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14. ABSTRACT
Changes in several areas will result in a better understood process that supports the Marine Corps' objectives of selecting, promoting, and retaining the highest caliber personnel. 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. Finally, bringing the Automated Performance Evaluation System 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.

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MASTER OF MILITARY STUDIES

TITLE:

Solutions to the Problems in the Marine Corps Performance Evaluation System

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

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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 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.

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: Several areas of the Marine Corps performance evaluation system could benefit from adjustments that would improve the ability of selection boards to identify the Service's highest-caliber personnel. Within the 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 innovative 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.

EXECUTIVE SUMMARY (PROBLEMS)

Title: Problems with the Marine Corps Performance Evaluation System

Author: Eugene R. 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 affects 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 Streaan 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.

DISCLAIMER

THE OPINIONS AND CONCLUSIONS EXPRESSED HEREIN ARE THOSE OF THE INDIVIDUAL STUDENT AUTHOR AND DO NOT NECESSARILY REPRESENT THE VIEWS OF EITHER THE MARINE CORPS COMMAND AND STAFF COLLEGE OR ANY OTHER GOVERNMENTAL AGENCY. REFERENCES TO THIS STUDY SHOULD INCLUDE THE FOREGOING STATEMENT.

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List of Illustrations

Figure 1: PARS for Professional Military Education (PME)	18
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TABLE OF CONTENTS

JOINT EXECUTIVE SUMMARY	I
EXECUTIVE SUMMARY (SOLUTIONS)	III
EXECUTIVE SUMMARY (PROBLEMS)	V
DISCLAIMER.....	VII
TABLE OF CONTENTS	XI
PREFACE.....	XIV
I. INTRODUCTION.....	1
II. EXPANDING PERFORMANCE EVALUATION TO ALL RANKS.....	3
III. FITNESS REPORTS	6
IV. PERFORMANCE-ANCHORED RATING SCALE.....	16
V. PROFILES AND RELATIVE VALUE	21
VI. REPORTING OFFICIALS.....	24
VII. AUTOMATED PERFORMANCE EVALUATION SYSTEM	34
VIII. EDUCATION TRAINING.....	41
IX. CONCLUSION	44
APPENDIX A: ACRONYMS AND ABBREVIATIONS.....	47
APPENDIX B: PME PARS EXAMPLE ASSESSMENT FOR MRO	51
APPENDIX C: REVISED FITNESS REPORT (NAVMC 10835)	55
APPENDIX D: SINGLE PAGE FITNESS REPORT (NAVMC 10835)	58
APPENDIX E: ACADEMIC FITNESS REPORT (NAVMC 10835).....	60
APPENDIX F: MODIFIED A-PES INTERFACE.....	64
APPENDIX G: RO WORKSHEET EXAMPLE 1	66
APPENDIX H: RO WORKSHEET EXAMPLE 2	68
APPENDIX I: MARKING PHILOSOPHY EXAMPLE.....	71
BIBLIOGRAPHY	77

PREFACE

As a Marine with over two decades of performance evaluation experience in the Marine Corps, the process of evaluating performance is a topic that has always been a primary focus in my career. Throughout my career, I have observed several problems in the performance evaluation process, providing me the opportunity to identify areas for improvement. While I have had some success with correcting issues at various levels of the command, enduring change is only achievable when implemented at the Service level. The implementation of changes, in alignment with our values, will allow the Marine Corps to both improve the identification, promotion, and retention of the best and brightest leaders, and give Marines confidence that their evaluation is an accurate representation of their performance. It will also ensure evaluated Marines remain competitive based on their actual performance over their career.

I want to thank my mentors during the development of this paper, Dr. Richard DiNardo and Lieutenant Colonel Sally Falco, for their excellent guidance and proposed edits through this process. Your suggestions have greatly assisted me in providing a clear and concise product to those with the authority to implement change. I would also like to thank Lieutenant Colonel Garrett Randel and Captain (retired) Andy Lear for the numerous discussions over the years that pushed me to cross-examine the process of performance evaluation in the Marine Corps. Those discussions assisted me to develop the framework for this paper.

Finally, I must give special thanks to my wife Suneeya, who has faithfully supported me over the past year that we were separated so I could focus my attention on

completing this program. You were quick to point out that I have spent the past seven years of our marriage behind a computer screen as I completed various degree programs with one of those years as a geo-bachelor. I promise to take a few months off before beginning the next educational objective and spend time ignoring the computer for a change.

I. INTRODUCTION

This paper is written in conjunction with Major Eugene R. Cazedessus IV as students of Command and Staff College. Major Cazedessus identified several problems in the Performance Evaluation System (PES) as part of his thesis, and it is strongly recommended that before reading this paper that his paper is reviewed in its entirety. Problems in accurately evaluating performance can have several unintended consequences affecting the identification, promotion, and retention of the highest-caliber Marines. The Marine Corps strives to identify the best and brightest Marines for selection to attend resident Professional Military Education (PME), fellowships, higher-level degree programs, promotion, competitive assignments, and continued retention in the organization. Any issues that inhibit the ability to achieve those goals results in a lessening of the quality of personnel within the Service. The problems identified by Major Cazedessus IV are solvable, and through the implementation of aggressive solutions, the Marine Corps 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 fixing the process and system that our Marines operate within for performance evaluation, sets Marines on a path to be successful. Including counseling and self-assessment into the process while also including an opportunity for the Marine Reported On (MRO) to discuss the assessment with the Reporting Senior (RS) before submission, creates an occasion for improved communication and more accurate evaluations. In situations of disagreement, the Reviewing Officer (RO) retains the role of adjudicating circumstances to ensure an

accurate report is submitted.

The evaluation of Marines assigned to academic environments has not been an area captured by current processes. While the PES allows for the use of the fitness report for these environments, most schoolhouses have not utilized it. Developing an academic fitness report, tailored for capturing attributes specific to these environments, provides a focused tool that talent management professionals can review as part of selection boards.

Performance anchored rating scales (PARS) are poorly understood, and this lack of comprehension results in significant issues that influence report averages and the calculation of relative values that are critical to the current selection process. By clarifying the use of PARS, MROs will be accurately evaluated, and selection boards will be more likely to select the highest caliber Marines. With an understanding of PARS, the ability of the RS to write an accurate assessment of the MRO, regardless of whether it is a less than flattering description, will assist selection boards with identifying the most qualified candidates within the middle-third grouping.

With the Marine Corps actively pursuing expanding the evaluation system to include junior enlisted Marines, the system needs to include enlisted personnel in the role of RS. In a related aspect of this expansion, leader-to-led ratios and limited observation frequently result in the RO completing their assessment solely from information provided by the RS.

Many of the identified adjustments require significant changes to the digital system used for performance evaluation, along with improved training. More than two decades after the last overhaul of the way Marines conduct performance evaluation,

multiple issues still exist related to a deficiency in training. Incorporating the changes within this paper, provides an excellent opportunity to develop improved training through videos, web-based information, and alternate approaches.

Once we have the right people operating within the evaluation framework using a process that is easily understood with clear performance metrics to achieve, we will have established a system that will identify the highest caliber Marines. Further developing our interpretation of what military ranks can function as reporting officials and under what roles, will ensure that Marines are properly observed and have the ability to fight for an accurate assessment through integration of aspects of a 360-degree process. 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. The first step in improving performance evaluation is to expand its application to all Marines.

II. EXPANDING PERFORMANCE EVALUATION TO ALL RANKS

The current evaluation process for Marines between the rank of Private through Corporal consists of assigning proficiency and conduct marks on a semi-annual basis or when specific occasions (transfer, discharge, promotion, reduction, annual, etcetera) require the assignment of marks.¹ Incorporating junior Marines into a performance evaluation process, beyond that of the proficiency and conduct marking framework, results in junior Marines comparing their performance to objective evaluation criteria earlier in their career. The expected result of this change is that Marines have a developed understanding of how their performance translates into a PARS architecture.

While an understanding of how performance aligns with the appraisal process does not drive initiative to improve individual performance, having an understanding is an essential requirement for individuals that desire to excel.² Following the incorporation of junior Marines into the PES, report averages could also replace proficiency and conduct markings, but how this conversion is accomplished is not a focal point of this paper.³

Performance counseling requirements exist for all ranks in the Marine Corps, but it is not strictly enforced and does not require physical counseling record creation.⁴ Recommended changes in the appraisal process will capture this issue more extensively (explained in greater detail later in this paper), but incorporating Marines in the rank of Private to Corporal produces more frequent counseling and mentoring between Marines at all ranks through the introduction of a requirement to document performance appraisal. Discussion of performance, positive or negative, is essential to building high performing leaders.⁵

The current PARS descriptors used for enlisted ranks of sergeant and above and officers up to the rank of colonel require only minor adjustment for application to assessment of performance for junior Marines. The PARS for the attribute of evaluations is the only area that would not be possible for junior Marines as this area is only applicable to Marines that are fulfilling reporting official tasks within the evaluation system.⁶ In the case of junior Marines, “H” would be the appropriate marking in this category, indicating a not observable attribute. Alternatively, modifying the descriptors for evaluations to include evaluations of all types would result in all Marines that

supervise personnel available to be assessed. Similarly, performance evaluation is an administrative skill, and generalizing this attribute to administrative activities broadens the applicability and areas for assessment.

During an interview with Major Cazedessus and the Officer in Charge (OIC) of Manpower Management Records and Performance, Performance Evaluation Section (MMRP-30) identified the creation of the Junior Enlisted Performance Evaluation System (JEPES). The purpose of JEPES is to digitally complete a performance evaluation of junior Marines below the rank of sergeant.⁷ Very little information exists about the design of this system and what policies would govern its usage. Efforts should focus on developing systems and processes that mirror each other for standardization and to facilitate an easier transition between systems at the rank of sergeant.

As with all systems, funding is a critical aspect, as is a thorough review of the business processes that will be supported by the system. Creating an entirely new system could be expected to be a less cost-effective approach than making changes to the current system, especially if changes are already necessary (discussed later in this paper). Alternatively, modifying the current system can be expected to have a higher up-front cost depending on the requirements of the current contract, but over time might be more cost-effective in comparison to maintaining two separate systems for the life of the acquisition. At a minimum, a cost-benefit analysis as part of a business case analysis should be completed to validate that a single system is not the better course of action.

The cumulative effect of these changes is that Marines have a better understanding of the process for objective evaluation of performance and how

performance aligns with the appraisal process. Additionally, having a single system that relies on the same processes and PARS standardizes performance evaluation in the Marine Corps and creates less friction when transitioning between systems. These Marines would also be better prepared to assist new reporting officials as they learn how to evaluate performance and give Marines experience doing objective performance reviews at an earlier point in their career.

III. FITNESS REPORTS

While most of the first sections covered the essential aspects of the stakeholders involved in the process, the actual FitRep and process require considerable modification to reduce complexity, confusion, and streamline understanding. The first change necessary to improve the process is a central aspect of the 2019 Commandant's Planning Guidance (CPG). The Commandant accurately identified that the current process does not allow the MRO to complete a formal self-assessment at the onset.⁸ When an occasion for a FitRep begins, the first step, the way the process is currently structured is for the MRO to complete the MRO Worksheet (MROW) in A-PES.⁹

An alternate approach is to complete the MROW within 30 days of establishing the MRO/RS relationship, as required by the PES.¹⁰ Using A-PES to document the initial counseling session with included functionality to identify RSs within the command that are delinquent, ensures completion of this critical step in the process.¹¹ The MRO should complete the steps necessary to initiate a MROW and complete the administrative aspects of the system. A-PES should identify that the counseling process was completed and provide reporting officials, and necessary command leadership, with reports that indicate

completion. This creates management mechanisms to ensure these critical aspects of leadership are executed. Once completed, the MRO and RS should meet to discuss and finalize the billet description and to complete a thorough discussion of the evaluation cycle to ensure that both parties understand the requirements of the PES and expectations of the RS.¹²

While no requirement currently exists, it is critical that the RS discusses performance in relation to PAR attributes, especially for junior Marines.¹³ This discussion creates a link between expected performance and how the FitRep will be completed.¹⁴ Additionally, understanding the goals of the MRO provides a better understanding for the RS to guide the formal counseling during the period toward successful achievement of the stated goals. This changes the focus (beyond providing an accurate picture of the Marines capability for selection processes) of the performance evaluation process from a transactional to a transformational leadership approach placing the emphasis on developing the MRO.¹⁵

Once the MROW and discussion are complete, the MRO should provide periodic updates to the billet accomplishments. The system could be expanded to allow the MROW to add accomplishments directly under specific attributes, clarifying the Marine's performance in relation to the PARS architecture during self-assessment. For example, adding PME completion or graduating as a distinguished graduate, books read, and additional steps taken in the context of the PME attribute ensures accuracy at the end of the reporting period while also putting performance in perspective of the overall attribute.

