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MASTER OF MILITARY STUDIES

**COMMON SENSE SOLUTIONS FOR STREAMLINING THE MARINE CORPS
PERFORMANCE EVALUATION SYSTEM**

SUMMITTED IN PARTIAL FULFILLMENT
OF THE REQUIREMENTS FOR THE DEGREE OF
MASTER OF MILITARY STUDIES

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Preface

As a Sergeant Major in the Marine Corps with the primary military occupational specialty of 8999, I have spent the last 8 years advising commanders as their senior enlisted leader and advisor. As outlined in Marine Corps Order P1610.7F (Performance Evaluation System), it is a senior enlisted advisor's responsibility to assist reporting officials and commanders in completing and processing enlisted fitness reports. Based on this requirement and my level of experience, I have reviewed hundreds of fitness reports on all enlisted ranks and company grade officers, to ensure the reports were administratively correct and to assist reporting seniors and officials in their assessments of their Marines. Additionally, I have conducted over 100 hours of instruction (classes) on the fitness report process and promotion system. I have assisted Marines in appealing fitness reports that were inaccurate or unjust through the Performance Evaluation Review Board (PERB).

Based on my experience and thorough review of current policies, I am writing this paper to not only address the confusion in the current performance evaluation system, but to provide solutions and recommendations to streamline the fitness report the Marine Corps uses to evaluate officers and enlisted personnel.

Executive Summary

Title: Common sense solutions for streamlining the Marine Corps Performance Evaluation System (PES)

Author: Sergeant Major William J. Gwaltney, United States Marine Corps

Thesis: This paper will advocate that in order to meet the Commandant's intent to select the best qualified personnel for promotion, augmentation, retention, resident schooling, command, and duty assignments, the Marine Corps must modify the Performance Evaluation System (PES). Removing redundancies in the fitness report, along with implementing critical structural changes, will assist reporting officials to more accurately, justly, and comprehensively evaluate Marines.

Discussion: The fitness report is a means by which reporting officials evaluate a Marine's performance. This evaluation is primarily used by selection boards to promote the best qualified Marines to the ranks of staff sergeant through major general, and to select Marines for resident schooling, slating for command, and other duty assignments.

After reviewing the PES the following changes are recommended:

- The restrictions or "handcuffs" have to be taken off of the Reporting Senior (RS) when writing within Section I.
- The PES must be updated to mandate and express the importance for the RSs' and ROs' fitness report values to match the comments relayed by the word picture.
- Recommendation: Do not require justification for higher marks. The RS should be able to use the Performance Anchored Rating Scales (PARS) without the need for justification.
- Change the current structure of three description blocks to four. The first box that corresponds to the "B" marking should reflect that the Marine is below the standard.
- Regardless of the fitness report being adverse or not, the MRO should be given the option to comment on the contents of the report before it is processed.
- The description boxes in the attributes section of the fitness report should be reformed to reflect the difference in rank and responsibility.
- Recommendations: Remove the directed comments from the Section I and insert a directed comment block within the administrative section.
- Remove all data points that provide no value to the fitness report to include: recommendation for promotion, duty preference, billet accomplishments or alternatively, retain the current fitness report format, and move all directed comments to a newly implemented addendum page.

Conclusion: The implementation of most, if not all of these recommendations will serve to meet the Commandant's intent to select the best qualified personnel for promotion, augmentation, retention, resident schooling, command, and duty assignments.

Introduction

The Commandant of the Marine Corps, General Robert B. Neller, has raised the issue that our current fitness report system may not be functioning to promote the best suited Marines?

The fitness report is a means by which reporting officials evaluate a Marine's performance. No one on active duty in the Marine Corps today can recall a time when the fitness report was in use. This evaluation is primarily used by selection boards to promote the best qualified Marines to the ranks of staff sergeant through major general, and to select Marines for resident schooling, slating for command, and other duty assignments.¹

This paper will advocate that in order to meet the Commandant's intent to select the best qualified personnel for promotion, augmentation, retention, resident schooling, command, and duty assignments, the Marine Corps must modify the Performance Evaluation System (PES). Removing redundancies in the fitness report, along with implementing critical structural changes, will assist reporting officials to more accurately, justly, and comprehensively evaluate Marines.

The last significant change to the fitness report was in 1999, when the Marine Corps implemented major changes to address the supposed problem of marking inflation by reporting officials.² These changes included:

- The establishment of Reporting Senior (RS) and Reviewing Officer (RO) profiles. These profiles rank a Marine's performance numerically, relative to other reports previously written by the RS/RO on Marines of the same rank. There was no historical comparison under the old fitness report system.
- The RS assesses a Marine on 14 attributes instead of 21.
- The addition of the billet description and billet accomplishment sections.

- The fitness report changed from a 2-page evaluation to a 5-page evaluation.

Since the change in 1999, the Marine Corps has conducted two thorough reviews of the fitness report to ensure that the system is meeting the Commandant's end state of promoting the most qualified Marines, as well as slating of officers for command or resident school. The Director of Manpower Management Division (MM) for the Marine Corps, commissioned the Center for Naval Analyses (CNA) to conduct the two studies.

The first study by the CNA was conducted in 2011. The Director of MM requested the CNA to conduct a systematic review of the fitness report to examine whether the system is accomplishing what the Marine Corps intended by posing two research questions: how do fitness report marks differ by observable characteristics? How do fitness report marks affect promotion and continuation?³

The study found a consistent disparity in fitness report marks in the case of race, gender, and military occupation. The study found that black Marines received lower fitness report marks than white Marines. Black staff sergeants, for example, received lower marks from white RSs than from black RSs. Additionally, female Marines and married Marines receive higher fitness report scores. Research findings also suggested that officers in finance and legal occupations scored higher than those in infantry and logistics, while officers in the communications and artillery occupations received the lowest scores.⁴

The study similarly found disparities in fitness report marks based on the commissioning source, class standing, and prior military experience. The study found that officers that commissioned through the United States Naval Academy or enlisted-to-officer programs had higher fitness report marks. Additionally, officers with a higher class standing at The Basic School received higher marks as well.⁵

Finally, the study indicated that RS marks are a major predictor of promotion to major and lieutenant colonel, while RO marks are predictors of promotion to lieutenant colonel and colonel.⁶

Overall, this study validated that the changes made in 1999 did assist to eliminate the issue of marking inflation. It also showed positive and encouraging trends on the benefits of service schools and enlisted-to-commissioning programs. Unfortunately, the fitness report change did appear to impact the problematic issue of bias in regard to race and gender.

