



MARINE CORPS **Gazette**

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Happy 248th Birthday, Marines!



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A publication of the Marine Corps Association



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IDEAS AND ISSUES

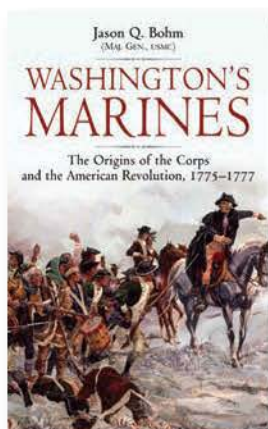


Cover

Since 1775, Soldiers of the Sea. Happy 248th birthday Marines. Photo: "Evacuation of Billingsport" by Col Charles Waterhouse, National Museum of the Marine Corps, Triangle, VA. (Prints available at <https://marineshop.net/product/evacuation-of-billingsport-waterhouse-print-106799>).

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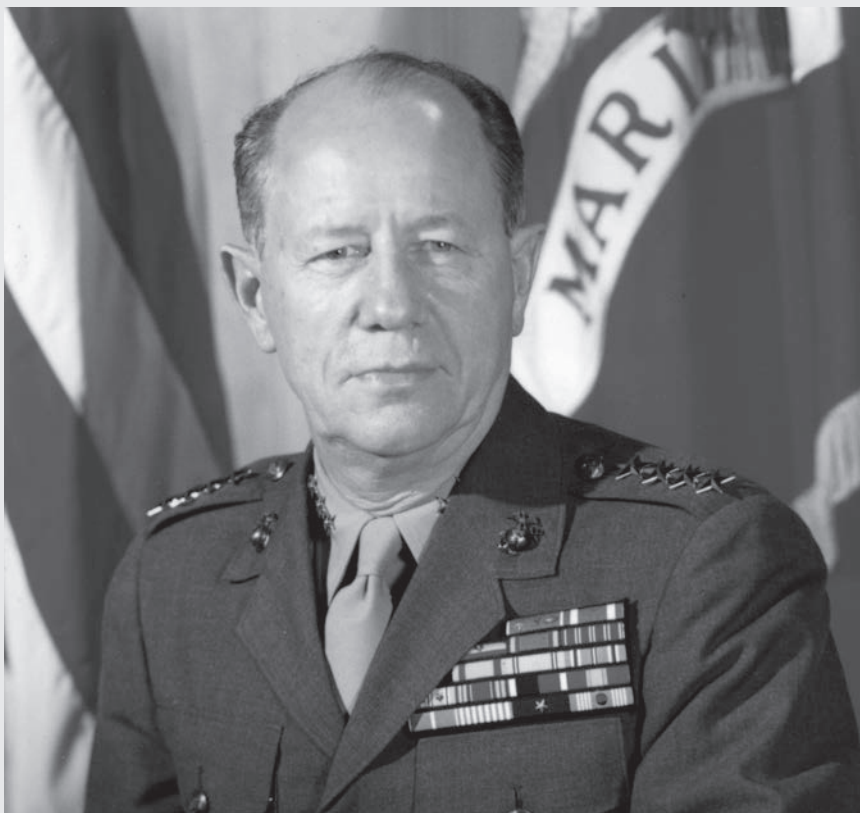
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GEN ROBERT E. HOGABOOM LEADERSHIP WRITING CONTEST



Gen Robert E. Hogaboom.

The Marine Corps Gazette's annual Gen Robert E. Hogaboom Leadership Writing Contest is here. The contest honors the essay that is the most original in its approach to the various aspects of leadership. Authors should not simply reiterate the 11 Principles of Leadership or the 14 Leadership Traits of an NCO addressed in the Guidebook for Marines. Authors must be willing to take an honest, realistic look at what leadership, either positive or negative, means to them and then articulate ways and methods of being an effective leader of Marines.

E-mail entries to: gazette@mca-marines.org

Mail entries to: Marine Corps Gazette
Hogaboom Writing Contest
Box 1775
Quantico, VA 22134

DEADLINE:
31 January,
2024

Background

The contest is named for Gen Robert E. Hogaboom, USMC(Ret), who served the Corps for 34 years. Upon graduating from the Naval Academy in 1925, Gen Hogaboom saw service in Cuba, Nicaragua, and China. Following action in a number of key Pacific battles in World War II, he later served first as assistant division commander, then division commander, 1st Marine Division, in Korea in 1954–55. Gen Hogaboom retired in 1959 as a lieutenant general while serving as the Chief of Staff, Headquarters, U.S. Marine Corps, and was subsequently advanced to the rank of general.

Prizes include \$3,000 and an engraved plaque for first place; \$1,500 and an engraved plaque for second place; and \$500 for honorable mention. All entries are eligible for publication.

Instructions

The contest is open to all Marines on active duty and to members of the Marine Corps Reserve. Electronically submitted entries are preferred. Attach the entry as a file and send to gazette@mca-marines.org. A cover page should be included identifying the manuscript as a Gen Robert E. Hogaboom Leadership Writing Contest entry and include the title of the essay and the author's name. Repeat title on the first page, but author's name should not appear anywhere but on the cover page. Manuscripts are acceptable, but please include a disk in Microsoft Word format with the manuscript. The *Gazette* Editorial Advisory Panel will judge the contest during February and notify all entrants as to the outcome shortly thereafter. Multiple entries are allowed; however, only one entry per author will receive an award.



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MARINE CORPS Gazette

Professional Journal of U.S. Marines

NOVEMBER 2023

Editorial: Happy 248th Birthday, Marines!

On 10 November, today's Marines, veterans, family, and friends commemorate the founding of the Continental Marines in 1775 as the birthday of the Corps. Uninitiated outsiders no doubt find our behavior strange as all Marines wish each other a happy birthday and celebrate as one family. For those who share our fellowship of arms, our traditions are part of what makes us unique. From simple cake-cutting ceremonies and small gatherings to parades and lavish formal birthday balls, we still most often remember those birthdays observed while deployed in austere conditions, in combat, and at sea while sharing what little we had with the Marines and sailors closest to us. Above all, we celebrate to remember and honor those who are no longer with us and to show the way to those who will carry on into the future.

On page 4 you will find our 39th Commandant, Gen Eric M. Smith's birthday letter, and on page 5, the Marine Corps Association President and CEO, LtGen Charles G. Chiarotti offers his birthday wishes. We also feature several articles recalling some of the Corps' history including "First to Fight: Lessons From the Battle of Belleau Wood" by Maj Kyle King on page 49 and the first of a two-part series examining command and control in the Pacific Theater of World War II titled "IWO JIMA: The Battle for Coordination" by author and lecturer Steven D. McCloud on page 53.

This month's edition is unique as we focus the magazine's content on Manpower and Reserve Affairs (M&RA) for the first time. From individual promotions, assignments, awards, pay, benefits, separations, and retirements to the development and implementation of the policies that guide these activities and the high-level planning that drives Talent Management and the Corps' Force Structure, M&RA is the center of gravity for the most valuable resource in the Corps—our people. Starting on page 7 with *Talent Management Tangibles* by LtGen James F. Glynn, the Deputy Commandant for M&RA, we present a series of ten articles in print plus another three in our online edition covering various aspects of the subject. Highlights include "*Talent Management 2030: A Cultural Case Study*" by LtCol Ryan W. Pallas on page 9, "The Looming Manpower Crisis: Threat Driven Assignments in the Pacific" by the Staff of Officer Assignments branch on page 26, and "Lateral Entry" by MGySgt Sage Goyda on page 36.

I also call your attention to the letter from our President and CEO on page 67. For the first time, the MCA will be updating our membership structure and increasing the price of membership. Detailed information is available on our website and our MCA Support Center is standing by to assist. I encourage MCA members and *Gazette* readers to take advantage of the opportunity offered to renew or extend your membership for three years at the current rates. In recognition of your years of loyalty, there will be no changes for our Life and Insured Members. There will also be added opportunities for today's Marines serving on active duty and in the reserve component.

Finally, bear in mind that we now begin a two-year journey to the Corps' upcoming 250th birthday. In addition to a historic national celebration planned for Philadelphia, PA, in November 2025, you can expect to see more special features on the history of the world's finest fighting force in both the *Gazette* and *Leatherneck*, and the Association will continue to pass the word about additional commemorative events happening across the country in the coming months. Again, all of us at the *Gazette* and the MCA wish all Marines and friends of the Corps a happy birthday. Semper Fidelis.

Christopher Woodbridge

MCA President and CEO, LtGen Charles G. Chiarotti, USMC(RET); VP Foundation Operations, Col Tim Mundy, USMC(RET); VP Professional Development, Publisher & Editor-in-Chief Marine Corps Gazette & Leatherneck Magazine of the Marines, Col Christopher Woodbridge, USMC(RET); VP Corporate Sponsorships, Events & Advertising, Ms. LeeAnn Mitchell.



10 NOVEMBER 2023

A Message from the Commandant of the Marine Corps

For 248 years, Marines have earned a reputation as the most disciplined and lethal warfighters in the world. This legacy of honor, courage, and commitment passed on to us was paid for in sweat, blood and sacrifice. From Belleau Wood to Inchon and Tarawa to Sangin, Marines have stepped forward to defend our Constitution when others either could not or would not. Our history is filled with heroes like Chief Warrant Officer 4 Hershel “Woody” Williams, Private First Class Hector Cafferata Jr., Sergeant Major Dan Daly, and thousands of others who performed acts of bravery, which went unseen in the heat of battle. We stand on the shoulders of these Marines, and we owe it to them to earn our title “Marine” each and every day.

Marines have given, and have been willing to give, their lives for Country and Corps in every fight our Nation has entered. Our actions turned back the tide of tyranny in Europe during the Great War, defeated fascism in Asia during World War II, fought for democracy in Korea and Vietnam, and offered the hope of self-determination in the Middle East. We go to war whenever our Nation calls, and in the interwar periods we train, we prepare, and we innovate. We have chosen a life of service and sacrifice—an honorable life that has meaning. We sacrifice so our fellow citizens don’t have to, and we seek nothing in return but a chance to be first to fight. Most will never understand why we choose to attack when others do not, why we revel in being covered in mud, why we snap to attention when “The Marines’ Hymn” is played, or why we say, “Ooh Rah.” We understand it, and this message is for us, for the Marines.

As Marines, we live on a war footing because someone must. This means that we ruthlessly adhere to our standards of excellence—Marine standards—as we know this will best prepare us for the wars of the future. Our high standards are a prerequisite of professional warfighting, and how we keep our honor clean in the cauldron of combat. They prepare us for the most difficult mission there is: fighting from and returning to the sea. Most importantly they shape our unique Marine culture, which is respected at home and across the globe.



USMC

Sergeant Major Ruiz and I are proud of all that you have done this past year to protect and enhance our reputation as America’s best warriors. We hope you know that we will be with you every step of the way as we prepare for the fights ahead. We ask that every Marine—active, reserve, and veteran—honor the legacy of those who went before us by continuing to uphold our high standards.

Protect your fellow Marines and our shared legacy. Happy Birthday, Marines!

Semper Fidelis,

Eric M. Smith
General, U.S. Marine Corps
Commandant of the Marine Corps



10 NOVEMBER 2023

A Birthday Message From the Marine Corps Association President & CEO



Today, as we look toward the future, we see the complexities, challenges, and global turmoil which will be faced by countless generations of men and women who earn the title Marine. These seemingly insurmountable barriers will require men and women of character, grounded in the fabric of our nation and shaped by the ethos, values, and commitment demanded of Marines. I remain comforted as I look around our Corps today to witness firsthand the magnificence of our Marines, and I am assured that we, who have served, are in good hands and will continue to be guided by this generation and the next of Marines who are equally up to the task of being our nation's finest fighting force.

As day follows night, and weeks follow days, we stop each year to celebrate the birth of our Corps. Young or old, private to general, and regardless of where we find ourselves, in garrison, on the high seas, or forward deployed throughout the globe, Marines take time to celebrate the Birthday of our Corps.

As we gather to celebrate our beloved Corps, I ask that you take time to remember our brothers and sisters who have come before us, given of themselves to the fullest

measure and whose legacy we stand on and enjoy today. Their indomitable spirit and readiness to face adversity head-on inspired generations of Marines. Their legacy of honor, courage, commitment, sacrifice and hardship, places us above all others in the annals of history. It is this legacy that on 10 November, we take time to celebrate.

I wish all Marines Happy Birthday!

Semper Fidelis,

Charles G. Chiarotti
Lieutenant General, USMC (Ret)
President & CEO



This edition of the Gazette is the first to welcome an open exchange of ideas focused on how to adapt our Talent Management system to ensure that the Marine Corps of 2040 and beyond remains the world's premier expeditionary force in readiness—maritime in character, but globally and technologically adept, and prepared to dominate complex future battlefields.

Our people, specifically the quality of the individual Marine, continues to be our competitive advantage. Toward that end, Talent Management is about leveraging the innate abilities, unique skills, and passions of our total force – including active, reserve, and civilian Marines—and aligning these to the warfighting needs of the Marine Corps to the mutual benefit of both. Each and every Talent Management initiative aims to better identify, develop, and retain skilled Marines and put them in positions where each is professionally challenged, fulfilled, and growing to become ever more capable.

Over the last three years, we have heard your feedback on both legacy and emerging aspects of Talent Management. To date, collaborative efforts have generated several initiatives that are currently underway. However, we are far from done. Some initiatives are evident to the total force today, while others are not as apparent. To better explain some of those, included in this edition are several current initiatives.

We remain fully invested in our people, and everything we do is to ensure the Corps' success in combat. The purpose and intent of Talent Management, and associated initiatives, is to maximize the number of trained, experienced, qualified, and deployable Marines in the Fleet Marine Force while simultaneously enabling a capable Supporting Establishment. We continue to critically examine policies and consider concepts for addressing challenges and exploiting opportunities. Within this collaborative approach to bettering our Corps, we must never forget that it is about increasing capability and readiness.

To ensure success, we must aggressively adapt and execute necessary reforms. Some of the most innovative and promising ideas have come from individual Marines who envisioned a better way and were bold enough to voice it. Please contact your manpower team with innovative ideas. The ongoing discussion on Talent Management affects us all, your insights and suggestions matter, we care, and we are listening.

A handwritten signature in black ink, appearing to read 'James F. Glynn', is positioned above the printed name.

JAMES F. GLYNN

Deputy Commandant for
Manpower and Reserve Affairs

Talent Management Tangibles

Current initiatives

by LtGen James F. Glynn

Since the release of *Talent Management 2030*, we have better aligned departments and organizations involved in talent management, assessed, and mapped out interdependencies of total force personnel policies, and begun to generate momentum with a sense of urgency. Leveraging authorities previously enabled by Congress, we enacted nine initiatives in 2022, which we will expand and accelerate in 2023:

Commandant's Retention Program (CRP): During FY23, the CRP offered pre-approved reenlistments to top-performing Marines by streamlining the process and giving priority access to primary military occupational specialty monitors for duty station and assignment options. The CRP resulted in a 72 percent increase of first-term reenlistment submissions by top-performing Marines with the average reenlistment approval accomplished in 24–48 hours, much quicker than the previous norm. Going forward, we will expand the program to more first-term Marines as well as our career force.

Staff NonCommissioned Officer (SNCO) Promotion Board Realignment: Beginning in FY24, we are realigning SNCO promotion boards to sequence more effectively with the assignments and reenlistment processes. This initiative will reduce SNCO billet gaps in the FMF and decrease the processing time of reenlistment packages. The realignment will provide greater predictability for SNCOs and their families while dramatically reducing the number of permanent change of station moves across the force.

Recruiting Station Commanding Officer Selection Board: We implemented two initiatives for the FY23 Recruiting Station Commanding Officer selection board. First, officers now have the opportunity to volunteer for command, including officers otherwise not scheduled for consideration. Second, officers may also request removal from Recruiting Station commanding officer consideration for one year, without penalty, should they prefer to complete a deployment or other professional obligation, or due to a personal life circumstance.

Special Duty Assignment (SDA) Volunteer Program: Prior to 2022, we screened and selected Marines for SDAs en masse. But last year, we launched a pilot SDA volunteer program, expanding incentives to provide duty station preference for volunteer recruiters, drill instructors, and combat instruc-

tors. As a result, volunteers increased by 62 percent, reducing the number of involuntarily screened Marines by 38 percent. This minimized disruption to Marines, their families, and FMF units while also reducing SDA school attrition. We will improve and expand this program in 2023.

MarineView 360-Degree Leadership Review: MarineView360 is a development tool for leaders that helps Marines identify their strengths, blind spots, and areas for focused improvement through the polling of their supervisors, peers, and subordinates. Leaders receive feedback and advice through a dedicated mentor and coach. The MarineView360 pilot began with a group of 150 sitting commanders and is now leveraging the experience of 200 additional selected commanders and senior-enlisted advisors. The final phase of the pilot will expand to 1,000 Marines of varying rank from gunnery sergeant to colonel.

Officer Promotion Opt-Out: Starting in 2022, both the active and reserve components offered certain officer populations the ability to opt-out of consideration for promotion once without penalty. This allowed officers increased flexibility in their career paths to pursue unconventional career experiences or formal education that would otherwise take them off track for key developmental assignments. We are currently exploring the expansion of this initiative to enlisted Marines to afford them the same flexibility in their careers.

Digital Boardroom 2.0 (DBR 2.0): DBR 2.0 increases the functionality and accuracy of information presented to board members, enhances the conduct of virtual boards, safeguards data, and improves this critical talent management process. The enlisted career retention and reserve aviation boards successfully used DBR 2.0 in 2022. With the availability of cloud-based data, we will expand use of DBR 2.0 while simultaneously assessing the outcomes, cost and time savings, and professional depth and breadth of board members to benchmark with our legacy process.

Separate Competitive Promotion Categories: To meet the demands of the future, the Marine Corps must retain the highest quality officers with the necessary skill sets at all ranks. To that end, we are exploring options to reorganize the unrestricted officer population into separate competitive categories to better meet the Marine Corps' needs for diverse expertise and experience at all ranks by competing

for promotion with peers having similar skill sets, training, and education. We will conduct a pilot program to evaluate the merits of this reorganization during the 2025 field-grade officer promotion boards.

Career Intermission Program: Many Marines desire to pursue specialized education or to focus on family for a significant life event. The Career Intermission Program is an initial step toward allowing Marines an option to temporarily pause their active-duty service and later resume their careers without penalty. This program enables career flexibility, and in doing so, also encourages retention of experienced, talented Marines.

Talent Management Way-Ahead Manpower Information Technology System Modernization (MITSM): In February 2022, Deputy Commandant, Manpower and Reserve Affairs created a business capability requirements document that outlines the capabilities required to begin the MITSM acquisition process. MITSM will aggregate legacy systems and capabilities into a device-agnostic, data-driven, and dynamic human resources information technology solution that meets the evolving needs of the Marine Corps' talent-based work force. One aspect of the MITSM will be a web-based talent marketplace, which will enable a collaborative

and transparent assignment process and increase the role of both commanders and individual Marines. This capability will help us better align the talent of individuals with the needs of the Service to maximize the performance of both. The *talent marketplace* is here and is currently being tested by five monitors and about fifty Marines.

Implementation of Indefinite End of Active Service Policy for Enlisted Personnel: As we seek to mature the force, we also seek to eliminate processes and policies that induce both friction within the personnel system as well as personal and familial stress. There is little reason why those who have served honorably for eighteen-plus years need to worry about re-enlistment before completing twenty-years of service. This year, we are exploring the feasibility of senior SNCO career designation to establish an indefinite expiration of active service. This shift will align senior SNCO retention practices, increase flexibility in assignments, reduce administrative burden and needless paperwork, and minimize uncertainty for SNCOs and their families.