Additional counseling sessions could also be included in A-PES as notes if the functionality of these aspects of the system included the option. The documentation of positive and negative performance during the reporting period results in more accurate FitReps submitted at the end of a year-long cycle.¹⁶ With one-quarter of the Marines interviewed by one professional journal author reporting that they received no more than sporadic counseling, the current process has proven to be ineffective.¹⁷ This approach centralizes the information in the system used to complete the FitRep, and because execution is in a digital system, it is easier to assess the overall process.

The finalization of the MROW in preparation to create a FitRep presents an opportunity for the MRO to complete a formal self-assessment that could also serve to drive discussion during the RS's FitRep conversation with the Marine. Completing an honest self-assessment based on an understanding of the PARS for each attribute would decrease friction during the brief while also preparing the RS to discuss areas of PAR divergence between the MRO and RS. While the recommended option is through a change to the system, RSs requiring that the MRO arrive at the FitRep in-brief with a completed self-assessment would achieve many of the desired outcomes. However, accomplishing this step through a digital process ensures completion while also providing the RS with time to prepare discussion points for any differences between the self-assessment and the RS's observations. Once a Marine submits the MROW to the RS, the drafting of the evaluation becomes the primary function of the RS until completion.¹⁸

The next change toward improving the process is that once the RS has completed the report, A-PES should route the report to the MRO for review. This entire process

should mimic the required procedure for adverse reports moving the report between the MRO, RS, and RO.¹⁹ By automating the routing process in this way, it allows the MRO to review the report in a low-stress environment to consider any questions about the markings or comments resulting in a more productive in-brief.

As part of this process, the RS should discuss the report markings and comments with the MRO, to avoid any surprises and attempt to resolve concerns before routing the FitRep to the RO.²⁰ The PES does not currently require this step as a responsibility of the RS and should be updated to reflect this action as a requirement.²¹ Following the discussion of the report, A-PES should require the MRO to “Concur” or “Not Concur” (checkbox and routing procedure) and an option to provide comments following the selection of “Not Concur.” The RO process should focus on the RS and arbitrating MRO non-concurrence with the content of the report (both adverse and not adverse) and whether the RS accurately completed the report per MCO 1610.7A.

In cases where the MRO and RS do not reach an understanding, A-PES will require the RO to select “Concur” or “Do Not Concur” with the RS and elaborate on the selection through comments. Reaching this conclusion will require discussion with the MRO and RS to understand the source of the contention. Clarifying misunderstandings is the primary purpose of RO comments in this revised process.²² As a potential comment, the RO also has the imperative to identify failures by the RS that could have resulted in the contention and provide those clarifying comments for the members of selection processes to consider.

While not an actual 360-degree evaluation, an RS that makes procedural errors that result in inaccurate evaluations of their Marines needs that information and the RO, as the RS for that individual, has a clear obligation to provide additional training and identify deficiencies as part of the individual's FitRep when necessary.²³ This process forces the RS to build an understanding of the entire PARS and ensures an attempt to assign PAR markings based on that understanding or be heavily scrutinized for a lack of proper execution.

When the MRO selects "Concur" with the RS, the RO has no specific MRO assessment requirements as part of the process. The only exception will be for RSs and ROs of the same grade requiring a mandatory comment (triggered by A-PES and not related to assessment of the MRO) to remain compliant with the requirements of the PES.²⁴ The comparative assessment portion of the process no longer serves a purpose under these new procedures.

In all cases, the RO is required to review the report for administrative accuracy and to ensure that the RS has a valid marking philosophy that meets the intent of the PES.²⁵ The RO does this by asking questions about the considerations used for determining the marks. Tendencies towards confirmation bias indicates that an RO will not be able to rely on agreeing with specific marks; marking philosophy alignment is not an accurate indicator of proper PAR assignment.²⁶ A-PES will require the RO to annotate review techniques used to review the marking philosophy. These annotations will not be viewable to members of selection processes or any other people outside of MMRP-30.

An example of such an annotation might be, “Discussed individual markings with the RS. As an example of the marking philosophy, the MRO was marked “A” for PME because the MRO failed to meet the minimum requirement set by the Commandant. Although the Marine is PME complete and had previously completed a bachelor’s degree in a prior reporting occasion, the MRO has not met the minimum standards required or attempted to meet them. The RS advised the MRO that failure to complete the required five books of reading would result in an adverse report during the initial counseling.²⁷ I am satisfied with the explanation and marking philosophy used for all report markings.” An engaged RO can accurately assess the RS’s marking philosophy and ensure compliance with regulations. MMRP-30 will have the visibility necessary to ensure that the process is being completed through a review of RO comments and ensuring that they are not the result of copy and paste. The author's suggested method for executing this task is for the RO to review the report in its entirety, noting any glaring administrative errors. Across all MROs, the RO must ensure that each mark is discussed at least one time to understand the RS’s marking philosophy for all the attributes.

Beyond the already stated improvements that implementing this process would have, it would also eliminate the use of RO Worksheets. Appendices F and G contain example RO Worksheets to illustrate the nature of the issue. “Ghostwriting RO remarks distorts the RO’s role,” which should focus on accurate completion of the process.²⁸ Eliminating ghostwriting (definition is in Appendix A) of FitRep comments also reduces extra work by the RS, and should also focus members of selection processes on review of RS comments instead of RO comments that were probably drafted by the RS.

Because the MRO has an opportunity to disagree with PAR marks and comments, an anticipated result is that there is a decrease in the necessity for Marines to request corrections through the Performance Evaluation Review Board (PERB) and Board for Correction of Naval Records (BCNR).²⁹ This results from two factors. First, a discussion of PAR marks and RS comments with the MRO provides more clarity resulting from the discussion itself with valid considerations that might have been missed by the RS now being included in the assessment. Second, the ROs involvement and documentation of the disagreement provides increased clarity of the disagreement at the time of the dispute. If the MRO still desires to submit for a correction, the documentation of the disagreement will significantly improve the understanding of the situation at the time when the report is completed.

In the 2019 CPG, General David Berger identified that non-observed FitReps for Marines completing academic instruction does a disservice to the institution by failing to identify the potential of these personnel in follow-on assignments. The Commandant suggests using observed academic reports for identifying the individual's "future potential in the next rank/grade or as an instructor."³⁰ With the current design of the FitRep intended to evaluate performance while in a traditional military working environment, it is not capable of addressing this shortfall. The Commandant's guidance creates two focus areas for consideration based on the lack of a current product to assess the results of an academic environment. First, should an academic FitRep be created that fills this gap to assist in identifying the future potential for promotion? Second, should

the new academic FitRep be more narrowly focussed on determining suitability for specific assignments, i.e., instructor?

With academic success as an indicator of work performance, there is strong support for using academic results during the assessment of capability for competitive assignments and promotion.³¹ For Marine Corps officers as a sub-group of the academic environment, attendance of resident PME is accomplished through selection by a board resulting in a competitive selection process.³² Stratifying the top 20% of the Marine Corps officer selectees for resident PME does not translate to results that aid the selection process. Because of the competitive nature of this process, attempting to stratify this group of personnel could result in remarkable Marines negatively impacted by a process designed to recognize the exceptional nature of the higher-performing students.

Enlisted Marines, in comparison, are not selected competitively for assignment to resident PME. Attendance of resident PME for enlisted Marines is mostly a factor of location, working situation, and the individual unit's perspective regarding resident PME. While competition is not a factor for enlisted PME assignment, the Marine Corps has traditionally used one performance evaluation approach for both enlisted and officer personnel. Based on the assessment of enlisted and officer situations leading up to completing PME, creating an academic report to assist during selection for promotion is problematic and will not be a focus of this paper, but the issues presented are irrelevant for using academic reports for assignment consideration.

Before determining whether an academic FitRep has potential value to selection processes during academic billet considerations, it is first necessary to identify what

characteristics are relevant in those situations. The Navy and Marine Corps have identified ten Key Performance Areas (KPA) as part of the Instructor Mastery Model (IMM) designed to be the focus for the professional development of instructional staff. The ten KPAs are instructional techniques, setting the example, communication and delivery, self-improvement, developing subordinates and peers, planning and preparation, learning environment, assessing effectiveness, subject matter expertise, and community of practice.³³ Of these, the most relevant KPAs to most academic environments are setting the example, communication and delivery, self-improvement, developing subordinates and peers, planning and preparation, and learning environment. Instructional technique, assessing effectiveness, subject matter expertise, and community of practice are KPAs that are not part of most Marine Corps resident programs, making them difficult to assess accurately. The assessment of KPAs becomes a task left to the individual organization to determine. For the Center for Naval Aviation Technical Training Unit (CNATTU) Cherry Point, KPAs were assessed as unsatisfactory, needs improvement, satisfactory, not observed, and not applicable depending on the type of instruction evaluated.

In comparison, the Army recently updated its academic environment assessment form to include character/accountability, presence/comprehensive fitness, intellect/critical thinking and problem solving, leads/communication and engagement, development/collaboration, and achieves/lifelong learner.³⁴ The assessment of attributes is through the selection of did not meet standards, met standards, exceeded standards, far exceeding standards, or as not evaluated. With two different approaches identified, the final step

before defining an approach for the Marine Corps is to determine what environments an academic FitRep will play a role in.

It is essential to understand what situations an observed academic FitRep could inform. Billets that Marines can serve within relevant to an academic FitRep include initial accession schoolhouses (recruit training, school of infantry, or MOS production), resident PME, at universities as part of a Naval Reserve Officers Training Corps (NROTC), and in any billet that emphasizes the characteristics relevant to successful instruction. Additionally, success in one schoolhouse environment is a good indicator of success in future academic settings, and with Marine Corps officer selection for all academic environments being a competitive process, these reports will serve a critical role in that regard. It is clear that observed academic FitReps serve a purpose in the Marine Corps, but it is not clear what attributes that tool should contain.

The author concludes that the following attributes belong in the Marine Corps Academic FitRep: “Leadership,” “Intellect,” “Critical Thinking,” “Initiative,” “Collaboration,” “Presence, Delivery, and Oral Communication,” “Written Communication,” “Self-Improvement,” “Creative Problem-Solving/Creative Thinking,” and “Planning and Preparation.” These attributes apply to all academic settings, or academic environments could be updated to include processes that lead to the assessment of these attributes. Unlike the non-academic fitness report that uses the PARS architecture, the academic fitness report would use the Likert Scale with selections of “Not Evaluated,” “Unacceptable,” “Marginal,” “Satisfactory,” “Accomplished,” or “Superior.” This allows for rubrics to align with the specific educational environment

instead of trying to force an insufficient rubric to work for a situation that it was not designed to function within.

Appendix E is an example of a proposed design for a fillable Academic FitRep that could be incorporated into A-PES. For this proposed design, the comments of the faculty member or instructor for the course would amplify any strengths and provide recommendations for what types of academic environments the student is suited to work within. The PES should be updated to include a list of recommended comments that would be beneficial during selection processes and will aid those future selection boards. It should not be considered a negative report if the student is better suited for non-academic environments.

IV. PERFORMANCE-ANCHORED RATING SCALE

A poorly defined explanation of how to successfully apply PARS attribute markings contributes to the Service's inability to select high-performing individuals. Misunderstandings regarding PARS usage frequently causes an RS to assign them incorrectly, and in some cases, senior officers demonstrate their lack of understanding in professional articles.³⁵ A reporting official needs to understand the PARS word picture for each attribute and attempt to evaluate performance against it. The PARS descriptors work as designed for every Military Occupational Specialty (MOS), rank below colonel, sergeant major (SgtMaj), master gunnery sergeant (MGySgt), chief warrant officer 5 (CWO5), and billet in the Marine Corps.³⁶ The PES needs to correct the example provided for the use of the PARS descriptors so that reporting officials understand how they are applied for each attribute.

The PES includes an example that complicates the application of PARS during usage and serves as an error that must be corrected to improve the overall system. “A marking philosophy refers to the weight an RS assigns to the PARS for individual attributes. For example, an RS may treat the “B” PAR as a below-average mark, the “C” PAR as an average mark, the “D” PAR as an above-average mark, and so on.”³⁷ The introduction of the marking philosophy and averages concepts ignores a fundamental principle of the Marine Corps; Marines perform to a standard and exceptional Marines perform to the highest possible level of the standard. When a Marine completes his physical fitness test, the score is tallied, and the Marine receives a performance level category assignment that ranges from unsatisfactory to Class A. PARS are no different as they are currently written, but the PES fails RSs by not explaining performance to standards. The vernacular of “averages” should be eliminated from the PES. The included example implies that a marking is average, rather than treating a mark of “B” as a Marine in standards and a mark of “A” as adverse or out of standards. Further, if “D” is an above-average mark, what does the marking of “E,” “F,” and “G” represent, and does this understanding of average work from one rank to the next? Explaining the marking philosophy in the context that a mark of “A” is below standards and a mark of “B” is achieving the standards, eliminates the vernacular of an average marking within the PARS architecture, and forces a different perspective for the application of the system.³⁸

Under this revised example, every marking above “B” is further away from a Marine that meets the minimum standards. Emphasizing the word picture for each PAR of the evaluated attribute forces the RS to understand the description provided and assess

the Marine based on that description instead of an arbitrary understanding of what average implies. Assuming the RS can explain how observed performance relates to the marking provided and the word picture, through discussion, the MRO receives a better understanding of what performance activities to focus on to improve overall performance with direct links to the PARS descriptors. For example, Figure 1 is the PARS for PME evaluation as contained in the United States Marine Corps (USMC) FitRep. If a MRO was evaluated as “B,” an RS explanation of what activities qualify for an outlook beyond the MOS (an aircraft mechanic reading articles about combat arms issues and discussing them with the RS), or developing a comprehensive personal program (reading Service or Joint publications or completing college course work), and explaining what advancing new concepts and ideas looks like (discussing the results of some of the previously mentioned activities with other personnel or writing articles for Service publications) would provide the MRO with specific recommendations for improving performance for the next reporting occasion.