The second study conducted by the CNA in 2012 examined whether the current fitness report system was suffering from grade inflation, and whether it is fair to all officers. It posed the question; Is the system contributing to the selection of the most qualified officers for promotion and career progression? This study focused solely on Marine officers.

The study concluded that there is no evidence to suggest grade inflation across the Marine Corps. However, the study highlights the potential concern in the declining variation in marks. The increasing uniformity of marks could increase the difficulty of identifying the most qualified officers.⁷

The study of whether the fitness report is fair to all officers was nearly identical to the previous study. Prior enlisted, top third at TBS, high college GPA, and attendance at military universities are predictors of higher fitness report marks. Marks tended to differ for officers of different races or ethnicities and military occupations. The study found that male officers receive higher marks from female RSs than from male RSs. Female Marine officers are marked lower by female RSs than by male RSs. White RSs give slightly higher marks to white and Hispanic MROs than to black and “other” MROs. Equally, black RSs give higher marks to black MROs than to white MROs. There are no significant marking deviations with Hispanic RSs.

When it comes to military occupations, RSs and ROs tend to give higher marks to infantry and logistics officers and lower marks to aviators.⁸

As with the previous study, the experts agreed that the current system resulted in the best and most qualified officers being selected for promotion. The recommendations provided in the study addressed additional training and education for RSs and ROs on the fitness report system, and the presentation of RO marks to boards to serve as a briefing guide to summarize RS and RO marks. It also recommends the continued monitoring and studies of the gender, race, and military occupation bias that potentially exists in the fitness report system.⁹

The studies conducted by the CNA focused mainly on the reporting officials marking trends. This was done to ensure the fitness report system is working as intended. While this important, the studies failed to examine the structure and policies governing the current fitness report.

This paper will not attempt to address the potential shortcomings of reporting officials, but will instead focus on the structure and policies of the Performance Evaluation System (PES). There remains a need for additional enhancements to the PES as the present system continues to be confusing, redundant, and potentially hinders reporting officials' efforts to properly evaluate a Marine's performance.

In order to meet the Commandant's intent to select the best qualified personnel for promotion, augmentation, retention, resident schooling, command, and duty assignments, the Marine Corps must modify the PES.¹⁰ Removing redundancies in the fitness report, along with implementing critical structural changes, will assist reporting officials to more accurately, justly, and comprehensively evaluate Marines.

In an effort to improve the PES, this paper will dissect the fitness report into three distinct parts: the administrative section, the attributes section, and the word picture section. Within each part, the paper will discuss the purpose and issues intrinsic within each section, while providing recommendations to address and correct the issues.

Background

Marines from the ranks of sergeant and above are assigned an RS and an RO. The RS is normally the first commissioned officer, warrant officer, or civilian grade GS-9 or above in the reporting chain who is senior to the Marine Reported On (MRO).¹¹ Responsibilities of an RS include the establishment and formalization of the MRO's billet description, and the initial counseling with MRO on his or her expectations, responsibilities, and duties. Additionally, the RS is responsible for the evaluation and accurate reporting of the MRO's performance, professional qualities and potential, and the completion of all RS requirements on the fitness report before forwarding it to the RO.

The RO is the first commissioned officer, warrant officer, or civilian GS-10 or above senior in grade to the RS.¹² For example, a sergeant who has a platoon commander for an RS will normally have the company commander for an RO. The RO must ensure accuracy and timely submission of fitness reports by completing all requirements prior to forwarding the report to Headquarters Marine Corps. The RO has the responsibility of educating subordinates regarding fitness report requirements and he or she serves to assess adverse reports and to arbitrate differences between the RS's evaluation and the MRO's statement.¹³

There are 13 different reporting occasions that affect the grades of sergeant through colonel. The RS and RO ensure that a Marine's performance is captured and recorded annually (semiannual for lieutenants), unless there is an occasion that prompts an earlier report.¹⁴ The

most common and impactful of these occasions are the annual, Commandant of the Marine Corps Directed, Change of Reporting Senior, and Transfer.

An annual report (AN) is submitted when the last day of reporting period ends, based on the rank of the MRO. For instance, annual reports for sergeants are due on last day of March, while staff sergeants are due in December. An AN report may be omitted if the MRO is on a temporary assigned duty (TAD), another reporting occasion occurred within 60 days, or the MRO comes under a new RS within 89 days or less of the establishment of the RS-MRO relationship.¹⁵ AN reports ensure that, at minimum, an MRO is evaluated each year.

A DC report (commonly referred to as a directed comment report) is required when a significant or adverse action by the MRO occurs.¹⁶ For instance, a DC report is generated when an MRO is found guilty at a court-martial or was the subject of non-judicial punishment. Additionally, conviction in a civilian court of an offense prosecutable under the Uniformed Code of Military Justice will require a DC report.

Change of Reporting Senior (CH) report is submitted when the RS changes but the MRO remains.¹⁷ For instance, if an RS transfers to a new command or is reassigned, a CH report is required. On the contrary, a Transfer Report (TR) is submitted when the MRO leaves the RS for reason other than going on a temporarily assigned duty.¹⁸ An example of a TR occasion is when an MRO executes orders to a new duty assignment.

