

REPORT DOCUMENTATION PAGE

*Form Approved
OMB No. 0704-0188*

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| 1. REPORT DATE (DD-MM-YYYY) 01-04-2020 | 2. REPORT TYPE Master of Military Studies (MMS) thesis | 3. DATES COVERED (From - To) AY 2019-2020 |
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| | |
|---|--|
| 4. TITLE AND SUBTITLE Problems with the Marine Corps' Performance Evaluation System | 5a. CONTRACT NUMBER N/A |
| | 5b. GRANT NUMBER N/A |
| | 5c. PROGRAM ELEMENT NUMBER N/A |

| | |
|---|------------------------------------|
| 6. AUTHOR(S) Cazedessus, Eugene R. IV (Major) | 5d. PROJECT NUMBER N/A |
| | 5e. TASK NUMBER N/A |
| | 5f. WORK UNIT NUMBER N/A |

| | |
|--|--|
| 7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES) USMC Command and Staff College Marine Corps University 2076 South Street Quantico, VA 22134-5068 | 8. PERFORMING ORGANIZATION REPORT NUMBER N/A |
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|---|--|
| 9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES) N/A | 10. SPONSOR/MONITOR'S ACRONYM(S) |
| | 11. SPONSOR/MONITOR'S REPORT NUMBER(S) N/A |

12. DISTRIBUTION/AVAILABILITY STATEMENT
Approved for public release, distribution unlimited.

13. SUPPLEMENTARY NOTES

14. ABSTRACT
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15. SUBJECT TERMS
Performance Evaluation System, Fitness Reports, FITREP, A-PES, PES

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|--|--------------------|---------------------|-----------------------------------|----------------------------|---|
| 16. SECURITY CLASSIFICATION OF: | | | 17. LIMITATION OF ABSTRACT | 18. NUMBER OF PAGES | 19a. NAME OF RESPONSIBLE PERSON |
| a. REPORT | b. ABSTRACT | c. THIS PAGE | | | USMC Command and Staff College |
| Unclass | Unclass | Unclass | UU | 46 | 19b. TELEPHONE NUMBER (Include area code) (703) 784-3330 (Admin Office) |

*United States Marine Corps
Command and Staff College
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Marine Corps Combat Development Command
Quantico, VA 22134-5068*

MASTER OF MILITARY STUDIES

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Problems with the Marine Corps' Performance Evaluation System

AUTHOR:

Major Eugene R. Cazedessus IV, USMC

AY 19-20

Mentor and Oral Defense Committee Member: Dr. Richard DiNardo,
Professor of National Security Affairs

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Date: 4/1/20

Oral Defense Committee Member: Dr. Jonathan Phillips
Colonel Thomas Gordon
Lieutenant Colonel Sally A. Falco

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Standard Form 298 (Rev. 8/98)
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JOINT EXECUTIVE SUMMARY

Title: Problems and the Solutions for the Marine Corps Performance Evaluation System

Author: Travis John Strean and Eugene R. Cazedessus IV, United States Marine Corps

Thesis: The lack of standardization, modernization, and training and education, across all ranks, on the Marine Corps' performance evaluation system, coupled with confusing policy and the widespread lack of conformity with its spirit and intent has concluded with substandard and insufficient records that impact the critical manpower process of retention, promotion, and selection boards for all Marines. The Marine Corps evaluation system is not broken, but implementing several changes in reporting official roles and tasks, process design, system integration, and training will go a long way toward making it better.

Discussion: The Marine Corps has problems with the Performance Evaluation System (PES) and this Master of Military Studies (MMS) highlights those significant problems. The most significant amongst the issues with the current PES are that performance evaluation does not cover all ranks and therefore not standardized across the Marine Corps. Expanding the system to include all ranks would build confidence in the system and create a better understanding of what objective performance evaluation entails. Additionally, the PES is an overly complicated system that often contradicts itself and creates confusion across the Marine Corps, lack of proper education and training on the system, and outdated physical layout and information displayed on a Fitness Report. Bringing the Automated Performance Evaluation System (A-PES) into the 21st Century through better system integration and business intelligence while tying all of the changes together with comprehensive training through a Marine's career, will significantly improve the ability of all participants in the evaluation system to ensure that the Marine Corps is properly evaluating its personnel.

Conclusion: Both MMS's attempted to highlight some of the more significant issues that continue to persist in the performance evaluation process and propose innovative solutions to address those issues. The Marine Corps is known for its skill of adaptation, as in the many times in the past that we have done so, the Corps must adapt again. This time with our PES. The PES is a great system; however, it is twenty years old and even the best system can still require improvements, which is the current situation we find ourselves. These issues are solvable, and through the implementation of aggressive solutions, the Service will continue to ensure the ability to identify, promote, and retain the Service's best and brightest. The PES will never be successful and implemented as intended if we don't properly educate the force, expand performance evaluation to encompass our junior enlisted Marines, and modernize our manpower systems and associated databases. All of this must be done if the Marine Corps wants to compete with the civilian sector while retaining the best and brightest individuals.

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EXECUTIVE SUMMARY (PROBLEMS)

Title: Problems with the Marine Corps Performance Evaluation System

Author: Eugene Romain Cazedessus IV, United States Marine Corps

Thesis: The lack of standardization, modernization, and training and education provided across all ranks, on the Marine Corps' performance evaluation system, coupled with confusing policy and the widespread lack of conformity with its spirit and intent has resulted in substandard and insufficient evaluations that impact critical aspects of talent management that negatively affect the manpower process of retention, promotion, assignments and special selection boards for all Marines.

