, the Balkans, the Sinai, the Horn of Africa and other locations across the globe. In 2005, guardsman made up nearly 40% of those serving in Iraq and one in six troops killed in theatre were members of the Guard. Looking forward, the reality for the U.S. is that any major troop commitment will require Guard participation. The U.S. Army is in the process of decreasing its size and the Guard will be required to fill the manpower gaps with trained, equipped and ready soldiers and units. The Guard fields units ranging in size from small, elite teams to effective brigade and division organizations capable of operations across the spectrum of conflict in combat, combat support and combat service support roles. The Guard has moved from the “Strategic” to the “Operational” reserve of the U.S. Military and the pace and scope of operations have increased. The Guard does not maintain a “Regimental System” as known within the

Commonwealth countries. Typically a Guardsman at the lower levels will parade with one unit. Senior Non-Commissioned Officers (NCOs) and officers are regularly posted in and out of units within the state in order to fill leadership gaps and gain leadership and military skills. Guard qualifications match the depth and breadth of those given to the active force. Legal protections are in place to protect Guardsmen from hiring discrimination and to protect their jobs and salary when called on active service. Benefits wise, the Guard offers members a wide range of occupations, roles within those occupations, a respected job, equivalent pay to Active Duty personnel, very good educational benefits, health benefits and retirement benefits.

2. The United Kingdom – Army Reserve⁷



The British Army Reserve (formerly Territorial Army) evolved from local militias and can trace its history back to early British times. As of 2014, the Army Reserve's estimated strength was 25,000 soldiers. The Reserve answers only to the National

⁷ Information in this section comes from two primary sources: (a) Ministry of Defence. "Reserves." Last accessed 7 June 2015. <http://www.army.mod.uk/reserve/31781.aspx>. (b) Ministry of Defence. "Reserves in the Future Force 2020: Valuable and Valued." July 2013. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/210470/Cm8655-web_FINAL.pdf.

Government and can be deployed for both domestic and international operations. Reservists commit for a minimum three year enrolment period. Training for Reserves is similar to that in Canada with Reservists expected to train with their units on a weeknight, weekend and annual camp basis. Terms of service do not mandate that they attend training; however, Reservists are encouraged to do so by receiving an Annual bounty for achieving their annual qualifications, attending a certain percentage of training days/weekends and attending annual camp. Over the past decade, Reservists have been called upon to volunteer to serve with Regular Army Units and as Augmentation Staff to British Army Operations in Iraq, Afghanistan and elsewhere. Nearly 7,000 Reserve soldiers deployed to Iraq as part of Op TELIC in 2003 and the Reserves played a key manpower role throughout that Operation. Looking forward, the U.K. completed a Defense review in 2010. Under this review, a plan has been implemented to increase the Reserve to 30,000 trained members with up to 8,000 members in training by 2020. In addition the reserve is refocussing from primarily combat roles to providing combat, specialist and support functions. With the Regular British Army being downsized to 82,000 soldiers, the Reserve will come to play a much greater and important role in the military. This is reflected by the greater Regular/Reserve force integration being undertaken, the greater funding being given to Reserve collective training, and the better equipment, individual training and benefits being given to the Reserve force. The Reserve maintains a "Regimental System" and typically members of the Reserves stay within the unit they join for most of their career. Reserve qualifications have historically not matched the depth and breadth of those given to the active force. Legal protections are in place to protect Reservists from hiring discrimination and to protect their jobs

when called for active service. Benefits wise, the Reserve is/is going to offer members a wider range of occupations, roles within those occupations, a respected job, equivalent pay to Regular Force personnel, improving educational benefits and health benefits.

3. Australia – Army Reserve⁸



The Australian Army Reserve evolved from the colonial militias and thus can trace its history back to the earliest British settlements in Australia. As of 2014, the Army Reserve's estimated strength was 17,000 active soldiers. The Reserve answers only to the National Government and can be deployed for both domestic and international operations. Training for Reserves is similar to that in Canada with Reservists expected to train with their units on a weeknight, weekend and annual camp basis. Terms of service do not mandate that they attend training. Over the past decade, Reservists have been called upon to volunteer to serve with Regular Army Units and as Augmentation Staff to Australian Army Operations Iraq, Afghanistan and elsewhere. Deployments have been at the individual augmentee level but the Reserve has deployed formed units on

⁸ Information in this section comes from two primary sources: (a) Australian Army. "Defence Reserves Support." Last accessed 20 June 2015. <http://www.defencereservessupport.gov.au/> (b)Australia. "Army Reserve Forces". The Auditor General Audit Report No.31, 2008-09 Performance Audit.

operations outside of Australia in lower threat peace keeping operations. The Australian reserve is primarily organized into six state based brigades as well as up to company sized and smaller sub-units attached to Regular Force units. In 2011, the Australian Defence Department announced “Plan Beersheba” which called for a major restructuring of the Army. A key aspect of the plan is the greater integration of Reserves into Army planning and operations. The Reserve maintains a “Regimental System” and typically members of the Reserves stay within the unit they join for most of their career. Reserve qualifications have historically not matched the depth and breadth of those given to the active force. Benefits wise, the Reserve offer members a wider range of occupations, roles within those occupations, a respected job and tax free pay.