Administrative Section

When a Fitness Report occasion is required, the Marine Reported On (MRO) is obligated to create and submit a Marine Reported On Worksheet (MROW) from the Automated Performance Evaluation System (A-PES) website to the RS. This worksheet provides an opportunity for the MRO to input and verify their section A data, highlight accomplishments,

and provide additional notes to assist the RS in completing his or her fitness report.¹⁹ Once the MRO completes the worksheet, the RS can then create the fitness report in A-PES and begin working on its completion, starting with the administrative section. The administrative section consists of the three parts: administrative information, billet description, and billet accomplishments.²⁰

The administrative information includes the MRO's name, rank, unit, and duty assignment, as well as important training information such as, physical and combat fitness test scores, and height and weight information. Additionally, the administrative section includes the reporting occasion and the time period the fitness report covers.²¹

The billet description section is a summarized list of what the RS expects from the MRO. This list correlates with the MRO's job assignment and rank. Within the first 30 days of an established relationship, the RS is responsible for counseling the MRO on his or her billet description, expectations and goals. The billet description can also include assigned collateral duties, i.e., safety manager or uniformed victim advocate.²²

The billet accomplishments section is a prioritized list of accomplishments and contributions the MRO completed during the reporting period. As previously stated, the MRO normally assists the RS in writing the billet accomplishments by providing highlights within the MROW. It is the RS's job to verify and prioritize them for this section. This section is limited to the space provided (character count). Once full, no further information is allowed.²³

Although the Administrative section is made up of non-evaluated data, its importance cannot be overstated. There were 816 fitness report appeals submitted by Marines to the PERB in 2018; more than 60 percent of them involved information from this section.²⁴ According to

the PERB members, the below are common policy and procedural errors that Marines frequently seek to correct.

- Adverse fitness reports due to inaccuracy in the Body Composition Program and or height and weight.
- Adverse fitness reports due to inaccurate physical and combat fitness test.
- Adverse fitness reports due to adverse material Non Judicial Punishment (NJP) or negative counseling).
- Fitness report to and from dates. Per the PES manual, an RS must write an observed report for a reporting period of 90 days or more. A report can be observed under 90 days if the RS believes he or she has sufficient observation based on personal contact and can therefore provide a fair assessment. Of note, out of the 444 officer appeals, over half involved observed reports under 90 days.²⁵

The administrative section directly impacts the word picture in Section I of the fitness report by mandating that the RS input directed comments in the Section I. This is based on the requirements established in the PES manual. The PES manual indicates 44 different occasions that require directed comments, 36 of which are directly linked to the administrative section.²⁶ These directed comments provide further insight and/or details based on the data points, for example, if the commendatory material box (Section A, Item 6a) is selected the RS must provide a directed comment on what type of a commendation was awarded during this reported period.²⁷

According to the PERB members, the number one reason why fitness report appeals are granted in full or partial is a lack of directed comments provided by the RS when it is mandated by the PES manual. In these appeals it is found that RS(s) are not in compliance with the order and thus the fitness report is pulled, or in some cases it is changed, by the PERB members'

recommendations.²⁸ This is a significant issue, particularly if the adversity can hinder the MRO being promoted, retained, and/or placed in billets of increased responsibility.

Issues and Recommendations: The PES manual does provide detailed instructions on how to properly fill out each section of the fitness report, including how to properly annotate directed comments in the Section I block. If every RS followed the order there would be no need to address this issue, but as with every complex system, sometimes requirements are unintentionally overlooked. Instead of recommending additional training for officers that some would argue would do little to address RS and RO oversights, the focus needs to be on changes to the structure of the fitness report.

1. Issue: Currently, most of the data points that require an RS to make directed comments are located in the Administrative section (Section A) of the fitness report. The Section A is located on page one, while Section I, the RS comments, is located on page 5 of the fitness report.

Recommendations:

1. Remove the directed comments from the Section I and make a directed comment block within the administrative section. If the RS needs to make a comment on the MRO's failure to take a PFT, he or she simply fills out the block, then proceeds to the directed comment section (on the same page) and provides the appropriate amplifying information. This would also assist promotion boards by making it easier for the evaluator to screen for and evaluate adversity.
2. Provide a software update to A-PES that identifies **all** cases when a directed comment is required.* This will improve the probability that the RS is submitting a fitness report that is administratively correct.

*Some data points do this now and it automatically adds a directed comment to the section I

2. Issue: Currently, there is no space on page one to insert a directed comment block without eliminating or moving other sections from page one.

Recommendations:

1. Remove all data points that provide no value to the fitness report, including:
 - Recommendation for promotion. Other than recommending the MRO for an accelerated promotion, it can be addressed in the mandatory comments within Section I.
 - Duty Preferences. Not relevant, adds no value.
 - Billet Accomplishments. Post promotion board interviews of board members state that this section holds no value in assessing the MRO's performance. If the accomplishments are that impactful they should be mentioned in Section I.
2. Keep the current fitness report format and move all directed comments to an addendum page. This will ensure the Section I comments remain focused on building the word picture of the MRO's professional character and performance.

These common sense solutions will have no impact on how an RS evaluates his or her Marines. The recommended format changes will require changes to both the PES and the current fitness report format, but will not affect RS/RO profiles.

Attributes Section

The Marine Corps has identified characteristics it deems most important when evaluating the "Whole Marine," both on and off duty. These key characteristics make up the attributes section of the fitness report, which consists of 5 sections, containing 14 performance-anchored rating scales (PARS). These PARS evaluate the MRO's demonstrated performance in relation to the attribute.²⁹

The first section is Mission Accomplishment. Mission accomplishment is an assessment of the MRO's ability to utilize the resources at his or her disposal to ensure mission accomplishment in an efficient, timely, and accurate manner.³⁰ This section is comprised of two attributes, performance and proficiency. These two attributes are evaluated separately and provide a balanced overall picture of the Marine.

Performance is defined as how well the MRO carried out the duties of his or her billet (job) and, any additional duties that were assigned.³¹ With performance, the evaluation needs to take into account what the MRO had to work with and how efficiently he or she employed those resources. Proficiency differs from performance in that it focuses on the results achieved. The MRO is evaluated on the skill and technical knowledge demonstrated in the execution of his or her overall duties.³²

The second section is Individual Character. This section measures the MRO's mental, physical, moral, and behavioral qualities that complete the picture of a "whole Marine."³³ This section is comprised of three attributes: courage, effectiveness under stress, and initiative.

The attribute of courage assesses the MRO's moral, physical, and mental strength to overcome fear, danger, difficulty or anxiety.³⁴ Displays of courage could range from an MRO correcting Marines that are not in compliance with Marine Corps orders, to saving someone from a burning building.