G. INTELLECT AND WISDOM							
1. PROFESSIONAL MILITARY EDUCATION (PME). Commitment to intellectual growth in ways beneficial to the Marine Corps. Increases the breadth and depth of warfighting and leadership aptitude. Resources include resident schools; professional qualifications and certification processes; nonresident and other extension courses; civilian educational institution coursework; a personal reading program that includes (but is not limited to) selections from the Commandant's Reading List; participation in discussion groups and military societies; and involvement in learning through new technologies.							
ADV	Maintains currency in required military skills and related developments. Has completed or is enrolled in appropriate level of PME for grade and level of experience. Recognizes and understands new and creative approaches to service issues. Remains abreast of contemporary concepts and issues.	PME outlook extends beyond MOS and required education. Develops and follows a comprehensive personal program which includes broadened professional reading and/or academic course work; advances new concepts and ideas.			Dedicated to life-long learning. As a result of active and continuous efforts, widely recognized as an intellectual leader in professionally related topics. Makes time for study and takes advantage of all resources and programs. Introduces new and creative approaches to services issues. Engages in a broad spectrum of forums and dialogues.		N/O
A	B	C	D	E	F	G	H
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 1: PARS for Professional Military Education (PME)

Source: USMC Fitness Report (1610), NAVMC 10835, Automated Performance Evaluation System

By not relying on an understanding of what average is for each RS, the revised approach allows for an MRO to transfer to a new RS under an expectation that performance evaluation remains objective and per the PES example. This change creates an environment where an MRO receives a PAR of “D” in PME on back-to-back evaluations working for different RSs because both are operating under an objective, and standards-based marking system built on a shared understanding of the PARS architecture. For the case of PME, a new RS might emphasize the completion of Defense Acquisition University (DAU) classes instead of college classes. Still, the expectation remains the same, completing academic course work as part of the basis for achieving a mark of “D.”³⁹ In this example, it is unlikely that DAU and college classes would not be assessed as equally beneficial toward achieving the PAR of “D,” but this preference should be discussed, so the MRO understands the assessment perspective of the RS.

The author tested this approach through focused training provided to all MROs over three years. Training was focused on the processes and understandings explained in this paper. When the author assigned a lower mark than what should have been designated (same marking level as a prior report), the MRO identified the lower mark during the FitRep in-brief, and the author increased the mark appropriately. The established understanding of the system and trust in the RSs stated objective of accurate assessment, created a situation that resulted in a shared understanding of performance assessment within the PARS architecture that resulted in higher performance by the MRO and a more accurate report provided by the RS.

One aspect that has not been fully articulated up until this point, but is critical to the selection of a PAR marking is having the fundamental knowledge of what each descriptor means, and having the courage to apply that understanding when the time for evaluation comes. Many reporting officials inflate marks because they accurately acknowledge that others are doing the same thing to help Marines be competitive for selection processes. They openly state as much during peer-to-peer discussions. The argument is simple; if others are doing it, the only person that is hurt is the person currently being evaluated by a different process. This mindset undermines the system and guarantees that errors regarding the selection of the most qualified individuals will exist. Reporting officials must ensure that the PAR marking matches the observed performance and restrict the urge to inflate marks.⁴⁰

To further expand on improving the application of PAR attribute markings, the Marine Corps should incorporate examples of observed performance and appropriate usage. In the 21st century, this information does not need to be incorporated into the PES to be available worldwide. Placing this information on an accessible portal and placing a link in the PES is sufficient and allows for adjustments and expansion over time. Providing specific examples of a marking process that focuses on an understanding of the PARS descriptors creates a level-set for reporting officials that is less ambiguous than an arbitrary average. Appendix B includes an example PAR attribute marking for PME. These examples would be especially helpful for difficult attributes to evaluate by personnel just entering the performance evaluation process.

V. PROFILES AND RELATIVE VALUE

Relative value (RV) has a proper usage, but its primary use should be by the RO during report processing as a tool to assist in evaluating the RS's marking process. Ensuring accurate reporting is completed is the responsibility of the RS with oversight by the RO; this process needs to be trusted, and RV use in the selection process has the potential to turn being an exceptional Marine into a penalty. RV usage is so contested in the Marine Corps that one recent recommendation was that "RSs track their profile carefully and write reports to achieve a specific RV since it is the only way for an RS to ensure that a selection board will accurately interpret their evaluation."⁴¹ This recommendation throws the idea of understanding the meaning of the assigned marks out the window in favor of a stratified report that a selection process can group nicely into thirds. In that case, the attributes become irrelevant, and the RS should assign a number on a profile in the third they feel is appropriate as the meaning would be the same. A selection process needs to rely on the FitRep average (PAR attribute markings are averaged to produce a report average for every FitRep generated) and the comments provided.

The RO can use the RV that is produced to determine whether the MROs are stratified logically based on observed performance throughout the unit. It is not an absolute measurement because Marines can vary widely across the attributes, with some resulting in a perceived strength that might not exist when considering the less visible aspects of the Marine's performance. For example, an MRO with significant initiative could appear to be a high-caliber Marine, but when PME, setting the example, and

developing subordinates (less visible attributes) are considered, the actual report average might be significantly lower than a balanced report for an individual that has less initiative but higher markings in every other category. The halo effect is the specific term used to describe this situation and is observed “when our general impression of a person, usually based on one prominent characteristic, colors our perception of other characteristics of that person.”⁴² It is for this reason that RV or report averages are just indicators that assist an RO with identifying marking philosophy issues. Assigning a PAR to an attribute to achieve a specific report average or RV, is expected to miss the subtle difference in Marines in favor of the more visible attributes. This issue also highlights the importance of assessing Marines based on the individual attributes at more frequent intervals so that less visible qualities are not ignored up until completion of the final FitRep.

From a selection process perspective, RV helps to evaluate report averages by the same RS across multiple billets and MOSs. The problem with RV is when all the evaluated Marines have comparable FitRep averages or when the RS has only written a few FitReps. If an RS writes three FitReps, the lowest report average will have a RV of approximately 80%, with the middle report average achieving an RV of roughly 90%, and the highest report average achieving a RV of 100% (all are estimates with the spread of report averages as the most significant factor).

In aviation units as an example, the Quality Assurance (QA) Division and Maintenance Control Division are sections that are “normally” comprised entirely of high-performing SNCOs. This is because of the importance these two sections have in

ensuring the unit is prepared for executing aviation missions. Poor leadership and management in these two areas of the command frequently result in units being shut down because of safety concerns, encouraging commands to ensure high-quality individuals are assigned to these billets. While it is true that some less qualified individuals sometimes get assigned to these billets, the vast majority of commands will only place the most qualified Marines in these two locations resulting in an RS profile built around high-caliber Marines. This results in a skewed and inaccurate RV that reduces the competitiveness of the Marine during selection processes.

A second issue with RV stems from the RS and RO problem raised earlier regarding observation issues for ROs. The author, while working as an executive officer (XO), received three FitReps with high report averages, but no RV as the reports are the first reports written by the RSs. The ROs worked in a different state and had no interaction with the Marine before writing the FitReps. While the RS submitted recommended comments and comparative assessment markings, the ROs only used the comments and dropped the comparative assessment marking without a reason to indicate a rationale for the drop. All of this took place after the MRO had already indicated that the RO's portion should not be observed because of no actual interaction or observation. The results of this situation are a lower RO comparative assessment that does not align with the markings of the RS, creating an issue that a member of the selection process will need to decipher. Situations like this, leave Marines with a lack of confidence that the system will result in an accurate assessment of performance during selection processes.

RV serves a purpose to stratify Marines for selection, but this same function could be done by determining population metrics and comparing the averages of the individual's FitReps. Under this model, a selection process would be comparing the FitRep average of the individual being considered against all FitReps in the Marine Corps for that rank and MOS being considered. Other comparisons could be used depending on the purpose and objective of the selection process. For example, for a promotion selection board for the rank of major, averaging all the FitReps received by an Aircraft Maintenance Officer as a Captain, First Lieutenant, and Second Lieutenant produces numerical results that can be compared over a career or in relation to the community/Marine Corps. Comparing this result across the MOS community results in a stratification similar to what RV accomplishes. Assuming that the RS implemented an objective adherence to the marking philosophy raised earlier in this paper, this process results in a more accurate stratification for selecting personnel.

VI. REPORTING OFFICIALS

The PES identifies two central roles in the evaluation of performance. While there are other roles for specific situations, the RS and RO are the two most essential billets involved in the evaluation of performance. While both are a critical focus of this paper, for this section, the primary focus is placed on the RS because the RO has been previously addressed. With far more Marines in the rank of Private to Corporal, the change of including junior Marines, as proposed in the prior section of this paper, does create some issues under the current officer led process that first needs to be addressed.

It is not practical to have officers conduct a performance evaluation for all Marines in the rank of Private to Corporal. Expanding the RS's role to include enlisted Marines in positions of leadership, results in several favorable outcomes while reducing an unsustainable workload. With Marines exposed to the evaluation process from an earlier rank, staff noncommissioned officers (SNCOs) become more knowledgeable of the system, and through training provided by command leadership and PME, these leaders have the knowledge and experience to complete performance appraisals for junior Marines.

The PES identifies the RS's role as the "first commissioned or warrant officer (or civilian supervisor GS-9/equivalent or above) in the reporting chain senior to the MRO. In unique situations, senior enlisted Marines may serve as an RS with an approved policy waiver from MMRP-30. As the officer/supervisor closest to the MRO, the RS is directly responsible for the Marine's daily tasking and supervision. The RS is in the best position to observe the Marine's performance and character."⁴³ The RS is responsible for assigning a PAR for each attribute, and writing a word picture for the Marine evaluated summarizing the MRO's performance in a context that selection processes can assess. In the section above, three aspects become necessary to analyze regarding the RS's role. The first is the idea that the RS is a commissioned officer, warrant officer, or civilian supervisor GS-9. The second consideration is that the officer is the supervisor closest to the MRO responsible for daily tasking and supervision. The final concern is that in some situations, enlisted Marines can also fill the role of RS with an approved waiver from MMRP-30.

A second lieutenant is the most junior commissioned officer authorized to complete performance evaluations for enlisted Marines. The only official training that is provided to Marine Corps officers on the duties and responsibilities for executing performance evaluations is presented at The Basic School (TBS) and is approximately two hours in length. There is no requirement for follow-on training, but every command is required to provide annual training regarding the Master Brief Sheet (MBS) and is assessed through the Inspector General of the Marine Corps' inspection.⁴⁴

In contrast with a second lieutenant, a senior enlisted Marine (authorized to conduct reporting official duties through a waiver) has no specific rank designation (E6 through E9), but for this comparison, it begins at the rank of gunnery sergeant (GySgt) and includes all higher enlisted ranks. While enlisted Marines receive official training at the rank of sergeant, they also have years of experience receiving performance evaluations before the rank of GySgt.

An argument for what enlisted rank to begin with, could revolve around a comparison of a General Scale 9 (GS-9) as the civilian equivalent that authority already rests with per the PES. In this context, a GS-9 equivalent is a second lieutenant.⁴⁵ This comparison is not sufficient as the warrant officer ranks are comparable to a GS-8 and a SgtMaj/MGySgt as an E-9, is only considered equivalent to a GS-7. GySgts are also considered equivalent to a GS-7 and have a length of service of between nine and fifteen years. By this point in their career, they have been the recipient of countless performance evaluations giving them far more knowledge of the system than a second lieutenant with two hours of training. While formal training for GySgts is not specific to conducting

performance evaluations using the FitRep, providing additional training as part of PME would correct this deficiency and augment the experience gained by being involved in the process through regular service.

While a second lieutenant might be the officer closest to the Marine being tasked or supervised, in most situations a SNCO is between the Marine and the first commissioned or warrant officer. With the author having had the opportunity to write evaluations on personnel in the Army, Navy, and Air Force, all these Services include SNCOs in the process of performance evaluation, with the Marine Corps as the only Service that does not acknowledge the ability of SNCOs to fulfill this critical aspect of leadership.