Discussion: The 38th Commandant of the Marine Corps, General David H. Berger, has identified major shortcomings in the current Performance Evaluation System (PES) which has been in place since 1999. This Master of Military Studies (MMS) highlights those shortcomings and their negative effects on Marines and the Corps as a whole. The most significant issue with the current PES is that all ranks are not evaluated alike as junior Marines are evaluated through other means. The Marine Corps has recently created a system that will expand to all ranks but will require adequate funding. The new system may address the standardization of performance-based evaluation across all ranks, but it will not address the problem of the current PES, which is an overly complicated system. The PES needs modernization because it is outdated due to contradictions between the software and several Marine Corps orders. Combine the contradictions with a lack of education and training on the Performance-Anchored Rating Scales (PARS) philosophy, and it confuses the Marine Corps. Each Reporting Senior (RS) and Reporting Officer (RO) try to counter the confusion by creating their evaluation philosophy. RSs and ROs create their philosophy outside of the PARS philosophy causing the Marines Reported On (MRO) to being confused. If an MRO is not represented correctly on the Fitness Report, it will have implications on continued performance, promotion, and retention in the Marine Corps. All these issues compound and produce adverse effects across the Corps' manpower processes. The solutions to these problems are outlined in the MMS produced by Maj Travis Streaun and written in conjunction with this author. A joint Executive Summary for both MMS's can be found in his MMS.

Conclusion: This MMS attempted to highlight some of the more significant issues that continue to persist in the performance evaluation process. The Marine Corps is known for its skill of adaptation, as in the many times in the past that we have proven this, the Corps must adapt again, This time with our PES. The PES was a great system; however, it is twenty years old, and the current system requires modernization, which is the current situation we find ourselves in. The PES will never be successful as it could be and implemented as intended if we do not adequately educate the force, expand performance evaluation to encompass our junior enlisted Marines, and modernize our manpower systems and associated databases. All of this must be done if the Marine Corps wants to compete with the civilian sector while retaining the best and brightest individuals.

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EXECUTIVE SUMMARY (SOLUTIONS)

Title: Solutions to the Problems in the Marine Corps Performance Evaluation System

Author: Travis John Streaun, United States Marine Corps

Thesis: The Marine Corps Performance Evaluation System requires changes in order to improve reporting official roles and tasks, process design, system integration, and training in order to support talent management.

Discussion: Four primary areas of the Marine Corps performance evaluation system could benefit from adjustments that improve the ability of selection boards to identify the Service's highest-caliber personnel. Within the four areas of reporting official roles and tasks, process design, system integration, and training, several changes will result in significant improvements in the current system. Expanding the system to include all ranks would build confidence in the system and create a better understanding of what objective performance evaluation entails. Changing the roles of reporting officials results in improved reporting accuracy and corrects an imbalance in the leader-to-led evaluation system of some commands. Relative value (RV) has benefits, but there is significant potential for the result not to match the individual's actual potential. Eliminating RV in the boardroom and replacing it with a comparison of report averages, or another comparison method would resolve this issue. The 2019 Commandant's Planning Guidance (CPG) identified an evaluation gap for those that attend academic settings. Creating an Academic Fitness Report (FitRep) for use during assignment consideration provides the requested functionality, and limiting its usage during promotion boards avoids stratifying the top 20% in a way that places these individuals below the bottom 80%. Finally, bringing the Automated Performance Evaluation System (A-PES) into the 21st Century through better system integration and business intelligence while tying all of the changes together with comprehensive training through a Marine's career, will significantly improve the ability of all participants in the evaluation system to ensure that the Marine Corps is properly evaluating its personnel.

Conclusion: The current Marine Corps performance evaluation system has several issues that are solvable, and through the implementation of aggressive solutions, the Service will continue to ensure the ability to identify, promote, and retain the Service's best and brightest. Expanding performance evaluation to all ranks while also developing our interpretation of what military ranks can function as reporting officials and under what roles, will build knowledgeable evaluators that understand how the evaluation process should function. Once we have the right people engaged in doing the correct tasks, fixing the process and system that our Marines operate within for performance evaluation gives them the tools to be successful. Finally, only through comprehensive and valuable training is it possible to tie the people, process, and system together into a performance evaluation framework that our Marines can be confident evaluates their performance accurately.

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PREFACE

As a Manpower Officer in the Marine Corps, at least some aspect of the performance evaluation system has been a part of my daily work for the past ten years. Having worked at the infantry battalion and Marine Forces level along with a tour at Manpower Management Enlisted Assignments I have seen a majority of the pros and cons of the performance evaluation system and the impact it can have on individual Marines' careers and lives. I hope that the Marine Corps can take something from this research and writing to help make the system better and have a positive and lasting impact for all Marines in the future.

I want to offer my most sincere appreciation to the mentors who assisted me, Dr. Richard NiDardo and LtCol Sally Falco. Their unselfish time and support throughout the entire academic year greatly assisted in the writing of this Master of Military Studies.

Last and certainly not least, I want to thank my wife and my children, first, to my wife Petra, who convinced me to proceed and complete this academic task. Your hard work and dedication to our family throughout the year made this all possible. Second, to my children, Elizabeth, Quinn, and Sebastian. You have endured the "not now," "we will do that another time," and "go outside and play" type of statement's all year long, and I look forward to becoming a committed dad again. I love all of you and am blessed to have such a strong and loving family to support me.