Small-Unit Leader Initiative: Under the current policy, first-term Marines are ineligible for promotion to sergeant. While the spirit of that policy is reasonable, it created a disincentive to the highest performing Marines across the force by establishing an administrative obstacle they cannot overcome regardless of individual talent. Going forward, if one of our talented Marines with at least 36-months of service wishes to re-enlist, then that Marine will become eligible for promotion to sergeant upon their re-enlistment. This program will incentivize the most talented who desire to stay for another enlistment and should help mitigate the persistent need for sergeants across the FMF.



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Talent Management 2030

A cultural case study

by LtCol Ryan W. Pallas

Ask any Marine, *what is the culture of the Marine Corps?* and a variety of answers will likely emerge. One would assume keywords and phrases such as rifleman, warrior, Semper Fidelis, flexible, adaptable, soldiers of the sea, infantry, *teufel hunden*, and many others—to be provided. This begs the question, without knowing what culture is, specifically the culture of the Marine Corps, how does an organization understand culture's influence? This is where our journey begins. This article seeks to do three things: first, define and discuss culture; second, define Marine Corps culture using scholarly works and organizational publications; third, identify how culture affects change within the Marine Corps. Ultimately, the goal is to determine if the ongoing reforms such as *Force Design 2030*, specifically *Talent Management 2030*, are contradictory or complimentary to the culture of the Marine Corps. The research suggests *Talent Management 2030* is in consonance with, vice in contradiction to, Marine culture.

Culture

A prominent culture scholar noted, "Culture is one of the two or three most complicated words in the English language."¹ Culture, whose study began with anthropologists and sociologists, has become a topic of increased attention, specifically within political science, since the early 1990s.² In the late nineteenth century, many anthropologists agreed with E.B. Tylor's 1871 definition from his work, *Primitive Culture*, "Culture ... is that complex whole which includes knowledge, belief, art, morals, law, custom, and any other capabilities and habits acquired by man as a member of society."³ Since this time of agreement, an assortment

>LtCol Pallas has completed tours at Marine Corps Air Station Miramar, Marine Corps Air Station Yuma, Camp Smith, HI, Kaneohe Bay, Manpower and Reserve Affairs, Headquarters Marine Corps, and currently serves as a Commandant of the Marine Corps Strategist Fellow at the Schar School of Policy and Government where he is studying the All-Volunteer Force.

of definitions now exist resulting in "a disturbing lack of agreement" regarding a common definition.⁴

Defining culture, like many variables, reveals variation. To ensure agreement and establish a foundation for the remainder of this argument, the table below provides various authors, their

work, and their definitions of culture.

Culture then is an amalgamation of *knowledge, ways of acting, values and norms, attitudes, symbols, unconscious assumptions, emotional responses, ideas, and standards.*

Within culture, there exist four analytical categories: *identity, norms,*

DEFINITIONS OF CULTURE		
Author	Title	Definition
Peter Katzenstein	The Culture of National Security	"Culture refers both to a set of evaluative standards, such as norms or values, and to cognitive standards, such as rules or models defining what entities and actors exist in a system and how they operate and interrelate." ⁵
Elizabeth Kier	The Culture of National Security	"Organizational culture as the set of basic assumptions, values, norms, beliefs, and formal knowledge that shapes collective understandings." ⁶
Ann Swidler	Culture in Action: Symbols and Strategies	"Culture consists of such symbolic vehicles of meaning, including beliefs, ritual practices, art forms, and ceremonies, as well as informal cultural practices such as language, gossip, stories, and rituals of daily life." ⁷
Gareth Jones	Organizational Theory, Design, and Change	"The set of shared values and norms that controls organizational members' interactions with each other and with suppliers, customers, and other people outside the organization." ⁸
James Q. Wilson	Bureaucracy	"A set of patterned and enduring ways of acting, passed on from one generation to the next." ⁹
Glenn et al.	A Cognitive Interaction Model to Analyze Culture Conflict in International Relations	"The total knowledge existing within a society, concerned in such a way that each item of knowledge is multiplied by a) the proportion of individuals who hold it, and b) the 'leverage' exercised by each of these individuals." ¹⁰
Jack Snyder	The Soviet Strategic Culture	"The sum total of ideas, conditioned emotional responses and patterns of habitual behavior that members of a national strategic community have acquired through instruction or imitation with each other with regard to nuclear strategy." ¹¹ (strategic culture)

values, and *perceptual lens*, all of which “represent common themes around which much of the cultural literature swirls.”¹² The table below provides a definition for each category provided by Dr. Jeannie Johnson in her study of Marine culture.

looked the Marines” was produced by Dr. Frank Hoffman long after Builder established his incisive look at Service cultures.¹⁸ The chart below uses the work of Builder and Hoffman to create basic typologies for each military Service providing a comparison.

Four Analytical Categories of Culture ¹³	
Identity	“The character traits this group assigns to itself, the reputation it pursues, and individual roles and statuses it designates to members”
Norms	“Accepted, expected, and preferred modes of behavior and shared understandings of concerning taboos”
Values	“Material or ideational goods that are honored and confer increased status to members.”
Perceptual Lens	“The filter through which this group views the world, the default assumptions that inform its opinions and ideas about specific others.”

Marine culture consistently discusses the importance of the human dimension and adaptation.

The categories are important to expand the reader’s understanding of culture, what it is, and what it is not. With the definitions and categories defined, the reader should understand what culture is, its categories, and its components.

The important conclusion when discussing culture is, “Decisions within organizations are framed by their perceptions of the world.”¹⁴ As Dr. Johnson concludes in her examination of Marine culture, if a reform is contradictory to culture, this may be considered a negative result and the reform will be lost on the actor “that finds them anathema to its own identity orientation.”¹⁵ A 2019 RAND study confirms this finding citing the importance of culture in bureaucratic organizations: “[i]n which bureaucracies may resist change when it does not conform to cultural preferences favoring the status quo.”¹⁶

Marine Corps Culture

A prominent work on military culture was provided by Carl Builder with *Masks of War* and has since been expanded upon.¹⁷ An addendum to Builder’s seminal work remedying “[t]he principal flaw in this book is that it over-

Marine culture consistently discusses the importance of the human dimension and adaptation. Both aspects are captured by Dr. Hoffman’s addendum and found within the pivotal works of the Service, such as *MCDP 1, Warfighting*. A seminal work to all Marines,

MCDP 1 states, “Because war is a clash between opposing human wills, the human dimension is central in war. It is the human dimension which infuses war with its intangible moral factors.”²⁰ Therefore, a personnel system able to “recruit and retain the right Marines for today’s era of renewed global competition” is critical to the Service’s success and warfighting ability.²¹ *MCDP 1* reflects the paramount importance Marine culture places on the human dimension.

A second hallmark work, *First to Fight* by LtGen Victor H. Krulak, highlights, “Adaptability, initiative, and improvisation are the true fabric of obedience, the ultimate in soldierly conduct, going further than sheer heroism to make the Marines what they are.”²² A subsequent scholarly study confirms, “Krulak argues that the Marine Corps is a military service that is innovative by nature.”²³ The adaptive and innovative culture of the Marine Corps is captured not by a sole author but by several senior leaders throughout history.

Marine culture is further described as adaptive and innovative by MajGen Fred Haynes, a retired Marine Corps two-star general, “[t]wo critical elements in the Marines’ culture, our way of doing things, are adaptability and imagination.”²⁴ Retired Marine

Service Typologies ¹⁹	
Army	<ul style="list-style-type: none"> -End-strength levels. -Talks about people, not equipment. -Resistance to technology or new equipment. -Slow shift toward adapting technology (newer tanks).
Navy	<ul style="list-style-type: none"> -Concerned about size. -Number of capital ships.
Air Force	<ul style="list-style-type: none"> -Newer or more technology. -Technologically advanced aircraft. -Measured in quality of aircraft.
Marine Corps	<ul style="list-style-type: none"> -Human dimension of war. -Marine title. -Service paranoia (remain relevant to lawmakers). -Promotes change (new tactics/technology).

Corps four-star Gen Anthony Zinni, former commander of U.S. Central Command, confirms the Marine Corps' characteristic for change, "in discussing the qualities and values of the Marine Corps ... '[we] have a reputation for innovation.'"²⁵ Generals Cooling and Turner highlight that "two predominant factors have driven the evolution of the Marine culture. The first of these factors is a blending of the traditional national, naval, and military cultures due to its unique role as a naval expeditionary power projection force. The second factor is a productive, institutional paranoia for remaining relevant."²⁶ Mansoor and Murray identify, "The US Marine Corps, for instance, prides itself on being a flexible expeditionary force capable of rapid deployment at the orders of the president."²⁷ The body of work examining Marine culture reveals the importance of the human dimension, innovation, and adapta-

tion, all driven by a Service paranoia to remain relevant, a paranoia confirmed by Dr. Hoffman, "The Marine Corps, which displays a degree of institutional paranoia due to its insecure position in the American national security architecture."²⁸ Terriff confirms this paranoia, emphasizing, "The Marine Corps' cultural characteristic of paranoia thus persisted even as it was instituting profound change," when referring to Gen Gray's implementation of *MCDP 1*.²⁹

Building upon Hoffman's initial and brief work, Johnson's study confirms this behavior, "Everything Marines do revolves around protecting and burnishing the essence, heritage, public persona, and future place of the Corps."³⁰ The desire to remain relevant continues to linger within the Marine Corps today. *Talent Management 2030* seeks to implement relevant personnel systems and policies that have remained largely static since World War II, un-

able to satisfy growing national security requirements, a competitive and modernized civilian labor market, and shifting societal demographics.³¹ If this innovation, adaptability, and emphasis on the human dimension exist, then it is expected to be found regarding personnel reform, where the human dimension is paramount.

How Culture Affects Change

Four Guardians, an examination of how the military Services vary in their implementation of defense policies, highlights, "The Marine Corps guards its culture closely and reproduces it religiously."³² Any attempt to alter Marine culture is therefore expected to be met with resistance. Such resistance is highlighted by four articles discussing the dangers of *Talent Management 2030*.

The first article argues, "Talent Management 2030 envisions Marines as specialists, specifically matched to an assignment for which they are uniquely

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qualified and trained. This is not who we are. We all are riflemen, primarily or secondarily trained for the rigors of combat.”³³ The author implies Marine culture is at risk due to *Talent Management 2030*, “Culture, traditions and ethos, those intangibles that define Marines, are the underpinnings of our combat effectiveness and must be preserved.”³⁴ Although a single opinion, it is an important consideration when analyzing organizational change. As the evidence provided in this paper illustrates, the adaptations, innovations, and focus on the human dimension in *Talent Management 2030* are in keeping with Marine culture. *Talent Management 2030* demonstrates “[a]daptability is, and has always been, an essential attribute of successful military forces” with Marine culture placing humans at the epicenter.³⁵

A second article questions aspects of *Talent Management 2030*, “Why do Marines of any rank seem to be prized for their ability to adapt, improvise and overcome? Do changes in the character of war demand that we change the very foundational culture of our force?”³⁶ The article proposes worthwhile questions but fails to provide more than anecdotal evidence of how the proposed reforms in *Force Design 2030* and *Talent Management 2030* would “change the very foundational culture of our force.” The article does confirm Marine culture as adaptive and innovative.

A third article by LtGen Newbold argues *Talent Management 2030* “threatens to change the ethos of the service.”³⁷ The recommendations are vestiges of the 1970s, opting for a younger “seabag ready” force that mirrors a conscription era construct consisting of high turnover at lower costs. The recommendations proposed by the author illustrate a failure to adapt or reliance upon the status quo, contradictory to a Marine culture that continually adapts, driven by an institutional paranoia to remain relevant, while focused on the human dimension.³⁸

Further concern is echoed by the 35th Commandant, Gen Amos, who said, “The adoption of personnel plans that are likely to destroy the culture and ethos of the Corps, attributes that have

enabled Marines to fight and win some of the nation’s most difficult battles.”³⁹ The counterarguments reveal that “culture may also have negative consequences, especially when it locks an organization into dated and inappropriate ways of operating,” which seems to be the recommended action of the authors regarding personnel reform.⁴⁰ Worth noting, the Marine Corps would have been absent the historic and successful tenure of the first aviator Commandant had it not been for similar flexible personnel concepts, concepts the Service is now looking to leverage and codify in *Talent Management 2030*, having witnessed and benefitted from such policies firsthand.

The concern expressed by the authors is understandable. A 2016 Naval War College article explains the hesitance expressed regarding *Talent Management 2030*. The article identifies that “[s]uccessful organizations can be extraordinarily persistent and creative in denying the obvious, ignoring the signals that suggest a need to challenge key strategic assumptions ...

at solving the perceived problems of 1985.”⁴² Reid’s analysis debunks the claims that an effective personnel system was employed by the Marine Corps.

Claiming a single study as adequate evidence to assuage the concerns articulated by senior leaders is poor scholarship; therefore, further data is required. Marine gunner, Stephen LaRose, provides a detailed analysis of the changes at the unit level in his article, “A View from the Trenches on the Debate Wracking the Marine Corps.” LaRose states, “Look in the trenches. The character of war has changed. We will either adapt or perish.”⁴³ A common fault of the arguments presented is failing to recognize that “the international system appears to be in the midst of both a return to wars between the great powers and a tectonic shift in how wars are fought. The U.S. military must be ready to learn and adapt.”⁴⁴

The changing character of war and the personnel required to support this change is further illustrated by the Marines of Alpha Company, 1/2 Mar, and the Infantry-Battalion Experiment. A

The Service requires a personnel system able to recruit, train, assign, and retain such a force providing the ability to fully execute Force Design 2030 ...

A danger of such sustained success is that the military might come to view these strategic assumptions not as ideas requiring continual reassessment but as enduring laws.⁴¹ If the authors argue the current personnel system and policies are effective, evidence must be provided to prove the contrary.

The Data

Col Reid, in his exhaustive analysis of the Marine Corps’ personnel enterprise, *The Courage to Change: Modernizing U.S. Marine Corps Human Capital Investment and Retention*, does just that. Reid illustrates, in copious detail, the dated and inappropriate ways of operating that have persisted for decades regarding personnel. Reid highlights the personnel system “was successful

podcast summarizes how *Force Design 2030* matured the force resulting in overwhelming internal unit capability.”⁴⁵ The Service requires a personnel system able to recruit, train, assign, and retain such a force providing the ability to fully execute *Force Design 2030* recognizing “that war is influenced primarily by human beings.”⁴⁶

A likely counterargument is if these changes are occurring under the current personnel system and policies, then reform is not necessary. That argument can be dismissed by illustrating *Force Design 2030* is not achievable within the current human capital framework. For example, current personnel practices rely upon a pyramid promotion system that reduces available positions as rank increases.⁴⁷ This pyramid system

will negatively impact *Force Design* efforts by failing to retain the noncommissioned and staff noncommissioned officers *Force Design 2030* leverages to succeed. Without addressing the faults of the current pyramid promotion system, one of many required changes, the current legacy system will silently cripple lawmaker-directed changes captured within *Force Design 2030*.⁴⁸ More importantly, if left in its current state, the personnel system will slowly erode the Service's human dimension by failing to recruit and retain the requisite quality and quantity of personnel required.⁴⁹

Also, regarding the argument against the maturation of forces, the concept predates *Talent Management 2030* and is woven into one of the most historic chapters of the Marine Corps—Belleau Wood. The U.S. military currently faces the most challenging recruiting environment since 1973.⁵⁰ In 1917, the Marine Corps faced similar circumstances with a majority of men being denied military service. The result was “the Marine Corps found itself deluged with fit, educated collegians.”⁵¹ In fact, “marine infantrymen tended to have a great deal more education and vocational training than their army counterparts.”⁵² Not only was it the officers who were more educated, but the recruiting sergeants who provided the personnel to build 6th Mar, “could pick and choose from a number of qualified candidates,” with [u]pward of five hundred undergraduates enlisted en masse.”⁵³

The arguments against *Talent Management 2030* also identify issues such as parental leave and the elongated times associated with pregnancy without addressing the genesis of the new policies. First, *Talent Management 2030* is responding to directions given by the Secretaries of Defense in 2013 and 2015 lifting the ban on women in combat roles and opening all occupations to women.⁵⁴ The direction must be underpinned by personnel policies able to recruit and retain women. Plainly, the Services must offset the fact that “the Gates Commission not only failed to consider the role women would play in the all-volunteer force, it never considered that the military would have to

become a more family-friendly institution.”⁵⁵

Second, data indicates women represent half of the population and obtain higher levels of education, education the military can leverage as it grows increasingly dependent upon technical skillsets.⁵⁶ A commonality across the articles is the authors “make no distinction between an infantry soldier, whose youth can be an extremely desirable asset, and a computer network troubleshooter, whose skills generally continues to grow with experience.”⁵⁷ The counterarguments fail to account for variation regarding training timelines, monetary costs, and capability development.⁵⁸ I agree that policies must be implemented with “a scalpel, not a saber,”⁵⁹ but the precise application of personnel policies across varying occupational specialties results in a system that closely resembles *Talent Management 2030*.

Conclusion

Ironically, a Service that felt compelled to prematurely divest proven hardware to abet its transformation completely failed to divest itself of legacy personnel practices. When the Service sought to remedy the system with *Talent Management 2030*, the arguments against such reforms suggested it would result in the degradation of Marine culture. This is not the case when Marine culture is distinctly identified as being *adaptable and innovative* with continual emphasis placed on the human dimension.

Accepting a decline in military capability because of unquestioned loyalty to legacy systems and policies is contradictory to Marine culture. The legacy systems and policies degrade the ability to remain relevant as a fighting force. This degradation is a result of a slavish devotion to the status quo regarding personnel reform which has “locked the Marine Corps into a remarkably durable process that has proved resistant to adaptation despite massive advances in technology, significant changes within American society, and mounting evidence of its inefficiency.”⁶⁰ When speaking of Marine culture, it is antithetical to implement policies and processes that

knowingly jeopardize warfighting capability when looking to remain the Nation's force-in-readiness. Unfortunately, it is a trend that has persisted for decades with a 1958 *Marine Corps Gazette* article by MajGen D.M. Weller and Col W.R. Collings, highlighting such inefficiencies that include but are not limited to, short enlistments, lack of stability, limited “usable productive time,” and a degradation of combat readiness.⁶¹

Culture can bond an organization and provide a common framework to which every member relates. Culture can also create a situation where an organization ignores necessary and required changes to remain relevant and effective. Peter Drucker, a management consultant, was correct in saying, “Culture eats strategy for breakfast,” revealing culture's power in preventing necessary and required changes such as *Talent Management 2030*.⁶²

The arguments against *Talent Management 2030* illustrate how culture can impede required changes contradictory to the defining attributes of a Service defined by adaptability, innovation, and a focus on the human dimension. The counterarguments fail to provide valuable feedback, outside of anecdotal experience, to positively improve the ongoing reforms within the Service—feedback which I argue all authors seek to provide. From the analysis and data provided, the proposed reforms in *Talent Management 2030* are in keeping with Marine culture by remaining adaptive, innovative, and focused on the human dimension of warfare.

>Editor's Note: Due to the length of this article and the number of sources, the complete bibliography is available in the online version.



Defining and Employing Talent

Performance evaluation

by Staff, Manpower Management Enlisted Assignments

“Our modern operational concepts and organizations cannot reach their full warfighting potential without a talent management system that recruits, develops, and retains the right Marines.”