While as the XO for CNATTU Cherry Point, the author sought approval from MMRP-30 to have master sergeant's RS FitReps. The situation was not unique, but rather, it was a situation very common to aviation units. Many aviation units suffer from an enlisted to officer ratio imbalance that places a requirement on the RS/RO to evaluate the performance of over a hundred Marines, frequently with no observation possible when personnel are geographically separated. In the specific example of CNATTU Cherry Point, the XO was responsible as the RS of more than 30 Marines, and as the RO of more than 130 Marines spread between two states with no opportunities for site visits. Failure to secure a waiver would have resulted in countless FitReps as having been not observed due to insufficient observation (the requirement per the PES in this situation).⁴⁶ Outside of aviation, "a new company commander has at least seven MROs under [their] charge, which may be manageable. A recruiting station commanding officer averages 70

MROs, which is not [manageable],” highlighting the ratio issue exists external to aviation and the belief that ratios significantly inhibit the ability to evaluate performance in the way the PES directs.⁴⁷ Alternatively, many commands utilize the trusted assistant feature of A-PES, or a locally generated RO Worksheet to “ghostwrite” FitReps.

Clarification of the issue is necessary regarding the waiver. While the PES includes provisions for requesting a waiver, most commands will not seek this option because of a perception that enlisted members writing evaluations will damage the Marines competitiveness during selection processes. While this belief has no merit, the perception remains diminishing the likelihood that commands will request the waiver. While the waiver was achieved in the case of CNATTU Cherry Point, prior attempts by the same officer, in a situation of a requirement to evaluate more than 200 Marines, the command would not route the waiver in preference of using an RO Worksheet instead. A RO Worksheet is a document drafted by the RS that includes a recommended comment and comparative assessment. While a copy and paste approach during the use of the trusted assistant/RO Worksheet is frowned upon, many ROs follow this approach or adjust the wording to match their personal style. The result is that the RS completes both their comments and marks, and the comments and marks of the RO.

There is one more consideration regarding the use of the waiver. In situations that an unbalanced leader-to-led ratio exists, commands frequently modify the reporting official structure within the command without approval to achieve a better balance.⁴⁸ Frequently, this results in a conflict when the person that should be doing the evaluation is no longer placed in a position to complete the evaluation but is still in the best position

to evaluate the Marine. This occurs most often when the senior officer directs that they will RS the higher-ranking individuals, even though those senior individuals work directly for the junior officer. A factor that is rarely considered is that this also places the new RO (the senior officer's RS) in the position to evaluate someone that may not be possible to observe while also further expanding the leader-to-led ratio issue up the chain of command. The result is the same, inaccurate assessment of performance that resulted from an unbalanced leader-to-led ratio.

In the CNATTU situation, the master sergeants received additional training and received assistance from the RO during the evaluation process. In the end, all FitReps were completed accurately, and the RS and RO comments were based on objective observations by both reporting officials that had direct observation of the Marines. Using master sergeants significantly reduced the ratio for RS duties to about 15 to 1 while the RO ratio shifted from 130 to 1 to approximately 30 to 1. "Ideally in an organization, according to modern organizational experts [the ratio] is approximately 15 to 20 subordinates per supervisor or manager. However, some experts with a more traditional focus believe that 5-6 subordinates per supervisor or manager is ideal."⁴⁹ The Marine Corps has not defined an appropriate ratio resulting in significant imbalance. As an institution, a ratio must be determined that considers the responsibilities of the leaders in various communities. The author has worked in ground, aviation, and joint communities, and can state that the work requirements (not including performance evaluations) placed on the officers in each of these communities vary significantly.

For this paper, the rank of GySgt is selected as the lowest rank conducting evaluations for sergeants and staff sergeants. In the case of expanding evaluation to Marines below the rank of sergeant, sergeants and staff sergeants (or the Marine responsible for the supervision of the junior Marines) is best positioned to evaluate the performance. Ranks above GySgt should not be excluded from writing evaluations, but efforts should be made to limit the use of the SgtMaj in this capacity to ensure the role of providing command review is maintained. Significant training will be required during implementation of these processes, but once all ranks are operating under the processes in this paper, accuracy and the capabilities of reporting officials will improve.

The PES identifies the RO's role is to "provide the experienced leadership, supervision, and detached point of view necessary to ensure consistent, accurate, and unbiased evaluations. ROs ensure adherence to policy and, as the last officer/supervisor in the normal reporting chain, are responsible for all subordinate performance evaluation activities."⁵⁰ While there are expanded requirements spread through MCO 1610.7A, this role is sufficient for defining what the RO should address. The role of the RO, as discussed earlier in this paper, meets the obligations of this requirement and aligns with the normal observation that this billet frequently has of the MRO.

With a firm understanding of what the RS and RO roles should be, what should comments entered on the FitRep encompass? The RS needs the ability to write an appropriate word picture for Marines that correspond with the markings, both good and bad. The PES tasks reporting officials to provide an accurate, objective, and fair assessment, but only as far as it only covers the good aspects of the observed

performance.⁵¹ This limit results in ambiguous, hard to decipher comments for selection processes, severely limiting the ability to select the best Marine based on the performance. Allowing reporting officials more latitude to describe the relevant performance fixes this issue as does the earlier proposed process change. If the Marine does not agree, a member of a selection process has a mechanism to interpret the disagreement through the comments of the MRO, RS, and RO. Just as important, the MRO has a compelling reason to correct performance deficiencies because accurate comments might result in a greater chance of not being selected by board processes.

The production of specific examples of Section I comments could assist in filling a perceived gap that is consistently identified by selection processes. What one RS deems to be strongly worded statements is tame to another RS and vice versa. The PES has not identified examples of specific statements that a boardroom recognizes as metered from the “B” Marine to the “G” Marine. If writing examples is the bridge too far, have selection boards identify comments that were helpful and modify these to create examples that improve the selection process.

Reporting officials need the ability to write a word picture that is accurate to the Marine and their belief about whether the MRO has continued potential in the Marine Corps. Frequently, it is identified that the FitRep is not a counseling tool, and the current version of the PES also reiterates this sentiment.⁵² As an opposing viewpoint, as leaders, we should absolutely be counseling Marines on their performance as documented by the FitRep. However, the FitRep should also not be the first time Marines have received counseling regarding subpar or performance that barely meets the standard. If the

comments and marks are accurate to the observed performance, they are valid comments, even if they are not flattering.

As an example, writing that a Marine is eligible for promotion but should only be promoted if no other Marines that are better qualified for promotion are available, should not be adverse or considered a “velvet dagger” (definition is in Appendix A). If it is a “velvet dagger,” there is very little “velvet” attached to the statement. Marines that frequently operate at an assessed PAR of “B” are sometimes content with coming to work and collecting a paycheck. Leaders will always attempt to inspire these individuals to achieve more, but if the willingness never materializes, the RS should have the tools necessary to identify their correct assessment of the MRO’s potential in less subtle verbiage. Comments like these are accurate, provided the MRO’s prior counseling supports making such a statement, and help clarify to selection processes the quality of the performance provided by the MRO.

To illustrate how the comments and previously mentioned issues come together to select poorly qualified Marines over better options, consider a comparison of a Marine that is content with coming to work for a paycheck and a Marine that normally works hard to complete assigned tasks but, made an error in judgment that resulted in an adverse FitRep. A Marine sergeant that comes to work and is content with a paycheck might be evaluated as nearly an across the board “B” Marine resulting in a FitRep average of 2.38 and a RV of 80%. The RS and RO comments describe the Marine in neutral non-negative terms that do little to explain to a member of a selection process what the potential of the Marine is. The other Marine sergeant is a hardworking individual that

makes mistakes but puts forth effort to improve and has potential to do well as a staff sergeant. However, the sergeant was caught underage drinking while in the barracks and received an adverse fitness report with a report average of 3.00 and a RV of 80%. Which Marine should be promoted to staff sergeant? Maybe neither depending on all of the Marines being evaluated, but the neutral comments of the lower performing Marine amplified by a lack of adversity and a process that looks at RVs, increases the likelihood that the lower performing Marine will be selected.

A concern raised within Marine Corps policy for combining performance evaluation and counseling is that it can result in inflated evaluation.⁵³ This policy was drafted during the prior performance evaluation system, which had issues with inflated markings, causing the need for the creation of the current system. It is also acknowledged “that counseling ties back to fitness reports - but only as a basis for reinforcing or improving performance in the future.”⁵⁴ This aligns with one of the stated reasons for implementing counseling as part of the evaluation process. However, it will be necessary to reassess the effects of combining counseling with performance evaluation to ensure that inflated marks are not an outcome, but if a PAR is assigned for observed performance, inflated marks should not be an issue. Additionally, changing the role of the RO and expanding the capability of inspection teams (discussed later) will ensure that evaluation is not inflated.

As with PARS descriptors, examples of authorized Section I comments for MROs with lower markings that assist selection processes in making their decisions might improve the quality of RS comments. This recommendation is not advocating for “velvet

daggers,” but instead returning to a more objective and honest assessment of performance that avoids the use of hidden meanings that could give the MRO a false sense of achievement. Focusing comments for “B” Marines on the positive accomplishments is the equivalent of awarding every team a participation medal in lieu of just recognizing the winning team.

VII. AUTOMATED PERFORMANCE EVALUATION SYSTEM

What information should an MRO provide to the RS, RO, and future selection processes? Billet Description should be limited to relevant billet bullets, but Billet Accomplishments should allow for an unlimited number of characters to allow the MRO to continuously update the system with perceived accomplishments over the evaluation period. Several options allow for focusing the RS on what the MRO believes to be the most relevant list of accomplishments, but the system should not limit the ability to relay a comprehensive list. Stating the most critical bullets first or allowing the MRO to highlight the most important would help the RS narrow down the final list of accomplishments that will comprise the submitted FitRep. Because of system limitations, many RSs encourage MROs to send a Microsoft Word document identifying additional bullets creating additional steps outside the system. Even if the information the MRO provides remains the same, or is allowed to accept more information, the displayed and printed products are not a fixed solution in digital systems.

While A-PES should have all of the PARS descriptors for each of the attributes to assist the RS during the process, printing this information as a default is not necessary in most cases. The MRO, RS, RO, and members of selection processes have enough

experience to understand what each PAR represents. All the information pertinent to creating each FitRep should be recorded during the finalization of the report but recording this data does not require the printing of the information on every FitRep until the end of time. The actual printed document, if ever printed, should be configurable to reduce the overall length of the report and allow for specific situations to be met. Appendix C and D contain two examples of a printed report that would be enough for most circumstances.

Correctly formatted, the report is not likely to be more than three printed pages with addendums. Reports with insufficient observation time will print on a single page instead of six. Even the “Commandant’s Guidance” section could be removed from the printed version freeing up several inches on the first page. This information is vital during the preparation of the report, not as a part of a printed document years later. The argument is not that the retention of an option to print a full report is not essential, but most circumstances do not require this six-page option.

Selection boards have a system designed specifically for their duties and requirements, and the changes to the system mentioned here will not affect that process or system. All the relevant data from the reporting process will be available to the members of the board, but the system that portrays that information can be entirely digital. There would not be a need to open a saved document version of the report. In a digital world, the way information is displayed and accessed by board members is easily adjustable to meet the requirement. If board members still require access to a printed

portable document format (PDF) version of the FitRep, provide a condensed version that limits unnecessary information and retains the focus on the relevant aspects.

A perfect example of information that could be removed from the process entirely, or at the very least, the printed document, are the duty station preferences. Additionally, while the PES identifies that policy published in other Orders and Directives are not authorized unless already covered in the pages of the PES, other Orders continue to direct actions as part of the performance evaluation process.⁵⁵ MCO 6100.13A CH 2 continues to direct Section I comments on all FitReps even though the PES specifically prohibits such direction placing reporting officials in the uncomfortable position of deciding which Marine Corps Order (MCO) to ignore.

Regarding directed comments, there are approximately 40 situations that require directed comments by the RS. Many of these do not contribute to the purpose of the comments.⁵⁶ Each directed comment should be assessed for importance as part of Section I and removed if not found to be necessary. Many RSs either are not aware of the requirements or have made the willing decision to ignore them. One such example is the requirement to “summarize the MRO’s progress with regard to professional development. Specifically comment on: Books read from the Commandant’s Professional Reading List...formal and other PME attended, and self-education.”⁵⁷ If a member of a selection process is aware of the requirement, identifies that a record does not identify five books being read as part of the Section I comment, the selection process member would be correct in assessing that the record being reviewed should have an adverse FitRep for failing to meet the minimum requirements under the PME attribute of

meeting the minimum standards. Alternatively, the RS might not have been aware of the requirement to read five books and document completion as part of the FitRep because Marines follow published Orders.