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I. INTRODUCTION

The research and writing of this Master of Military Studies (MMS) paper will identify the problems within and across the entirety of the Marine Corps' Performance Evaluation System (PES). Performance evaluation has received well-deserved scrutiny over the past year. As recently as July 2019, the analysis amplified with the release of General David H. Berger's, Thirty-eighth Commandant of the Marine Corps, Commandant's Planning Guidance (CPG). As stated in the CPG, "Despite a major reform effort [that began] in 1996, there are major shortcomings in our current PES that must be addressed. As was true then, there is a growing lack of faith within our ranks in the system's ability to accurately identify their skills, performance, and future potential."¹ Although reviews and changes were already being implemented or discussed, such as the adjusting of the format for Sergeants Major, Master Gunnery Sergeants, and Chief Warrant Officer 5 reports to be a single page and match that of a Colonels report, numerous other aspects of the current system and process require attention. They may require significant changes to achieve a measurable improvement to restore that faith in the PES.

Having had the opportunity over the last three and a half years to discuss the Marine Corps' PES with other officers from the Navy, Army, and Air Force, all could honestly say that the Marine Corps' system is the overall best system compared to the evaluation of their services' systems and formats. However, every service member

¹ United States Marine Corps, *Commandant's Planning Guidance* (CPG) (Washington DC: Headquarters of the Marine Corps, July 2019), 8.

understands that even the best process can likely become better. The lack of standardization, modernization, and training and education, across all ranks, on the Marine Corps' performance evaluation system, coupled with confusing policy and the widespread lack of conformity with its spirit and intent has concluded with substandard and insufficient records that impact the critical manpower process of retention, promotion, and selection boards for all Marines. This MMS paper will highlight the problems and broken aspects of the entire PES system and the MMS paper produced by Major Travis J. Streat, USMC will identify how to fix those problems via solutions that are not only functional but able to be realistically implemented across the PES.

II. EXPANDING PERFORMANCE EVALUATION TO ALL RANKS

A significant issue with the current PES is that performance evaluation does not cover all ranks and, therefore, not standardized across the Marine Corps. This lack of standardization has significant impacts across the force in terms of the retention and promotion of our junior Marines, eventually leading to the lack of knowledge and understanding of the PES once Marines are promoted to Sergeant and begin receiving Fitness Reports. Currently, instead of having their performance evaluated and falling under the PES, which is governed by Marine Corps Order (MCO) 1610.7A, Marines from the rank of Corporal and below receive conduct and duty proficiency markings. Those "pro and con marks" are administrative falling under the guidance and direction of MCO P1070.12K, the Marine Corps Individual Records Administrative Manual (IRAM). Headquarters Marine Corps (HQMC), Manpower Information Field Operations Branch

(MIF) manages the current personnel administrative and travel capabilities and is the responsible office for the IRAM.

Many commands do not follow the regulations within the IRAM, or they arbitrarily assign proficiency and conduct marks without an objective review of the Marine's performance over the reporting period. "Marking guidance created at the unit level is not standardized across the Marine Corps, which results in Marines being rated too high or too low relative to peers across the MOS."² Furthermore, "the commander should consult with the officer or senior noncommissioned officer who supervises the Marine's performance of duty before assigning duty proficiency marks."³ A battalion commander is not likely to be a part of the reporting chain for most of his sergeants and staff sergeants; however, he is responsible for "assigning" conduct and duty proficiency markings. This example of battalion commander involvement, coupled with the fact that our evaluation of junior Marines is administrative and separate from the PES, exemplifies the problem with non-standard processes.

A meeting with the Manpower Management Records and Performance, Performance Evaluation Section (MMPR-30), Section Head provided the author with significant updates and details regarding the expansion of performance evaluation to all ranks to standardize Marine Corps performance evaluations. Per the MMPR-30 Section Head, the Junior Enlisted Performance Evaluation System (JEPES) has been created, and

² Headquarters US Marine Corps, M&RA, *JEPES Policy and System Improvements Executive Summary* (MMPR-30, Quantico, VA, December 4, 2019), PowerPoint presentation.

³ Commandant of the Marine Corps, *Marine Corps Individual Records Training Manual (IRAM)*, MCO P1070.12K, July 14, 2000, 4-42, <https://www.marines.mil/News/Publications/MCPPEL/Electronic-Library-Display/Article/899281/mco-p107012k-wch-1/>.

the spirit and intent have been staffed and approved.⁴ However, like with most aspects of the military, this system will not be set in the policy becoming operational via software like the Automated Performance Evaluation System (A-PES) until it is appropriately funded. The funding for JEPES must become a priority if the Marine Corps is to develop its future senior enlisted advisors properly.

The development of a performance-based evaluation process like JEPES that encourages self-reflection in pursuit of self-improvement at a lower rank would not only standardize the system across the force but also optimize retention and promotion. Solidifying this beyond that of the IRAM and as part of the PES would get junior Marines thinking about how they are evaluated earlier in their career. This inclusion in the PES system would also build an understanding of an evaluation process before encountering it at the rank of Sergeant and prepare Marines to commence the fitness report process. The cumulative effect is future leadership that has a better understanding of the process for objective evaluation of performance and could assist in the further education of their future Second Lieutenants upon their arrival at their first command.

III. FITNESS REPORTS

The current model for performance evaluation within the Marine Corps began near the turn of the twenty-first century when General Charles C. Krulak, serving as the 31st Commandant of the Marine Corps, spearheaded the implementation of the current PES. The process was implemented “to address the previous system’s perceived

⁴ MMRP-30 Section Head, discussion with author, December 16, 2019.

shortcomings – chiefly mark inflation.”⁵ Numerous studies from both the Center for Naval Analyses (CNA) and Naval Postgraduate School have been conducted on the PES over the years since its inception and have determined that mark inflation is not an issue within the current PES. As recently as 2012, the CNA conducted a study for the Marine Corps and found that “overall... the FitRep system is working well, and there is no evidence of rampant inflation at an aggregate level.”⁶ The Manpower Management Records and Performance, Performance Evaluation Section (MMRP-30) Section Head confirmed, referencing the completed studies, that Manpower and Reserve Affairs (M&RA) does not intend to make drastic modifications to the PES but confirmed that some updates were necessary. Going on twenty-one years since it went into service, one could argue for keeping the same system in place but making changes that would unequivocally be considered drastic.

