

RESOURCES MANAGEMENT AT BATTALION LEVEL

Captain Kevin J. Kehoe
IOAC 2-82, Roster #080
June 1982

UNITED STATES ARMY INFANTRY SCHOOL
Command and Tactics Department
Fort Benning, Georgia 31905

ATSH-B

4 June 1982

SUBJECT: Resources Management at Battalion Level

1. PROBLEM. Determine the Resources Management Knowledge Required of a Company Grade Officer.

2. ASSUMPTIONS.

a. The information contained herein will pertain primarily to company level combat arms officers.

b. Maneuver divisions within the active Army will adopt the Tactical Unit Financial Management Information System (TUFMIS).

c. Within combat arms battalions, those jobs which require resource management knowledge are normally limited to company commander, company executive officers, battalion maintenance officer (BMO), and battalion logistics officer (S-4).

3. FACTS BEARING ON THE PROBLEM. Interviews conducted with company grade officers attending the Infantry Officers Advanced Course (IOAC), indicated most units utilize a decentralized form of resource management at the battalion level. Interviews are summarized in ANNEX B.

4. DISCUSSION.

a. Under a decentralized type of resource management, funds allocated to a battalion are broken down under the commanders direction and sub-allocated to the companies for management. Although the battalion monitors the spending of funds, and often redistributes or sub-allocates additional funds, companies are responsible for the management of their sub-allocation.

ANNEX C--Bibliography

1. Antal, John F., Captain, Armor, U.S. Army, Interview; 2 June 1982.
2. Augustine, Joseph S., Captain, Infantry, U.S. Army, Interview; 2 June 1982.
3. Brosk, Fred, Captain, Infantry, U.S. Army, Interview; 2 June 1982.
4. Buck, Joel A., Captain, Artillery, U.S. Army, Interview; 2 June 1982.
5. Carry, John D., Captain, Air Defense Artillery, U.S. Army, Interview
2 June 1982.
6. Collins, John, Captain, Infantry, U.S. Army, Interview; 2 June 1982.
7. Diloreti, Joseph D., Captain, Infantry, U.S. Army, Interview; 2 June 1982.
8. Donovan, James M., Captain, Infantry, U.S. Army, Interview; 2 June 1982.
9. Horn, Glen E., Captain, Infantry, U.S. Army, Interview; 2 June 1982.
10. HQ, Department of the Army, DA Pam 37-4, Army Comptroller Handbook,
April 1976.
11. Karcher, Donald, Captain, Infantry, U.S. Army, Interview; 2 June 1982.
12. Mattingly, Richard, Captain, Field Artillery, U.S. Army, Interview;
2 June 1982.
13. Rogers, Larry D., Captain, Infantry, U.S. Army, Interview; 2 June 1982.
14. Stahl, David, Captain, Infantry, U.S. Army, Interview; 2 June 1982.
15. Swaringen, Mark A., Captain, Infantry, U.S. Army, Interview; 2 June 1982.
16. Winfield, W.M., Captain, Armor, U.S. Army, Interview; 2 June 1982.

ANNEX B--Summary of Interviews

14. Swaringen, Mark A., Infantry Battalion S-4, 1st Infantry

- a. Decentralized management system
- b. Utilized TUFMIS
- c. Received TUFMIS briefing in unit; Poor
- d. Recommends: TUFMIS briefing in advanced course

15. Winfield, W.M., Cavalry Troop Commander, 2nd Armored Cavalry

- a. Decentralized resource management
- b. Utilized COLEX
- c. Recommends: Supply procedures

ANNEX B--Summary of Interviews

9. Horn, Glen E., Infantry Company Commander, 1st Infantry Division
 - a. Decentralized resource management
 - b. Utilized TUFMIS
 - c. Briefed on TUFMIS in unit
 - d. Recommends: TUFMIS briefing at unit
10. Karcher, Donald, Infantry Company Commander, 4th Infantry Division
 - a. Decentralized management system
 - b. Utilized TUFMIS
 - c. Received TUFMIS briefing in unit
 - d. Recommends: PLL management and TUFMIS briefing in advanced course
11. Mattingly, Richard, Artillery Battery Commander, 172nd Brigade
 - a. Decentralized management system
 - b. Utilized TUFMIS
 - c. Received TUFMIS briefing in unit
 - d. Recommends: Supply procedures and TUFMIS briefing in advanced course
12. Rogers, Larry D., Infantry Company Commander, 4th Infantry Division
 - a. Centralized management system
 - b. Utilized TUFMIS
 - c. Received no TUFMIS briefing
 - d. Recommends: TUFMIS briefing in unit
13. Stahl, David, Infantry Battalion Maintenance Officer, 25th Infantry Division
 - a. Decentralized management system
 - b. Utilized TUFMIS
 - c. TUFMIS self-taught
 - d. Recommends: TUFMIS briefing in advanced course, follow on in unit