As an RS, what information should be visible when completing the RS functions? While the Combat Fitness Test (CFT), Physical Fitness Test (PFT), rifle and pistol data remain part of Section A, the inclusion of this information as part of a pop-up module on the left or right side of the system screen indicating what is documented in Marine Online or Marine Corps Training Information Management System (MCTIMS), ensures the submission of the most accurate information. A-PES should also display Time-in-Grade (TIG) / Time-in-Service (TIS) calculations, and display resident and non-resident PME completion data. Inclusion of all the billet accomplishment data from the MROW could remain part of the FitRep and viewable by members of the selection process.

A comprehensive list of accomplishments requires the MRO and RS to discuss changes to this data to ensure accurate information remains part of the final report. This would allow a selection process to focus on what was determined to be most important when time is critical but allows for greater depth by reviewing the comprehensive list of accomplishments when preparing to brief or when more granular data is necessary to distinguish between candidates. Designing the interface to be more modular with more information available significantly improves the ability of the RS and RO to assess various aspects of the marking process from one interface.

Instead of adding book information to Section I or an addendum page, this information should be selectable from a drop-down (when selecting books from the

Commandant's Reading List) or manually entered for other reading. Creating an entry section within the MROW for the book information increases critical Section I space for content that is more important to selection processes but would also create a mechanism for evaluating the MRO's professional development during efforts to assess the attribute of PME. In a digital system, if the institution is going to stand-by this requirement, the system can be designed to prevent a PAR mark of "B" or higher if the minimum requirement was not met during the reporting period. Mechanisms would need to be integrated for shorter periods or unusual circumstances that legitimately prevented the MRO from achieving the requirement. Separating and specifically addressing this data entry requirement also places emphasis on an aspect of professional development that continues to be ignored by many leaders and places institutional emphasis on what it values.

Additionally, the design of the system could include the example PAR attribute marking descriptions, or Section I word pictures to assist a new RS or provide a link to them. Appendix F provides an example of what the interface might look like but is not all-inclusive. The integration of any tool that an RS currently feels compelled to have access to is the objective. Appendix I provides an example of a marking profile tracker that should be built into the A-PES system for quick reference and ensuring accuracy of the information provided during the debriefing.

As an RO, the information provided to the RS is also viewable, but an RO view is tailored to the role that includes information relevant for assessing the RS's marking philosophy. There are numerous possibilities for how this portion of the system could

work, but it should remain focused on providing the RO the information necessary to assess the RS's execution of their FitRep responsibilities. The RS's marking philosophy is not relevant to the RS and should only be visible to the RO. The RSs only requirement is to assess the performance of the MRO during the reporting period, and knowledge of the marking philosophy is only going to make the process more prone to manipulation. This perspective is only relevant if RV is removed from the selection process. If Marines continue to be evaluated based on RV, the RS must have access to this information, and the lack of it will drive the creation of tools to provide it outside of the system.

To further assist the RO, A-PES should provide statistical analysis of what the RS's profile looks like and where the report falls in relation to other MROs (comparison to the last 30 reports, and overall summation that includes report averages RV information) under the same RS. Through this statistical review, the RO will be able to identify improper reporting procedures or discuss specific marking process questions with the RS beyond the specific attribute markings. This same information should be available to the unit commanding officer (CO) and XO for each of the command's reporting officials. This provides useful tools that the CO and XO can use to provide focused mentorship and guidance beyond what the ROs may already be providing.

Returning to some of the specific processes and requirements internal to the report, selecting "Yes" for promotion of Marines that do not meet TIG/TIS or the minimum PME requirements should not be possible. "N/A" is more appropriate for Marines that do not satisfy these minimum requirements. If the perceived potential is already apparent, this does not prevent the RS from commenting on the potential to

function in the next higher billet or rank. For a newly promoted Marine receiving their first FitRep in that grade, selecting “Yes” for promotion might contradict the RSs assessment, but doing otherwise results in an adverse FitRep. Unless submitting the Marine for an accelerated FitRep, TIG and TIS requirements should trigger the system to auto-populate the “N/A” option.

One of the most significant functional changes that A-PES should incorporate relates to the automation of business processes. A-PES, either through Marine Online or direct update of A-PES, should allow for hierarchical designs that show organizational hierarchy, leader-to-led ratios, overdue FitReps, and Marines with date gaps in their record. Through proper implementation, inspection teams armed with access to relevant metrics can ensure that the evaluation process is not inflated, is being conducted in accordance with policy, and that determined leader-to-led ratios are enforced once established. In addition to key reporting officials, the CO, XO, and SgtMaj should receive push notifications for situations related to late FitReps, date gaps, and returned FitReps automatically instead of through data pull processes. Similarly, Headquarters Marine Corps (HQMC) has a vested interest in understanding the leader-to-led ratios within their subordinate commands to assist in identifying situations that might require adjustments to the Table of Organization. A properly designed system could show this information, similar to how Command Profile displays key demographic information currently.

In 2018 it was identified that 10,270 FitReps were late with officers identified as submitting reports late 47% of the time.⁵⁸ This is unsatisfactory, but understandable given

the limitations in the system and some of the ratios mentioned earlier. If Marine Online accountability is updated showing that a Marine is executing temporary additional duty (TAD) in excess of 30 days, A-PES should identify that a To Temporary Duty (TD) FitRep is required and the status of the report (missing, in-work, submitted). Requiring a manual FitRep tracker when all the necessary data exists in a digital system should not be the default answer. Late, missing, or inaccurate FitReps should prompt the system to notify the CO, XO, and SgtMaj long before a Marine's new CO is contacting the command on a report that is six months late. Additionally, this information should be available to the RS of a reporting official for consideration during PARS determination. Improved business logic might be required depending on the role of the RO in the process. In the current system, it can be assumed that the RO is frequently the source of the delay in processing FitReps because of the volume of reports the RO is responsible for. Alternatively, there is also the situation of when an RS sends 25 FitReps to the RO the day before they are due. System design needs to include the necessary functionality to enable leaders to manage the execution of processes.

VIII. EDUCATION TRAINING

There is a training deficiency that exists for reporting officials, and junior and senior Marines have repeatedly identified it.⁵⁹ Leaders that have been around for any length of time will quickly recount the numerous examples of an RS that did not understand the evaluation system. Many will recognize the, "start with a 'C' and adjust to get the report where it belongs in my tracker," "I have to manage my profile," "his board is this year, and the Marine needs a strong report," "this is where I evaluate your

MOS,” or the highlight of a tour, “your right, that mark was too low but I will need to lower another mark to keep you aligned on my tracker.” When an MRO that understands how the process should work pushes the RS to explain a mark, the RS invariably shuts down because of an inability to explain what qualities are desired to achieve a higher marking. The RS is focussed on the FitRep average and aligning the Marine on the tracker and has not been properly trained on how to articulate the PAR for each attribute in terms that the MRO can strive to achieve. All of these demonstrate a poor understanding of how the system of performance evaluation works and the apparent lack of training that exists. To encounter a diverse list of responses to how the RS and RO complete their obligations within the PES, pull any 20 random officers into a room, and ask the group what process they use. The result will be a wide variety of approaches demonstrating the lack of standardized training that has been provided for this critical leadership function.

Only through the design of robust performance evaluation training will the issues that exist in the execution of this vital requirement cease to hinder improper techniques. One suggestion is to improve the quality of training provided at TBS for commissioned and warrant officers. “TBS students should write training FitReps on each other in order to intimately learn the Marine Corps PES, MBS, and promotion process.”⁶⁰ As part of this training program, these officers could function in both roles as RS and RO, followed by guided discussions that build an understanding of a marking philosophy by trial and error. If A-PES is used to complete this training, it would also provide a realistic understanding of how the system will function following graduation.

Moving beyond training provided at TBS, providing additional instruction while assigned to MOS schools would reinforce and refresh the understanding of officers in lengthy training pipelines. Following TBS, some officers may continue training for more than a year with no requirements to complete an evaluation on a Marine. Some officers attend schools where no Marines are organic to the command. In these instances, Marine officers assigned to local commands could provide the training, or in extreme circumstances, the Senior Marine Representative (SMR) as part of their duties in support of non-Marine RSs and ROs could provide training (through digital or in-person means).

If other elements of this paper are implemented, i.e., extending the role of RS to senior enlisted personnel, establishing this training as part of the PME curriculum would ensure both enlisted and officers receive the necessary training. Regardless of whether the role of RS is extended to enlisted Marines, providing additional training in what to expect during the evaluation process limits the potential for future issues.

As previously mentioned, MCO 1610.7A requires that units conduct annual MBS training. The contents of the MCO are ambiguous regarding the training requirements for the evaluation system, with the Inspector General of the Marine Corps publishing a Functional Area Checklist for the PES Program identifying a requirement to train the MBS. This limited scope training requirement is a contributor to the training deficiency in the institution. Mandating that comprehensive performance evaluation training occur annually, and providing the tools to conduct proper training, would significantly improve knowledge in this critical area.

As clearly shown, a lack of training in any area of performance evaluation leads to the development of issues in the entire system. If the performance evaluation is not extended to include all Marines, initial training for enlisted Marines should begin at Corporals Course to ensure that Marines that are promoted to the rank of sergeant understand the process before their first evaluation. If the performance evaluation is expanded to include all Marines, training should be incorporated into Marine Corps Recruit Training and reinforced during follow-on training either as part of the performance evaluation process or as official training.

One final recommendation for improving the training of the Marine Corps is to develop training videos for reference before performing evaluation functions. Recording training that discusses the assignment of a PAR for each attribute provides a quick reference for a reporting official that is uncertain of how to interpret the provided word pictures or the examples that have been suggested earlier in this text.

IX. CONCLUSION

Marines need to have confidence that their evaluation is an accurate portrayal of the performance during the period. When an RS or RO that has had no contact with the MRO completes the evaluation, that trust is broken. Furthermore, “velvet daggers” and ambiguous comments do little to aid personnel assigned to selection processes in their task of selecting the best and brightest for schools, assignments, retention, and promotion. They also do not provide the MRO with an accurate performance assessment that can trigger a desire to achieve more for follow-on reporting occasions.

Establishing a mechanism for self-assessment ensures introspection is part of

every evaluation and aids the RS in identifying gaps between the MRO's perspective of performance and what was observed by the RS during the period. Changing how A-PES functions to ensure that the MRO's voice exists as part of the process will force RSs to debrief the results of the evaluation, and when disagreement exists, the RO is in a position to assess the situation and ensure the requirements of MCO 1610.7A were met.

Through the development of tools to aid the RS and RO with their duties compounded by the implementation of PARS application examples for each attribute, videos, and improved training, the knowledge, and understanding of how performance evaluation is executed will improve. The cumulative effect of all of the proposed changes in this paper will ensure that high-caliber Marines are identified during selection processes and retained, promoted, or selected ensuring that a more lethal and capable fighting force is available to fight the country's battles.

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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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APPENDIX B: PME PARS EXAMPLE ASSESSMENT FOR MRO

Introduction: PME was chosen for this example because it is common to all ranks and is the most straightforward attribute to stratify across the PARS for assessment in a way that is easy to relate to and understand regardless of rank or background. Each scenario is similar to make it easier to follow. Critical differences between scenarios are placed in bold. Middle marks, “C,” “E,” and “G” were not explained, but if the MRO meets some of the aspects of the higher mark, these middle marks are appropriate.

Scenario 1—Adverse “A” Mark: The MRO is entering the annual fitness report (FitRep) cycle at the rank of master sergeant with an eight-month observation period in the Aircraft Division. The RS completed initial counseling with the master sergeant within 30 days of arrival, emphasizing the importance of completing all required actions to achieve a “B” mark in PME. Additionally, the RS gave examples of activities that would qualify the master sergeant for a higher mark. The MRO acknowledged understanding and stated that reading was not something that was usually done under prior RSs, and that was unlikely to change under this RS. The RS emphasized the importance of completing all required actions to achieve the minimum mark for PME. The MRO completed a master's degree and required PME for the current grade before arriving at the unit. The MRO is current on all annual training and was 100% complete at the end of the prior fiscal and, periods. The MRO frequently discusses the current issues in the Military Occupational Specialty (MOS) with other Marines in the field and discusses the issues with the SNCOs that work in the section to ensure that the issues are understood. The MRO read no books, from the Commandant’s Professional Reading List or books in general.

Assessment: This MRO is assessed as an “A” for the attribute of PME. While reading five books from the Commandant’s Professional Reading List has been broadened to include other types of books, reading no books places the master sergeant out of standards for the Marine Corps and is assessed as an “A.”

Scenario 2—Achieving the Standards “B” Mark: The MRO is entering the annual FitRep cycle at the rank of master sergeant in the Aircraft Division. The **MRO completed a master's degree during the prior reporting period under the same RS** and completed the required PME for the current grade before arriving at the unit. The MRO is current on all annual training and was 100% complete at the end of the prior fiscal and annual periods. The MRO frequently discusses the current issues in the Military Occupational Specialty (MOS) with other Marines in the field and discusses the issues with the SNCOs that work in the section to ensure that the issues are understood. The **MRO read five books** from the Commandant’s Professional Reading List during the evaluation cycle for this report.