The predominant reason for necessary changes to the PES is that it is an overly complicated system that is often contradictory and creates confusion across the Marine Corps. As a survey, conducted by the author, for part of the research for this MMS, Sergeants and above were asked if they had ever heard of the Performance-Anchored Rating Scales (PARS) philosophy and seventy-seven percent questioned answered no. Even though every one of those Marines that answered the survey had numerous Fitness Reports written on them, with some having written many themselves, they have no

⁵ Adam Clemens, Gary Lee, Lauren Malone, and Shannon Phillips, *An Evaluation of the Fitness Report System for Marine Officers*, (Alexandria, Virginia: Center for Naval Analyses, July 2012),1, <https://www.hqmc.marines.mil/Portals/138/DRM-2012-U-001003-Final.pdf>.

⁶ Clemens, Lee, Malone, and Phillips, *An Evaluation*, 1.

conception of what a PAR is. Does part of this problem commence from the lack of training and education on the PES? Yes. On the other hand, the Marine Corps purposely made the PARS the central process of the PES, ensuring that Reporting Seniors (RSs) write to each individual and not a set of Marines. Then it added in a Fitness Report List containing Fitness Report averages for Reporting Officials within their Official Military Personnel File (OMPF) and a Relative Value (RV) of their reports listed on their Master Brief Sheet (MBS) and concurrently instructed Reporting Officials they are just tools and not to use them. Giving Reporting Officials these options would be the equivalent to putting a scope on the rifle of an infantry Marine while telling him not to use it.

Unlike the use of RV and lack of knowledge of the PARS system, the single biggest problem for the actual Fitness Reports is the leadership and officer corps in general within the Marine Corps. All too often, too many “experts” share their own biased opinion on how the PES works or should work. A case in point for this is when the author worked at Manpower Management Enlisted Assignments (MMEA) under M&RA, the Deputy Commandant for M&RA at the time Lieutenant General Mark A. Brilakis had a Professional Military Education (PME) event for all officers within M&RA. At this PME, General Brilakis told all officers in attendance that if an RS did not write to a profile, then he was wrong.⁷ Instances like this, when the direct leadership in charge of PES, are unaware of how the system works, whether intentional or not, will have negative impacts for years to come. Additionally, officers themselves create profile trackers, like the one offered to the author when at MMEA from an officer at Manpower

⁷ Mark A. Brilakis, “PME on Fitness Reports” (speech, M&RA, Quantico, VA, 2014 ~ 2015).

Management Officer Assignments. This tracker was so sophisticated that it ran on Microsoft OneNote had detailed drop-down menus, and its ultimate reason for existing is that it would provide the RS with the RV of what a report would be once an RS had rated each PAR. If actions like this continue, then the PES is destined to go the way of its predecessor.

IV. PERFORMANCE-ANCHORED RATING SCALES

The PARS is what makes up the “meat” of the Marine Corps’ Fitness Report. Within the Fitness Report sections, D through H consist of a total of fourteen attributes that each has a scale from “A” to “H.” “A” is adverse, “F” and “G,” being that they are rated the most outstanding, require written comments to justify such lofty marks, and “H” is considered “not observed”: only used on a Marine that is not observable in a specific category. Each of the letters is assigned a numerical value, “A” equals one, and “G” equals seven, “H” equals zero and is not factored into a calculated average. When all thirteen or fourteen of the attributes are added together, they form an average for the fitness report. When discussing marking procedures, the PES order states that “the purpose of sections D, E, F, G, and H is not to find fault, nor is it to exaggerate the competence of individuals, but rather to objectively evaluate Marines on their own merits. Attribute grades should be earned, not given; they should reflect the Marine Reported On (MRO) exhibited efforts and results; the marks should not be based on a preconceived or artificial fitness report average.”⁸ This quote was emphasized within the order as it was worded slightly differently from its previous use, where it was underlined.

⁸ CMC, *Performance Evaluation System*, 4-24.

It highlights the requirement for RS's to write to the individual Marine vice to a profile or an RV.

In an April 2017 Marine Corps Gazette article, LtCol Robert G. Antolino accurately identified an issue with the current PARS attribute markings noting that “the description of each attribute’s level of demonstrated performance clearly sets the competency standard as a “B” marking.”⁹ He continues with “the problem with that is RSs cannot realistically use “B” as the standard because it allows no room to mark a Marine as needing improvement without rendering the report adverse (“A marking).”¹⁰ This marking issue highlights problems with the PARS in that there is no marking between adverse “A” and within standards “B,” with only half of the six markings from “B” through “G” having associated descriptions. Since the PES order never actually states “B” is an average Marine, leadership attempts to understand a poorly defined system. If “B” does not identify the minimum to be within standards, the problem would then be that the PES never defines what an average Marine is.