Effectiveness under stress is the evaluation on how well the MRO thinks, functions, and leads under the conditions of physical and mental pressure. The ability to inspire others while leading under adverse conditions. This characteristic is essential for any all Marines in leadership positions. This attribute measures the MRO's mental agility and grit while navigating difficult situations.³⁵

The final attribute under individual character is initiative. Initiative can be defined as the instinct to begin a task and follow through energetically on one's own accord. An assessment of initiative measures the MRO's ability to act in the absence of specific direction, while being proactive and doing what is necessary, without prompting.³⁶

The third section is Leadership. The 19th Commandant of the Marine Corps, General Clifton B. Cates, described leadership as "the measure of inherent ability to control and direct, self-confidence based on expert knowledge, initiative, loyalty, pride and sense of responsibility."³⁷ All Marines who receive fitness reports are leaders and have an inherent leadership responsibility regardless of their billet. The leadership section consists of five attributes: leading, developing and ensuring the well-being of subordinates, setting the example, and communication skills.

The first attribute under leadership is leading subordinates. Leading subordinates is the application of leadership principles to provide direction and motivation to subordinates. A leader uses authority, persuasion, and personality to influence and motivate subordinates to accomplish assigned tasks. The MRO is assessed in his or her ability to achieve a balance between direction and delegation.³⁸

Developing subordinate is the ability to combine teaching and coaching. An MRO is evaluated on his or her ability to train, educate, and challenge his or her Marines, thus creating an atmosphere of professional and personal development within the realm of their subordinates.³⁹

Ensuring the well-being of subordinates is an assessment of the MRO's efforts to enhance his or her subordinates' ability to focus on mission accomplishment by taking an interest in their well-being.⁴⁰ Marine Corps units perform better when their leadership invests time and effort in the well-being of their Marines.

The next attribute under leadership is setting the example. This characteristic measures the MRO ability to serve as a role model to his subordinates by demonstrating the highest standards of conduct, ethical behavior, fitness and appearance. The MRO must have a commitment to the core values of honor, courage, and commitment, and abide by them on or off duty.⁴¹

The final attribute under leadership is communication skills. Communication skills assesses the MRO's ability to receive and convey information. Additionally, the assessment includes the MRO's capacity to perceive problems and situations, provide concise guidance, and express complex ideas that are understood by everyone.⁴² A leader who cannot communicate is often misunderstood, which results in a diluted guidance and confusion with his or her subordinates.

The forth section is Intellect and Wisdom. This section measures the MRO's efforts to grow intellectually, both personally and professionally. Additionally, the section highlights the MRO's ability to make practicable and judicious decisions.⁴³ This section consists of three attributes: professional military education, decision-making ability, and judgement.

The first attribute under Intellect and Wisdom is Professional Military Education (PME). PME is assessed by the MRO's commitment to education that is beneficial to both the unit and the Marine Corps. This education includes the attendance and completion of military resident schools, professional certification and qualification courses, as well as civilian educational course work.⁴⁴ Completing both resident and non-resident PME is the responsibility of the MRO.

The next attribute under intellect and wisdom is decision-making ability. The PES defines decision making ability as "the balance between an optimal solution and a satisfactory,

workable solution that generates tempo.”⁴⁵ The MRO’s is assessed on his or her ability to make viable and timely decisions in accordance with the commander’s intent and mission accomplishment.

The final attribute is Judgment: The PES describes judgment as “the discretionary aspect of decision making.”⁴⁶ In this attribute the MRO is evaluated on his or her use of education and capacity to make decisions, to make the right choice or offer the best option.”

The fifth and last section is Fulfillment of Evaluation Responsibilities. This section is only evaluated if the MRO serves as a reporting official. It evaluates how well the reporting officials fulfill their responsibilities.⁴⁷ This section consists of the attribute evaluation, which is an assessment of the MRO’s ability to submit accurate, uninflated, and timely evaluations.

The PARS are markings that range from “A” to “H,” and correspond to three distinct description blocks (see figure 1). These description blocks help the RS determine the MRO’s position on the PARS that best reflects his or her performance in the assigned billet during the evaluation period. Markings of “A,” “F,” or “G” require additional justification at the end of each section, while the letter “H” is used if that attribute is “Not Observed.”⁴⁸

D. MISSION ACCOMPLISHMENT							
1. PERFORMANCE. Results achieved during the reporting period. How well those duties inherent to a Marine's billet, plus all additional duties, formally and informally assigned, were carried out. Reflects a Marine's aptitude, competence, and commitment to the unit's success above personal reward. Indicators are time and resource management, task prioritization, and tenacity to achieve positive ends consistently.							
ADV	Meets requirements of billet and additional duties. Aptitude, commitment, and competence meet expectations. Results maintain status quo.		Consistently produces quality results while measurably improving unit performance. Habitually makes effective use of time and resources; improves billet procedures and products. Positive impact extends beyond billet expectations.		Results far surpass expectations. Recognizes and exploits new resources; creates opportunities. Emulated; sought after as an expert with influence beyond unit. Impact significant; innovative approaches to problems produce significant gains in quality and efficiency.		N/O
A	B	C	D	E	F	G	H
☐	☐	☐	☐	☐	☐	☐	☐

Figure 1: Performance Anchored Rating Scale (PARS) for Performance.

Source: Commandant of the Marine Corps. *Performance Evaluation System*. MCO P1610.7FCh2, November 19, 2010. [https://www.hqmc.marines.mil/Portals/133/ Docs/MCO%20P1610_7F%20W%20CH%201-2.pdf](https://www.hqmc.marines.mil/Portals/133/Docs/MCO%20P1610_7F%20W%20CH%201-2.pdf)

The PARS letter markings correspond to a number value from 1 (A) to 7 (G). The Fitness Report Average (FRA) for the report is calculated by adding the number value of each

attribute, then dividing by the total number of attributes graded in the fitness report. The FRA is then captured in the RS's profile.⁴⁹

All RS profiles are updated and maintained by Headquarters Marine Corps (HQMC), and reflect an RS's rating history, and rating philosophy.⁵⁰ All FRAs are ranked against historic reports written on the same rank by the individual RS. These historic comparisons establish the Relative Value (RV) for each report. The RV is a means to compensate for grading differences and personal philosophy between RSs. It ensures that all fitness reports are fair and consistent, regardless of how strict or lenient the RS.⁵¹ An MRO is able to view the RV of his or her report once it is processed by HQMC. The RV has a numeric range from 80 to 100.⁵²