***—Gen D.H. Berger,
38th Commandant of the Marine Corps***

The Service should no longer rely on high-quality assignments as a manner of good fortune or happenstance. To enable *Force Design 2030*, *Talent Management 2030* placed talent at a level of tantamount importance and left its employment largely undefined and immeasurable.¹ To optimize the assignments process, the Service needs to develop comprehensive and collaborative tools to meet *Talent Management 2030*’s objective, a more lethal and operational effective force. This article builds on the *Talent Management* definition of talent—“an individual’s innate potential to do something well”—and provides the conceptual underpinnings for how to measure, report on, and use talent to effectively employ the tenets of *Talent Management*. The Service needs to do the spade work to build the metadata for an effective modernized information technology system or risk deploying an underachieving tool because we failed to do the work upfront.

Since the publication of *Talent Management 2030*, the discussion around talent has primarily focused on the individual Marine, as talent is a multifaceted term encompassing an individual’s

innate skills, abilities, and individual aptitudes that are enhanced through experience and training. Marines immediately expected Headquarters Marine Corps to employ this definition within a new assignment process and the term is now weaponized to influence current assignment processes. Talent is a common phrase when Marines and commands engage the monitors about why they should remain at their command instead of executing orders, or allowed to lateral move, despite often conflicting with Service priorities or assignment policies beyond the control of the Service. Make no mistake, the Service needs to change, but change is not instantaneous.

As the Service moves towards a new personnel management system, it needs to define the criteria for its billets (specific or generic); measure an individual’s performance, skills, experience, and aptitude against those billet requirements; and then match an individual with a specific requirement or capability in a billet. Defining billet requirements, either specifically or generally, is necessary to determine how well talent is employed. Today, the closest thing to a designated “talent” a

Marine should possess is in the *MOS Manual* and within the performance evaluation checklists that Marines are evaluated against. However, these basic requirements do not differentiate between the level of command or type of billet, nor are they reflected in any performance evaluation (Junior Enlisted Performance Evaluation Systems or in a Marine’s fitness report [FITREP]). For example, a sergeant 0311 at 1/1 Mar might be a squad leader or in the battalion operations section (S-3). Each Marine could be exceedingly proficient and capable with drastically different skill sets.

Conversely, those same Marines may have the same skill sets; one succeeds where the other struggles. The Marine Corps does not know why these Marines performed how they performed, nor do we understand whether they are a good match for the position. Though the monitor has an innate sense of the assignment based on their personal experience, the Service cannot measure or replicate it without any sense of confidence. Moreover, assignments are currently made on the available population eligible for assignments, not by best fit. Until the Service begins measuring actual requirements between grade, billet, and MOS, no proper optimization of talent matching can occur.

The other half of the talent equation is the individual Marine. The billet requirements need to be defined—visionary leader or taskmaster, technical analyst, or tactical savant—and a systematic approach must be developed to measure the individual Marine’s measured accomplishments, skills, abilities, and aptitudes against job

requirements. FITREPs and Junior Enlisted Performance Evaluation Systems provide nothing more than rudimentary ways of defining “skills,” nor were they designed to do so. Each tool suits its current purpose, enabling promotion determination, but is ill-suited for identifying, let alone assigning, talent at scale. To improve how we define an individual’s talents, the Market Place or the Talent Management Engagement Portal must include a self-identification of skills and a command validation of them.² Understanding what skills are required allows the individual and the Service to set a path for individual growth and development.

Reporting on an individual’s talents is made up of at least two parts: individual and command identification and validation of skills, aptitudes, and abilities. Evaluations need to become both the identification of past performance and future potential. “The purpose of [performance] reviews are two-fold:

an accurate and actionable evaluation of performance, and then the development of that person’s skills in line with job tasks.”³ Commands also must be able to register individual performance, skills, capabilities, and potential within both a formal and informal Service-level evaluation tool. As previously stated, current evaluation systems are not nuanced enough to identify talent, but the largely subjective grading (at least within FITREPs) does not enable the effective use of big-data analysis.⁴ Therefore, performance evaluations require updating. Both FITREPs and Junior Enlisted Performance Evaluation Systems reports must capture performance and validate the skills and innate abilities of the individual. Informal evaluation tools, or those not used for promotion purposes, must also be designed and implemented. These tools will identify, capture, and report against the technical and tactical skills of the individual Marine and be used

to guide conversations regarding career growth and incentivize Marines to gain the skills necessary to achieve their goals and aspirations.

To further improve the identification of talent, the 360 reviews need to be used to identify individual strengths and skills.⁵ As currently designed, these reports’ sole purpose is only to support the Marines’ personal and professional development. Not utilizing the report wastes a target-rich resource. With ten to twenty fellow Marines responding, the reviews provide a multi-point validation of individual strengths that will quickly build a Marine’s talent profile, continually further refine billet requirements by grade, MOS, and level of command, and improve the rate at which the Service’s conducts talent-to-billet matching.

From an individual perspective, Marines should personally identify and rate their discrete skills. If validated by their command, the assignments tool would



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use that information to align a Marine's skills against billet requirements. This identification would include criteria such as professional experiences (for example: "Squad leader during ITX-rank sergeant" or "served as the acting G-8 finance chief-rank staff sergeant" or "served on a Headquarters Marine Corps staff [insert staff] rank staff sergeant") as well as the personal development accreditations or education a Marine has gained. The data system should collect, measure, and report identified skills against those assessed as required within the current position, including any additional beneficial skills, and identify those under-utilized skills to assign against future assignments.

Determining which characteristics and traits will lead a Marine to be successful is daunting and undefined. The authors recommend a two-part approach. First, identify eight to ten core characteristics for each grade that predict high performers and strong individual character. These traits will likely remain similar across all ranks; however, there will and should be a deviation between our entry-level Marines and senior leaders, officers, and enlisted. The book, titled *Talent War*, provides the nine foundation traits used for predictors of high performance: drive, resiliency, adaptability, humility, integrity, effective intelligence, team-ability, curiosity, and emotional strength.⁶ Riffing off these or other variations provides a solid starting point. Second, each billet should be evaluated against the five to ten critical technical or tactical attributes that are indicators of success. These indicators will vary significantly and require considerable data management to catalog and track, leading to the need for a modern assignment system.

Manpower Management Information Technology Systems Modernization is currently developing a modern assignments system with injects from various Marine Corps commands. While focused on process improvement and bringing together disparate systems currently used in the assignments process, this Manpower Management Information Technology Systems Modernization overhaul is only the beginning of truly achieving

talent management. Effectively employing talent boils down to the ability to analyze accessible data and transform it into knowledge required to make an assignment. Talent employment matches the individual's skills against billet requirements, personal and professional aspirations, and assigns that talent to meet operational demands. As proposed in this article, artificial intelligence or machine learning algorithms should iteratively "identify traits that best correlate with operational success and guide service members with those traits to billets where they can be most useful."⁷ Over time, artificial intelligence or machine learning will develop correlations and pattern recognition to refine and update the assignment algorithm. The assignments process should be data-informed and driven, with individuals involved to deconflict priorities and personal situations that arise.

We must identify the core characteristics and traits by grade and billet that will lead to success across assignments, individual development and retention, and mission effectiveness. Key stakeholders in this process are Manpower and Reserve Affairs, Training and Education Command, and Combat Development and Integration. These communities need to bridge the individual talent gap between their organizations. Combat Development and Integration, through the occupational field managers, need to engage with the force to identify and catalog by billet identification code requirements. Training and Education Command must fully integrate reporting in the Marine Corps Training Information Management System to capture the true performance and experience of each individual Marine and feed that data into their records. Manpower and Reserve Affairs with Programs and Resources ongoing assistance need to continue driving Manpower Management Information Technology Systems Modernization and harness billet requirements and talent characteristics to develop an optimized assignment tool that improves the individual Marines and the Service's ability to conduct warfighting. Without defining the requirements and individual talent to this level of detail,

any fielded artificial intelligence/machine learning-enabled IT system will make assignments based on the same data monitors utilized today—limited and unstructured from across multiple disparate systems.

If "[t]alent management is the act of aligning the talents of individual Marines with the needs of the Service to maximize the potential of both," the Service must undertake substantial preparatory work to define how talent is measured, reported on, and employed for all personnel.⁸ Failing to perform the work upfront will cause years of frustration and disappointment, as the data used to support assignments will not meet the demands of the end user. If we are going to do it right, we must start today. We must build-out requirements and iteratively refine how talent is measured throughout a Marine's career, from unit to unit, and billet to billet.

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Human Capital

Increasing the return on investment

by Maj Larry Wigington

As the DOD's recruiting landscape continues to present unprecedented challenges, organizations like the Marine Corps are compelled to adapt current strategies to maximize the return on investment (ROI) of their human capital. With increasing time requirements for Marines' training, rising costs of competitive compensation in industry, and evolving demands for critical skills in its workforce, it has become crucial to identify opportunities that enhance the ROI of service members. The Marine Corps Manpower and Reserve Affairs have taken a proactive approach, recognizing the potential for optimizing ROI through various avenues. This article explores the changing dynamics within the Marine Corps, shedding light on the increased time required for training, the total cost of compensation, and the potential opportunities to maximize a service member's ROI. By embracing these challenges and seeking innovative solutions, the Marine Corps aims to unlock the full potential of its human capital investment, ensuring its continued success in an ever-evolving world.

Background

In recent years, the Marine Corps has witnessed a notable shift in the dynamics impacting its human capital's ROI. Over the past two decades, the Service has experienced a progressive increase in the time and financial resources allocated to entry-level time to train (TTT) and, to a lesser extent, end-of-service out-processing. Paradoxically, this intensified investment has resulted in a significant decrease in ROI as measured by contract efficiency. Several factors have contributed to this challenge, further exacerbating the situation.

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Firstly, the recruiting environment has presented a formidable obstacle, with the need for more militarily relevant talent accompanied by increasing costs. Like many organizations, the Marine Corps faces the growing dilemma of attracting and retaining top-quality candidates amidst a shrinking pool of qualified individuals.

Secondly, the demand for more complex and specialized skills in modern battlefields has led to the extension of entry-level training (ELT) programs. While this adaptation is crucial for ensuring operational readiness and meeting the tenants of *Force Design*, it has inadvertently contributed to longer training durations without associated increases in enlisted contract lengths, impacting the overall ROI of human capital investments.

Defining Service Member Return on Investment

As the Marine Corps faces evolving challenges within its human capital investment, it becomes essential to delve into the elements that define its service members' ROI. Several key factors contribute to this definition, including the increased time Marines spend in ELT, the rising costs associated with ELT and TTT, and the importance of contract lengths in optimizing ROI.

While the rising costs associated with compensation during ELT do not directly contribute to the definition of service member ROI, it is an important consideration. The investment required

to provide comprehensive and rigorous training has increased, reflecting technological advancements, evolving operational demands, and the need for specialized skills. As the Marine Corps strives to equip its service members with the necessary capabilities, the associated costs have escalated. Furthermore, the evaluated costs only consider the pay and allowances to the individual Marine and do not encompass various aspects, such as instructor salaries, training materials, equipment, and facilities. The sustained increase in ELT and TTT costs further underscores the need to quantify and optimize the ROI of service members to ensure efficient resource allocation and maximize the value of human capital investments. For example, in fiscal year (FY) 2022, it cost the Marine Corps approximately \$46,026 for entry-level Marines to complete their ELT, compared to just \$27,000 in FY2000.¹

In addition to the cost as mentioned earlier increases, the Marine Corps has witnessed a notable increase in the time spent by service members in ELT programs. In FY 2000, the median ELT TTT across all enlisted entry-level MOSs was 6.1 months, accounting for approximately 13 percent of a standard, 48-month enlistment period. This means that, in FY 2000, an average of 87 percent of a Marine's enlistment remained after ELT. However, in FY 2022, the median ELT TTT has risen to 10.2 months, representing approximately 21 percent of the standard

48-month enlistment. The increased duration of ELT signifies a significant investment of time and resources, impacting the overall ROI of service members.

The current career force requirement within the Marine Corps plays a pivotal role in shaping retention goals and contributes to the existing ROI paradigm. The need for a certain number of career force personnel stems from the Marine Corps' strategic objectives, operational demands, and the desire to maintain a seasoned and experienced core of ser-

vice members as codified in our tables of organization and equipment. The career force requirement sets the retention goals by establishing the desired level of experience and expertise within the ranks, ensuring the availability of qualified leaders and subject-matter experts. Achieving these retention goals is instrumental in maximizing the ROI, as retaining seasoned personnel mitigates the costs associated with recruitment, initial training, and the learning curve for new personnel. Furthermore, the career force's cumulative experience and institutional knowledge contribute to operational efficiency, effectiveness, and organizational adaptability. Therefore, the current career force requirement drives the Marine Corps' retention efforts and directly influences the ROI paradigm by emphasizing the value of retaining experienced personnel and capitalizing on their contributions and expertise.

Contracts define the duration of a Marine's commitment to the Marine Corps and determine the period during which the organization can benefit from his skills and contributions.

vice members as codified in our tables of organization and equipment. The career force requirement sets the retention goals by establishing the desired level of experience and expertise within the ranks, ensuring the availability of qualified leaders and subject-matter experts. Achieving these retention goals is instrumental in maximizing the ROI, as retaining seasoned personnel mitigates the costs associated with recruitment, initial training, and the learning curve for new personnel. Furthermore, the career force's cumulative experience and institutional knowledge contribute to operational efficiency, effectiveness, and organizational adaptability. Therefore, the current career force requirement drives the Marine Corps' retention efforts and directly influences the ROI paradigm by emphasizing the value of retaining experienced personnel and capitalizing on their contributions and expertise.

Contract lengths are essential in shaping service-member ROI. Contracts define the duration of a Marine's commitment to the Marine Corps and determine the period during which the organization can benefit from his skills and contributions. A contract length that balances operational needs and

individual career growth is crucial in maximizing ROI. Shorter contract lengths result in a higher turnover rate, increasing recruitment and training costs. In contrast, longer contract lengths decrease the turnover rate since Marines stay in the service longer, reducing the strain on recruiting. Finding the optimal contract length enables the Marine Corps to capitalize on the investments made in training, development, and retention, ultimately enhancing the overall ROI of service members.

since the Marine is not contributing to warfighting readiness but continues to count towards end strength and receive full pay and benefits. Figure 1 shows the three primary ROI detractors since FY 2000. First, median TTT has increased by 4.1 months to 10.2 months. Second, recent congressional interest in facilitating exit from Service has resulted in a new mandate for Marines to have completed the transition plan 12 months before EAS.² This likely intensifies distraction inefficiencies during the final twelve months of the contract. Third, the number of personnel participating in the SkillBridge program has increased and may impact operational readiness, which will require additional analysis to understand fully.

Evaluating Return on Investment: Contract Inefficiency Ratio

Visualizing a Marine's initial enlistment provides insight into the Service ROI. A Marine's contract begins with ELT, represented as Service liability, since, during that time, the Service is making an investment but not yet gaining combat capability. Only when a Marine has checked into his first unit does the Service begin to realize ROI. Finally, on the far-right, processing and terminal leave represents an additional liability

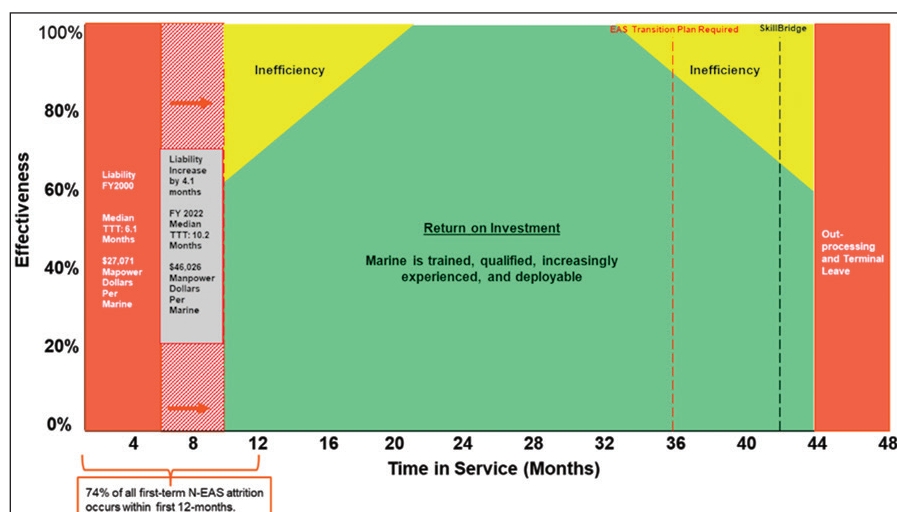


Figure 1. Median contract utilization. (Figure provided by author.)

had an unfavorable CIR. Absent corresponding increases in contract duration, this decreases the Service's aggregate ROI.

While aggregate Service-level data is useful, an MOS-specific understanding of contract inefficiency is more instructive. Figure 3 shows selected MOSs and the varying degrees of contract utilization. The red and orange shaded elements on the left-hand side of the bar graph depict recruit training, School of Infantry or Marine Combat Training, time awaiting training, and PMOS instruction. The green portion depicts the contract utilization when a Marine can perform the duties of the PMOS. Finally, the red portion on the right-hand side represents a Marine's transition out of the Service, which is a liability since, during that time, the Marine is not producing combat readiness although the Marine is still on active duty.

Two observations are noteworthy. First, various MOS have significantly different ELT durations and contract utilization. Second, contract extensions have an outsized positive impact on improving ROI, as shown in the bottom two bars within Figure 3. A 4-year infantry rifleman contract has 23 percent contract inefficiency (i.e., 77 percent of a Marine's contract generates combat readiness). Extending this enlistment to 5 years, the CIR falls to 18 percent (i.e., 82 percent of the Marine's contract generates combat readiness).

Opportunities for Increasing Return on Investment

To achieve more favorable ROI within the Marine Corps, concerted efforts must be made to increase post-ELT contract utilization through increased contract lengths, retention opportunities, incentive programs focusing on increasing ROI, and combinations of these approaches. By focusing on three high-payoff areas, the Marine Corps can enhance ROI and optimize the value derived from its human capital investments.

Optimize enlistment contract structure and length: The Marine Corps can explore various options to extend contracts, such as providing enlistment bonuses for voluntary contract exten-

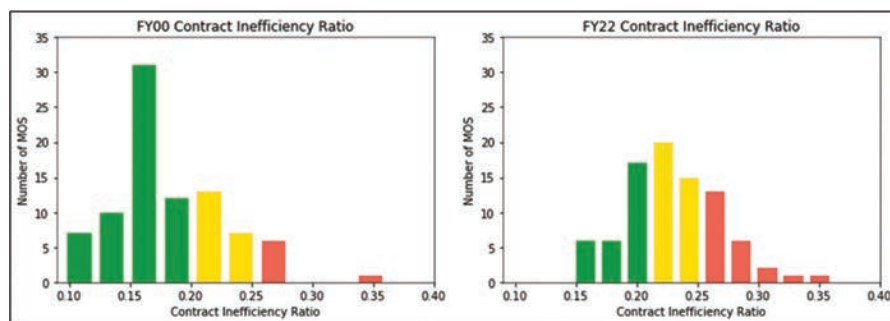


Figure 2. Decreasing contract efficiency. (Figure provided by author.)

sions. Collaborative efforts between the Manpower and Reserve Affairs and the Marine Corps Recruiting Command can be initiated to investigate the possibility of initiating contract obligations once Marines earn their PMOS rather than at the beginning of recruit training. The FY 2023 Targeted Investment Shipping Bonus is a pilot initiative for this approach. Adjusting and increasing the career force personnel requirements while reducing the number of first-term personnel can profoundly impact the overall first-term retention requirement, increase the seniority of the force, and enhance the ROI within the Marine Corps. Retaining experienced and skilled service members through career force personnel initiatives directly contributes to a higher ROI by capitalizing on their accumulated knowledge, expertise, and leadership capabilities. These seasoned individuals bring valuable institutional knowledge and experience, leading to improved operational readiness, continuity in mission execution, and enhanced organizational

performance. By prioritizing retention, the Marine Corps can ensure the longevity and stability of its workforce, thereby maximizing the return on the initial investment made in training, development, and career progression. Additionally, increased retention fosters a mentorship and professional growth culture as more senior personnel provide guidance and support to junior members, further enhancing the ROI by fostering a skilled and competent workforce. Ultimately, by striking a balance between career force retention and first-term personnel recruitment, the Marine Corps can optimize its ROI and create a resilient and effective force capable of meeting future demands.