What the PES does a good job of defining is the marking philosophy and its association with the PARS criteria. “The PARS descriptors provide the framework for RSs to develop their marking philosophy. A marking philosophy refers to the weight an RS assigns to the PAR for individual attributes. Once a RS has decided on a marking philosophy, they must maintain that same marking philosophy for all ranks and all MOSs for the entirety of their career. Unlike an RS’s marking philosophy, PAR criteria will not

⁹ Robert G. Antolino, "PES Shortfalls," *Marine Corps Gazette* 101, no. 4 (April 2017), 17, <https://search-proquest-com.lomc.idm.oclc.org/docview/1882459779?accountid=14746>.

¹⁰ Antolino, "PES Shortfalls," 17.

remain the same for all ranks, or all MOSs/billets. The RS's PAR criteria must be adapted for each rank and each MOS/billet.”¹¹ However, defining something and the intended audience being able to interpret or understand that definition is two separate and distinct acts.

The deeper one delves into trying to understand the PARS, the more problems it seems to create as one tries to navigate while at the same time making sense of the PES order. It says to have a marking philosophy, but it needs to be different for each MOS, even at the same grade, and make it different for each rank as well. Why would it need to be different for each MOS, particularly when officers are not promoted based on MOS? Then Marines have RV explained in detail on an MMRP-30 brief, with the information pulled directly from the PES order, and that RV will be used on every promotion board across the Marine Corps, but don't write to it, it's just a tool. “After the report is complete, the RS should go back through each attribute and compare the assigned attribute marks to the attributes marks assigned to the other fitness reports within the RS's profile. Attribute comparison is not a process to enable an RS to write to a profile.”

¹² Imagine one is a Second Lieutenant trying to survive in their new Platoon Commander or Staff position, trying not to be relieved of their position, not recalling what was even taught in the well overlooked two-hour course on the PES at TBS.

¹¹ CMC, *Performance Evaluation System*, 4-23.

¹² CMC, *Performance Evaluation System*, 8-4.

V. PROFILES AND RELATIVE VALUE

The PES still functions as intended, notably keeping inflated reports in check primarily because RS's can only use four of the total seven PAR that is available. As previously discussed, the first is adverse; the top two require written justification when used and therefore they are rarely utilized. The theme of confusion within the policy from the preceding sections continues. "It [the RS Profile] is a key tool for use in accomplishing the objectives of the PES."¹³ That statement alone is not confusing and is factually correct because "Reporting Officials report the credible and accurate recording of the history of an individual's performance to members of a promotion or special selection board,"¹⁴ via Fitness Reports and the associated RS Profile. Nevertheless, the PES contradicts itself again by stating that one "should avoid the temptation to intentionally mark attributes in a manner that ensures the report will be at the bottom of their profile, while simultaneously writing laudatory comments in section I to mislead the MRO into believing the overall report is laudatory."¹⁵ If an RS is not supposed to write to a profile why then would the policy give an example of ensuring a report is written in a manner that puts it at the bottom of their profile.

Just like the RS Profile, the RV is considered a tool. However, RV is specifically for board members. Per the New Reporting Officials brief pulled from the MMRP-30 webpage, "it [RV] is a time saving metric that prevents board members from having to pull the profile of every RS of every report for every Marine being considered by the

¹³ CMC, *Performance Evaluation System*, 8-3.

¹⁴ CMC, *Performance Evaluation System*, 1-1.

¹⁵ CMC, *Performance Evaluation System*, 4-42.

board.”¹⁶ The RV reflects how the Fitness Report average from single reports compare to both the average of all reports written on a specific grade and the highest report of a specific grade. An RV is the perfect example of how complicated it is to define an average Marine, as this is the sole purpose for RV, with every reporting official having a different average for each rank. The single most significant factor, outside of lack of education on the PARS philosophy, for RS’s use of the RV is that they all know that it is the one metric consistently used on promotion and selection boards, consequently keeping the cycle of bad habits churning.

VI. REPORTING OFFICIALS

The RS is the first commissioned or warrant officer in the MRO’s chain of command. The PES states that one of the responsibilities of the RS is to “accurately complete sections A through I with appropriate marks and justifications.”¹⁷ The problem is what exactly does right look like for evaluating an MRO for Section D through H? As mentioned previously, RSs employ numerous approaches to complete this process. The correct and less common approach is to understand the PARS word picture for each attribute while attempting to evaluate the MRO against it. Having discussed this approach with numerous RSs, the author rarely encountered an individual that has attempted it, even though it works well and requires no profile management on the part of the RS. Usually, the discussion invariably arrives at the “it is too late to fix it now” response or the “I will be impacting all of the previously written reports.” While for

¹⁶ Headquarters US Marine Corps, M&RA, *New Reporting Officials Brief* (MMPR-30, Quantico, VA, accessed December 20, 2019), PowerPoint presentation.

¹⁷ CMC, *Performance Evaluation System*, 2-2.

some, this might be true, most RSs could move to accurate reporting through an understanding of each PAR without much impact to prior reports. Additionally, the RO often does not have an adequate observation of the MRO and cannot expand on the specific marks assigned by the RS.

Section I and K restrictions, “velvet daggers” (definition is in the appendix), and Marines operating at the standard consistently present challenges for RSs and ROs alike. An RS is restricted from saying negative comments unless the report is adverse, the A-PES automatically identifies negative words, and a RO must identify the potential of the MRO where none may exist. For Marines with many “B” and “C” marks, it is virtually impossible to make a promotion recommendation that is not construed to be a “velvet dagger” because the Marine is probably not ready for promotion or would be nobody’s preferred last choice for promotion. Some Marines genuinely are developing and have the potential to be solid performers at the next rank but saying that becomes a “velvet dagger.” Nor can one select “no” under “recommended for promotion” without rendering the report adverse. A compiled debrief of the Fiscal Year (FY) 2013 Sergeant Major through Master Sergeant promotion boards from the Manpower Management Records and Performance, Officer and Enlisted Career Counseling Section (MMRP-50) stated that “Overall the response to the value of section I and K comments are mixed. The relative values carried more weight, however; break out comments that matched the relative values helped solidify performance. Board members did not want to see “fluff” and

would rather see quantifiable information about the Marine's promotion potential.”¹⁸

Reporting Officials are not attempting not to provide comments, but no “good” guidance has been provided to them on how to address this problem.