ANNEX B--Summary of Interviews

5. Carry, John D., Air Defense Battery Commander, 2nd Division Infantry
 - a. Decentralized resource management
 - b. Utilized TUFMIS
 - c. No briefing on TUFMIS until requested
 - d. Required to complete yearly budget projection
 - e. Recommends: Supply procedure and TUFMIS be taught in advanced course and then specifics covered in unit
6. Collins, John, Infantry Company Commander, 5th Infantry Division
 - a. Decentralized resource management
 - b. Utilized TUFMIS
 - c. No briefing on TUFMIS received
 - d. Recommends: TUFMIS briefing in advanced course
7. Diloreti, Joseph D., Infantry Company Commander, 1st Armored Division
 - a. Decentralized resource management
 - b. COLEX system utilized
 - c. Recommends: Supply procedures
8. Donovan, James M., Infantry Company Commander, 3rd Infantry Division
 - a. Decentralized resource management
 - b. Utilized TUFMIS
 - c. TUFMIS briefing in unit
 - d. Recommends: Supply procedures

ANNEX B--Summary of Interviews

1. Antal, John F., Armor Company Commander, 3rd Armored Division
 - a. Decentralized resource management
 - b. Utilized TUFMIS system
 - c. Received TUFMIS brief in unit
 - d. Recommends: TUFMIS class in advanced course then more specific in unit.

2. Augustine, Joseph S., Infantry Battalion S-4, 4th Infantry
 - a. Decentralized resource management
 - b. Utilized TUFMIS system
 - c. Self-taught in TUFMIS use
 - d. Recommends: TUFMIS class in advanced course

3. Brosk, Fred, Infantry Battalion, Battalion Maintenance Officer, 8th Infantry
 - a. Decentralized resource management
 - b. Utilized TUFMIS
 - c. Given TUFMIS briefing - Poorly conducted
 - d. Recommends: TUFMIS brief in unit

4. Buck, Joel A., Artillery Battery Commander, 3rd Armored Division
 - a. Decentralized resource management
 - b. Utilized COLEX, then TUFMIS
 - c. Received TUFMIS briefing in unit
 - d. Recommends: TUFMIS briefing in advance course then in unit

ANNEX A--Interview Outline

1. The following is a list of those questions consistently used during the interviews summarized in ANNEX B.

- a. What was your duty position and parent unit on your last assignment?
- b. Did your battalion utilize a centralized or decentralized resource management system?
- c. Did your division utilize the Tactical Unit Management Information System (TUFMIS)?
- d. Were you ever briefed on TUFMIS and if so where?
- e. What resource management knowledge is required of a company grade officer in the position you were in?

b. Of those officers whose units utilized TUFMIS, all indicated that they either were briefed on the system or were forced to research its use on their own. They further stated that this information was required to function well in their duty positions.

c. When the officers interviewed were asked specifically what resources management knowledge was required in their position, 80 per cent indicated TUFMIS and 40 per cent indicated TUFMIS and supply procedures.

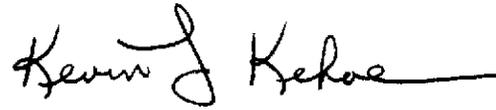
d. The interviews indicated that although TUFMIS was utilized in the majority of units surveyed, variations still existed in procedures associated with its use. This suggested the additional question of where information on TUFMIS use should be disseminated; either at a centralized location or unit level. When asked that question, 60 per cent indicated the need for a briefing in an advanced course, 53 per cent said a short briefing at the advanced course with specifics given in a unit, and 20 per cent indicated that TUFMIS should be taught at the unit level.

5. CONCLUSION.

a. Due to the widespread implementation of TUFMIS, and the knowledge required to properly use the system, the company grade resource managers must be familiar with its use.

b. The large percentage of interviewees stating that a TUFMIS briefing should be given in the branch advanced course strongly supports its inclusion in the Program of Instruction (POI).

6. ACTIONS RECOMMENDED. A general class on the basics of the TUFMIS system should be presented during branch advanced courses, most probably as an addendum to the supply procedures portion of the existing logistics training.



Kevin J. Kehoe
Captain, Infantry
IOAC 2-82, Roster #080

ANNEXES: A--Interview Outline
B--Summary of Interviews
C--Bibliography