Tailor grade: Besides adjusting grade structure to meet operational requirements, the Marine Corps must increasingly account for retention needs to achieve and maintain targeted maturation objectives in high-investment MOSs. A refined grade structure that signals the demand for retaining more Marines at the sergeant and staff ser-

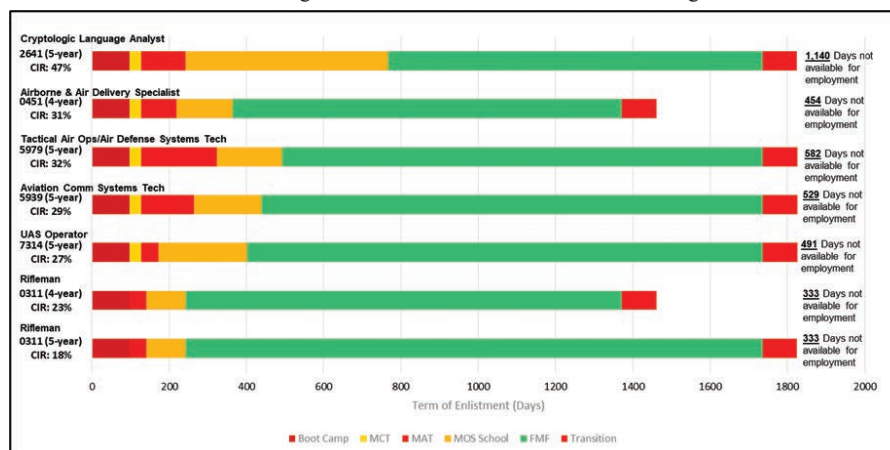


Figure 3. Contract inefficiencies by select PMOS. (Figure provided by author.)

geant ranks can significantly increase retention rates in critical MOSs, improving operational readiness, reducing accession and training costs, and decreasing non-end of active service attrition.

Increase re-enlistments and extensions: Encouraging more Marines to re-enlist, extend their contracts, or conduct lateral moves can expand the post-ELT period, resulting in increased productivity and ROI. This recommendation particularly benefits MOSs with extensive training requirements, where retaining experienced personnel yields significant advantages.

Implement Training and Education 2030: Consistent with the *Training and Education 2030* vision, Manpower and Reserve Affairs will support the Training and Education Command in analyzing ELT pipelines and formal learning centers to minimize time to train while upholding standards. The evaluation of existing Information Technology Resource Office agreements and the potential for MOS mergers to produce multi-skilled Marines and efficiency within the Human Resource Development Program should also be considered.

Conclusion

As the Marine Corps progresses toward its *Force Design 2030* and vision, ROI will become an integral consideration in all policies and processes. By understanding the factors influencing ROI, such as increased time spent in entry-level ELT, rising costs, and the significance of contract lengths, the Marine Corps can strategically address these challenges. Implementing initiatives to optimize enlistment contract structure, tailoring grade structure to consider ROI considerations, increasing re-enlistments and extensions, and aligning with *Training and Education 2030* are key to enhancing ROI. These efforts aim to achieve a favorable ROI by increasing post-ELT contract utilization, reducing ELT time, and retaining experienced personnel. It is vital to recognize that increased retention not only strengthens the overall seniority and expertise of the force but also directly impacts ROI by reducing recruitment and training costs and fostering a cul-

ture of mentorship and continuity. As the Marine Corps progresses toward its *Force Design 2030* and *Talent Management 2030* vision, it must embed ROI as a foundational consideration in all planning processes. By understanding and incorporating ROI into strategic decision making, the Marine Corps can optimize resource allocation, cultivate a skilled and resilient workforce, and maintain a competitive edge in the ever-evolving operational environment. The pursuit of increased retention and a comprehensive understanding of ROI will undoubtedly contribute to the Marine Corps' readiness, success, and ability to address future challenges effectively.

Notes

1. As represented by manpower dollars. This cost only represents the fully encumbered salary and benefits of E1s and does not include travel, cost of initial issue, and cost of instruction, using FY2022 dollars.

2. *DODI 1332.35* dtd 26 Sept 2019 requires an approved pre-separation timeline by 365 days before separation. Legislation proposed in the House and Senate both seek to codify this requirement in law.

3. Contract inefficiency is a contract inefficiency ratio (CIR), defined as [total TTT + end of service transition]/contract duration.



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Toward Modern Digital Solutions in Human Capital and Talent Management

Keeping pace with the technological horizon has never been more imperative

by Maj Joseph Zukowski

Moore's Law postulates that the number of transistors on a microchip will double about every two years—significantly improving performance in almost every human domain. This exponential growth seems to typify our commercial interactions with technology. The latest on the scene is Generative AI, ChatGPT being the most notable example, delivering human-like interactions and hallucinations. Generative AI and other types of artificial intelligence are giving way to a paradigm shift in how we view our world and what is possible. These technological gains have helped industry capture, manage, and maintain its human capital and increase its talent pools. Yet, the delivery of DOD and Marine Corps human resource information technology solutions seems to be the antithesis of this commercial growth. As the Commandant aptly states in *Talent Management 2030*, "At a time when most of us manage our personal business on our smartphones, the service is stuck using antiquated tools optimized for desktop use and rarely updated." The Marine Corps must alter its approach to planning, resourcing, developing, and delivering human resource capabilities, and software solutions more broadly, to take advantage of modern digital tools.

>Maj Zukowski is a Communications Officer currently serving as an Information Systems Plans Officer with Manpower Information Division, Manpower and Reserve Affairs.

The As-Is

The As-Is state of our human resources development process information technology systems is ripe for modernization. With that said, our systems are not bad nor are they broken. In fact, we have the most stable and accurate pay system within the DOD enjoying a 99.6 percent average pay and data accuracy rate month after month. The Marine Corps Total Force System remains the only integrated—integrating the active and reserve components into a single database to support the seamless transition between duty statuses, pay, and personnel systems within the DOD. Our current human capital management systems represent an era of development that stressed, and found great success in, building point solutions for point problems. Each individual system that is currently in use supports a discrete business process and its expert users. This monolithic development modality was the common approach to delivering information technology solutions to back-office

users in previous decades. If our current systems work as intended, is there a need to modernize?

The answer is a resounding yes. As our monolithic IT infrastructure continues to age, we accrue technical debt, where the cost of not fixing problems exponentially grows over time, which makes it increasingly more difficult to modernize. Perhaps unsurprisingly, this is a common problem with industry leaders in many sectors struggling with similar issues. Aging IT infrastructure, legacy databases, large unmanaged swathes of data, and a lack of integration across business solutions are ubiquitous. One need not look any further than Southwest cascading IT failures that led to nationwide flight cancellations during peak holiday travel season to see our problem is not unique. While this is a compounding challenge, it is not the sole reason to modernize. If you recall our systems are well-built point solutions built to support expert users as the customer. This methodology provides neither the agility nor velocity we seek to deliver solutions that are automated, data exploitive, and generally abstracts and simplify our organizational business processes for our Marines. To enable these qualities and the other imperatives envisioned in *Talent Management 2030*, we need to change our IT delivery paradigm.

Delivery Paradigm

The current Marine Corps software delivery paradigm favors a big-bang deployment approach that involves gathering a firm set of requirements and releasing a fully developed and tested software solution all at once. Big-bang deployment provides immediate access to all features but trades the ability to adapt to changing requirements and emergent technologies. This approach mitigates fiscal and temporal risk by ensuring schedule and performance remain well-tracked and managed. Subsequently, big bang follows a predictable and familiar fiscal trajectory, high-cost development up front, and maintenance and sustainment tail in the out years. The approach simplifies planning cost through the annual funding cycle and aligns well with current spending assumptions but trades velocity and flexibility of capability delivery. The big-bang approach served the Corps well, but in an era where technological advances exponentially impact the world around us, a new approach with continuous iterative advances is required to meet the vision in *Talent Management 2030* and beyond.

The Corps needs to embrace a cycle of continuous iteration and delivery focusing on delivering capability in smaller, incremental updates over time. A culture of continuous iteration and delivery offers faster value delivery to customers, enables user feedback incorporation, and provides flexibility to adapt to changing requirements. This delivery modality is not without its risks. All features delivered may not be kept and some entire software iterations may be deprecated or divested from if they do not provide organizational value. It also carries with it a very uncertain fiscal and temporal trajectory with either consistent spending or peaks and valleys through the traditional planning cycle for increased expenditure when large iterations are anticipated or planned for. However, the trade space with this methodology is faster delivery of capability that matters to the end user and flexibility to meet an ever-changing technological landscape.

Challenges To Digital Transformation

As we look to industry, we see many examples of successful delivery and deployment of modern platforms and software solutions that obfuscate and

The Corps needs to embrace a cycle of continuous iteration and delivery ...

streamline any number of business processes and procedures. Many existing platforms could provide the Marine Corps with its next suite of tools to support fully automated human capital and talent management processes. One challenge will be in embracing organizational change management. The

Marine Corps must strike a balance between maintaining rigidity in certain cultural and critical business processes while being flexible in routine processes that serve human resource functions. It is important to challenge the assumption that all Marine Corps business processes are too unique to be supported by commercial products. Although there may be areas where flexibility is limited, finding the appropriate trade space between rigidity and malleability can lead to an effective and modern suite of digital human resource management tools within the Marine Corps.

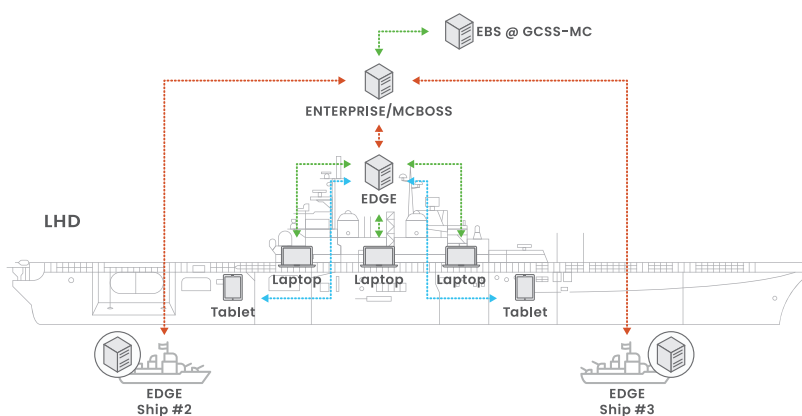
However, we must recognize that industry solutions do not provide a panacea to our modernization desires. Commercial solutions can provide an excellent return on investment for our common human resource process and serve to demonstrate a minimum viable product. However, we should explore custom coding for culturally relevant business processes to ensure

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that our Service equities and uniqueness remain at the forefront of the development and delivery cycle. An example of this can be found in the Digital Boardroom 2.0 Application, a custom-coded suite of tools to support the various selection and promotion boards that the Marine Corps executes and is managed by the Manpower Information Systems Division within Manpower and Reserve Affairs. This critical talent management function may or may not have an industry analog; however, keeping development in-house allows the Marine Corps make realtime changes and adaptations to ensure the workflow and supporting toolsets meet all design considerations, security requirements, and business process idiosyncrasies without compromising standing law, policy, and regulation requirements.

Another non-trivial challenge that we will face while transforming our human capital management IT

of our data to aid in decision support and provide predictive analysis for leaders at all levels.

Manpower Information Technology Systems Modernization

The Manpower Information Technology Systems Modernization Portfolio Office, led by Col Robert Bailey, stood up in February 2023 to help tackle these modernization challenges. Col Bailey's portfolio covers the gamut of hire-to-retire systems that service our Marines. The Manpower Information Technology Systems Modernization team is charged with modernizing legacy applications and developing new capabilities to operationalize the Commandant's vision for a modern Talent Management IT portfolio of capabilities with the ability to leverage data analytics to optimize manpower management outcomes. Taking a portfolio approach is critical to the overall success of delivering a modern human

support expert users and delivering value to our most precious assets.

Characteristics of the To-Be

The To-Be state of our human resources development process information technology systems is currently being framed and planned. To determine which processes are culturally unique to the Marine Corps and require custom solutions to provide the highest business value we are decomposing our current systems into discrete business processes along with business process reengineering. For all other routine processes finding commercial analogues and configuring solutions to support those processes will produce the highest return on investment. For this to work we need to ensure the portfolio leverages an integration layer where all applications receive common services, data, and other things through API and other modern connector modalities. As we move forward, the Marine Corps Total Force System will remain our base of fire, acting as the backbone to modernize and operationalize our data. Its ability to ensure that our Marines are paid on time and accurately cannot be understated. We will work to expand the Marine Corps Total Force System as needed to support additional data storage to act as our single source of truth. Over time, we will migrate workloads off the mainframe that are not suitable for its operating and delivery paradigm. This hybrid approach will allow us to rapidly execute the development of new applications, custom or configured, and quickly integrate with key data holdings for data-driven decision making while ensuring the sanctity and security of the pay and entitlements for our Marines.



This methodology ensures that the Marine is at the center of application design and delivery, preventing point solutions to support expert users and delivering value to our most precious assets.

systems is the integration of applications, services, data, and other digital tools together into a cohesive suite to support our Marines. To mitigate this challenge, we need to devise and build a suite of common application services that deliver standardized solutions shared across the application layer. Our current systems are built with their own identity, hierarchies, and other application services that make integration extremely challenging. We need to assign an authoritative data source and define what attributes make up a Marines personnel record. Once defined and standardized, we must administer tight control over how and why we add additional data elements to that record to prevent continued amassing of technical debt. Standardized data will help unlock the potential

capital and talent management IT solution. This holistic approach mitigates risk by ensuring a complete view of our human capital management business processes is taken into consideration when modernizing—ultimately ensuring that the future technology landscape consolidates, rationalizes, and deprecates the correct business processes to meet the Commandant's Talent Management vision.

To that end, the Manpower Information Technology Systems Modernization team has put in place a process that focuses on user-centered design and a cycle of continuous integration and delivery to increase the velocity of software capability delivery for the Marine Corps. This methodology ensures that the Marine is at the center of application design and delivery, preventing point solutions to

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The Looming Manpower Crisis

Threat-driven assignments in the Pacific

by the Staff of Manpower Management Officer Assignments

The traditional permanent change of station (PCS) season introduces significant operational risk to critical units and installations in the Service's priority theater. Additionally, rigid adherence to traditional tour control factors artificially constrains the population eligible to serve while simultaneously restricting career progression opportunities for many. The Service should revisit Manpower Management, Officer Assignments (MMOA) traditional practices if it is to excel in its mission by assigning "the right officers, to the right billets, at the right time ... to optimize Marine Corps warfighting capability and readiness." To best posture the Corps to "fight tonight," MMOA should spearhead the design and execution of a deliberate manning and training plan centered around a twelve-month unaccompanied tour.

Benefits to the Warfighters

By removing the requirement to align report dates with the academic school year, personnel readiness shortfalls can be evenly distributed across the entirety of the year and mitigate cascading turnovers across echelons of command. Marines would report after completing a deliberate pre-assignment training plan facilitating rapid orientation and execution. More commonplace completion of shorter tours would create a secondary return on investment for the Service, increasing exposure to III MEF's operational environment and concepts in effect creating a *ready bench* to be called upon in a time of war.

Benefits to the Marines

As more Marines deviate from the standard road map, one-year tours facilitate the flexible accomplishment of traditional career trajectory milestones. Such an advantage will become critical as time-in-grade windows shrink. Additionally, one-year tours are attractive to many families, creating opportunities to homestead while Marines serve forward. This would limit moves for families, increase spousal employment, and provide educational stability for dependents—all initiatives within *Talent Management 2030*.

Threat-Driven Assignments: Revisiting the Risk of the PCS Season

PCS season begins in April with the majority of moves complete by August, stretching across roughly half the year. As inexorable and enjoyable as the concurrent tax season, the move cycle imposes stress on families, Marines, and units alike—just as children leave their friends, Marines report to new formations—with or without turnover or sponsors. While undergirded by premises derived from the legacy manpower model and sustained through the predictable deployments of the past two decades, the current paradigm produces significant operational costs against our priority commands. As a result, the units that the Corps states are its priority are not fully manned and thus are not fully mission-capable, for roughly half of the calendar year.

Operational requirements exacerbate these shortfalls. III MEF must forward posture if it is to blunt a near-peer threat with little to no unambiguous warning. Thus, III MEF has designed op-

erational concepts that consistently deploy its forces in support of distributed operations across the first and second island chains. The timing of these deployments is often juxtaposed with the summer mover cycle. Fall and winter returns require unnatural movements that impact the slating of replacements and complicate the incumbent Marines' ability to screen for career competitive opportunities. Manpower decisions at the unit level are therefore constrained by what capabilities are available: the service does not provide our leaders with the option to execute these deployments with what is optimal.

Simultaneously, most officers are balancing the additional and unique stresses of an overseas move on their children and spouses. Assignments to the Pacific, in Okinawa or Guam in particular, impose intangible and tangible costs across the family unit. New families require time to acclimatize, foster new support systems, purchase foreign vehicles, and wait upward of a month before gaining access to housing. This limits the immediate tactical effectiveness of the Marine and slows the overall operational tempo for even the most gung-ho Marine and invested family. III MEF's active and engaged efforts to receive and support families are admirable but the reality is that reporting to the command is not synonymous with being ready for duty.

This latency is particularly acute at the field grade ranks. Many of III MEF's highest performing officers are directed to depart the island earlier in the move season to ensure prompt attendance at school or to assume command. Indeed, the most impactful leadership positions

experience higher than average turnover due to selection on competitive boards. In execution, this means that roughly a third of the most impactful billets are vacant or in transition at any given time. Worse, this often occurs simultaneously across echelons of command. Finally, the Service levies an additional tax on its leadership to support manpower requirements: promotion, command, and education boards all occur within the same period.

In 1776, George Washington led our warrior ancestors across the Delaware River on Christmas night in a surprise attack against Hessian mercenaries. Gen Washington knew that despite the dangerous conditions of the operational environment, catching his adversary ill-prepared offered a strategic advantage that could change the course of the war. The Taiwan Strait in the summer is not the frozen Delaware: the military PCS season occurs parallel with the most favorable conditions for adversary action. Moreover, our yearly battle rhythm is not a closely guarded secret; current practices not only impose costs but potentially invite adversary action.

The One Year Tour: Empowering Agency, Sustaining Careers, and Supporting Families

Talent Management asserts that the Corps must support the execution of non-standard career paths to increase the diversity of thought and experiences among our senior leaders while also generating novel incentives to retain talented officers. As such, more officers are deviating from the standard infantry officer career path as they pursue experiences traditionally considered career dead ends. Culturally, the Service is slowly evolving to recognize the value these officers bring to the institution. Fiscal Year 2023 Command and Education Boards selected Marines for O5 command who had not held command at all ranks and selected lieutenant colonels for top-level schools who were not O5 commanders. Nevertheless, Rome was not built in a day; to be competitive for promotion and command, Marines must complete primary MOS tours within the FMF. The education and utilization required for many education

programs, such as Naval Post-Graduate School, result in Marines racing back to the fleet before screening on boards.