High performing Marines are easy to evaluate, as are adverse Marines because the RS and RO can write to the reality of the situation. Standard and approaching below standard Marines require significant “wordsmithing” to keep the report from turning into a counseling tool. The RS can understate the performance of the Marine and speak to the Marine's strengths in completing basic tasks; ultimately, unless a board member can read between the lines, an average report is going to be non-descript. To add injury to insult, this “middle third” or “average” Marine is where promotion and selection boards spend the most time working and analyzing and ultimately have a hard time breaking Marines out when the Reporting Officials job is hamstrung by policy.

Some of the areas where RSs and ROs are the ones directly causing problems to the PES are comments, timeliness, purposefully attempting to work the system and counseling. Comments affect the system in many forms, from the comments in Section I not matching the markings, recommended comments from the RS cut and paste onto the report by the RO, and not writing their comments to the intended audience, the board. Per Marine Administrative Message (MARADMIN) 234/18, half of the reports submitted over twelve months from 2017 to 2018 were late, which significantly impacts Marines

¹⁸ United States Marine Corps, “FY 2013 SgtMaj through MSgt selection board compiled debrief,” accessed January 20, 2020, <https://www.cherrypoint.marines.mil/News/Article/525546/fy-2013-sgtmaj-through-msgt-selection-board-compiled-debrief/>.

who are being screened for promotion, special assignments, PME, etcetera.¹⁹ Both Reporting Officials are guilty of trying to “game the game,” RS’s, for example, has ten reports all as the RS high, so each Marine then has a 100 percent showing for the RV on their MBS, and RO’s by lumping groups of Marines on the “Christmas tree” populated on the fitness report. Regarding counseling, RS’s are neglectful in both not conducting an initial counseling’s or by using the Fitness Report as a counseling tool and, as a result creating a significant increase in Performance Evaluation Review Board request. This paragraph highlights that plenty of the problems with the PES lie directly in the hands of Reviewing Officials because of their intentional actions.

VII. AUTOMATED PERFORMANCE EVALUATION SYSTEM

In addition to all the policy and future educational problems, there are many design and physical issues with the actual Fitness Report itself as well as within A-PES. One easily identifiable area is the removal of duty station preferences. These served a purpose before the technological advances of the past twenty to thirty years, but today, duty station preferences as part of the A-PES process are not necessary. This example is to illustrate one part of the problem. Fundamentally, the most significant problem with the Fitness Report and A-PES, more specifically, is our lack of vision. We aren’t tied to the form design developed decades ago, and none of our selection boards need to view a portable document format (PDF) document. What the system displays or what is recorded as part of the process isn’t tied to the Fitness Report that is printed. A-PES, as an online

¹⁹ Commandant of the Marine Corps, *Reinforcing Guidance with Regard to Timely Fitness Report Submissions*, MARADMIN 234/18, April 24, 2018, <https://www.marines.mil/News/Messages/Messages-Display/Article/1502026/reinforcing-guidance-with-regard-to-timely-fitness-report-submissions/>.

system tied to the data, can be made to do anything we need it to do. The Marine Corps must invest in the modernization and automation of all manpower systems, and specifically A-PES.

Further issues with the actual Fitness Report are that over forty scenarios require directed comments on a fitness report as identified in the PES. Many of these stated requirements read like recommended topics for the word picture; instead, they are directed comments. This entire list needs re-assessment for applicability to the entire Marine Corps. As an example, one directed comment that is required is to “Summarize extent of efforts and accomplishments pertaining to joint matters, training planned and executed, and exercise participation.”²⁰ Some requirements are dictated by higher instruction, but if every requirement were placed in Section I, it would quickly grow to a page by itself.

A large amount of directed comments highlights another issue, as though forty scenarios were not enough, other MCOs place additional requirements on the RS for directed comments; not all of them identified in the PES. MCO 6100.13, for example, requires that a directed comment be placed in the report for all Marines that achieve a Physical Fitness Test or Combat Fitness Test score of 285 and above. Keeping in mind that the report is designed for a boardroom that has access to the OMPF, which displays this information, as well as the actual fitness reports, what possible reason would require this information to be added to the Section I? If truly necessary, why is it not a stated requirement in the PES? Sometimes directed comments fill most of Section I, and RS’s

²⁰ CMC, *Performance Evaluation System*, 4-43.

will not create an addendum page to accurately capture the Marines performance. Taking up valuable space in Section I is not necessary and places an overemphasis on physical performance during a time when overall performance is more relevant.

While these were some of the more important topics, there are still several process changes in the PES that should be refined. Usage of thirty, sixty, and eighty-nine-day windows all need adjustment to provide the best opportunity for quality observation and a useful report that aids a selection board. If an MRO had a report eighty-nine-days before the annual, omit the annual entirely (currently sixty days). If another occasion is known to be taking place within eighty-nine days, omit the annual (currently thirty days), this should apply for Second and First Lieutenants also. While there is an observation requirement for these ranks, eighty-nine-day reports do not provide an accurate assessment of continued potential in the Marine Corps. An RS should be given some latitude to adjust the reporting window for Lieutenants to ensure proper observation, and an accurate assessment is possible rather than forcing a forty-day report with minimal observation potential.