Assessment: This MRO is assessed as a “B” for the attribute of PME. While the MRO is PME complete and has completed a master’s degree, both events took place in a preceding reporting occasion. All other actions meet the definition of a standard Marine.

Scenario 3— “D” Mark: The MRO is entering the annual FitRep cycle at the rank of master sergeant in the Aircraft Division. The MRO is enrolled in a program leading to a master's degree, having completed two classes during the reporting period, and had previously completed the required PME for the current grade before arriving at the unit. The MRO is current on all annual training and was 100% complete at the end of the prior fiscal and annual periods. The MRO frequently discusses the current issues in the Military Occupational Specialty (MOS) with other Marines in the field and discusses the issues with the SNCOs that work in the section to ensure that the issues are understood. The MRO frequently reviews military professional periodicals and discusses novel ideas from those with members of the command, and even implemented a process that was suggested in one publication through coordination with the S-1. The MRO read three books from the Commandant's Professional Reading List, two books related to leadership development, and two science fiction books during the evaluation cycle for this report.

Assessment: This MRO is assessed as a “D” for the attribute of PME. There are clear indicators that the MRO follows a comprehensive personal program and that the master sergeant is advancing new concepts and ideas. The expanded reading profile is an indicator of a comprehensive personal program that also exceeds the minimum requirement of five books while also working on a degree. While the mark of “D” might be possible if the master sergeant was working on a bachelor's degree, the use of the master's degree further clarified that the MRO follows a comprehensive personal program that probably stretches the entire career of the Marine. It is important to note that completing classes or the degree are not the elements that make this assessment a “D” mark. The word picture does not indicate that it is a requirement for achieving a “D” mark.

Scenario 4— “F” Mark: The MRO is entering the annual FitRep cycle at the rank of master sergeant in the Aircraft Division. The MRO is enrolled in a program leading to a master's degree, having completed two classes during the reporting period and had previously completed the required PME for grade before arriving at the unit. The MRO is enrolled in a DAU course related to the field that the MRO works within and has begun work in one course. The MRO is current on all annual training and was 100% complete at the end of the prior fiscal and annual periods. The MRO frequently discusses the current issues in the Military Occupational Specialty (MOS) with other Marines in the field and discusses the issues with the SNCOs that work in the section to ensure that the issues are understood. The MRO frequently reviews military professional periodicals and discusses novel ideas from those with members of the command, and even implemented a process that was suggested in one publication through coordination with the S-1. One of the MRO's suggestions has the potential to fix a Marine Corps issue, and the Marine has a draft of an article for submission in the Marine Corps Gazette. The MRO keeps a stack of periodicals in the office, along with a bookshelf of books that are frequently referenced during discussions with peers and senior personnel. Nearly every day, the MRO references ideas that were

learned in class or through personal reading that are relevant to solving problems in the command or provide individual development options for Marines that work with the MRO. When an issue comes up that is outside the normal, this is the Marine that is sought to see if a non-standard approach might exist that was learned through the MRO's extensive individual learning attempts. The MRO requested to attend and was an active participant in an OPT focused on correcting training deficiencies in the MOS. The MRO read five books from the Commandant's Professional Reading List, three books from the Chairman's reading list, two leadership books, and three science fiction books during the evaluation cycle for this report. The MRO also led two leadership book discussions with the Marines that work directly with the MRO and set up a reading club that the command is looking at adopting.

Assessment: This MRO is assessed as an "F" for the attribute of PME. The MRO's actions demonstrate dedication to life-long learning. The comprehensive personal program is mature and shows that the MRO takes advantage of all resources and programs through college classes and course work in DAU. Because of the interactions with the command, the MRO is recognized as the intellectual leader across a wide range of topics. The drafting of an article for release in a professional magazine has two views. Either the attempt can be assessed as part of the "F" mark, or the release of the article can be the trigger for the "F." Frequently, the release of a professional article is the action required for the assignment of the "G" mark in PME if all other aspects of the mark have been achieved.

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APPENDIX C: REVISED FITNESS REPORT (NAVMC 10835)

USMC FITNESS REPORT (1610) NAVMC 10835 (Rev. 7-11) (EF) PREVIOUS EDITIONS WILL NOT BE USED FOUO - Privacy sensitive when filled in.		COMMANDANT'S GUIDANCE		DO NOT STAPLE THIS FORM	
The completed fitness report is the most important information component in manpower management. It is the primary means of evaluating a Marine's performance and is the Commandant's primary tool for the selection of personnel for promotion, augmentation, resident schooling, command, and duty assignments. Therefore, the completion of this report is one of an officer's most critical responsibilities. Inherent in this duty is the commitment of each Reporting Senior and Reviewing Officer to ensure the integrity of the system by giving close attention to accurate marking and timely reporting. Every officer serves a role in the scrupulous maintenance of this evaluation system, ultimately important to both the individual and the Marine Corps. Inflationary markings only serve to dilute the actual value of each report. Reviewing Officers will not concur with inflated reports.					
A. Administrative Information					
1. Marine Reported On:					
a. Last Name	b. First Name	c. MI	d. EDIPI	e. Rank	f. DOR
g. PMOS	g. BILMOS				
2. Organization:					
a. MCC	b. RUC	c. Description			
3. Occasion and Period Covered:					
a. OCC	b. From	To	c. Type	4. Duty Assignment (descriptive title):	
5. Special Case:					
a. Adverse <input type="checkbox"/>	b. Not Observed <input type="checkbox"/>	c. Extended <input type="checkbox"/>			
6. Marine Subject Of:			7. Recommended for Promotion:		
a. Commendatory Material <input type="checkbox"/>	b. Derogatory Material <input type="checkbox"/>	c. Disciplinary Action <input type="checkbox"/>	a. Yes <input type="checkbox"/>	b. No <input type="checkbox"/>	c. N/A <input type="checkbox"/>
8. Special Information:					
a. QUAL <input type="text"/>	c. PFT <input type="text"/>	e. CFT <input type="text"/>	g. Reserve Component <input type="text"/>	9. Report Concurrence:	
b. HT(in.) <input type="text"/>	d. WT <input type="text"/>	f. Body Fat <input type="text"/>	h. Status <input type="text"/>	a. MRO Yes <input type="checkbox"/>	b. RO Yes <input type="checkbox"/>
No <input type="checkbox"/> No <input type="checkbox"/>					
10. Reporting Senior:					
a. Last Name	b. Init	c. Service	d. EDIPI	e. Grade	f. Duty Assignment
11. Reviewing Officer:					
a. Last Name	b. Init	c. Service	d. EDIPI	e. Grade	f. Duty Assignment
D-H. PARS Attribute Assessment					
Attribute			Justifications		
Mark					
D-1. Performance					
D-2. Proficiency					
E-1. Courage					
E-2. Effectiveness Under Stress					
E-3. Initiative					
F-1. Leading Subordinates					
F-2. Developing Subordinates					
F-3. Setting the Example					
F-4. Ensuring Well-Being of Subordinates					
F-5. Communication Skills					
G-1. Professional Military Education					
G-2. Decision Making Ability					
G-3. Judgment					
H-1. Evaluations					
Report Average					

1. Marine Reported On:				2. Occasion and Period Covered:										
a. Last Name	b. First Name	c. MI	d. EDIPI	a. OCC	b. From	To								
I. Directed and Additional Comments														
J. Marine Reported On Statement (if required):														
1. Comments:														
K. Reviewing Officer Comments (if required):														
1. Comments: Required when the report is adverse, when there is disagreement between the Marine Reported On and Reporting Senior regarding comments or marks, and in all circumstances that comments are directed for in MCO 1610.7_.														
L. Certification														
1. I CERTIFY that to the best of my knowledge and belief all entries made hereon are true and without prejudice or partially and that I have provided a signed copy of this report to the Marine Reported on.				_____	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> </tr> </table>									
				(Signature of Reporting Senior)	(Date in YYYY MM DD format)									
2. I ACKNOWLEDGE the adverse nature of this report, or that my statement is accurate and true.				_____	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> </tr> </table>									
<input type="checkbox"/> I have no statement to make <input type="checkbox"/> I have attached a statement				(Signature of Marine Reported On)	(Date in YYYY MM DD format)									
3. I CERTIFY that to the best of my knowledge and belief all entries made hereon are true and without prejudice or partiality.				_____	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> </tr> </table>									
				(Signature of Reviewing Officer)	(Date in YYYY MM DD format)									
4. I ACKNOWLEDGE the adverse nature of this report, or that my statement is accurate and true.				_____	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> <td style="width: 20px; height: 20px;"> </td> </tr> </table>									
<input type="checkbox"/> I have no statement to make <input type="checkbox"/> I have attached a statement				(Signature of Marine Reported On)	(Date in YYYY MM DD format)									
M. Addendum Page														
Addendum Page Attached: <input type="checkbox"/> Yes														

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APPENDIX D: SINGLE PAGE FITNESS REPORT (NAVMC 10835)

A. Administrative Information										
1-5. Marine (Rank Last, First, MI, EDIPI)				6. DOR	7. PMOS	8. BILMOS	9. MCC	10. RUC	11. Description	
12. OCC		13. From	To	14. Type	15. Duty Assignment (descriptive title):					
16. Special Case:			17. Marine Subject Of:			18. Recommended for Promotion:				
a. Adverse <input type="checkbox"/>			a. Commendatory Material <input type="checkbox"/>			a. Yes <input type="checkbox"/>				
b. Not Observed <input type="checkbox"/>			b. Derogatory Material <input type="checkbox"/>			b. No <input type="checkbox"/>				
c. Extended <input type="checkbox"/>			c. Disciplinary Action <input type="checkbox"/>			c. N/A <input type="checkbox"/>				
19. Special Information:				20. Report Concurrence:						
a. QUAL <input type="text"/>		c. PFT <input type="text"/>		e. CFT <input type="text"/>		g. Reserve Component <input type="text"/>		a. MRO		b. RO
b. HT(in.) <input type="text"/>		d. WT <input type="text"/>		f. Body Fat <input type="text"/>		h. Status <input type="text"/>		Yes <input type="checkbox"/>		Yes <input type="checkbox"/>
								No <input type="checkbox"/>		No <input type="checkbox"/>
21. Reporting Senior:										
a. Last Name		b. Init. Service		d. EDIPI		e. Grade		f. Duty Assignment		g. Signature/Certification
22. Reviewing Officer:										
a. Last Name		b. Init. Service		d. EDIPI		e. Grade		f. Duty Assignment		g. Signature/Certification
D-H. PARS Attribute Assessment										
Attribute		Mark	Attribute		Mark	Attribute		Mark		
D-1. Performance			F-1. Leading Subordinates			G-1. Professional Military Education				
D-2. Proficiency			F-2. Developing Subordinates			G-2. Decision Making Ability				
E-1. Courage			F-3. Setting the Example			G-3. Judgment				
E-2. Effectiveness Under Stress			F-4. Ensuring Well-Being of Subordinates			H-1. Evaluations				
E-3. Initiative			F-5. Communication Skills			Report Average				
Justifications for Section D-H Attribute Assessment										
I. Directed and Additional Comments										
J. Marine Reported On Statement (if required):										
K. Reviewing Officer Comments (if required):										
1. Comments: Required when the report is adverse, when there is disagreement between the Marine Reported On and Reporting Senior regarding comments or marks, and in all circumstances that comments are directed for in MCO 1610.7.										
L. Marine Reported On Certification										
1. I ACKNOWLEDGE the adverse nature of this report, or that my statement is accurate and true following Reporting Senior actions.										
<input type="checkbox"/> I have no statement to make <input type="checkbox"/> I have attached a statement				_____ (Signature of Marine Reported On)				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
								(Date in YYYY MM DD format)		
2. I ACKNOWLEDGE the adverse nature of this report, or that my statement is accurate and true following Reviewing Officer actions.										
<input type="checkbox"/> I have no statement to make <input type="checkbox"/> I have attached a statement				_____ (Signature of Marine Reported On)				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
								(Date in YYYY MM DD format)		
M. Addendum Page										
Addendum Page Attached: <input type="checkbox"/> Yes										

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APPENDIX E: ACADEMIC FITNESS REPORT (NAVMC 10835)