Talent Management substantiates this risk stating that “even a small deviation in the timing of assignments can have significant consequences ... an extra 6–12 months in school might mean a major miss the opportunity for a key fleet billet before their lieutenant colonel promotion board.” The Service does not offer any opportunities for Marines to rapidly meet their FMF/primary MOS requirement outside of the 5th MEB in Bahrain. This results in

Talent Management 2030. The document cited the frequency of PCS moves as a significant factor in the decision for Marines to end active service. *Talent Management* understands that, at its core, a decision to serve is made by the Marine but borne by the family.

The reluctance to seek assignment to the Pacific for many is rooted in familial preferences and the deterrent nature of a 36-month tour control factor. No longer are single breadwinner families the constant, most Marines have spouses with professional goals that are not often easily aligned with overseas service.

Talent Management asserts that the Corps must support the execution of non-standard career paths to increase the diversity of thought and experiences ...

Marines requesting waivers or curtailments from local commands in order to accomplish what the larger Service has told them is required for their personal advancement. As time-in-zone grades shrink, supporting-establishment tours may present similar career timing concerns, creating an inverse relationship between local command requirements with a Marine’s career trajectory. This will introduce additional risk in the Service’s ability to support diverse and technical career tracks that are required in the future fight.

Increasing the availability and the Services’ tolerance of twelve-month unaccompanied orders provide additional avenues for Marines to reconcile their personal preferences with Service requirements. Shorter tours allow Marines to compact more experiences at each rank and grade, in effect creating more exposed and aware leaders. Furthermore, the prospect of unaccompanied orders produces incentives to serve overseas assignments that are attractive to many modern Marines with families. While serving forward, Marines can leave families at home and in place, creating stability for those most important to them. Indeed, reducing PCS frequency was also a directive within

This creates financial costs to families, both in immediate loss of salary and concerns over career longevity.

As children age, educational stability and proximity to aging family members become a driving priority in assignment calculus. Unaccompanied tours increase the pool of officers interested in assignment by “meeting Marines where they are.” It allows Marines to enjoy the benefits of the mythical homestead: spouses maintain careers, children remain in schools, and proximity to families and support networks are preserved.

Increasing unaccompanied tours will decrease the relative medical and housing requirements. Logically, this stands to increase efficiency in the process for both Marines executing accompanied orders and the Service. Assignments to austere locations, such as Okinawa, are largely driven by the overseas screening process. Availability of medical facilities and providers have a threshold of support before inbound dependents are deemed unsuitable. When dependents are deemed unsuitable, the service member executes a twelve-month restricted tour anyway but after experiencing seven months of administrative actions and with limited time to create a family care plan. Houses are already

packed, and resignations have already been submitted. Decreasing the total number of personalities may increase access for those who may be otherwise deemed unsuitable and increase efficiencies in the overseas screening process. Similarly, a slightly reduced demand may also streamline access to housing or access to childcare on a traditional tour.

Anecdotally, Marines are beginning to raise the risk of conflict when discussing assignments with their monitors. As tensions fluctuate between the United States and China, officers are considering the threat environment as a factor in their calculus. Marines that arrive in the summer of 2024 will be on island in 2027—the year in which many analysts state the Chinese Communist Party will be prepared to take action to resolve the “Taiwan situation.” This is a vari-

commands within a larger, holistic approach to staffing assignments forward. Unaccompanied tours give MMOA the flexibility to create a sustainable manpower model that centers assignments with warfighting capability firmly at center mass. On-cycle and off-cycle considerations are secondary: the cycle is III MEF’s training, exercise, and employment plan. At first glance, shorter tours appear to be an ill-advised solution for continuity issues. Once divorced from a single date window, however, MMOA can produce a systematic and continuous staffing plan that ensures a constant floor of capabilities across the calendar year. The *short-timers* can become the continuity itself.

5th MEB in Bahrain, another forward deployed formation within a WEZ, serves as a suitable template. III MEF would specify certain vacancies

To mitigate community concerns, MMOA could build a training window into the assignment planning. If desired by the gaining command and directed by the Service, each short timer would complete a deliberate pre-assignment training process. Marines would report to tactical centers of excellence, such as Marine Tactics and Operations Group, to receive a pre-deployment training program similar to individual augment deployments in years past. Marines will be immersed in intelligence briefs, operational exercises, and local unit standing operating procedures before they depart. Optimally Marines with assignments spanning echelons of command with similar departure dates attend as a cohort, conducting training and simulations as a team in their future roles. This not only reduces the requirement to spin people up but also produces interpersonal relationships before Marines depart. Once on-island, Marines would be ready to row—already familiar with their duties, and expectations—and with family considerations fairly commensurate with a traditional deployment.

It is not Talent Management 2025, 2040, or 2050. It is Talent Management 2030 because of the prospect of war.

able that the Service must prepare for: Marines may be hesitant—or outright unwilling—to bring families to Okinawa in the coming years. Monitor interviews will continue to become more delicate: praising the family experience while talking about an assignment in the weapons engagement zone in the same breath will become less academic with each passing year. These conversations will occur as Marines within the legacy retirement transition, creating a population that is predominantly composed of the Blended Retirement System. As families weigh their future, the traditional carrot of a twenty-year retirement may no longer be a sufficient lever for a monitor to pull.

The Pacific Pre-Assignment Training Plan: Creating the Ready Bench

To be clear the proposal is not to implement the single-year unaccompanied tour as the new standard but to expand opportunities to increase personal agency and mitigate risk at

that would be suitable for an unaccompanied assignment as well as specify others that required 24- or 36-month tour control factors. One-year assignments would be filled opposite the traditional move cycle, spread-loading transition risks. MMOA would then assign a Marine to each vacancy with a three-month turnover at the beginning and closure of a tour. This provides tangential benefits in addition to kneecap-to-kneecap replacements; the relative overstaff provides a surge capability for any *stand-to* situation and readily enables a shift to 24-hour operations if situations require it. As these tours increase in frequency, the number of officers familiar with the threat environment, mission sets, and processes of units forward will grow accordingly. The most persuasive return on investment is a Service-wide deepening of the bench—a cadre of experienced action officers that could catalyze the Corps’ ability to provide support to high-intensity conflict with little to no warning.

Conclusion

It is not Talent Management 2025, 2040, or 2050. It is *Talent Management 2030* because of the prospect of war. As that reality becomes less academic and increasingly real, lesser variables must be dismissed to ensure lethality and readiness trump all. Assignment practices to our Service’s most important installations and units must be reviewed to confirm that the Service is encouraging the most talented leaders and planners to serve where they are needed. With 2030 on the horizon, the wider Service must appreciate that any difficulties staffing forward units may metastasize from a manpower problem to a warfighting failure in short order.



Building Retention

Enlisted assignments for 2030

by the Staff of Manpower Management Enlisted Assignments

It has been two years since the publication of *Talent Management 2030* (TM 2030), the groundbreaking document that established that the Marine Corps' "organization, processes, and approach to personnel and talent management are no longer suited to today's needs and incompatible with the objectives of *Force Design 2030*."¹ This article outlines how Manpower Management Enlisted Assignments (MMEA) is evolving its culture, structure, and assignment process and how it is influencing systems modernization and Service-wide education to meet the intent outlined in *TM 2030*. Some initiatives are already underway and producing the desired change, while others will take substantially more time and resources. Regardless, MMEA's primary purpose remains unchanged: we are committed to assigning the right Marine, to the right billet, at the right time that enables the Marine to maximize his potential while meeting the needs of the Marine Corps.

the Commandant's Retention Program. The Command Retention Mission is an assigned mission from the Commandant to his major subordinate command (MSC) commanding generals to achieve the Service's FTAP and STAP goals. The Commandant's Retention Program is an evolutionary program that identifies our most highly qualified FTAP Marines and offers them an automatic reenlistment and duty station of their choice.

In FY23, we accomplished our FTAP and STAP goals in unprecedented numbers and time. We achieved our FTAP goal of 6,225 on 7 February 23 and our STAP goal of 5,632 on 9 March 23. Although we did not meet our retention goals across every MOS, we did match or increase retention numbers in 127 of the 153 MOSs. The Marine Corps has never met its retention goals in this fashion. FY23 also witnessed an unprecedented number of FY24 FTAP Marines opting to reenlist early; over 2,000 Marines took advantage of the Early Reenlistment Authority option. Ad-

However, there is still work to be done. We do not have the right monitor-to-population ratios to allow for customized discussions between every Marine and their monitor. Our manpower systems remain antiquated; monitors use fourteen disparate systems to develop a common operational picture to inform an assignment. Our communication strategy is ineffective, lacking a unifying method or central agency to coordinate strategic messaging. The relationship between the active component (AC) and reserve component (RC) is fractured, requiring unification and alignment. Our training and education of leaders regarding the intricacies of enlisted retention and assignments is lacking, reducing the efficiency and effectiveness of retention and assignment initiatives. To sustain the success experienced in FY22 and FY23, we need to implement the following initiatives at speed.

Culture

Peter Drucker, the famed 20th-century management guru, once said, "Culture eats strategy for breakfast."² His point is important to recognize as we move forward with the implementation of retention and assignment initiatives. None of this will matter if we do not create the right culture at the macro and micro levels across the Marine Corps that allows Marines to maximize their potential. Every leader in today's Marine Corps, from corporals to commanding generals, must build a culture that compels our best Marines to *stay Marine*. Building a retention culture, which MMEA defines as a "feeling a Marine has towards his or her unit that mobilizes individual commitment to unit performance through continued service," is the foundation from which the following initiatives must be built.

MMEA assesses our success in FY22 and FY23 as the result of engaged command leadership, innovative retention programs and incentives ...

Before I address how our approach to enlisted retention and assignments is evolving, let me offer a quick review of current retention efforts. In fiscal year (FY) 2022, we accomplished our First Term Alignment Plan (FTAP) and Subsequent Term Alignment Plan (STAP) goals for the first time since 2011. FY22 witnessed the introduction of the Command Retention Mission, and FY23 saw the development and implementation of

ditionally, over 2,300 Marines volunteered for a Special Duty Assignment, an extraordinary number considering the challenging nature of these assignments.

MMEA assesses our success in FY22 and FY23 as the result of engaged command leadership, innovative retention programs and incentives, and more effective dialogue between the Marine, command teams, and the monitors.

For a more detailed description of how and why MMEA is evolving its culture to align with current modernization initiatives, please review the article “Building a Coaching Culture in MMEA.”

Structure

MMEA Structure

Based on an analysis of the 16,000 interviews monitors conducted in FY22 and 23, *TM 2030* has clearly changed the expectations enlisted Marines have of the assignment process. They rightfully want and expect the opportunity to discuss when and where they will be assigned. These discussions take time, a commodity a monitor does not have when they are responsible for assigning as many as 13,000 Marines. To meet these expectations, MMEA is adjusting its structure by an additional 3 Marine

concepts. MMEA is already aligned across aviation, logistics, and combat arms communities. We were slow to respond as Deputy Commandant for Information and MEF Information Group formations emerged to meet the demands of today’s operating environment but have taken the actions needed to establish this key relationship.

MMEA is also establishing MMEA-3: a resourced operations section. MMEA-3 is responsible for coordinating the conduct of our assignment boards (which we will address later in this article), strategic communications, assessments, lateral move coordination, and information management. As retention plays a greater role in the sustainment of the future force, MMEA must have the ability to plan, coordinate, and assess operations on a scale

Reserve Affairs directed Manpower Management to establish a DAP cell within MMEA in June 2023. Consisting of one officer and five enlisted Marines, the DAP cell is directly responsible for the coordination of Marines leaving the AC and continuing their service in the Selected Marine Corps Reserve. MMEA’s DAP cell is the Marine Corps’ first step in developing closer integration between the AC and RC. The severity of the accessions environment, the need to think and act across the total force, and emerging ideas like permeability are indicators that this integration will be critical for the Service moving forward.

Career Planner Structure

TM2030 assertions that our “approach to personnel and talent management are no longer suited to today’s needs” is especially true for our career planner force. Career planners are on the front lines of our retention efforts and are employed as integral members of a unit’s command team by units that do retention well. However, our career planners do not have the right structure, systems, or education and training to meet the needs of today’s Marines. There are 479 career planners in the Marine Corps today, a number which includes those in a training status and not actively in a career planner billet. Most career planners reside at the O5 level of command, although career planners serve at every level of command from the battalion to the component level. There are, however, over 30 O5 and O6 commands out of the Corps’ 421 command-slanted units that are not structured to have a career planner—a number that grows when accounting for units that rate career planners but are gapped for any period of time.

To address these shortfalls, MMEA submitted and was approved for a compensated table of organization and equipment change request to add three master gunnery sergeants to the career planner structure. These Marines will serve as the career planners for MarForPac (a billet that was eliminated under directed staff reductions in 2020), the course director for the Career Planner School House (a billet currently held

TM2030 assertions that our “approach to personnel and talent management are no longer suited to today’s needs” is especially true for our career planner force.

officers and 31 Marines enlisted with its recently approved table of organization and equipment change request. We are right-sizing the monitor-to-population ratios across our infantry, motor transport, tiltrotor, airfield operations, engineer, logistics, aviation command and control, intelligence, and chemical, biological, radiological, and nuclear communities. These additional monitors will allow MMEA to manage these populations more effectively by dividing the orders process between FTAP and STAP populations.

Additionally, MMEA internally reorganized its communications, cyber, intelligence, electronic warfare, and administration monitors under MMEA-21. This effort aims to effectively align with the Deputy Commandant for Information and MEF Information Group communities to ensure our retention and assignment efforts are aligned with developing operating

commensurate with its responsibilities. MMEA-3 brings focus to these critical responsibilities, freeing monitors and career planners from the requirement to execute these actions and buying them more time to focus solely on engagements with Marines and command teams.

MMEA’s table of organization and equipment change request also includes a structure to support the establishment of a Direct Affiliation Program (DAP) cell within MMEA, which will help the Service draw focus on a pool of Marines that have historically been ignored—our AC end of active service cohort. Every year, the Service accepts a loss of approximately 17,000 FTAP Marines, 2,000 STAP Marines, and an increasing number of officers to end of active service. To optimize the ability of the Service to capitalize on retaining separating Marines through the DAP, Deputy Commandant Manpower and

by a master sergeant), and as the occupational field sponsor—a new billet that will be responsible for developing future structure and education. Additionally, MMEA has initiated a study to determine how career planner structure, training, and education need to evolve to meet the needs of *TM 2030*.

MMEA is actively working with the Marine Corps Recruiting Command to reestablish the Career Planner School House in Quantico under the direction of MMEA. Career planner training is currently conducted at Marine Corps Recruit Depot, San Diego under the cognizance of the Basic Recruiter School. This relationship has worked for the last twenty years, but it is inadequate to move career planner training and education to the necessary level. By placing the career planner schoolhouse in the same location as the Service's manpower leaders and planners, advocacy and education for career planners will increase significantly, which we argue will lead to resourcing and education reforms that will enhance the Service's retention efforts.

Assignments

Assignments within the Human Resource Development Process are the most misunderstood, contentious, and rewarding job in the manpower business. It is also the area where we need the most development. *Talent Management 2030's* description of the assignment process is not wrong, but its oversimplification of an extremely complicated process is misleading and has led to many broad, and sometimes conflicting, interpretations to fit individual narratives. To evolve the assignments process, MMEA is working to influence assignment policy, has established E9 slating boards, is pursuing the concept of career permeability, and is underwriting all activities in the long-term currency of relationship building.

Assignment Policy

Assignments are governed by DOD and Headquarters Marine Corps orders designed to ensure every unit receives their portion of a finite number of assignable Marines to accomplish their assigned mission essential tasks

while providing constraints and restraints involving permanent change of station (PCS) frequency to ensure Service-wide fiscal responsibility.³ This process requires a centralized approach to ensure that the Marine Corps—and not just specific units—is ready. *TM 2030's* guidance was clear regarding the reduction of PCS frequency: “Beginning in 2022, monitors will seek to keep Marines and their families in the same geographic duty station as long as opportunities for career growth exist. In other words, monitors will make more regular use of Permanent Change of Assignment (PCA) orders, rather than PCS orders.”⁴ To further develop our assignment policies, MMEA is researching the following entry question: *How does MMEA maximize the Service's operational effectiveness AND minimize the number of PCS moves while also meeting a growing number of overseas requirements?*

Maximizing PCA moves was an already established practice within MMEA prior to the publication of *TM 2030*; it's just good business. The challenge with *TM 2030's* language is its failure to reconcile the Marine Corps' global commitments and the unfortunate reality that not every duty station is created equal. The biggest inequality amongst installations that impacts the assignment process is medical care, particularly for family members. A family member's disqualification to accompany the Marine to a duty station does not preclude a monitor from issuing orders. However, it creates the dilemma of separating families for at least twelve months, which increases the potential for a host of other challenges to emerge. Monitors take every step possible to avoid these situations.

MMEA assesses that overseas assignments will characterize service in the Marine Corps for the foreseeable future. The role of Marine Corps Forces, Pacific and III MEF, to include Marine Corps Installations Pacific, in the Indo-Pacific will only continue to grow. As we move forward with the development of assignment policies to meet the objectives established in *TM 2030*, we are going to have to reconcile the tension between the desire for stability with the

need to stay mobile. Marines and their families should anticipate serving overseas, but to accommodate the impact of an overseas assignment, MMEA is working to develop more predictability in the assignment process. Ideally, a monitor should be able to combine two sets of orders, spanning a six-to-eight-year period, that offer the Marine and his family the ability to plan and make informed decisions regarding home ownership, schools for children, healthcare, and family member employment. MMEA is working diligently to find the balance between duty station stability and the need to meet our global requirements.

E9 Slating Boards

The Director of Manpower Management Division has authority over all assignments, executed through the judgment and discretion of monitors. Beginning in FY22, MMEA initiated a series of E9 slating boards to increase transparency and agency of the assignments process and to build a repeatable and reputable process that increases our ability to match individual talents to operational requirements. Within the E9 ranks, there are 46 different communities with a total of 755 E9 billets. Of those, 225 are considered high-visibility or general officer-level billets, with upward of two-thirds requiring an assignment annually given the high turnover and number of retirements. Of these 46 communities, some have as few as three E9s with a single high-visibility billet requirement, while others have as many as 80 E9s with 26 high-visibility billet requirements. Currently, these assignments are made with varying input from the respective communities, from emailing the monitor directly to holding slates with community members over the course of a week.

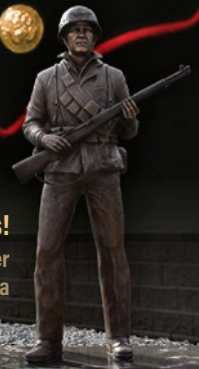
Currently, MMEA conducts slates for sergeants major, 0399 E9s, and various aviation communities. This year, slates were held for the 0699 E9 community and are scheduled for the 04XX E9 community. Analysis of these slates and boards will shape the future of E9 assignments. If determined to be sustainable, this process increases transparency by gaining community

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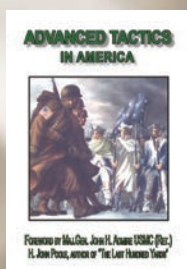
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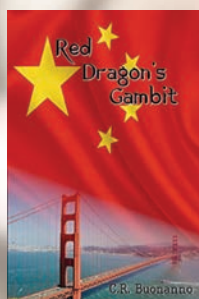
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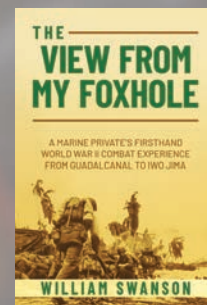
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input prior to making E9 assignments, but this is not a one-size-fits-all solution. The slating process is not where we want to be yet, but we will get there. The Service and the Marines demand and deserve the highest performers in the most demanding billets.