VIII. EDUCATION AND TRAINING

One of the most significant problems with the current PES is the lack of substantial formal education and training of the PES order and the overall process for performance evaluations. The first paragraph of the first chapter of the PES order states that “achieving these concepts (accuracy, accountability, simplicity, and consistency of policy and evaluation methods) requires a standardization of the evaluation chain,

supervision throughout the system, and the education of all participants in the system.”²¹ Unfortunately, in the opinion of the author and other officers, the education referenced in the order is not occurring, and if it is, many inconsistencies exist across the Marine Corps. This is not to say that Marines do not understand the importance of education; the proof is in the expansion and full development of the Marine Corps’ PME program over the last several decades. However, most Marines turn a blind eye to the fact that there is a significant gap in education when it comes to the PES. This gap critically impacts the entire career of every rank Sergeant and above and, therefore, the Marine Corps as an institution. The careers of our junior Marines, Corporals and below, are also impacted by the PES not currently being standardized across the force. This was discussed in detail in section II of this MMS. The focus for this section will remain on the education of the rank of Sergeant and above.

The problem with education of our enlisted Marines, specifically our Sergeants, when it comes to the PES, is that waiting until they become Sergeants to implement that education means it is already too late. Imagine a senior graduating from high school, showing up to college where the grading system is entirely different from what they knew for their entire academic life up to that point, receiving zero formal training on the new system and then being graded on the new system within weeks of showing up to campus. This previous example is precisely what happens with the performance evaluation of Marines when they are promoted to Sergeant. They will not officially learn about the

²¹ Commandant of the Marine Corps, *Performance Evaluation System (PES)*, MCO 1610.7A, May 1, 2018, 1-1, <https://www.marines.mil/News/Publications/MCPEL/Electronic-Library-Display/Article/1513503/mco-16107a-cancels-mco-16107/>.

PES until they attend Sergeants Course, which may occur up to four years after their promotion. The education process should begin well before they are promoted to Sergeant, either within the Lance Corporal seminar or Corporals course, as that is when they begin to have their performance evaluated. Expecting them to be promoted and instantly understand the evaluation process and how it will affect the remainder of their career without any prior education is an unacceptable stance. There is no expectation that a Sergeant should, or would, have a complete grasp of the entire PES, but they do need to have a basic understanding of how the process works before they are counseled for their first fitness report.

Conversely, a Second Lieutenant is expected to show up to his first command, know the entirety of the PES, and begin writing fitness reports from day one. If we think we are setting our Sergeants up for failure by not educating them, envision how the lack of appropriate education on the PES for our young officers impacts the Marine Corps' entire manpower spectrum. Those Sergeants are only initially responsible for ensuring that they have enough of an understating of the PES to ensure that their Reporting Senior (RS) is not inadvertently impacting their career. Lieutenants, on the other hand, are responsible for the careers of numerous Marines, as they are writing on Marines of all enlisted ranks, and if they get it wrong from the beginning, it will likely never be corrected.

The onus is on the Marine Corps to ensure that the education of Lieutenants is enough, so they get it right and minimize the impacts on other manpower processes. "The Marine Corps thought it best, though, to teach it over a few hours of lecture to a group of

tired, hungry, and disgruntled lieutenants at The Basic School (TBS) in between field exercises and 10-mile walks through the woods conducting land navigation.”²² In an email message to the author on December 23, 2019, the Marine Air-Ground Task Force Section Head at TBS provided information regarding the PES and how it is instructed. He stated that “we’ve been blending classroom instruction with moodle-based practical applications to reinforce learning.”²³ This is a step in the right direction, but not the complete answer as a majority of the instruction is happening in the heart of training, which is Phase III.

It is understood that PES must be taught to Lieutenants at TBS, however the process of how, for how long, the emphasis on the importance of it, complete and proper explanation of the PARS, and when it is taught needs significant review and revision from Training and Education Command with direct input from Manpower Management section of M&RA. A part of the review process should cover why the Lieutenants are responsible for conducting peer evaluations and why they are not tied directly to the PES in which they will work for the remainder of their careers. “TBS students should write training FITREPS on each other to intimately learn the Marine Corps PES, master brief sheet, and promotion process.”²⁴ Until The Basic School corrects its PES educational shortcomings, it will continue to negatively impact the Marine Corps as well as fail to live up to its mission statement of educating newly commissioned officers.

²² Barrett P. Dupuy, "Performance Evaluation System," *Marine Corps Gazette* 98, no. 3 (March 2014), 75, <https://search-proquest-com.lomc.idm.oclc.org/docview/1506927912?accountid=14746>.

²³ MAGTF Section Head, email message to author, December 23, 2019.

²⁴ David R. Dixon and Matt Ford, "The PES," *Marine Corps Gazette* 101, no. 4 (April 2017), 21, <https://search-proquest-com.lomc.idm.oclc.org/docview/1882459888?accountid=14746>.

As the saying goes, education is continuous, and this is especially true regarding the PES with the requirement to continue to build on the foundation of knowledge created at the Marine Corps' entry-level and professional military education schoolhouses once Marines are in the operating forces. Per the PES order, "commanders must ensure reporting officials uphold PES policy... and a strong PES education program best ensures the integrity and credibility of the system."²⁵ The quote from the PES order on education programs is accurate, and the order additionally directs Manpower Management Records and Performance, Policy and Compliance Section (MMRP-31) to "supervise the PES education program for the Marine Corps."²⁶ However, there is no implemented or standardized education program for the Marine Corps. Most commands do not adhere to the order by conducting PES training at their level, and unit commanders are not held accountable to this requirement because the Inspector General of the Marine Corps' (IGMC) functional area checklist for the PES does not require it. The functional area checklist for the PES only questions, "Does a review of training documentation (e.g., training rosters, training material) support the conduct of annual master brief sheet training?"²⁷ If they do conduct the training, the lack of standardization means that commanders across the Marine Corps are likely teaching completely different or incorrect information, which only further compounds the problem of the lack of proper education on the PES.