RECOMMENDATIONS

In the section above I reviewed the reserve forces of the U.S. (Army National Guard), the U.K. (Reserve) and Australia (Reserve). I have spent the time doing so as their review helps to contextually align my some of my recommendations. Recent CAF changes to the reserve have been moving counter to those changes being made in the ABCA allies and this could prove to be damaging to the health and capability of the reserve force in the long run. Both the U.S and U.K have greater operational experience as an army and have employed reserves in more theatres then Canada has. Based on this review, I would make the following three broad recommendations to improving reserve effectiveness:

1. Change Reserve Terms of Service

Currently, reserve terms of service differ significantly from that of the regular force. Specifically, unless there is a general mobilization ordered, reservists serve only with consent and are subject to some unique employment administration differences from their regular force counterparts⁹. This creates a challenge for the CAF. Chief amongst these is that reserve force generation is unreliable and that reserve soldiers who deploy may do so without having current medical, dental, fitness or baseline (Individual Battle Task Standards – IBTS) training necessary to function on the deployment. For those deploying on Expeditionary Operations, this means time is spent in ensuring that volunteers are DAG’ed green. For those deploying on emergency Domestic Operations, this means deploying on a “come as you are” basis with shortfalls needing to be addressed by commanders on the ground as soon as practical.

My recommendation is to change reserve terms of service to enable individual specialist and unit mobilizations for expeditionary and domestic operations. Other ABCA forces (U.S. and U.K.) do this and changing the terms of service is the only way to ensure that the requisite numbers of reserves and specialist qualified individuals are available to the CAF when they are needed. Reservists have always stepped forward to meet the operational challenges presented. The military however is placed in a difficult situation in that there is always the possibility that not enough reserve “volunteers” will step forward when needed. Also, reservists who deploy may only be able to do so for short windows enabled by their available work holidays and their civilian employer’s good will. The ability to activate personnel would ensure that the military could continue to ask individuals to step forward and support operations but they would do so with the

⁹ Canada. Department of National Defence. *B-GJ-005-302/FP-001, CFJP 3-2 - Domestic Operations*. Ottawa: Commander of Canada Command, 2011-12. 1-4.

knowledge that manpower gaps could be filled through activation if required. It is also important to note that reservists can only be employed in individual augmentation or composite organizations at this time. Changing the terms of service would enable unit or sub-unit level activation and employment similar to other ABCA allies.

I believe that this change would not be unwelcomed in the reserves. Individuals join with the desire to serve and the knowledge that they may be called on to do so. This change would however require several legislative and administrative changes within the CAF. Legislatively, reservists would require job protection, protection from hiring discrimination and programs in place to assist employers when a reservist deploys for a prolonged operation. Administratively, and similarly to the regular force, the CAF would have to ensure that there is sufficient support and training in place to ensure that reserve soldiers remain DAG'ed green and deployable.

2. Maintain Reserve and Regular Force Individual Training Equivalency

Variations between reserve and regular force training have existed since the two forces were created. There have always been two schools of thought on how reservists should be trained. The first is that standards should be the same between the regular force and reserve. The second is that reserve training should be paired down to enable reservists to achieve competency in core areas but that training needs to be reduced in order for reserves to be able to become qualified in an acceptable period of time. Since 9/11¹⁰, and the increased operational tempo that resulted, reserve training within the CAF has largely been aligned between the regular force and reserves. This has benefited the

¹⁰ History. "9/11 Attacks." Last accessed 19 June 2015.
<http://breakingdefense.com/2014/03/national-guard-commanders-rise-in-revolt-against-active-army-mg-ross-questions-guard-combat-role/>

CAF as a whole as reservists were able to easily be plugged into an overseas deployment with the same level of refresher “workup” training as that given to the regular force. With Canada’s withdrawal from Afghanistan, the pendulum has swung the other way and reserve training is being reduced. As directed by the Army Training Authority, during the last two years, Non-Commissioned Member (NCM) training has been reduced with training having a reduced breadth but the same depth in those subject taught to the reserves vis the regular force. An infantry soldier, for example, who is currently graduating from a reserve Development Period 1 (DP1 Inf) course is receiving the same C7 rifle training as a regular force soldier but is not being trained on some weapons systems like the M203 Grenade Launcher or 84mm Carl Gustav Anti-Tank Weapon.