Permeability

With the addition of a DAP cell within MMEA, the Service has inexorably linked the AC and the RC in a way unseen before. This is a much-needed step in the right direction, but further integration of AC and RC retention policies will support a modernized force. Chief among the concepts we are exploring within Manpower and Reserve Affairs is the idea of permeability. Permeability refers to the hypothetical concept of an AC Marine moving seamlessly between the AC, RC, and possibly even career intermission programs without the policy, procedural, and administrative barriers that currently prevent this concept from implementation. We envision a future where Marines who still want to wear the uniform can continue to support the Corps in a different component or status while they pursue some level of personal stability. This stability could enable starting a family, supporting a spouse's career, pursuing education, or gaining a skill set unavailable in the Service or in the Marine's PMOS. While permeability conversations are admittedly in the conceptual stage at this time, we argue that MMEA is a crucial stakeholder in the process, as a refined permeability concept would augment our current and future assignments policies to provide Marines with the opportunities needed to further their personal and professional desires while supporting Marine Corps end strength requirements.

Building Relationships

The essential task within MMEA for the last three years has been to build and sustain a dialogue with FMF and supporting establishment command teams and Marines. This dialogue is built from respect and shared understanding. The Marine Corps would not have met its retention goals in FY22

and FY23 without this special relationship. The quality of our relationship has and will continue to underwrite any success we expect to have moving forward. Regardless of what systems or policies emerge, retention and assignments are people businesses that require a dialogue between two or more people. In the technology world, this is called having a man-in-the-loop. Everything put forth in this article is designed to enhance the efficiency and effectiveness of our relationship. Monitors are committed to building these relationships and actively working to be viewed as a partner in a Marine's career planning.

Systems Modernization

It is no secret that the Marine Corps' personnel systems are antiquated. *TM 2030*'s description of how monitors conduct assignments is accurate: Monitors do not have the tools to assess past experiences and talents. They use fourteen disparate systems to develop a comprehensive understanding of a Marine's capabilities, limitations, and desires, which takes an extraordinary amount of time. *TM 2030* is also correct when it asserts that monitors are limited to email, their own spreadsheets, the official military personnel files of their populations, internal orders writing systems, and outdated analytic models.⁵

To address these shortfalls, MMEA is working closely with Marine Corps Systems Command and Manpower and Reserve Affairs' Manpower Information Division to develop the manpower systems of the future. Programs like the Talent Management Engagement Portal and Total Force Retention Systems Next are underway and expected to enhance the assignment process. MMEA stands ready to implement these systems once they become available.

MMEA is also focused on addressing short-term concerns as institutional systems are being developed. Over the last year, we developed and implemented the MMEA Dashboard to improve transparency and information sharing. Utilizing existing programs and technology, the MMEA Dashboard is easily downloaded onto government computers and gives leaders near real-time information on MOS health,

retention progress, staffing goal percentages, information on lateral moves, and contact information to MMEA. We have also digitized our Roadshow with QR Code and LinkTree data collection technology. For the first time, Marines have access to critical retention and assignment information via their phones and can provide MMEA accurate feedback regarding the retention and assignment process. To improve our ability to share and collect information, MMEA is working with the Marine Corps Software Factory to develop an app that provides Marines with the retention and assignment information they need to make informed decisions. While we recognize that these short-term solutions are "bridging" solutions until future manpower systems come online, the positive reception they have received thus far, and the influence these solutions can provide toward future manpower systems, justify the efforts in creating and managing these solutions.

Modernizing the Marine Corps' personnel systems is a herculean task that will work across a multi-year phased approach. In the meantime, MMEA remains committed to finding areas for improvement under our control.

Training and Education

When *TM 2030* raised the expectation of leader involvement in enlisted retention and assignments, it exposed a lack of understanding of basic retention and assignment principles amongst our SNCOs and officers. As a force, we simply have a low IQ of manpower issues. To address this, MMEA developed and submitted a Training and Education Needs Statement to Training and Education Command. The Training and Education Needs Statement is the first step in developing a standardized period of instruction to be taught across the Training and Education Command enterprise to increase awareness and understanding of enlisted retention and assignment principles. To cover immediate concerns, MMEA introduced a Manpower 101 class for company-grade officers and staff noncommissioned officers that is being taught during the Roadshow. Both efforts are coupled

with our strategic communication and automation efforts to ensure Marines and command teams have easy access to relevant and updated information. If we

the next barriers to growth requires additional resourcing, which is ongoing, but at a pace that does not match the demands of the environment. To get

and finding creative solutions to wicked problems. As of today, we are not where we want to be nor where you expect us to be—but we are getting there.

... through pure grit and dogged determination, MMEA continues to do what Marines have done for generations: making the best of the situation and finding creative solutions to wicked problems.

expect to evolve enlisted retention and assignments, we must have a common understanding of the policies, orders, benefits, and requirements.

Conclusion

After two years, MMEA has made significant strides toward building a retention and assignments culture that supports the *TM2030* vision. Crossing

there, the vision of *TM2030* needs to be resourced, from structural changes to support more meaningful engagements and to the IT systems that enable retention and career development to meet the needs of the Service. In the interim, through pure grit and dogged determination, MMEA continues to do what Marines have done for generations: making the best of the situation

Notes

1. Headquarters Marine Corps, *Talent Management 2030*, (Washington DC: 2021).
2. Peter Drucker, *The Essential Drucker* (New York: HarperCollins Publishers, 2001).
3. Manpower and Reserve Affairs Department, *MCO 1300.8: Personnel Assignments Policy*, (Quantico: 2014).
4. *Talent Management 2030*.
5. Ibid.



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Lateral Entry

A key strategy for staffing immediate and emerging requirements

by MGySgt Sage Goyda

How can the Marine Corps enhance its capabilities to meet immediate and evolving demands necessitating experienced personnel? In preparing for an increasingly complex and ever-evolving operating environment, the Marine Corps grapples with a critical warfighting readiness issue: how to expediently source, evaluate, train, and employ personnel with highly specialized skills and experience to address emerging or immediate national security requirements.

Our traditional recruitment and accession strategies, while crucial for maintaining the strength and effectiveness of the preponderance of the force, fail to attract and nurture talents needed for more advanced and technical roles. In the current global defense dynamic, the Marine Corps requires specialized expertise in technical domains, including but not limited to, intelligent robotic autonomous systems and cyber operations.

By implementing a lateral-entry program, the Marine Corps could tap into a reservoir of talent already seasoned with mature technical skills and mid-level experience in contrast with the current development model of a closed system that necessitates a considerable investment of time and resources for training. A significant portion of this potential talent pool lies within the civilian sector, particularly in the realm of emerging and rapidly evolving technologies. Rather than expecting these highly skilled individuals to abandon lucrative civilian careers to begin at entry-level ranks, a sensible strategy would involve integrating them into commensurate ranks and roles reflective of their experience, skills, and abilities.

The successful implementation of lateral entry in other military branches,

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coupled with the expanded authorities granted for such programs by the *Fiscal Year 2019 National Defense Authorization Act*, provides a sound basis for the Marine Corps to assess and adapt a lateral-entry framework to address Service

its implementation. For example, valid concerns exist regarding its potential impact on Service culture, cohesion, and *esprit de corps*. There may also be apprehension that it may dilute or alter the time-honored and revered standards of what it means to be a Marine. Additionally, questions may exist regarding its need, given other fill and staffing options, including the use of civilians, contractors, and reserve personnel.

We can mitigate potential concerns through careful planning and controlled implementation of the program. One way is by making it mandatory for lateral entrants to complete the same entry-level training as any other Marine can ensure that they are instilled

The absence of a lateral-entry process could ... narrow the Marine Corps' options and compromise its preparedness ...

needs. The absence of a lateral-entry process could inadvertently narrow the Marine Corps' options and compromise its preparedness against future threats while unintentionally yielding capability development to other Services the Marine Corps will be required to internally develop regarding future operating concepts.

To this end, Headquarters Marine Corps is currently developing a pilot program aimed at assessing the feasibility of implementing lateral entry within the Corps and the program will be objectively focused on the functional merits and feasibility of lateral entry.

While lateral entry presents clear benefits, we should consider and address potential concerns associated with

with our traditions and core values. Concerns over leadership ability, performance, organizational familiarity, and the creation of potential occupational subcultures could be addressed by setting clear standards and controls. The pilot program plans to establish strict implementation criteria and a rigorous screening process for all applicants, ensuring that they maintain the high standards synonymous with the Marine Corps. The implementation criteria seek to clearly identify the required number of lateral entry candidates within each occupational specialty while uniformly distributing such capability evenly across the Service.

The lateral-entry program is not intended to replace other staffing op-

tions, such as the use of civilians and reservists. Rather, it is meant to provide an additional pathway to source talent to satisfy warfighting requirements eliminating potential gaps in emergent and immediate skillsets. For example, a civilian or contractor may not be viable for certain roles due to working conditions, specialized skills needed, or legal constraints. Additionally, the reserves can be a considerable source of talent, but may not always address specific and/or long-term needs.

Overall, introducing a lateral-entry program to the Marine Corps will be a change, and the Service must continually analyze and refine the viability of the program. However, the Service can attempt to control for and mitigate potential concerns through the program's design and implementation. Moreover, the greater concern and risk of harm is in limiting the Marine Corps' ability to fill warfighting requirements—and ultimately readiness—by failing to consider all viable options by ignoring existing capabilities provided by lawmakers.

Marines pride themselves on standards with the philosophy of maneuver warfare centered on flexibility and adaptability. In an era characterized by rapidly evolving, complex threats, the Service's talent management strategy must echo these principles.

A lateral-entry program can provide greater agility to the Marine Corps by offering an alternative avenue for sourcing urgent talent requirements, especially in emerging technology fields. It has demonstrated potential in other settings, and any delay in its implementation due to untested concerns could be detrimental to the Corps' readiness.

While it is essential to address legitimate concerns, these can be alleviated through meticulous program implementation. The significance of having all Marines complete the same entry-level training cannot be overstated, and all applicants must undergo stringent screening to ensure they meet Marine Corps standards. Although it may be a barrier for applicants and reduce the

population size, entry training is currently a requirement.

As the Service strides forward into an increasingly complex threat landscape while navigating a challenging recruiting environment, the necessity of developing, testing, and perfecting a lateral-entry process cannot be emphasized enough. Such a process cannot be a contingency plan implemented in the face of a crisis but a well-established protocol underpinned by robust testing and validation. As the Service seeks new and innovative ways to satisfy capability development in a growingly complex world, the Service must adhere to its culture that is centered upon the human dimension, innovative, and adaptable while remaining relevant to lawmakers. The Service's mission remains clear, and a well-implemented lateral-entry program can play a pivotal role in developing the Service's capability by gaining a competitive advantage through the rapid acquisition of technology skillsets through a lateral-entry pathway.

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Marine Corps Civilians

Our valued teammates

by Dr. Michael R. Strobl

There are roughly 18,000 civilians currently filling the table of organization (T/O) requirements for the Marine Corps.¹ To put this into context, there are more civilians in the Corps than there are active-duty staff sergeants, lieutenant colonels, and colonels combined. The civilian workforce represents a critical capability without which the Corps could not accomplish its mission.

The Corps takes well-earned pride in its reputation for taking care of Marines. When it comes to our civilian Marines, however, we can do better. The 2022 Federal Employee Viewpoint Survey that asked civilians how they felt about working for the Marine Corps shows that they believe in and are committed to the Corps' mission. Notable, however, is that the Corps ranked number 388 out of 432 federal organizations in the annual Best Places to Work Federal Government rankings.² This is clearly below the standards of the Corps.

This article has two goals. The first is to provide a primer for uniformed leaders on this essential aspect of our total force. Many Marines serve an entire tour without interacting with a Marine Corps civilian. Other Marines might not work with civilians until they are staff noncommissioned officers or field-grade officers. My intent is to speed up the learning curve for Marines who find themselves working alongside our civilians and to highlight some similarities and differences between our civilians and our Marines.

The second goal is to increase awareness of current efforts toward civilian talent management. That discussion will focus on the Corps' Civilian Workforce Strategic Plan.

Civilian Workforce Demographics

Civilian Marines perform vital func-

>Dr. Strobl is a retired Marine currently serving as the Assistant Deputy Commandant, Manpower and Reserve Affairs, HQMC.

tions at bases and stations around the world and many are deployed in support of forward operating forces. Contrary to the stereotype of ossified civilians punching the clock from deep in the bowels of the Pentagon, approximately 95 percent of the Corps' civilians work

Civilian Marines perform vital functions at bases and stations around the world ...

outside the Washington, D.C., beltway. A full 62 percent are veterans; many are former Marines.

Civilian positions include acquisition professionals, administrative assistants, electricians, human resource specialists, lawyers, logistics specialists, security officers, and more. Sixty-five percent of the Corps' civilians are under the general services (GS) pay system. These GS positions are typically white-collar jobs. Another eighteen percent of the civilian workforce is in blue-collar jobs and the remaining seventeen percent are scattered into various pay systems such as the Defense Civilian Intelligence Personnel system and the Civilian Acquisition Professional system.

Optimal Workforce Mix

Before getting to a comparison of military to civilian billets, it is worth a moment to consider why we have civilians on our T/Os at all. While it might strike some as counter-intuitive, after years of working in the Human Resources Development Process, I understand that civilians are, in fact, the default manpower type on organizational T/Os. Yes, you read that correctly: civilians—not Marines—are the default manpower type. This concept is codified in *DODI 1100.22, Policy and Procedures for Determining Workforce Mix*.

As military manpower is generally more expensive than civilians, a billet should only be coded for a Marine if it meets the criteria promulgated in the *DODI 1100.22*. As it happens, the large majority of T/O billets do meet the criteria to be military. This does not, however, change the fact that civilian manpower is the default entry argument. Ironically, in Congressional testimony and other venues, the Corps' leadership often boasts that the Corps' one-to-ten ratio of civilian manpower to military manpower is the lowest of all the Services. Rather than a source of pride, our low civilian-to-military ratio could be a signal that too many Marines are performing functions that could (and should) be performed by lower-cost civilians, thus either saving money or freeing a Marine to perform functions that only uniformed personnel can do by law or policy (e.g., directing and controlling combat situations).

Uniformed and Civilian: Similarities

Although the bulk of this article focuses on the differences between Marines and civilians, if the reader remembers only one thing, it should be this fundamental similarity: both

groups are made up of dedicated professionals who have volunteered to serve our Nation and our Corps. Just like our Marines, our civilians have made deliberate choices to serve the Corps—choices that incur an opportunity cost of foregone private sector opportunities and benefits. Like Marines, our civilians are steadfast professionals who are committed to their mission. While this similarity between Marines and civilians is fundamental, there are interesting differences between the two types of manpower that military leaders must work to reconcile and use to maximize potential.

Uniformed and Civilian: Differences

Stability. A notable strength of our civilian workforce is its relative stability. In commands characterized by high and frequent turnover of Marines, whether due to permanent change of station moves or separations from the Corps, the civilian workforce provides a stable source of deep memory and institutional experience. Our civilians are rarely subject to permanent change of station moves nor do they work under contracts with finite end of active service dates. They can, as some do, stay in the same job for decades.

This relative stability of the civilian workforce presents both opportunities and challenges for the uniformed supervisor of civilians. Leaders should rely on and seek the viewpoints of their experienced civilians. Whatever the issue of the day might be, it is likely that the tenured civilian has seen it before. The other side of the coin, however, is that stability can lead to resistance to new ideas. Supervisors must guard against stability evolving into stubbornness.

To the extent our civilians provide stability, it is because they want to. As mentioned above, civilians are not under contract, and this means that our civilian workers are free to leave anytime they please. Commanders and supervisors should never take for granted the stability of their civilians. Unlike Marines who face potential punishment if they do not show up for work, civilians make a choice to come to work every day and are free to pursue other options on short or no notice. This leads

to two considerations: First, commanders and supervisors should treat their civilian workforce in a manner that makes the employees want to come to work. Second, supervisors should be cautious about placing themselves in a position of being overly reliant on a key civilian—a civilian who faces continual and attractive opportunities in the private sector.

There is an old saying to the effect that we ride our best horses the hardest. This usually means that our best and hardest working Marines tend to get more than their share of work. This axiom applies to our civilians as well. Supervisors need to remember that the “best horses” also tend to have the best opportunities outside of the Corps. Treat them well.

Training. There is a striking difference in the training we provide our Marines compared to that provided to our civilians. For example, a manpower officer receives approximately 32 weeks

Like Marines, our civilians are steadfast professionals who are committed to their mission.

of training (The Basic School and Manpower Officers’ School) before filling a billet. An enlisted administrative specialist receives approximately 23 weeks of training (boot camp, Marine Combat Training, admin school). By contrast, a civilian human resources specialist receives no formal training. At best, the civilian might attend a week-long action officer course, but most “training” will be on-the-job. While we evaluate resumes and conduct interviews, we have to rely on the skillset that the civilian has acquired prior to joining the Corps’ workforce.

Beyond entry-level training, Marine officers and enlisted follow a well-defined path of training and education at nearly every grade. Civilian training, by comparison, is less formalized and is

subject to workload, course availability, and the owning unit’s ability and willingness to fund temporary additional duty travel. It is critical that commanders invest in civilian training; not only for the explicit value of improving skills but also for the intrinsic message we send to our civilians that they are valued colleagues. Leaders can find information about civilian training at the Manpower Plans and Policy website.³

Promotion, Pay, Benefits, and Awards. Unlike Marines, civilians rarely receive promotions. Most are hired into a billet at a specific pay grade and the civilian will stay in that pay grade unless the billet is upgraded, or the employee applies for a higher-graded billet elsewhere. Commanders and supervisors must be sensitive to this important difference between Marines and civilians. Over time, the civilian employee can watch as all the Marines around them receive promotions while the employee receives none.

On the other hand, some aspects of compensation and benefits skew to the advantage of civilians. For example, civilians are eligible for performance-based bonuses, raises, cash “spot awards,” or time off (leave) awards. This system is designed to incentivize superior performance and supervisors can use it to reward the civilian workforce in ways unavailable to the uniformed workforce.

Of course, not all rewards are monetary. As Marines are aware, commands are typically diligent about ensuring that Marines’ superior performance is recognized with formal awards. Unfortunately, formal awards are rare for civilians. While Marines often enjoy end-of-tour awards or occasional impact awards, civilians can work for years with nothing comparable. Commanders must seek out both formal and informal ways to recognize and reward their civilian employees. The command’s human resources office can assist with civilian recognition programs.

Another major difference between Marines and civilians is the amount of annual leave earned. While all Marines—even the newest private or second lieutenant—earn 30 days of leave per year and are not charged for sick

days, a new civilian hire typically earns 13 days of annual leave and 13 days of sick leave per year.⁴ Civilians are required to take leave in fifteen-minute increments; thus, a quick run to the dry cleaners, a flat tire on the way to work, or a routine dental checkup can eat into an employee's leave balance in a way that it would not for a Marine.

To round out the discussion of benefits, there is one more difference between Marines and civilians. Civilians, unlike their uniformed counterparts, can earn compensatory time off, travel compensatory time, and overtime pay. Commanders and supervisors need to be familiar with the applicable rules and ensure that their civilians receive the time off and pay that they have earned.

Comparison of Paygrades

A significant and obvious difference between Marines and civilians is that civilians do not wear their pay grade on their collar and are rarely referred to by their pay grade. Nevertheless, pay grades do matter, and Marines who work with and supervise civilians should be familiar with the rank structure. Although comparisons between military and civilian paygrades are inexact, Table 1 below shows the general translation of civilian GS paygrades to their military counterparts.