²⁵ CMC, *Performance Evaluation System*, 1-5.

²⁶ CMC, *Performance Evaluation System*, 8-1.

²⁷ United States Marine Corps, "Inspector General of the Marine Corps," accessed January 12, 2020, <https://www.hqmc.marines.mil/igmc/Units/Inspections-Division/Functional-Area-Checklists-FACs/>.

IX. CONCLUSION

The lack of education and contradicting aspect of the PES order creates ripple effects that originate from the writing of the Fitness Report and culminate when Marines are screened for selection to Brigadier General, for those talented enough to make it that far. “The fitness report provides the primary means for evaluating a Marine’s performance to support the Commandant’s efforts to select the best-qualified personnel for promotion, career designation, retention, resident schooling, command, and duty assignments.”²⁸ The problem here is that if the PES is not being implemented correctly or adequately adhered to, then all of those critical Manpower processes just listed in the PES order are negatively impacted down the line. Boards are affected by the lumping done by ROs, to the writing to a profile by RSs that creates a muddled middle third. If Reporting Officials were doing their job correctly and writing under the spirit and intent of the PES, then the ability for boards of all types to screen and select the “best and most fully qualified” from the middle third Marines would be vastly improved and elevate the retained talent and improve the efficiency of the force.

Like the previous paragraph, this MMS attempted to highlight some of the more significant issues that continue to persist in the performance evaluation process. The Marine Corps is known for its skill of adaptation, as in the many times in the past that we have done so, the Corps must adapt again. This time with our Performance Evaluation System. The PES is a great system; however, it is twenty years old and even the best system can still require improvements, which is the current situation we find

²⁸ CMC, *Performance Evaluation System*, 2.

ourselves. The PES will never be successful and implemented as intended if we do not properly educate the force, expand performance evaluation to encompass our junior enlisted Marines, and modernize our manpower systems and associated databases. All of this must be done if the Marine Corps wants to compete with the civilian sector while retaining the best and brightest individuals.

APPENDIX A: ACRONYMS AND ABBREVIATIONS

| | |
|---------------|--|
| A-PES: | Automated Performance Evaluation System |
| BCNR: | Board for Correction of Naval Records |
| CFT: | Combat Fitness Test |
| CNA: | Center for Naval Analysis |
| CNATT: | Center for Naval Aviation Technical Training |
| CO: | Commanding Officer |
| CPG: | Commandant's Planning Guidance |
| DAU: | Defense Acquisition University |
| FitRep: | Fitness Report |
| Ghostwriting: | When an RS provides recommended comments and comparative assessment for an RO that has no/limited observation of the MRO and is unable to provide objective comments and marking without the provided input. Frequently, ghostwritten comments are copied and pasted and receive minimal adjustment. |
| GS: | General Scale |
| GySgt: | Gunnery sergeant |
| HQMC: | Headquarters Marine Corps |
| IMM: | Instructor Mastery Model |
| IRAM: | Individual Records Administration Manual |
| JEPES: | Junior Enlisted Performance Evaluation System |
| KPA: | Key Performance Areas |
| M&RA: | Manpower and Reserve Affairs |
| MARADMIN: | Marine Administrative Message |
| MGySgt: | Master Gunnery Sergeant |
| MBS: | Master Brief Sheet |

| | |
|----------|--|
| MCO: | Marine Corps Order |
| MCTIMS: | Marine Corps Training Information System |
| MIF: | Manpower Information Field Operations Branch |
| MMEA: | Manpower Management Enlisted Assignments |
| MMRP-30: | Manpower Management Records and Performance, Performance Evaluation Section |
| MMRP-31: | Manpower Management Records and Performance, Policy and Compliance Section |
| MMS: | Master of Military Studies |
| MOS: | Military Occupational Specialty |
| MRO: | Marine Reported On |
| MROW: | Marine Reported On Worksheet |
| NROTC: | Naval Reserve Officers Training Corps |
| OIC: | Officer in Charge |
| OMPF: | Official Military Personnel File |
| PAR: | Performance Anchored Rating |
| PARS: | Performance Anchored Rating Scale |
| PDF: | Portable Document Format |
| PERB: | Performance Evaluation Review Board |
| PES: | Performance Evaluation System, which is shorthand for Marine Corps Order 1610.7. |
| PFT: | Physical Fitness Test |
| PME: | Professional Military Education |
| PRO/CON: | Proficiency and Conduct Marks |
| QA: | Quality Assurance |

| | |
|----------------|--|
| RO: | Reviewing Officer |
| RS: | Reporting Senior |
| RV: | Relative Value |
| SgtMaj: | Sergeant Major |
| SMR: | Senior Marine Representative |
| SNCO: | Staff Noncommissioned Officer |
| TAD: | Temporary Additional Duty |
| TD: | To Temporary Duty |
| TBS: | The Basic School |
| TIG: | Time-in-Grade |
| TIS: | Time-in-Service |
| Velvet Dagger: | A written remark that is interpreted as a positive comment but is interpreted by selection boards as negative in nature. |
| XO: | Executive Officer |
| USMC: | United States Marine Corps |

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