My recommendation is to maintain reserve training equivalent to that of the the regular force. The other ABCA alliance nations either do this now or are changing their training based on overseas operations to develop equal training levels. The CAF is moving in a different direction and I view this as a mistake. My reasoning is four fold. First, creating training differentials means that a training delta exists between regular and reserve members which will have to be addressed during operational pre-deployment training. This will increase the workup period for reservists and lengthen the time they are away from family and their civilian work. Second, creating different standards between reservists and regular force members causes a barrier to entry for reservists looking to component transfer. Right now, the regular force is heavily reliant on reserve transfers to maintain their numerical strength. With retention being an issue in both the regular force and reserve, this change is counterproductive. Thirdly, we live in a very dynamic world where short notice deployments are likely to increase. The regular force

is managing this via the Army Managed Readiness Plan. There is, however, an acknowledgement that all overseas missions beyond ROTO 0 and all domestic operations will require significant (up to 30%) reserve support. Given the potential for short notice deployments, the ability to conduct adequate workup training may not exist in the future threat environment. Forth, creating a difference in training means that a dual standard is being institutionalized. The observed result of this in the 1990's was a lack of confidence of the regular force in the skills of the reserves, a lack of confidence of the reserve in their own skills and a significant negative moral factor when reservists were being demoted when accepting overseas operational tasks (i.e. Sgt demoted to MCpl or Cpl for an overseas mission). This runs counter to the "Total Force"¹¹ concept that the military has been trying to institutionalize since the late 1980s. For these reasons, I believe that regular and reserve force training should be maintained at par.

3. Restructure the Reserve Force, Refocus the "Footprint" and Improve Reserve Benefits

The last real restructuring of the Reserves was conducted in 1996¹² with the creation of the Reserve Brigade Groups across Canada. Since that time, the structure has remained the same but the target numbers of reserves have been increased from a paid ceiling of 14,500 members to a paid ceiling of 23000 (actual numbers of up to 30,000). The unfortunate truth however is that the army, and the reserves, grew during the conflict in Afghanistan but have both shrunk since the CAF withdrawal. Reserve recruiting has been unable to keep up with attrition either by those leaving the force or those component

¹¹ Canada. "The Reserve Force of the Canadian Forces: Restructuring Process." Department of National Defence. 10 May 1996. <http://publications.gc.ca/Collection-R/LoPBdP/MR/mr138-e.htm>

¹² Ibid. "The Reserve Force of the Canadian Forces: Restructuring Process".

transferring to the regular force. As a result, without concrete steps being taken, the reserves will continue to shrink. To solve this issue, I would make the following restructuring, “footprint” and benefits suggestions:

- a. Maintain the regular force at full strength. This has been a continual challenge for the regular force. The three regular force brigades have been challenged to remain at full authorized strength. A variety of factors are at play here including competition with civilian work forces, lack of wide scale public support for young people to join the forces, recruiting problems, personnel demands by the Canadian Special Operations Command, etc. Given that the military was larger in the past with a smaller population base, the military should not be having difficulty in maintaining its strength. It would appear however that this short staffing has become acceptable to the government as a means of fiscal management. This needs to change. The pace of world events means that the military will “come as you are” to any operation. If the troops are not there then the military mission is likely to fail. In the 1990s and 2000s, Canadian infantry units routinely deployed with a second regular force unit generating their third infantry companies. This firefighting approach to solving manpower issues works in the short term but leads to long term soldier burn out and dissatisfaction. The reserves were called on to fill these gaps with the result that almost 30% of rotation personnel were reservists. The downside to this is that key personnel are pulled out of the reserves and reserve force generation capability suffers. Currently, a severe shortage of personnel is being experienced within 3rd Canadian Division (Western Canada) with the result that a significant number of soldiers are being component

transferred from the reserve to the regular force and the reserve is being stripped of qualified junior officers and Senior NCOs. Maintaining a fully manned regular force during peace time would assist in decreasing this drain and improve the effectiveness of the reserves.