Civilian Talent Management

Shifting focus, I now want to touch on civilian talent management and

the Civilian Workforce Strategic Plan (CWSP). As a companion to the publication of the Marine-focused *Talent Management 2030* in November 2021, Manpower & Reserve Affairs published the *FY2022–FY2025 United States Marine Corps Civilian Workforce Strategic Plan* in October 2021.

The CWSP is a cornerstone strategic-level policy, which provides the overarching goals, objectives, and metrics to sustain and grow our civilian Marines. As such, the CWSP aligns with the DOD and Department of the Navy Human Capital Strategies as well as embodies our *Commandant's Planning Guidance*, *Force Design*, and *Talent*

The first objective addresses succession planning for the future workforce. This means figuring out what kinds of jobs are needed and making sure there are skilled people to do them.

The second objective centers on the education and training of the civilian workforce. From fostering a culture of learning to ensuring that education and learning are adequately resourced, this section offers key performance indicators to help commands develop their civilians.

Keeping the current employees happy is the theme of the third objective. This means making sure they have a good balance between their work and

Given the Corps' commitment to promoting an environment of excellence, this strategy underscores the importance of aligning civilian roles with the Marines' distinctive values and principles.

Management lines of effort. The goals and objectives laid out in the CWSP will help ensure success for the Marine Corps mission, our civilian Marines, and the Marines we support.

The CWSP is a roadmap that guides how the Marine Corps organizes and supports its civilian employees. It outlines four overarching objectives and employs a range of strategic methodologies to attain these objectives.

personal lives, which helps them stay motivated and dedicated. It also includes fostering a welcoming and informative acculturation program and implementing and maintaining a robust employee rewards program. Given the Corps' commitment to promoting an environment of excellence, this strategy underscores the importance of aligning civilian roles with the Marines' distinctive values and principles.

The fourth objective is to help employees become leaders. Similar to active-duty Marines, civilian employees are encouraged to evolve into leaders. To facilitate this, the CWSP proposes initiatives such as comprehensive training programs and mentorship opportunities, intending to nurture a culture of leadership development that mirrors the ethos ingrained in the Marine Corps.

A key to achieving the success of the CWSP goals and objectives is communication. Commands are encouraged to communicate this plan during new employee onboarding, acculturation training, and town hall meetings and share how their local plans are aligned with the goals and objectives in this

Civilian Pay Grade	Approximate Military Equivalent
GS-1/2/3	Pvt–LCpl
GS-4	Cpl
GS-5	Sgt, SSgt
GS-6	GySgt–MGySgt/SgtMaj
GS-7	WO-1, CWO-2, 2nd Lt
GS-8/9	CWO-4, CWO-3, 1st Lt
GS-10/11	Capt
GS-12	Maj
GS-13/14	LtCol
GS-15	Col
Senior Executive Service (SES)	BGen–LtGen

Table 1. Civilian and military paygrades.

plan. Commanders, command leadership, managers, supervisors, and employees themselves are responsible for promoting and supporting the plan and should ensure supplemental plans are aligned with the strategic goals and are in concert with the objectives of the CWSP.

In essence, the Marine Corps Civilian Workforce Strategic Plan serves as a multifaceted blueprint to optimize the civilian workforce's contribution to the Marine Corps' missions. By encompassing diverse strategies and initiatives, the plan not only seeks to align the civilian workforce with the Marine Corps' evolving needs but also to foster a culture of excellence, leadership, and adaptability.

Readers can find the CWSP at the M&RA website.⁵

Conclusion

The Corps could not accomplish its mission without its dedicated civilian

workforce. While there are many differences between Marines and civilian employees, I circle back to the vital similarity: Like Marines, the Corps' civilians are volunteers dedicated to serving our Corps and country. Commanders and supervisors must be aware of and sensitive to the nuances of the civilian workforce and take care of the civilians just like they take care of Marines.

Notes

1. This article addresses only those civilians that are funded with Appropriated Funds ("APF Civilians"). There are another 10,670 civilians supporting the Marine Corps who are Non-Appropriated Fund (NAF) civilians as well as 4,078 foreign nationals filling T/O requirements.

2. Staff, "2022 Best Places to Work in the Federal Government® Rankings," *Best Places to Work in the Federal Government*, 2022, <https://bestplacetowork.org/rankings/?view=overall&size=sub&category=leadership&>.

3. Manpower and Reserve Affairs, *MPC-30, Civilian Workforce Planning and Development*, (Quantico: 2020).

4. Civilian annual leave accrual amounts can increase over time.

5. For more information, visit: https://www.manpower.usmc.mil/webcenter/portal/oracle/webcenter/page/scopedMD/s8f19613d_4923_4f05_baf0_df031cd2b0d6/Page5ccde1d9_0a9b_476e_9c20_8536f482c75f.jsp.



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Meeting the No Fail Mission

Special duty assignments

by Capt Drew Tykwinski

The Marine Corps identifies three screenable duties as special duty assignments (SDAs): recruiting duty, drill instructor duty, and Marine Security Guard Detachment commander duty.¹ These duties have a unique degree of public visibility and responsibility, and their distinction from other screenable duties requires a greater depth of screening of eligible Marines.² Currently, Manpower Management Enlisted Assignments (MMEA) staffs SDAs to 100 percent of their Authorized Strength Report (ASR), indicative of the criticality of these duties to the Corps' strategic posture. Achieving 100 percent SDA staffing requires the careful balancing of separate institutional priorities and the needs of individual Marines. Most individuals are unaware of these disparate requirements; consequently, the complexity of SDA staffing often results in confusion and frustration. To alleviate misperceptions and increase organizational understanding, this article describes the priorities of key process stakeholders (Manpower Plans, Programs, and Budget [MPP], SDA Commands, FMF, and the Marine), explains how MMEA currently meets SDA staffing requirements, and details why MMEA seeks to reduce or eliminate involuntary Headquarters Marine Corps SDA Screening Team (HSST) assignments.

The identification of which MOSs serve on an SDA begins with MPP. Using the semi-annual ASR as its input, MPP iteratively develops end strength, accession, retention, promotion, and inventory targets to match personnel and structure requirements.³ MPP

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then produces the grade-adjusted recapitulation (GAR): the total quantity of Marines needed for every grade and primary MOS (PMOS) to fill a given structure.⁴ Within the GAR, PMOSs are programmed personnel targets accounting for all PMOS structure requirements in the ASR and are allocated a proportional quantity of additional targets in a category known as Free Build. Free Build exists to ensure that enough Marines of appropriate

one PMOS over-executes its Free Build allocation by providing more Marines to non-PMOS duties than planned, another underperforms. The underperforming PMOS still receives additional promotions, retention boatspaces, and accessions allocations but does not lose as many Marines to non-PMOS-specific duties. Conversely, the over-performer does not receive additional promotions, retention boatspaces, or accessions allocations—causing staffing shortfalls in PMOS-specific duties. Therefore, the distribution of GAR Free Build is crucial in determining each PMOS's SDA staffing target. This ensures each PMOS meets operational requirements in the MOS and limits the number of Marines from a specific MOS that may be assigned to an SDA.

SDA commands are also major stakeholders in the SDA staffing process. SDA

... SDAs require Marines to perform duties without direct supervision, to possess a high degree of maturity and trustworthiness, and ... exemplary appearance, professionalism, and judgment.

grade exist to support ASR structure that does not have a PMOS-specific requirement on the Service's table of organization—including SDAs.

By increasing the total personnel requirement for a PMOS, Free Build increases a PMOS's promotion allocations, retention boatspaces, and accession targets. In turn, this drives the need to balance PMOS SDA staffing. When

eligibility requirements are outlined in *Marine Corps Order 1326.6*.⁵ While each SDA has unique billet responsibilities, all SDAs require Marines to perform duties without direct supervision, to possess a high degree of maturity and trustworthiness, and to maintain exemplary appearance, professionalism, and judgment.⁶ While these traits are certainly desirable in the FMF, SDAs

are unique in the degree to which they must be exercised on a daily basis.⁷ The significant public exposure, responsibility, and often-isolated locations of SDAs require that a Marine's family stability, disciplinary record, financial stability, physical and medical fitness, tattoos, communication skills, and academic potential be considered for eligibility.⁸

In addition to the above requirements, tour length is important to consider when analyzing SDA staffing. Initial SDA tours are 36 months, which make effective and efficient use of the new skills Marines have achieved after completing their respective SDA schools. New recruiters spend their first

FMF, particularly regarding deployment staffing. As previously alluded to, the attributes and skills needed on SDAs are also needed by the FMF for effective leadership at the noncommissioned officers and staff noncommissioned officer ranks. Like SDAs, deployment staffing requires lead time and personnel stability to provide staffing predictability, further limiting the quantity of Marines available for assignments. For example, Marines stabilized for deployment will not be assigned to an SDA class reporting within the stabilization period but can be assigned following it; likewise, Marines assigned to an SDA class will not be removed for the pur-

promotion, the possibility of additional composite score points, and special consideration by promotion boards. SDAs also offer additional pay, especially for volunteers, to meet Marines' financial needs. These incentives are intended to mitigate individual concerns and promote the volunteerism of talented staff noncommissioned officers and noncommissioned officers.

Career timing is a key consideration for individual Marines, who must be forward-thinking about when to submit for SDAs. Volunteer assignment periods begin as early as two years prior to the report date of the fiscal year's (FY) latest classes, and involuntary assignments occur as early as seventeen months prior to those same classes. Marines are encouraged to volunteer after their first or second FMF tour because they become eligible for involuntary assignment via the HSST after their first re-enlistment. Completing up to two FMF tours allows sufficient time to gain PMOS credibility and deployment experience to offset time spent out of the MOS on an SDA. To accommodate the time required to complete professional military education, sergeants through gunnery sergeants executing or who have completed a successful SDA tour are exempt from resident professional military education requirements for 365 days following assignment of the SDA.⁹ Career timing is a crucial consideration in SDA staffing and is often the most difficult aspect to align when considering the requirements of the Marine, FMF deployments, and SDA classes.

With an understanding of the various requirements influencing SDA staffing, the current process can now be examined, beginning with timing. Most recently, assignments to staff FY24 SDA billets (target FY) began with the volunteer period in July 2022

Despite their demanding and challenging nature, SDAs are highly incentivized to assist in meeting the needs of Marines.

9–12 months certifying as a canvassing recruiter and generally find their first 18–24 months the most challenging and time-consuming. With honed skills and established networks, recruiters typically gain efficiency and time throughout the final year of their tour. During a drill instructor's tour, approximately 24 months are spent with a recruit training company, and 12 months are spent supporting the recruit training cycle while on "quota." This pattern is designed to fill all required billets with an appropriate level of experience while simultaneously balancing the time and psychological demands of the duty with time outside the training companies. Marine Security Guard Detachment commanders spend their tour split between two eighteen-month posts, affording them the opportunity to spend time at two embassies. Initial tours of less than 36 months for any of the 3 SDAs can be detrimental to effectively employing and balancing the Marine's time on duty, particularly at the end of the tours when the Marine's training and experience have optimized the Marine's effectiveness.

Equally important to the requirements of the SDA are the needs of the

pose of deploying. Beyond deployment requirements, both FMF and supporting establishment commands have key garrison billet-holders that require careful management. Risks to gapped FMF and supporting establishment billets require mitigation through replacement slating and contribute to the lead times involved in staffing SDAs (discussed in detail below).

Last, but certainly not least, stakeholders in SDA staffing planning are individual Marines. Despite their demanding and challenging nature, SDAs are highly incentivized to assist in meeting the needs of Marines. SDA volunteers usually have some choice in the location of their SDA, and they are afforded a geographic duty station preference upon completion. For Marines seeking career progression, SDAs offer greater allocations for meritorious

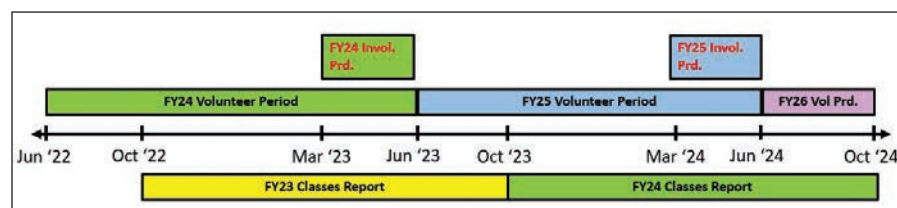


Figure 1. Assignment period overlaps. (Figure provided by author.)

(FY22) and closed in June 2023 (FY23) with the completion of involuntary assignments (See Figure 1). The involuntary assignment period typically begins seven months prior to the first SDA class of the target FY to allow the assigned Marines to receive orders no later than six months in advance of reporting. The volunteer period does not cease during this time, but Marines identified for involuntary assignment screening via the HSST are no longer considered volunteers.

Detailed planning for staffing a target FY begins in the months prior to the opening of that target FY's volunteer period and starts with determining the number of graduates needed to maintain each SDA at 100 percent staffing. For each month of the target FY, MMEA estimates the number of Marines departing the duty, either due to tour completion or relief. This

unteers, MMEA seeks to staff SDAs with as many volunteers as possible.

The higher attrition for involuntary HSST-assigned Marines, along with the many eligibility factors of the SDAs, contribute to the large numbers of Marines identified by the HSST for screening each FY. The HSST list includes nearly twice as many Marines as assignments needed and nearly three times as many Marines expected to ultimately graduate from their SDA course. As such, inclusion on the HSST list does not guarantee a Marine will be assigned to an SDA; this is only true for about half of the Marines listed, and of that half, even fewer will ultimately graduate and complete the assignment.

Using historical attrition data, MMEA updates PMOS targets accordingly and disseminates the targets to monitors at the start of the target FY's volunteer period. MMEA PMOS and

MMEA intends to grow volunteerism through increased education of the SDA assignment process and increased command engagement. By reducing the overall quantity of SDA assignments and aligning the priorities of the Marine and the SDA, volunteerism enables the most effective and economic use of our greatest asset—the Marine. With this as the guiding principle, MMEA continues to leverage current and anticipated tools to manage the irreplaceable talent of our staff noncommissioned officers and noncommissioned officers leaders against the whole of the service's requirements.

Notes

1. Headquarters Marine Corps, *MCO 1326.6, Selecting, Screening and Preparing Enlisted Marines for Screenable Billets and Independent Duty Assignments (SCREENMAN), CHANGE-1*, (Washington, DC: 2021).

2. Hope Seck, "Marine Corps Rolls Out Sweeping Changes to Special Duty Assignments," *Military.com*, December 13, 2017, <https://www.military.com/daily-news/2017/12/13/marine-corps-rolls-out-sweeping-changes-special-duty-assignments.html>.

3. Manpower and Reserve Affairs, "Manpower Plans, Programs, and Budget (MPP)," *USMC.mil*, n.d., <https://www.manpower.usmc.mil/webcenter/portal/MPP>.

4. Headquarters Marine Corps, *MCO 5311.1E, Total Force Structure Process*, (Washington, DC: 2015); and Manpower and Reserve Affairs, "Enlisted Personnel Availability Digest," *USMC.mil*, n.d., <https://www2.manpower.usmc.mil/epad/help.jsp>.

5. *MCO 1326.6*.

6. *Ibid.*

7. *Ibid.*

8. *Ibid.*

9. Headquarters Marine Corps, *MARADMIN 663/16, Exemption to Enlisted Professional Military Education Policy for Marines Serving on Special Duty Assignments*, (Washington, DC: 2016).



... SDA, volunteerism enables the most effective and economic use of our greatest asset—the Marine.

determines the number of graduates each SDA class must produce during the target FY to ensure the SDA is appropriately staffed. The collective sum of the target FY's SDA graduates is then allocated to PMOSs in accordance with MPP's GAR Free Build allocations, creating specific SDA targets by PMOS.

After determining initial PMOS targets, two attrition factors are applied to account for assignment losses: pre-class attrition and in-class attrition. As shown in Figure 1, SDA assignments often occur well over a year before a corresponding SDA class date, increasing the potential for pre-class attrition, which includes the modification or cancellation of a Marine's assignment. Most commonly, this occurs when an assigned Marine no longer meets the eligibility criteria required by the SDA. In-class attrition results from Marines who fail to complete the SDA training course. Due to significantly reduced attrition factors compared to non-vol-

SDA monitors play integral roles in weighing the desires of the Marine via the screening materials submitted and their respective knowledge of the FMF and SDA requirements. A monitor's ability to weigh the individual's needs is limited to what is provided in their screening materials and the Marine's communication with the monitor. Ideally, SDAs would be staffed entirely with volunteers in the correct PMOS distribution, as this would provide the best balance for each stakeholder. However, monitors who have not achieved their assignment targets by the involuntary assignment period will select Marines for screening via the HSST to meet the Service's staffing requirements.

Though the ideal scenario of staffing SDAs with 100 percent voluntary assignments has yet to occur, MMEA continues to improve processes toward achieving this goal, attaining its highest total number of SDA volunteers in the FY24 assignment season. In FY25,

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Building a Coaching Mindset in MMEA

More than issuing orders

by the Staff of Manpower Management Enlisted Assignments

During my in-calls with new monitors and career planners, I always ask what their impressions were of Manpower Management Enlisted Assignments (MMEA) before checking in. Most of them describe MMEA as difficult to communicate with, explain that the assignments process is confusing and lacks transparency, or suggest that MMEA is a “black hole” that just issues orders, often at the most inconvenient time. Interestingly, I hear similar comments when I am out on the MMEA Roadshow. And if that isn’t enough, the impressions were reinforced in *Talent Management 2030* when it characterized monitors as discouraging input from Marines and command teams.¹

a Marine’s potential to maximize his or her own performance.² We also know that our culture is the most important component of MMEA’s transformation process. It will not matter how good our systems and processes are if they are not anchored in a culture that allows us to connect with the Marines we serve.

Why Coaching?

During the Summer of 2022, we assessed MMEA’s structure, systems, processes, and culture to determine both what and how we needed to evolve to meet the intent of *Talent Management 2030*. We concluded that we needed to do a better job of helping Marines match their professional goals and aspirations with opportunities in the Ma-

retention process. Because of its focus on powerful questioning and active listening, a coaching mindset can turn a potentially adversarial engagement into a rich and beneficial process that allows the monitor to meet the needs of the Marine Corps while simultaneously creating the opportunity for the Marine to maximize his potential. When done right, a retention and assignment discussion based on coaching principles can be the most effective, efficient, and rewarding way to ensure we are assigning the right Marine to the right billet and at the right time. We think the principles of coaching will anchor MMEA’s culture as it evolves to meet the demands of the future.

Defining Culture

Building the right culture within an organization, to ensure it can accomplish its assigned tasks, is a leader’s primary responsibility. That requires a leader to do three things: first, understand what the organization is tasked to do; second, understand how the organization’s current culture developed to execute those tasks; third, propose a vision for how the organization’s culture needs to evolve to ensure it remains competitive in its current and future operating environments. The difficulty of accomplishing those tasks is compounded because of the abstract nature of culture, which is hard to define. It is difficult, especially for the untrained observer, to understand how culture impacts individual and organizational behavior. To help simplify the complexities of evolving MMEA’s culture, I adopted Ed Schein’s definition of culture and used it to understand MMEA’s

It will not matter how good our systems and processes are if they are not anchored in a culture that allows us to connect with the Marines we serve.

Let me say this: I hear you, and we are actively working to address these impressions. In our article, “Building Enlisted Retention and Assignments for 2030,” we outlined a framework to evolve MMEA’s structure, processes, and systems.