- An RV of 100 indicates the highest FRA of any report written by the RS on a Marine of that grade. An RS can have multiple reports with an RV of 100, if the FRA is the same. An RV that ranges from 93.4-100 indicates the report is above average, or in the upper third of the RS's profile.
- An RV of 90 indicates the FRA is equal to the RS's average. An RV that ranges from 86.7-93.3 indicates that the report is average, or in the middle third of the RS's profile.
- An RV of 80 indicates the lowest FRA of any report written by the RS on a Marine of that grade. An RS can have multiple reports with an RV of 80 if the FRA is the same. An RV that ranges from 80-93.3 indicates the report is below average, or in the bottom third of the RS's profile.⁵³

Issues and Recommendations: The PES states, "The purpose of Attributes Section is not to find fault, or to exaggerate the competence of MROs, but rather to objectively evaluate Marines on their own merits. Attribute grades should be earned, not given; they should reflect the MRO's

exhibited efforts and results.”⁵⁴ The ability to provide a fair and uninflated evaluation is the foundation of the fitness report. Although the current fitness report is adequate in assessing the “whole marine” there are some challenges that can be addressed to improve the overall evaluation.

1. Issue: The current description blocks for the 14 attributes are inadequate and fail to address below average performance. For example, the lowest marking a Marine can receive for any of the attributes is a “B” without the report being adverse. The PES manual states, that an RS and RO should mark the report adverse for unsatisfactory performance, lack of potential, or unacceptable professional character.⁵⁵ If the MRO has potential and sound character but needs supervision when handling tasks commensurate with his or her rank and billet, should the Marine receive an adverse mark? What if the below average or unsatisfactory performance is a result of a recent change of Military Occupational Specialty lateral move? Should the MRO receive an “A” marking?

While there are only three description blocks in the attributes section of the fitness report, the Individual Records Administration Manual (IRAM), which establishes guidelines in assigning E-4 and below proficiency and conduct (Pro and Cons) marks, has 6 different description blocks.⁵⁶ The IRAM description boxes are similar to the fitness report boxes; they guide and assist the evaluator in determining a Marine’s performance. Additionally, the IRAM directs markings below the established average for performance, if there are acceptable and sufficient reasons - this does not make the markings adverse. Adverse markings and documentation are required when the performance is unsatisfactory.⁵⁷

Recommendation: Change the current structure from three description blocks to four.

The first box that corresponds to the “B” marking should reflect that the Marine is below the standard. For example:

The current description block for a “B” marking in performance states: “Meets requirements of billet and additional duties. Aptitude, commitment, and competence meet expectations. Results maintain status quo.”⁵⁸

Proposed Recommendation for “B” marking: “Meets most billet and additional duty requirements. Shows the ability, commitment, and potential to achieve expectations.

Implementing these changes to the attributes section will result in a more accurate evaluation of Marines and assist in spot-lighting the individuals whose performance is exceeding the standards.

Of note, the only adverse description block representing the “B” marking on the current fitness report, is located in the “fulfillment of evaluation responsibilities” section. This block is used to evaluate a reporting seniors’ and reporting officials’ abilities, to correctly process fitness reports in accordance with the PES manual.⁵⁹

2. Issue: The current description boxes do not address differences in rank. A Sergeant fitness report is no different than a report used to evaluate a Lieutenant Colonel. This makes it difficult for Sergeants, and company grade officers to achieve higher PARS markings.

For example, in order for a Sergeant or Lieutenant to receive an “F” marking in performance, he or she needs to meet the description block standard of being:

- A true expert in their field with knowledge and skills impact far beyond those of peers.
- Translates broad-based education and experience into forward thinking, innovative actions.

- Makes immeasurable impact on mission accomplishment. Peerless teacher, selflessly imparts expertise to subordinates, peers, and seniors.⁶⁰

The argument could be made that an outstanding Sergeant or Lieutenant could never meet this standard, based on his or her low experience level and small sphere of influence.

Recommendation: The description boxes in the attributes section of the fitness report should be changed to reflect the difference in rank and responsibilities. For simplicity, the recommendation is for two distinct groups: Group one, consisting of company grade officers and E-5s/E-6s; and group two, consisting of field grade officers and E-7s/E-8s.

This proposed solution will result in a greater dispersion of FRAs in each rank- from the performers at the top, to the performers at the bottom. The implementation of these changes will ensure that only the highest quality Marines are selected for promotion, command, and resident professional military education.

3. Issue: The current system discourages RSs from using the full spectrum of the range of PARS. Although studies have shown a direct correlation between higher FRAs, and higher ranks, the deviations in marking within those ranks remain small (see Figure 2). Most fitness report averages fall between 3.0 and 5.0, or markings “C” to “E.”⁶¹

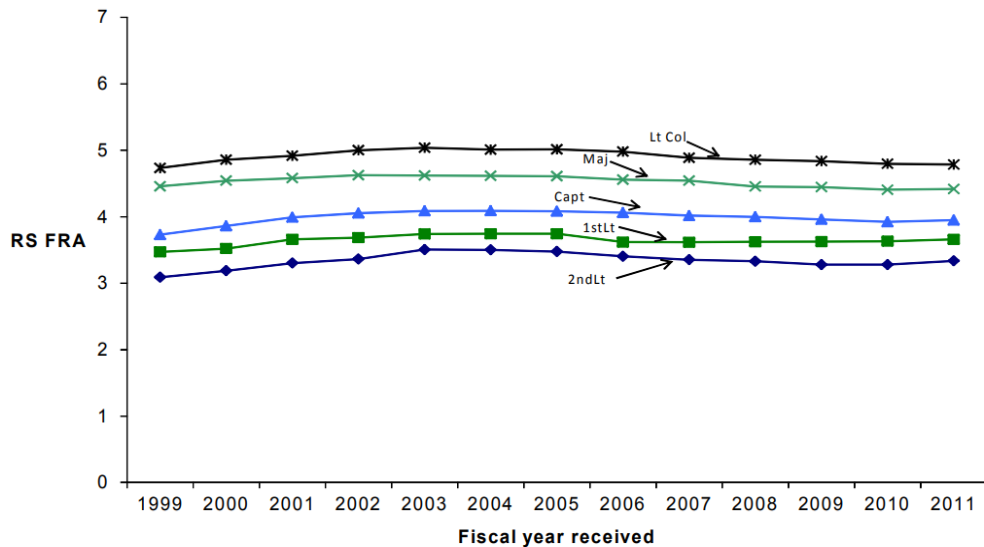


Figure 2: RS fitness report averages by rank of MRO and fiscal year

Source: Center for Naval Analysis. *An Evaluation of the Fitness Report System for Marine Officers*. Shannon Phillips, Adam Clemens, Lauren Malone, Gary Lee (Arlington VA, 2012).