- b. Eliminate the self-imposed “Army Reserve Establishment” and refocus the “footprint”. During the last reserve restructuring, units within the reserve were allocated one or two sub-units as their establishment. This effectively capped the size of units. While effective in decreasing the numbers of ineffective soldiers in larger units, this cap artificially limited the capacity of units in fertile recruiting areas from growing while giving positions to units in areas without a solid recruiting base. The net result of this is to reward failure in a time when the stated army policy on the reserves is to grow. Some urban units were forced to physically reduce their numbers via attrition while others were given positions they could not fill. The question this raises is what is more important to the CAF, evenly sized units or growing the reserve? I would suggest that it is in the CAF’s best interest to eliminate the self-imposed Army Reserve Establishment with a view to meeting the military’s reserve growth goals. Further, Army Reserve Establishment prevents the army’s “footprint” from being proportionately allocated across the country by population. The CAF needs to re-examine its footprint with a view to concentrating its efforts on large urban communities where the recruiting base exists rather than smaller communities. Smaller communities are unable to maintain local unit strengths nor can they generate sufficient senior officers and NCMs to maintain the health of the local unit

leadership pools. Maintaining the “footprint” has value, I would however suggest that resources be better allocated and the “footprint” maintained by means outside of having local unit/armouries. Concentrating in larger centers also enables the cross movement of personnel which will help strengthen the officer and NCM corps in those centres.

- c. Improve the recruiting and training process. Both the regular and reserve force have been experiencing significant recruiting and training issues. Recruits have been taking significant time to make it through the recruiting and training processes. Competing priorities exist when processing candidate applications. Largely, this has meant that reserve recruiting has taken a back seat to Military College and regular force recruiting. Although understandable, this still leaves the reserves with the short end of the stick. To fix this, I would recommend the creation of specific reserve recruiting positions within each of the recruiting centres and opening up/manning additional centres in areas where reserve recruiting is high. Doing this would increase the manpower and lower the priority friction that exists. Training of reserves has also become an issue. The peak training period remains the summer months, however, training is largely limited by the number of available instructors. I would therefore recommend that during non-high readiness periods, regular force leadership and instructors be leveraged to train reservists until such time that the reserve is able to self-generate sufficient internal instructors.

- d. Recruit and retain through improved reserve benefits.¹³ Reserve benefits have always been a bit of a contentious issue. Reserves currently are funded for 37.5 individual training days and an additional 9 collective training days (46.5 total) in addition to their military courses. As a result, infrastructure and personal equipment aside, the cost to employ a reservist is between 20% and 50% of that of a regular force member. This also applies to other benefits such as pension and education amounts. In looking at the ABCA partners, Canadian reserve benefits are much smaller than those given elsewhere. Both the U.S. and U.K pay their reservists the same amount per diem as their regular force counterparts and while Australia pays less, reserve pay there is tax free. Other pay incentives in the U.S. and U.K. include reenlistment bonuses and training bonuses for those personnel who complete a set percentage of training. Education reimbursement is also significantly higher in both the U.S. and U.K. As a result, I would recommend that Canadian reserve pay be increased to match regular force per diem rates, either a signing/reenlistment bonus be given or a bonus for unit training attendance/completion and that education benefits be increased to proportionately match Canadian regular force rates or higher if an additional service commitment requirement is imposed. This would ensure greater equality between the regular and reserve force in Canada as well as match up against those given within out ABCA partners. These steps would greatly assist in reserve retention.

¹³ Chief of Military Personnel: Policies and Directives: CF Military Personnel Instructions: Class A Reserve Service <http://www.cmp-cpm.forces.gc.ca/pd/pi-ip/20-04-eng.asp#ins-03>.

- e. Provide a more robust regular force cadre to reserve units. Currently, most units have four to seven soldiers from the regular force attached to them. These individuals fill key positions such as Operations Officer, Adjutant, Chief Clerk and Regimental Quartermaster. I recommend that this number be increased to 10% of unit strength. Having taken part in the 10/90 experiment in the 1990's I can say from personal experience that this type of augmentation significantly enhances the ability of the reserve units. Being able to draw on the experience of these personnel and having leaders on the ground to organize deployments and assist with soldier training is invaluable. This step also helps significantly in building regular force and reserve cohesion in the long run. Putting programs in place to encourage those leaving the regular force to transfer to the reserves would also help achieve this effect.

CONCLUSION

In the proceeding paper I reviewed reserve effectiveness, provided an overview of comparable ABCA reserve forces and presented three broad recommendations for improving reserve effectiveness in order to better enable the force to meet the Army's future needs. None of these recommendations occur in isolation. Instead, they should be considered within a more holistic plan for increasing reserve force capability. Changing reserve service requirements, maintain regular and reserve individual training on par and restructuring the reserve force, refocusing the "footprint", improving reserve benefits and increasing regular force cadre's all would aid significantly in maintaining the professionalism and capabilities of the reserve force.

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