

Unlocking W4 Talent: The Case for AGR W5 REFRAD Boards

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Despite the Army's emphasis on talent management and leader development, we struggle to address stagnant or peaked talent, particularly among Chief Warrant Officer Five (CW5 or W5) in the United States Army Reserve (USAR). Promotion to W5 is guided by a structured select-objective process designed to balance authorized positions with projected losses within a career management field (CMF) to determine promotion numbers for the upcoming promotion selection board (PSB). While this process ensures systematic promotion of qualified warrant officers, it also creates challenges, particularly when W5s remain in the Army Reserve long term, limiting promotion opportunities for Chief Warrant Officer Fours (CW4s or W4s). This bottleneck within the Selected Reserve (SELRES) affects the overall effectiveness of USAR leadership and progression. Establishing an annual W5 release from active duty (REFRAD) board, modeled after existing processes for Lieutenant Colonels (LTC) and Colonels (COL), could serve as a strategic mechanism, particularly in career management fields (CMFs) with a surplus of talented, eligible W4s. This paper will focus specifically on Active Guard Reserve (AGR) W5s.

Talent Management

The Army initiated efforts in 2016 to refine its talent management system, emphasizing a systematic and analytics-based framework. According to U.S. Army (2016), the Army Talent Management Strategy (ATMS) mission statement is to “acquire, develop, employ, and retain professional Soldiers and Civilians with a breadth and depth of talents needed to enhance Army readiness”, and the end state is “a ready, professional, diverse, and integrated team of trusted professionals optimized to win in a complex world” (p. 4). However, the ATMS neglects to address what happens when talent is stale, raising critical questions about how the Army can adapt its talent management framework to address talent gaps and replenish expertise, particularly by drawing from a ready pool of high-performing W4s. The Army People Strategy emphasizes retaining critical talent by actively engaging them and providing meaningful opportunities (Department of the Army, 2019). What greater incentive is there than offering promotion to W5 and the chance to continue serving in the USAR?

Strategic-level talent management required the development of policies, programs, and processes to identify, cultivate, and leverage essential skills, knowledge, and behaviors to achieve optimal effectiveness. In many cases, Soldiers reach their peak performance well before their mandatory separation date, which, for warrant officers, is set at age 60, a considerable duration in a military career. General (Retired) Odierno asserts that leader development is paramount to maintaining a competitive edge in today's complex operating environment (Odierno, 2015). Our enduring advantage lies in cultivating exceptional leaders who are not only agile and forward-thinking but can command with precision in uncertain, rapidly evolving conditions. This imperative also requires us to recognize when leadership has stagnated and, with care and professionalism, create space for emerging talent to strengthen and guide the future of our Army.

AGR LTCs and COLs REFRAD Boards

Each year, the USAR conducts a REFRAD board as a “force shaping process to help meet the needs of the Army, the USAR, and the AR AGR program” (MILPER Message Number 25-128, 2025). A military

personnel (MILPER) message is released each year outlining eligibility criteria, typically for all LTCs and COLs in basic branches. HQDA Policy Notice 600–4 (2024) provides selection guidance for REFRAD boards. The basic premise is that the board will recommend, by majority vote, the specified number of officers for release, based on their assessed potential for future contribution to the Army relative to their peers. It is challenging to determine how many officers have been selected for REFRAD because the results are not public. Nevertheless, the program appears to be contributing to effective force management within the Army Reserve, although limited data limit a more precise evaluation.

Select Objective Process

Each year, the Senior Leader Development Office (SLDO), which manages all USAR W5s, collaborates with the Office of the Chief of Army Reserve (OCAR) G-1 to determine the select objective for W5 promotions for the upcoming promotion selection board (PSB). Drawing from direct observation and personal involvement in the process, the candidate chooses an objective analysis that begins approximately three months before the promotion board convenes. The SLDO reviews and refines the select objective estimate by projecting losses extending 18 months beyond the board's convene date. Pending losses predominantly consist of approved retirement or mandatory removal date (MRD) within the time period. Still, they may also include REFRAD from the AGR program or transfers to the Individual Ready Reserve (IRR), in which case the W5 no longer counts against the AGR select objective.

To illustrate this principle, consider the following scenario. Suppose the authorized number of W5 AGR Property Book Officers (PBO or 920A) is nine, and the current assigned strength is also nine. In that case, the calculated select objective is zero, and no 920A promotions are authorized for that year. However, if the SLDO projects two losses, then the chosen objective is 2, meaning 2,920As can be promoted in the next W5 PSB. Consider another CMF with a more limited authorized strength. For CMFs where one is authorized and one is assigned, this means the selected objective is zero for the duration of the warrant officer's tenure in the AGR program. In a hypothetical scenario in which the warrant officer promotes to W5 at age 45, he or she could delay future promotions for 15 years until reaching MRD at age 60. Furthermore, even if the warrant officer subsequently vacates the hard-coded CMF position and is reassigned to an immaterial (011A) billet, the select objective is still zero. This is because the position itself remains inextricably linked to the warrant officer's rank and CMF, effectively blocking advancement opportunities for eligible W4s in that CMF.

REFRAD Board for W5s

One potential mitigation strategy for alleviating the W5 promotion bottleneck is the implementation of a REFRAD board for W5s. This will need to be executed carefully and methodically. While a REFRAD board could be beneficial for specific CMFs, it carries the risk of negatively affecting others due to a shortage of eligible W4 officers. The SLDO, in collaboration with OCAR G-1, will recommend which CMFs should be considered for a REFRAD board, ensuring a balanced and strategically informed decision-making process.

W5 REFRAD boards would be implemented with several proposed conditions. First, W5s will be protected from REFRAD boards until they have held that grade for three years. Second, they will be eligible for the REFRAD board regardless of their active federal service (AFS) time; however, if selected and they have at least 18 years of AFS, they will remain on active duty until they reach 20 years of AFS. Finally, suppose a W5 is selected for REFRAD. In that case, he or she may choose to revert to Troop Program Unit (TPU) or Individual Mobilization Augmentee (IMA), contingent upon the availability of a

suitable position. In instances where a TPU or IMA position is not available, the warrant officer would be required to either transfer to the IRR or retire, ensuring a dignified transition and maintaining the integrity of the force management process.

Conclusion

Stagnant senior talent within the AGR W5 population has created a structural barrier to advancement, limiting opportunities for capable W4s and slowing leadership progression across the USAR. Addressing this issue requires more than incremental adjustments. It demands a deliberate and strategic approach to force renewal. A targeted W5 REFRAD board, guided by thoughtful criteria and flexible transition options, offers a path to restore balance and momentum to the warrant officer talent pipeline. By creating space for rising leaders while honoring experienced ones, the Army Reserve can strengthen its adaptability, sharpen its edge, and uphold its commitment to a dynamic, future-ready force.

References

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