Though there are no definitive reasons why this occurs, a contributing factor could be the PES's requirement to justify markings that are "F" or "G." In order for an RS to justify an "F" or "G" marking he or she must have a written, concrete argument. The written justification must have verifiable, substantive, and quantifiable accomplishments. If an RS justification is perceived as lacking or inflated, HQMC will return the fitness report.⁶² A returned report that has to be reprocessed through the RO, can directly affect the RS's markings when he or she is being evaluated.

Recommendation: Do not require extensive justification for higher marks. The RS should be able to use the PARS without the need for justification.

The PES manual states that an RS should not assign markings based on a preconceived or artificial FRA.⁶³ Although this sounds good in theory, most reporting officials would agree, that their markings are a means to manipulate the FRA, therefore ensuring that an MRO is

ranked in a proper and deserving order compared to other marines of the same grade the reporting official has previously evaluated. Requiring justification of marks to HQMC, is a redundant process when taken into account, that the PES places the responsibility of monitoring the inflation of reports, on the ROs themselves.

Word Picture Section

The last part of the fitness report is the word picture section. If the Attributes section is the meat of the fitness report, the word picture section is the potatoes. This section contains two major parts, the section I (RS directed and additional comments) and section K (RO comments and comparative assessment).⁶⁴ The RS comments communicate, in writing, a summary of an MRO's conduct and performance during the reporting period. These comments serve to build a word picture of the "Whole Marine."⁶⁵ The PES manual instructs the RS to format their comments in the following order:

- **Mandatory Comments:** These comments should attempt to create a word picture of the Marine's professional character, demonstrated proficiency and leadership, and endorsement for retention.
- **Directed Comments:** These comments are requirements by the PES to provide amplifying information on the corresponding section and item number.
- **Additional Comments:** Any comments the RS wishes to convey that are not covered in the previous sections. For example, the MRO receiving a civilian award for community involvement, or completing off-duty education.⁶⁶

The RO comparative assessment is similar to the attributes section, in that the RO is provided a description block to assist them in evaluating and marking the MRO. This scaled marking is in the shape of, and referred to as the "Christmas tree"(see figure 3), It ranges from

level 1 (unsatisfactory) to 8 (the eminently qualified), with 8 representing the top of the tree. RO markings are compared against all previous RO markings for MROs of that rank the RO has evaluated. This comparison is captured in the RO profile. The RO is to mark the MRO, not only on his or her performance but also future potential for service at more senior ranks and billets.⁶⁷

K. REVIEWING OFFICER COMMENTS		
1. OBSERVATION: ☐ Sufficient ☐ Insufficient		2. EVALUATION: ☐ Concur ☐ Do Not Concur
3. COMPARATIVE ASSESSMENT: Provide a comparative assessment of potential by placing an "X" in the appropriate box. In marking the comparison, consider all Marines of this grade whose professional abilities are known to you personally.	DESCRIPTION	COMPARATIVE ASSESSMENT
	THE EMINENTLY QUALIFIED MARINE	☐
	ONE OF THE FEW	☐
	EXCEPTIONALLY QUALIFIED MARINES	☐
	ONE OF THE MANY HIGHLY QUALIFIED	☐
	PROFESSIONALS WHO FORM THE MAJORITY OF THIS GRADE	☐
	A QUALIFIED MARINE	☐
UNSATISFACTORY	☐	

Figure 3: Section K. Reviewing Officer Comparative Assessment

Source: Commandant of the Marine Corps. *Performance Evaluation System*. MCO P1610.7FCh2, November 19, 2010. [https://www.hqmc.marines.mil/Portals/133/ Docs/MCO%20P16 10_7F%20W%20CH%201-2.pdf](https://www.hqmc.marines.mil/Portals/133/Docs/MCO%20P16%2010_7F%20W%20CH%201-2.pdf)

Although the RO is not restricted in formatting his or her comments, the PES manual states that the RO comments should amplify the marking in the comparative assessment and evaluate the MRO's potential for continued professional development, resident PME (officers only), command assignment, promotion, and retention.⁶⁸

Issues and Recommendations: As indicated at the start of this paper when the Commandant of the Marine Corps, General Robert B. Neller, raised the question of, "is the current fitness report functioning to promote the best suited Marines?" He went on to state at that time that he questions whether the current restrictions on Section I are impeding the RS's ability to provide

an accurate word picture of the MRO's performance. The PES states, "comments identifying minor limitations, shortcomings, occasional lapses, or weakness in an otherwise overall positive performance, serve no constructive purpose, foster a zero-defect mentality, and are not relevant to the overall evaluation."⁶⁹ Any adverse language in Section I renders the entire fitness report adverse. This language constraint creates two related problems.

1. Issue: The current restrictions on the RS/RO comment sections are making it difficult for reporting officials to properly assess below average performance. For example, if an RS wrote:

"Staff Sergeant Knucklehead is a hard working Marine who needs little supervision in accomplishing his assigned tasks."

or

"Sergeant Belt Buckle has the potential to be an outstanding leader."

These statements are accurate, as the RS is to capturing the Marine's performance as a whole without any negative connotation. However, the words "little supervision," and "potential to be," could easily be construed as being adverse due to the implication in those statements, which is that the Marine is currently not performing to the level expected. The PES Manual states that negative words, phrases, or qualifying adverbs should be avoided, unless the intent is to make the report adverse.⁷⁰

Though the RS may be well intentioned and satisfied with the progress the MRO is making, his other true observations cannot be captured without using the above adjectives. These words could be viewed by the RO as being adverse, therefore making the entire fitness report adverse. The inability for an report official to capture below average performance leads into issue 2.