USMC ACADEMIC FITNESS REPORT (1610) NAVMC 10835-1 (Rev. 3-20) (EF)				COMMANDANT'S GUIDANCE			
<p>The completed fitness report is the most important information component in manpower management. It is the primary means of evaluating a Marine's performance and is the Commandant's primary tool for the selection of personnel for promotion, augmentation, resident schooling, command, and duty assignments. Therefore, the completion of this report is one of a reporting officials most critical responsibilities. Inherent in this duty is the commitment of each Reporting Senior and Reviewing Officer to ensure the integrity of the system by giving close attention to accurate marking and timely reporting. Every officer serves a role in the scrupulous maintenance of this evaluation system, ultimately important to both the individual and the Marine Corps. Inflationary markings only serve to dilute the actual value of each report. Reviewing Officers will not concur with inflated reports.</p>							
A. Administrative Information							
1-5. Marine (Rank Last, First, MI, EDIPI)				6. DOR	7. PMOS	8. BILMOS	9. MCC 10. RUC
11. Unit Description							
12. OCC 13. From To 14. Type 15. Duty Assignment (descriptive title):							
16. Special Case: a. Adverse <input type="checkbox"/> b. Not Observed <input type="checkbox"/> c. Extended <input type="checkbox"/>			17. Marine Subject Of: a. Commendatory Material <input type="checkbox"/> b. Derogatory Material <input type="checkbox"/> c. Disciplinary Action <input type="checkbox"/>			18. Recommended for Promotion: a. Yes <input type="checkbox"/> b. No <input type="checkbox"/> c. N/A <input type="checkbox"/>	
19. Special Information: a. HT(in.) <input type="text"/> c. PFT <input type="text"/>				e. Body Fat <input type="text"/> g. Status <input type="text"/>		20. Report Concurrence: a. MRO Yes <input type="checkbox"/> No <input type="checkbox"/>	
b. WT <input type="text"/> d. CFT <input type="text"/>				f. Reserve Component <input type="text"/>		b. RO Yes <input type="checkbox"/> No <input type="checkbox"/>	
21. Reporting Senior: a. Last Name b. Init c. Service d. EDIPI e. Grade f. Duty Assignment g. Signature/Certification h. Date							
22. Civilian Faculty When Applicable: a. Last Name b. Init c. EDIPI d. Title e. Duty Assignment f. Signature/Certification g. Date							
23. Reviewing Officer: a. Last Name b. Init c. Service d. EDIPI e. Grade f. Duty Assignment g. Signature/Certification h. Date							
B (1-10). Attribute Assessment							
Attribute		Mark		Attribute		Mark	
1. Leadership				6. Presence, Delivery, and Oral Communication			
2. Intellect				7. Written Communication			
3. Critical Thinking				8. Self-Improvement			
4. Initiative				9. Problem-Solving/Creative Thinking			
5. Collaboration				10. Planning and Preparation			
Justifications for Section B1-B10 Attribute Assessment							
C. Academic Achievements							
1. Grade Point Average (if applicable)				2. Distinguished Graduate (if applicable) <input type="checkbox"/>			
D-1. Talent Management (Reporting Senior)							
1. Comments: Provide recommendations for future assignment based on the assessed potential for continued educational selection, assignment to instructor billets, or strengths related to the observed performance while in an academic setting.							
D-2. Directed and Additional Comments (Reporting Senior)							

1-5. Marine (Rank Last, First, MI, EDIPI)	6. DOR	7. PMOS	8. BILMOS	9. MCC	10. RUC								
D-3. Directed and Additional Comments (Civilian Faculty Member When Applicable)													
E. Marine Reported On Statement (if required):													
F. Reviewing Officer Comments (if required):													
1. Comments: Required when the report is adverse, when there is disagreement between the Marine Reported On and Reporting Senior regarding comments or marks, and in all circumstances that comments are directed for in MCO 1610.7_.													
G. Marine Reported On Certification													
1. I ACKNOWLEDGE the adverse nature of this report, or that my statement is accurate and true following Reporting Senior actions.		_____		<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>									
<input type="checkbox"/> I have no statement to make <input type="checkbox"/> I have attached a statement		(Signature of Marine Reported On)		(Date in YYYY MM DD format)									
2. I ACKNOWLEDGE the adverse nature of this report, or that my statement is accurate and true following Reviewing Officer actions.		_____		<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>									
<input type="checkbox"/> I have no statement to make <input type="checkbox"/> I have attached a statement		(Signature of Marine Reported On)		(Date in YYYY MM DD format)									
H. Addendum Page													
Addendum Page Attached: <input type="checkbox"/> Yes													

A. Purpose

1-5. Marine (Rank Last, First, MI, EDIPI) 6. DOR 7. PMOS 8. BILMOS 9. MCC 10. RUC

11. Purpose

a. Continuation of Comments	b. Adverse Report	c. Admin Review	d. Supplemental Material	e. HQMC Use
MRO <input type="checkbox"/> Justification <input type="checkbox"/> RS <input type="checkbox"/> CIVFAC <input type="checkbox"/> RO <input type="checkbox"/>	MRO Statement <input type="checkbox"/> 3rd Officer Sighter <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

B. Text

C. Submitted By

1.					
a. Last Name	b. First Name	c. MI	d. EDIPI	e. Service	f. Grade
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____ (Signature)				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> (Date in YYYY MM DD format)	

D. General/Senior Officer Adverse Report Sighting

1.					
a. Last Name	b. First Name	c. MI	d. EDIPI	e. Service	f. Grade
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
g. Title				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> (Date in YYYY MM DD format)	
_____ (Signature)					

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APPENDIX F: MODIFIED A-PES INTERFACE

FTREP - Automated Performance Evaluation System

NAME: _____

Page: 1 | 2 | 3 | 4 | 5

Sections: A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Admin: Change | Knowledge | History | Training | Admin | RS View | RO View | Philosophy

MCTMS Training Summary

Annual Training: 3.44 (14 Overdue)
 Fiscal Training: 0 of 4 Overdue
 PFI# for Grade: Incomplete
 Highest School Level: High School
 PFT Date: Score: 293 Date: 20200115
 CFT Date: Score: 200 Date: 20191115
 MCMAP Rat: Status: Block Date: 20170515
 RRI#: Status: Expired Date: 20200613
 Plist#: Status: Expired Date: 20200619
 Water Qual: Status: Overdue - Date: N/A
 RCLF: Exempt
 Qualifications: See for Eligible: 20190519

Additional Admin Data

Time-in-Grade: 3 years 2 months
 Time-in-Service: 13 years 5 months
 Supervisor for: 3 Mentors: 2 Sailors
 Assigned to BCP: Status: No Date: N/A
 Assigned to MAP: Status: No Date: N/A
 Promotion Eligible: Status: No Eval Date: 202105
 End Date Last Filrep: 20200301
 Date Gaps Present: Yes

PAGE ONE

COMMANDANT'S GUIDANCE

The completed fitness report is the most important information component in manager management. It is the primary means of evaluating a Marine's performance and is the Commandant's primary tool for the selection of personnel for promotion, augmentation, resident schooling, command, and duty assignments. Therefore, the completion of this system by giving close attention to accurate naming and line/ reporting. Every officer serves a role in the accurate maintenance of this evaluation system, although important to both the individual and the Marine Corps. Inflationary ratings only serve to dilute the actual value of each report. Reviewing Officers will not concur with inflated reports.

A. ADMINISTRATIVE INFORMATION

1. Marine Reported On
 a. Last Name: _____ b. First Name: _____ c. MI: _____ d. ID: _____ e. Grade: _____ f. DOB: _____ g. PIOS: _____ h. BU/MS: _____
 a. MCC: _____ b. RUC: _____ c. Unit Description: _____

2. Organization
 a. MCC: _____ b. RUC: _____ c. Unit Description: _____

3. Occasion and Period
 a. OCC: _____ b. From: _____ To: _____ c. Type: _____
 YYYYYYMMDD YYYYYYMMDD YYYYYYMMDD

4. Duty Assignment
 Describe The _____

5. Special Case
 Address by RS
 Not Challenged
 Extended

6. Marine Subject Of
 Commendatory Material
 Derogatory Material
 Disciplinary Action

7. Recommended For Promotion
 Yes
 No
 N/A
 Accelerated Promotion

8. Special Information

a. Files Qual: _____ b. PFT Code: _____ c. CFT Code: _____
 Period Qual: _____ PFT Score: _____ CFT Score: _____
 Date: _____ h. Status: _____

d. Height: _____ e. Weight: _____
 f. Body Fat: _____ g. Reserve Component: _____

9. Duty Preference

a. Code: _____ b. Description: _____
 1st: _____ 2nd: _____ 3rd: _____
 (Not Required)

10. Reporting Senior Information

a. Last Name: _____ b. Initial: _____ c. Service: _____ d. ID: _____ e. Grade: _____
 f. Duty Assignment: _____

g. If your Service is Chilian, you must type in your Grade (e.g. GS15). Do not use punctuation or spaces in Chilian Grades.

11. Reviewing Officer Information

a. Last Name: _____ b. Initial: _____ c. Service: _____ d. ID: _____ e. Grade: _____
 f. Duty Assignment: _____

g. If your Service is Chilian, you must type in your Grade (e.g. GS15). Do not use punctuation or spaces in Chilian Grades.

RS View

Current Filrep Average: 3.84
 Current Filrep Relative Value: 88%
 Last Filrep Report Average: 3.85
 Report Length: 189 Days
 Rank Filrep Average: 3.90
 Rank # Observed FTREPs: 189
 Recorded Filrep Book History: [Full Book History](#)

- This Report
 - Last Report
 - Prior RSs

RO View

RS Filrep High For Grade: 4.00
 RS Filrep Low for Grade: 3.00
 Current Filrep Average: 3.84
 Current Filrep Relative Value: 88%
 Last Filrep Report Average: 3.85
 Report Length: 189 Days
 Rank Filrep Average: 3.90
 Rank # Observed Filreps: 189
 Rank # Filreps Working: 12
 Rank # Filreps in Routing Component: [Click Here](#)
 Rank # Supervised: 12
 Total Direct Reports: 18
 Marking Philosophy By Rank: [Click Here](#)
 Recorded Filrep Book History: [Full Book History](#)

- This Report
 - Last Report
 - Prior RSs

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APPENDIX G: RO WORKSHEET EXAMPLE 1

V27 REVIEWING OFFICER WORKSHEET

MRO: 1stLt Marine

RS: Maj Devildog

OCCASION	FROM DATE:	TO DATE:
GC	20150430	20150909

REPORTING SENIOR PROFILE

RS High for Grade	4.21
RS Low for Grade	3.46
RS Avg for Grade	3.78
MRO Avg (this report)	3.46

RECOMMENDED SECTION K COMMENTS

Put an X in the appropriate [] for the recommended RO observation.

OBSERVATION	SUFFICIENT [X]	CONCUR [X]
	INSUFFICIENT []	DO NOT CONCUR []

COMPARATIVE ASSESSMENT

Right click on appropriate box, select "Format Autoshape, under Fill: select the color drop down arrow, select black.

<p>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.</p>	DESCRIPTION	COMPARATIVE ASSESSMENT	
	<u>THE EMINENTLY QUALIFIED MARINE</u> ONE OF THE FEW	<input checked="" type="checkbox"/>	
	EXCEPTIONALLY QUALIFIED MARINES	<input type="checkbox"/>	
	ONE OF THE MANY HIGHLY QUALIFIED	<input type="checkbox"/>	
	PROFESSIONALS WHO FORM THE MAJORITY OF THIS GRADE	<input type="checkbox"/>	
	<u>A QUALIFIED MARINE</u>	<input type="checkbox"/>	
UNSATISFACTORY	<input type="checkbox"/>		

RECOMMENDED RO COMMENTS

(Include a character assessment and recommendations for promotion, retention, resident PME, and potential for command or follow on duty assignment)

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APPENDIX H: RO WORKSHEET EXAMPLE 2



UNITED STATES MARINE CORPS
REGIONAL DEFENSE COUNSEL WESTERN REGION
MARINE CORPS DEFENSE SERVICES ORGANIZATION
MARINE CORPS BASE, BOX 555240
CAMP PENDLETON, CALIFORNIA 92055-5240

IN REPLY REFER TO:
1611
RDC
13 Jun 2012

From: Regional Defense Counsel, Western Region
To: Chief Defense Counsel

Subj: FITNESS REPORT IN THE CASE OF MAJOR I. M. MARINE, U.S. MARINE
CORPS (AN OCCASION; FROM 20110601 TO 20120531)

1. Date Submitted to APES. 13 Jun 2012.
2. Background Information.

a. Is the MRO PME complete for grade or currently enrolled? Yes, MRO completed U.S. Marine Corps Command and Staff College through the Distance Education Program.

b. Is MRO in zone for promotion? Yes, MRO is in zone for the next promotion board.

c. What is MRO's desired follow-on assignment? MRO seeks an operational law billet with forward deployed forces in the U.S. Central Command Area of Responsibility and to be looked for command when eligible.