2. Issue: The Basic School (TBS) Fitness Report Student Handout states that comments within the section I should clarify the score of the report, and the flavor of the comments should match the score.⁷¹ A large percentage of enlisted Marines' PERB cases claim that the RS's were being deceptive in their markings due to the perception of mismatched word pictures.⁷² Although the PES Manual states that the RS and RO comments should reflect the FRA, it does not mandate it.⁷³ Comments made by the board members of the FY 19 E-8, E-9 promotion board echo this sentiment. They concluded that when the RS and RO comments don't match the RV comparative assessment:

- It made reports less influential to board members.
- The fitness report was questionable and decreased the trust in the validity of the entire report.
- Most board members agreed that they viewed those reports negatively, and had to default to either ruling out the markings, or disregarding the comment section completely.⁷⁴

The concerns in issue 1 are exacerbated by issue 2. Because the ROs are "handcuffed" in creating a word picture for below average performance, they have to rely on unwritten words or phrases to get their messages through. This is normally referred to as the art of fitness report writing.⁷⁵ Figure 4 below is an excerpt from the TBS fitness report writing guide that demonstrates this art.

Example Section I Comments: *Weak Performer*

1. Marine Reported On:				2. Occasion and Period Covered:		
a. Last Name	b. First Name	c. MI	d. SSN	a. OCC	b. From	To
WILLIAMS	ROY	A	xxxxx6789	TR	20090105	20090704
I. DIRECTED AND ADDITIONAL COMMENTS						
Sergeant Williams is an effective NCO who operates at a level expected of a Marine with his rank and experience. Demonstrates the leadership and technical skills required to accomplish assigned billet responsibilities. Directs the various administrative and training requirements of his unit with limited guidance. Promote.						

PROFICIENCY: MOS skills and ability to execute assigned duties

LEADERSHIP: How well does MRO lead, mentor Marines & Sailors

PROMOTION: How strongly do you feel MRO should be promoted

Figure 4: The Basic School fitness report writing guide on documenting weak performance

Source: Marine Corps Training Command, The Basic Course, *Fitness Report Student Handout*, (Quantico Va, 22134, 2018).

The weak promotion endorsement is a clear signal to any board that the MRO is not competitive with his or her peer group. The TBS fitness report handout acknowledges the challenges in documenting weak performance as an art that is learned with time and experience.⁷⁶ This is a problem considering a majority of fitness reports are written by RSs with little experience. Additionally, all fitness reports carry the same weight regardless of the rank and experience of the officials.

Recommendation 1: In order to address the problem of the word picture not matching the markings, the “handcuffs” have to be taken off of the RS. If the MRO is below average, the RS must be able to create a word picture that conveys this message, without writing techniques (art) that are learned with experience. This will ensure the end state of promoting the most qualified Marines.

Recommendation 2: The PES must be updated to mandate and express the importance for the RSs' and ROs' fitness report values to match the comments relayed by word picture. Guidance should be given as to what warrants an outstanding evaluation of performance versus a below average observation. Evaluations can be highly subjective due to an RS's personal opinion and/or biases, and can vary greatly between RSs. The RO must audit the fitness report to ensure that the RV of the report coincides with the word picture.

3. Issue: The MRO worksheet is the first and last time an MRO has the opportunity to input information to influence his or her fitness report, unless that report is adverse. If the report is deemed adverse by the RS, the MROW has the opportunity to acknowledge and address the adversity, by providing a written rebuttal statement in the addendum page of the fitness report.⁷⁷

The Marine Corps Order on Performance Evaluation Appeals, (MCO 1610.11D) states that general claims of inaccurate or unjust appraisals of performance or potential, or claims of bias or prejudice on the part of the ROs, are grounds for submission.⁷⁸ It is upon this basis, that PERB members agree this is a common motive for submission. Enlisted Marines contest their reports because of a perceived personal conflict between the MRO and the RS.⁷⁹ It is this perception that may cause a Marine to discern that there was bias or prejudice reflected in the overall contents of his or her report. In cases where there could be validity, because the cases are highly opinionated and lack evidence, MROs have a low probability of success. If the PERB denies the case, the fitness report remains as written, and the Marine's grievance is not noted in his or her permanent record.

Recommendation: Regardless of the fitness report being adverse or not, the MRO should be given the option to comment on the contents of the report before it is processed. In order to avoid potential conflicts, an MRO option to comment should be given prior to the RO comments

(Section K). This will allow the RO to review and address any issues before the report is processed. This additional step will accomplish three things:

1. Similar to an adverse report, the MRO will have an opportunity to provide his or her account regarding any perceived bias that may have been present during the reporting period.

2. The MRO grievance will be permanently recorded on his or his fitness report for consideration by any selection board.

3. In the instance that a report results in a PERB submission, it will be documented that the effort of due diligence was displayed by an MRO.

Conclusion

This paper analyzed each section of the fitness report in an effort to address redundancies and to provide recommendations for structural changes to the fitness report. These proposed recommendations will enable reporting officials to more accurately, justly, and comprehensively evaluate personnel.

There are inherent problems when implementing changes to the current system. Any change that effects the RS profile, FRA/RV, or changes that effect the way selection boards review and analyze fitness report data, will essentially create a virtual “line in the sand.” This “line in the sand” is a permanent date in time in which HQMC mandates that changes to the PES will go into effect. This will divide the evaluation data into fitness reports completed before the change, and fitness reports completed after. Taking the aforementioned into consideration, the recommendations provided by this paper are ranked in order of importance.

1. Recommendation: The restrictions or “handcuffs” have to be taken off of the RS when writing within Section I. The current restrictions on the RS/RO comment sections are making it difficult for reporting officials to properly assess below average performance. Any

adverse language in Section I renders the entire fitness report adverse. This type of restriction should be removed. An RS should be allowed to use neutral or negative phrasing if it captures the complete word picture on the MRO's performance.

2. Recommendation: The PES must be updated to mandate and express the importance for the RSs' and ROs' fitness report values to match the comments relayed by the word picture. Although the PES Manual states that the RS and RO comments should reflect the FRA, it does not mandate it. Previous E-8, E-9 promotion boards have concluded that when the RS and RO comments don't match the RV comparative assessment, it makes the reports less influential and it decreased the trust in the validity of the entire report.

3. Recommendation: Do not require justification for higher marks. The RS should be able to use the PARS without the need for justification. Requiring justification of marks to HQMC, is a redundant process when taken into account, that the PES places the responsibility of monitoring the inflation of reports, on the ROs themselves.