3. Additional Information.

a. MRO's commitment to PME is illustrated by his willingness to volunteer to teach classes for the Expeditionary Warfare School Non-resident course aboard Base. Furthermore, MRO had two articles published during the reporting period: "How to PT and do PME While an SDC" in the Army Lawyer; and, "Leadership and Legal Service Support" in the Marine Corps Gazette.

b. MRO's ability to fulfill Senior Defense Counsel requirements while simultaneously being fully engaged in PME and other duties is an illustration of MRO's tireless work ethic. Moreover, MRO is able to maintain balance personally and professionally despite the demands that nine children have upon MRO and MRO's spouse.

c. MRO is a team builder and thrives as a mentor.

Enclosure (1)

Subj: FITNESS REPORT IN THE CASE OF MAJOR I. M. MARINE, U.S. MARINE CORPS (AN OCCASION; FROM 20110601 TO 20120531)

4. Reporting Senior's Profile for the Appropriate Grade.

RS High for Grade till this Report	5.0
RS Low for Grade till this Report	3.0
RS Avg for Grade till this Report	4.0
MRO Avg (this report)	4.0
For all reports of this grade I rank MRO	This is my 17th FitRep on a Major as an RS and MRO ranks 9 of 17

5. Recommended RO Comments. MRO is an outstanding MAGTF Officer and judge advocate. MRO set the conditions for success for his Defense Team while simultaneously obtaining excellent results for all of MRO's clients. MRO did a superb job fulfilling duties as Acting Regional Defense Counsel in the RDC's absence. MRO superbly assisted my office with the planning and execution of conferences and training events. A humble but incredibly capable professional, MRO is a valued and trusted member of the Defense Services Organization. MRO cares about his Team, our clients, works hard to support the mission, and makes a positive impact throughout the DSO. Highest Recommendation for Promotion, School, and Command.

6. Recommended RO Marks in the Comparative Assessment. My recommendation is highlighted below.

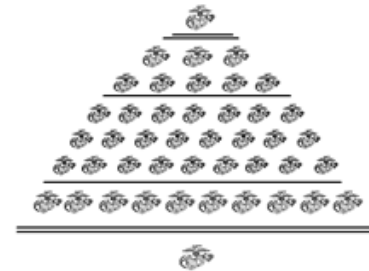
- THE EMINENTLY QUALIFIED MARINE X of X

- ONE OF THE FEW X of X
- EXCEPTIONALLY QUALIFIED MARINES X of X

- ONE OF THE MANY HIGHLY QUALIFIED X of X
- PROFESSIONALS WHO FORM THE** X of X
- MAJORITY OF THIS GRADE X of X

- A QUALIFIED MARINE X of X

- UNSATISFACTORY X of X

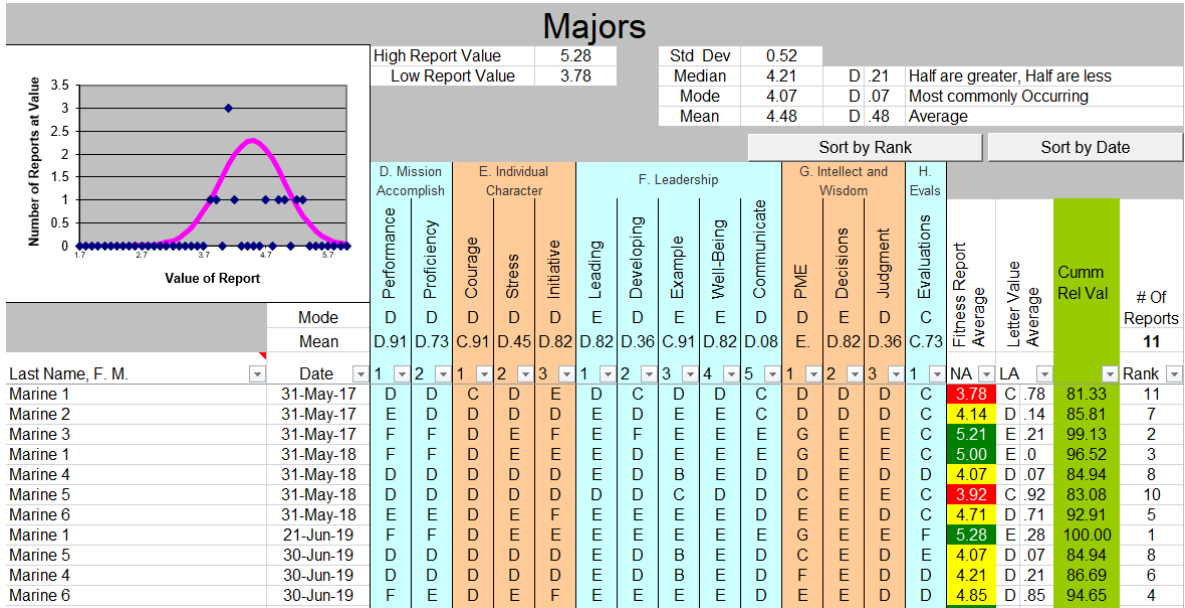


7. Respectfully submitted.

/s/
I. M. REPORTING SENIOR

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APPENDIX I: MARKING PHILOSOPHY EXAMPLE



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NOTES

¹ Commandant of the Marine Corps. *Marine Corps Individual Records Administration Manual*. MCO P1070.12K W/CH 1, July 14, 2000. <https://www.marines.mil/portals/1/Publications/MCO%20P1070.12K%20W%20CH%201.pdf?ver=2012-10-11-163726-583>. The Individual Records Administration Manual (IRAM) contains the process and procedures for completion of proficiency and conduct markings for Marines in the ranks of private to corporal. Guidance is limited with significant subjectivity existing across the Marine Corps for what metrics and qualitative information to consider during assignment of marks. No counseling is required as part of this process.

² Elaine D. Pulakos, *Performance Management: A Roadmap for Developing, Implementing and Evaluating Performance Management Systems* (Alexandria: SHRM Foundation, 2004), 5.

³ MCO 1610.7A provides a process for translating specific PARS attribute markings into a numerical value. Summation of these numerical values results in a report average. This report average represents a single numerical value that does not immediately replace the two values represented by proficiency and conduct markings but could be used in lieu of through adjustment to several administrative processes that rely on these markings.

⁴ Commandant of the Marine Corps. *User's Guide to Counseling*. NAVMC 2795, July 21, 1986, 1-5, <https://www.marines.mil/portals/1/Publications/NAVMC%202795.pdf?ver=2012-10-11-163939-500>.

⁵ Pulakos, 1.

⁶ MCO 1610.7A, 4-40.

⁷ Headquarters US Marine Corps, M&RA, *JEPES Policy and System Improvements Executive Summary* (MMPR-30, Quantico, VA, December 4, 2019), PowerPoint presentation.

⁸ Commandant of the Marine Corps. *Commandant's Planning Guidance: 38th Commandant of the Marine Corps*. February 2019. 8, https://www.marines.mil/Portals/1/Publications/Commandant's%20Planning%20Guidance_2019.pdf?ver=2019-07-17-090732-937.

⁹ MCO 1610.7A, 1-4.

¹⁰ MCO 1610.7A, 1-4.

¹¹ William Algarin-Mendoza, and Dominic Daly, "Fitness Report Counseling and Awards," *Marine Corps Gazette* 102, no. 7 (July 2018), 28, <https://search-proquest-com.lomc.idm.oclc.org/docview/2115195467?accountid=14746>.

¹² MCO 1610.7A, 1-4.

¹³ MCO 1610.7A, 5-2.

¹⁴ Laurie J. Mullins, *Management and Organizational Behaviour* (7th ed. Essex: Pearson, 2005), 771.

¹⁵ Peter G. Northouse, *Leadership: Theory and Practice*, 7th ed. (Los Angeles: SAGE Publications, Inc., 2016), 162.

¹⁶ Algarin-Mendoza, 29.

¹⁷ Brian R. Criley, "Performance Counseling," *Marine Corps Gazette* 90, no. 9 (September 2006), 68, <https://search-proquest-com.lomc.idm.oclc.org/docview/2214.43872?accountid=14746>.

¹⁸ MCO 1610.7A, 1-4.

¹⁹ MCO 1610.7A, Chapter 5. Chapter 5 of the reference contains the process for adverse FitReps. The key requirement for understanding the new process as it relates to the current process, is that the FitRep returns to the MRO after each reporting official action.

²⁰ MCO 1610.7A, 1-4.

²¹ MCO 1610.7A, 2-5.

²² MCO 1610.7A, 4-50. The referenced paragraph requires the RO to adjudicate the "factual differences between the RS's evaluation and the MRO's statement..." While this section is specific to adverse FitReps, the concept remains the same for this revised process.

²³ Mullins, 765. This textbook briefly discusses several performance evaluation systems, their benefits, and the problems associated with them. For 360° feedback systems, they often result in undesirable

tensions between the leadership and those being evaluated if the system is not implemented correctly. Implementing in an academic setting reduces the potential for Service level issues while providing an opportunity for continued development of the system for application to the entire institution.

²⁴ MCO 1610.7A, 2-5.

²⁵ MCO 1610.7A, 4-50.

²⁶ Headquarters US Marine Corps, *Marine Corps Design Methodology*, MSTP Pamphlet 5-0.1. (Washington, DC: Headquarters US Marine Corps, May 8, 2017, B-2. The Marine Corps defines confirmation as “when individuals seek confirmatory information for conclusions they have made prematurely, not realizing that the evidence supports several hypotheses. As a result, individuals fail to search for or discard inconsistent and disconfirming evidence. This bias emphasizes the need for the commander to establish a culture of collaboration and discourse in the organization.”

²⁷ Headquarters Marine Corps, ALMAR 005/19, Revision of the Commandants Professional Reading List (Washington, DC: March 2019), <https://www.marines.mil/News/Messages/Messages-Display/Article/1773787/revision-of-the-commandants-professional-reading-list/>.

²⁸ Thomas C. Gillespie, "Let's Stop Ghostwriting Reviewing Officer Remarks," *Marine Corps Gazette* 86, no. 10 (October 2002), 29, <https://search-proquest-com.lomc.idm.oclc.org/docview/221423794?accountid=14746>.

²⁹ MCO 1610.7A, 8-1.

³⁰ Commandant of the Marine Corps. *Commandant's Planning Guidance: 38th Commandant of the Marine Corps*. February 2019. 8, https://www.marines.mil/Portals/1/Publications/Commandant's%20Planning%20Guidance_2019.pdf?ver=2019-07-17-090732-937.

³¹ Nathan Kuncel, Sarah Hezlett, and Deniz Ones, “Academic Performance, Career Potential, Creativity, and Job Performance: Can One Construct Predict Them All?.” *Journal of Personality and Social Psychology* 8, (February 2004), 148, https://www.researchgate.net/profile/Deniz_Ones/publication/8922929_Academic_Performance_Career_Potential_Creativity_and_Job_Performance_Can_One_Construct_Predict_Them_All/links/00b49523334225734b000000/Academic-Performance-Career-Potential-Creativity-and-Job-Performance-Can-One-Construct-Predict-Them-All.pdf. Wise, David A. “Academic Achievement and Job Performance: Earnings and Promotions.” New York: Ford Foundation, 1973, 8. These two studies both determined a relation between academic and job performance. The latter included salary outcomes into the analysis, but also addressed the influence of grade point average and school attended on performance following graduation. There is

³² Marine Administrative (MARADMIN) messages are released annually, announcing the selection board process for officers. Selection messages frequently identify that the process was extremely competitive for selection, but do not include statistics for quantitative review.

³³ Commandant of the Marine Corps. *Marine Corps Formal School Management Policy Guidance*. NAVMC 1553.2, September 21, 2015, 3-3. <http://www.marines.mil/portals/1/Publications/NAVMC%201553.2.pdf?ver=2016-06-09-094625-947>

³⁴ Headquarters US Army. *Evaluation Reporting System*. AR 623-3, June 14, 2019, https://armypubs.army.mil/pub/eforms/DR_a/pdf/ARN17680_A1059_FINAL.pdf

³⁵ 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>.

³⁶ Officers in the rank of colonel and above, and sergeant majors are not required to have PARS attribute markings completed.

³⁷ Commandant of the Marine Corps. *Performance Evaluation System*. MCO 1610.7A, May 01, 2018, 4-23. <http://www.marines.mil/portals/1/Publications/MCO%201610.7A.pdf?ver=2018-05-07-074813-187>

³⁸ Robert G. Antolino, "PES Shortfall," *Marine Corps Gazette* 101, no. 4 (April 2017), 17, <https://search-proquest-com.lomc.idm.oclc.org/docview/1882459779?accountid=14746>.

³⁹ MCO 1610.7A, 4-37.

- ⁴⁰ MCO 1610.7A, 8-9.
- ⁴¹ Ryan T. Baker, U.S.M.C.R. and Yuk Wing Kwan. "Miscalculating Performance: How Relative Values Work, and Why the Marine Corps should Stop using them," *Marine Corps Gazette* 99, no. 12 (December 2015), 66, <https://search-proquest-com.lomc.idm.oclc.org/docview/1752548610?accountid=14746>.
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