4. Recommendation: Modify the current structure, which currently comprises three description blocks, by inserting an additional block to increase the number of blocks to four. The current description blocks intended for the 14 attributes are inadequate and fail to address below average performance. For example, the lowest marking a Marine can receive for any of the attributes is a "B" without the report being adverse. This recommendation would add an additional block to address below average performance without the report being adverse. The first box that corresponds to the "B" marking should reflect that the Marine is below the standard.

5. Recommendation: Regardless of the fitness report being adverse or not, the MRO should be given the option to comment on the content of the report before it is processed. The

PERB members have stated that perceptions of unjust appraisals of performance or potential, or claims of bias or prejudice on the part of the RS, have been common grounds for submissions by MROs. The proposed recommendation would allow the MRO to disclose any grievance he or she may have with the RS prior to the report being processed. MRO option to comment should be given prior to the RO comments. This will allow the RO to review and address any issues before the report is processed.

6. Recommendation: The description boxes in the attributes section of the fitness report should be reformed to reflect the difference in rank and responsibility. The current description boxes do not address variances in rank. A Sergeant fitness report is no different than a report used to evaluate a Lieutenant Colonel. This makes it difficult for Sergeants, and company grade officers to achieve higher PARS markings. This recommendation would create two distinct fitness report groups (this change would only affect the attribute section):

Group 1: Company grade officers and E-5s/E-6s.

Group 2: Field grade officers and E-7s/E-8s.

This proposed solution will result in a greater dispersion of FRAs in each rank- from the performers at the top, to the performers at the bottom.

7. Recommendations: Remove the directed comments from the Section I and insert a directed comment block within the administrative section. If the RS needs to make a directed comment on the MRO's failure to take a PFT, instead of going to the section I portion of the fitness report (page 5), he or she simply fills out the block, then proceeds to the directed comment section (on the same page) and provides the appropriate amplifying information. This would also assist promotion boards by making it easier for the evaluator to screen for and evaluate adversity.

8. Recommendations: Remove all data points that provide no value to the fitness report such as: recommendation for promotion, duty preference, and billet accomplishments, to provide space for a directed comment block on the Administration Section. Alternatively, retain the current fitness report format, and move all directed comments to a newly implemented addendum page. This will ensure the Section I comments remain focused on building the word picture of the MRO's professional character and performance.

The implementation of most, if not all, of these recommendations will serve to meet the Commandant's intent to select the best qualified personnel for promotion, augmentation, retention, resident schooling, command, and duty assignments.

¹ Commandant of the Marine Corps. *Performance Evaluation System*. MCO P1610.7F Ch2, November 19, 2010. [https://www.hqmc.marines.mil/Portals/133/ Docs/MCO% 20P1610_7F%20W%20CH%201-2.pdf](https://www.hqmc.marines.mil/Portals/133/Docs/MCO%20P1610_7F%20W%20CH%201-2.pdf), 5.

² Center for Naval Analyses. *The Fitness Report System for Marine Officers: Prior Research*. Shannon Phillips, Adam Clemens (Arlington VA, 2011), 3.

³ Center for Naval Analyses. *The Fitness Report System for Marine Officers*, 1.

⁴ Center for Naval Analyses. *The Fitness Report System for Marine Officers*, 1,2.

⁵ Center for Naval Analyses. *The Fitness Report System for Marine Officers*, 2

⁶ Center for Naval Analyses. *The Fitness Report System for Marine Officers*, 2

⁷ Center for Naval Analyses. *An Evaluation of the Fitness Report System for Marine Officers*. Shannon Phillips, Adam Clemens, Lauren Malone, Gary Lee (Arlington VA, 2012), 13.

⁸ Center for Naval Analyses. *An Evaluation of the Fitness Report System for Marine Officers*, 3

⁹ Center for Naval Analyses. *An Evaluation of the Fitness Report System for Marine Officers*, 37

¹⁰ Commandant of the Marine Corps. *Performance Evaluation System*. 5.

¹¹ Commandant of the Marine Corps. *Performance Evaluation System*. 18.

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¹³ Commandant of the Marine Corps. *Performance Evaluation System*. 20.

¹⁴ Commandant of the Marine Corps. *Performance Evaluation System*. 25.

¹⁵ Commandant of the Marine Corps. *Performance Evaluation System*, 29

¹⁶ Commandant of the Marine Corps. *Performance Evaluation System*, 26

¹⁷ Commandant of the Marine Corps. *Performance Evaluation System*, 27

¹⁸ Commandant of the Marine Corps. *Performance Evaluation System*, 27

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- ²⁶ Commandant of the Marine Corps. *Performance Evaluation System*. 78.
- ²⁷ Commandant of the Marine Corps. *Performance Evaluation System*. 78.
- ²⁸ Lesley Ecker (Head, MMRP-13 PERB) discussion with the author January 15, 2019
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- ³¹ Commandant of the Marine Corps. *Performance Evaluation System*, 62
- ³² Commandant of the Marine Corps. *Performance Evaluation System*, 62
- ³³ Commandant of the Marine Corps. *Performance Evaluation System*, 64
- ³⁴ Commandant of the Marine Corps. *Performance Evaluation System*, 65
- ³⁵ Commandant of the Marine Corps. *Performance Evaluation System*, 66
- ³⁶ Commandant of the Marine Corps. *Performance Evaluation System*, 67
- ³⁷ "Principles of Marine Corps Leadership," , accessed May 9, 2019,
<https://www.tecom.marines.mil/Portals/120/Docs/Student Materials/CREST Manual/RP0103.pdf>, 1
- ³⁸ Commandant of the Marine Corps. *Performance Evaluation System*, 68
- ³⁹ Commandant of the Marine Corps. *Performance Evaluation System*, 69
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- ⁴¹ Commandant of the Marine Corps. *Performance Evaluation System*. 69
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- ⁵⁸ Commandant of the Marine Corps. *Performance Evaluation System*. 62.
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- ⁶² Commandant of the Marine Corps. *Performance Evaluation System*. 76.
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- ⁶⁴ Commandant of the Marine Corps. *Performance Evaluation System*. 77.
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- ⁷⁶ Marine Corps Training Command, The Basic Course, *Fitness Report Student Handout*, 7.
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- ⁷⁸ Commandant of the Marine Corps. *Performance Evaluation Appeals*. 6.
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