This article builds on that framework and describes how MMEA is developing a *coaching mindset* to meet the expectations of the Marines we serve. If we expect to retain our most talented Marines, we need a first-class assignments branch designed to assist in unlocking

Marine Corps. We recognized that future systems like the Talent Management Engagement Portal and an updated Total Force Retention System will help this process. But we also determined that Marines want to talk with monitors and career planners about career decisions. Regardless of how the Talent Management Engagement Portal and Total Force Retention System are integrated into enlisted retention and assignments, we argue monitors and career planners will always play a prominent role in the assignment and

current behavior and how that behavior impedes or enhances our ability to accomplish our primary tasks—retaining and assigning our most talented Marines.

“The No Fail Mission” article) and ensuring Marines were assigned to billets that did not gap any unit’s capability, the system worked. Neither MMEA nor commanders were held account-

careers as we expect them to do on the battlefield? We argue this is the case and that developing a coaching mindset within MMEA is the best way to meet their expectations.

“The culture of a group can be defined as the accumulated shared learning of that group as it solves its problem of external adaptation and internal integration, which has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, feel, and behave in relation to those problems.”³

Schein submits that “the most important element of this definition is to note that culture is a *shared* product of *shared learning*.”⁴ That means an organization’s culture develops from the observation and acceptance of a series of interactions, events, and behaviors that, over time, define how the organization operates. This is where we get the phrase, *this is how we have always done it*. For MMEA, our culture developed under a manpower model that did not require a large number of one-on-one interviews, where interaction with command teams was not necessary, and where a large degree of transparency in the assignment decision-making process was not seen as beneficial. Our behavior was acceptable because it met the needs of the Marine Corps during a time when surplus manpower in the Corps allowed the Service to take a less stringent approach toward the nuances of any individual Marine. Additionally, command teams were not expected to play an integral role in the retention and assignment of the enlisted force. In fact, our recruit-and-replace model did not require a significant retention effort. We only needed to retain about 23 percent of a given fiscal year first-term alignment program cohort, which the Service made in fiscal year 2022 for the first time since 2010. Additionally, if we met a couple of key assignment metrics, like filling special duty assignments (see

able for ensuring we placed the right Marine, in the right billet, at the right time. The impressions I mentioned in the introduction emerged because MMEA’s structure, systems, processes, and culture developed to meet the needs of a 20th-century manpower system, and were what leaders accepted.

The true genius of *Talent Management 2030* is not in the programs it proposes. Instead, its genius lies in its recognition of the developing tension between the need to retain and develop a Marine who is independently-minded and on a path of self-actualization and interdependence with the Marine Corps’ hierarchical and traditional approach to manpower management. Gen Berger recognized that a large portion of modern society is moving away from traditional business and management methods of command and control.⁵ Indeed, today’s operating environments, whether in business or on the battlefield, require individuals on a path toward self-belief and interdependence.⁶ The operating environment requires the evolution of managerial practices to meet the expectations of those who operate within it. *Force Design 2030* requires that we retain and assign a mature, intelligent, and independent-minded Marine capable of taking the initiative and developing the situation. Is it not logical to expect that Marines will take the same approach to their

Developing a Coaching Mindset

Coaching can best be defined as “partnering with clients [Marines] in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.”⁷ We argue this definition sets the right mental model to redefine the relationships between monitors, career planners, Marines, and command teams. Evolving these relationships from one of limited interaction and transparency to one of trust and collaboration requires monitors and career planners to possess a high degree of emotional intelligence, a belief in an individual’s future potential, the ability to ask focused questions, and active listening skills that focus on understanding the goals and aspirations of the Marine.⁸ Finding the right Marines to serve as monitors and career planners and providing them with quality training is critical to this process.

It takes a unique individual to serve as a monitor or career planner in MMEA. The Marine needs to have the right blend of MOS credibility, temperament, and character because the decisions they make can have institutional impacts. In their book, *The Talent War*, Mike Sarraille and George Randle drive home this point: “A single individual can accomplish only so much on their own, but when you put a talented individual in charge of selecting and training other talented individuals, their impact grows exponentially.”⁹ We see this dynamic unfolding in our infantry community today. For the second year in a row, we have over-executed retention goals for riflemen, machinegunners, and mortar-men. This is a testament to how our infantry monitors connected with Marines, command teams, and infantry occupational field sponsors to ensure Marines had the right information to make informed decisions. We are seeing similar results in the reconnaissance, AV-8B maintenance, cyber, and motor-transport communities. Our observations confirm Sarraille and Randle’s

rationale for why A-players need to be monitors: (1) talent is attracted to talent, (2) it takes talent to recognize talent, and (3) A-players want other A-players.¹⁰ We look forward to actively working with command teams to find the right Marines to serve as monitors and career planners in MMEA.

The second part of developing a coaching mindset is training. A common pitfall organizations fall into when trying to develop a coaching culture is a lack of quality training. In his book, *The Coaching Habit*, on the Commandant's Professional Reading List, Michael Bungay Stanier offers three reasons why coaching fails in many organizations. First, the training is too theoretical, too complicated, and divorced from reality. The second reason is coaching is too

tor is completely reliant on the quality of the turnover he receives from the outgoing Marine. We are also actively seeking outside agencies to assist in the development of our coaching program. We argue our monitors and career planners should be certified via a reputable coaching agency. Finally, like any good organization, we have implemented a rigorous training plan that ensures our monitors and career planners are proficient with the tools needed to accomplish their tasks.

As MMEA's paradigms shift to support a coaching culture, it is crucial to recognize that the other half of the equation—the Marine on the other end of the line—should also be evolving to meet the demands expected of the force that the Commandant envisions

We are committed to ensuring our structure, systems, processes, and culture ... meet the expectations of the Marines we serve ...

hard to translate into daily actions. Finally, the third reason is that coaching is surprisingly difficult.¹¹ Compounding these challenges is the reality that many Marines have spent years giving advice.¹² That is what Marines do: we issue orders, we give directions, and we instruct. It is ingrained in our DNA. However, that might not be the best approach if we want a manpower system capable of matching individual talent to the needs of the Marine Corps. We need to become better at asking questions and actively listening to our Marines—the underlying tenants of coaching.

Today, MMEA's approach to training and educating monitors and career planners is unacceptable. It's another example of how our programs and processes meet the needs of the old system. Because those needs have changed, so should our approach to training and education. MMEA is redesigning how it trains and educates incoming monitors. We are professionalizing our monitor school to provide monitors and career planners with comprehensive training prior to checking in. Right now, a moni-

tor in 2030. Whether the Marine reaching out to MMEA is an individual seeking career advice or a member of a command team seeking to support solving a manpower issue at their unit, the Marine should be an independent-minded, initiative-focused, intelligent, and mature individual capable of engaging in an open-ended conversation with a manpower subject-matter expert. Just as MMEA personnel must maintain open minds that are able to actively listen and think creatively across various domains, individuals contacting MMEA must recognize where they are on their journey of self-actualization, recognize the value of the information they bring to the conversation, and possess both active listening and active vocalization to communicate their wishes, understand MMEA's perspective, and participate in a collaborative dialogue that betters both parties. Only when both parties are committed to a meaningful dialogue can the maximum potential of a coaching culture be truly unlocked.

Conclusion

It is an exciting time to be in MMEA. We could not agree more with Gen Berger that the time for change is now. We are committed to ensuring our structure, systems, processes, and culture evolve to meet the expectations of the Marines we serve and the requirements of *Force Design* and *Talent Management 2030*. Every monitor and career planner in MMEA is ready to be a part of a thought-provoking and creative discussion aimed at unlocking and maximizing your potential. We recognize the need to lead the culture shift we want and expect for the Service as a whole and are excited about the opportunity to display this culture in the many interactions we anticipate having across the FMF and the supporting establishment over the following years.

Notes

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First to Fight

Lessons from the Battle of Belleau Wood

by Maj Kyle King

“And, waking or sleeping, I can still see before me the dark threat of Belleau Wood, as full of menace as a tiger’s foot, dangerous as a live wire, poisonous with gas, bristling with machine guns, alive with snipers, scornfully beckoning us to come on and be slain, waiting for us like a dragon in its den. Our brains told us to fear it, but our wills heard but one command, to clean it out, and I can still see before my very eyes those waves in the poppy-spattered wheat-field as the steady lines of our Marines went in.”¹

—Albertus Catlin,
With the Help of God and a Few Marines

Col Albertus Catlin, commander of 6th Mar at Belleau Wood, recorded these words a year after the Marine Corps’ performance in that small crop of woods east of Paris in the summer of 1918. Catlin’s first line poetically describes the overwhelming odds Marines faced in the battle: mustard gas from German artillery shells, Maxim machineguns dug in ready to fire, and enemy snipers scanning the battlefield for targets. It is his second line that reveals those intangible traits Marines exhibited during the almost month-long battle—virtues that have set the Corps apart since its inception: discipline, gallantry, grit, sacrifice, *esprit de corps*, and mission accomplishment among others. Outgunned and outmanned, a brigade of Marines fought for nearly 26 days against multiple divisions of battle-hardened German infantry and ultimately won.

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Although the battle has long passed, we Marines have an obligation to look back at this storied engagement and extract from it applicable lessons for today. This article is just that, a simple recap and analysis of the Battle of Belleau Wood and the leadership fundamentals and virtues exhibited that remain timeless in war. Under the severest of conditions, Marines overcame their tactical and operational missteps, equipment shortfalls, and an overwhelming enemy force. These are the reasons every new generation of Marines must know the story of Belleau Wood.

America Goes to War

To fully appreciate the battle, we need to go back further to 1917, the year the United States entered World War I. The war had been raging in Europe since 1914 with President Woodrow Wilson pledging to keep America out. When Great Britain intercepted the Zimmerman Note (Germany’s request for an alliance with Mexico) in January 1917 and turned it over to the United States, it was enough for President Wilson to petition Congress for war.

Beleaguered French and British allies needed the Americans immediately. The United States responded by assembling roughly 14,000 troops and sent them to France in June 1917. Named the American Expeditionary Force and commanded by Army GEN John J. Pershing, the force included 5th Mar. In February of 1918, the 6th Mar arrived in France and joined with the 5th Mar to form the Fourth Marine Brigade, attached to the Army’s U.S. Second Infantry Division.²

American action in the war was minor throughout the winter of 1918 until the Germans launched a series of offenses with fresh troops freed from the now-silent Eastern Front. British and French forces repulsed the first two German offensives, but the third, known as the Aisne Offensive, struck at French forces in the Chateau-Thierry region of France, only 39 miles east of Paris. The force and momentum of this German offensive smashed the French army and dashed most Frenchmen’s hopes of keeping the Germans out of Paris. The Allies suddenly threw American forces into the line to blunt the invasion. The U.S. Second Infantry Division was ordered to Chateau-Thierry, and the Marine Brigade’s mission was to take back Belleau Wood, an ancient

hunting ground half the size of New York's Central Park.³

Baptism by Fire

Departing their camp near Paris and traveling by foot and truck for over 36 hours, the Marines arrived filthy and exhausted, falling in along the front near the villages of Champillon and Lucy-le-Bocage only a few kilometers north of the Metz-Paris Highway and the city of Chateau-Thierry. By the morning of 2 June 1918, despite poorly designed French maps issued in minimal quantities, most of the Marine Brigade reorganized along a northwest-running defensive line.⁴ French troops were tied in on the brigade's western flank and the Army's 9th Infantry Regiment was tied in to their east. When oncoming Germans repulsed a French counter-offensive forward of Marine lines, retreating Frenchmen demanded the Marines withdraw with them. Capt Lloyd Williams, a company commander with 2/5 Mar, replied to a dispirited French major, "Retreat, Hell! We just got here." The brigade, although untested in battle, was ready for action.⁵

On the afternoon of 3 June, the woods across from the Marines' line finally came alive. Waves of German soldiers emerged from the tree lines and advanced through waist-high wheat fields toward the Marines. Some reports list 500 yards away, others say 300 yards away, but at some distance the Germans were not expecting, the Marines of 1/5 Mar and 2/5 Mar, lying prone with their 1903 Springfield bolt-action rifles, began pouring precision rifle fire into the advancing enemy. While watching the onslaught, Col Catlin recalled, "The Boches fell by the score there among the wheat and the poppies ... they didn't break, they were broken."⁶ Marines and their rifles alone won the day in their first encounter with the enemy. Even nearby French units praised the Marines for their unmatched marksmanship. After three failed attacks on 3 June, the Germans limped back into Belleau Wood and began fortifying their front. The Marines rested and reorganized their lines over the next two days, preparing to clear out the woods when orders came.

At 2225 on 5 June, brigade headquarters issued orders for an assault, with zero hour set for 0345 on 6 June. Commanders now had only five hours to deliver the order to their men dispersed along the line, coordinate supporting arms, and ready their men. Despite the impossibility of the task word passed through the darkness, troops checked their equipment and readied their weapons, and platoons moved to their rendezvous points. The first objective would be Hill 142, a prominent terrain feature that commanded high ground a few hundred meters west of Belleau Wood. 1/5 Mar would spearhead the attack.

At 0345 only the 49th and 67th Companies were in position to begin the assault, and at 0350 whistle blasts signaled the weary yet eager Marines to begin the attack. Many veterans remember the initial waves moving toward Hill 142 as a textbook performance of an attack formation. The platoons attacked in lines of four, maintaining proper intervals, with French-made Chauchat light machineguns interspersed for suppressive fire. The parade-like formations, however, fell apart when German machineguns sprang to life. Withering fire from German Maxims and Mausers raked the approaching Marines, killing scores. Platoon formations quickly morphed into individual struggles for survival. Momentum stalled. Then small-unit leaders took charge. Only meters from machinegun emplacements, junior officers and noncommissioned officers rushed forward, inspiring their men to keep moving. One Marine lost a hand grabbing an enemy machinegun barrel. The enemy gun crew, however, suffered a worse fate at the hands of Marines with bayonets.

By noon on 6 June, 1/5 Mar had secured Hill 142 but at a cost of 16 officers and 544 Marines killed or wounded.⁷ The Germans suffered far greater with an estimated 2,000 casualties. With the high ground overlooking Belleau Wood in American hands, the assault on the woods could begin.⁸

From just the first few days of the battle, we can take away several lessons: 1. *Forced Marches: When not enough ve-*

hicles were available for transportation, 1/5 Mar, and the 5th Machine Gun Battalion were forced to march with weapons and equipment to the front line.⁹ Rigorous training both stateside and in France prior to the battle prepared Marines to undergo these strenuous conditions and perform superbly. Although vehicles and aircraft are the norms for transportation today, commanders must still ensure that their units can move themselves and their equipment to distant objectives without those luxuries and still complete the mission.

2. *Marksmanship: During the initial encounter with the enemy on 3 June, marksmanship displayed by the Marines engaging targets out to 500 meters was far superior to French and German marksmanship during the war. Although mission sets change, the Marine Corps must continue to imbue marksmanship fundamentals to all Marines in both recruit training and the FMF, and commanders must make every effort to increase the accuracy and lethality of Marines under their charge. Get your Marines trigger time, that is always a good investment.*

3. *Aggressive Execution: Poorly planned orders to secure Hill 142 gave subordinate commanders minimal time to plan and execute. Regardless, at zero hour, NCOs and junior officers were moving amongst the troops, getting them in order and inspiring them with their command presence and leadership. When chaos ensued, well-trained small-unit leaders made the difference in securing the objective. That legacy of sacrifice, determination, and leading from the front must continue to be instilled in all junior leaders throughout the Corps through rigorous training, effective promotion screening, and character development by their commanders and senior enlisted leaders.*

Into the Woods

Brigade headquarters issued orders to clear out the entirety of Belleau Wood while the engagement on Hill 142 raged back and forth. Setting zero hour for 1700 that same day, 6 June, Gen Harbord, commander of the Marine Brigade and a career Army officer, issued Field Order Number Two, calling for a multi-pronged attack on the woods. 3/5 Mar would execute the main attack

by striking the woods on its western front while 3/6 Mar would penetrate the woods at its southwest tip and clear the woods northward. Rotating on 3/6 Mar's right flank, 2/6 Mar would protect 3/6 Mar's flank and secure the village of Bouresches east of the woods.

Intelligence on enemy activity in Belleau Wood during the days leading up to the attack was limited. Various French air scouts reported observing enemy activity inside the woods, and division intelligence believed that the Germans were consolidating positions in the woods. Gen Harbord, however, believed the woods were either empty or occupied by only a small force to be easily captured. As a result, the brigade scheduled minimal artillery support for the attack, a decision that would prove disastrous.¹⁰

At 1700 on 6 June 1918, the attack on Belleau Wood commenced. Leaving the safety of their lines, the attacking battalions proceeded through waist-high wheat fields toward their objectives in the dark, looming tree line. 3/5 Mar, the northernmost unit, had the most exposed approach to the woods.¹¹ 3/6 Mar, to the south, fared somewhat better with trees and terrain shielding their approach.

Spread out on-line in four different waves, 3/5 Mar's Marines were several hundred yards from the woods when German machineguns ripped into their front and flanks. Marines fell by the dozens. Casualties mounted. Lieutenants abruptly found themselves in command of rifle companies, sergeants suddenly commanded platoons, and privates now led squads. Col Catlin, commander of 6th Mar, was observing his regiment's progress when a German bullet smashed into his chest, rendering him unable to continue command. Maj Benjamin Berry, 3/5 Mar's battalion commander, lost most of his right arm in the attack but remained with the battalion until forced to evacuate. 3/6 Mar, fighting to the south, gained a foothold on the southern edge of the woods but not before sustaining heavy casualties from devastating enemy machinegun and rifle fire.

Around 2100 on 6 June, Berry's battered Marines of 3/5 Mar, having

failed to gain a foothold in the woods, withdrew back to their lines. 3/6 Mar, also decimated by machinegun fire and low on ammunition, held only a sliver of Belleau Wood's southwestern leg. 2/6 Mar, east of the woods, fared the best. Having gained a foothold in the village of Bouresches, 2/6 Mar would hold the village to the battle's end.

The fighting on 6 June proved to be one of the costliest days for the Marine Corps in all its history. That day alone, the Marine Brigade lost 31 officers and 1,056 enlisted men.¹² Although the fighting spirit among the Marines was strong, valor and aggressiveness could go only so far against machineguns and artillery. The Marines would need the next few days to filter in replacements, resupply ammunition and equipment, and better coordinate their supporting arms.

The Brigade's actions on 6 June reveal countless lessons worthy of review: *1. Reconnaissance/Intelligence: Division intelligence reports suggested that the Germans were fortifying the woods. Any legitimate reconnaissance mission into the woods would have revealed significant enemy troop activity and the numerous machinegun emplacements. With these obstacles identified, the brigade could have ordered attacks at weaker points or utilized greater supporting arms to suppress enemy strong points. Commanders have a responsibility to get eyes on the objective whenever possible.*

2. Synchronization and the Use of Supporting Arms: Gen Harbord's belief that the woods were lightly occupied caused him to forgo the extensive use of integrated artillery fire to soften enemy strong points. Further, the use and positioning of machineguns by the 5th and 6th Machine Gun Battalions failed to effectively suppress enemy machineguns and strong points in support of maneuver elements. Although speed and tempo are always factors in an operation, commanders must make every effort to fight the enemy using combined arms.

3. Commander's Intent and Mission Accomplishment: The capture of the village Bouresches east of Belleau Wood is a superb example of small-unit leaders understanding the commander's intent and utilizing their own initiative, ingenuity,

and resourcefulness to seize the objective. The first unit to enter the village was a platoon of Marines led by 2ndLt Clifton Cates, the future Commandant, whose report to higher, "I have no one on my left and only a few on my right. I will hold," reflected the grit of those junior leaders committed to accomplishing the mission. Commander's intent means something; it gives subordinates clarity in chaos and decision-making ease in situations of strained communication.

Hard Fought Victory

On 8 June, only two days after the bloody lessons of the 6th, Maj Berton Sibley's 3/6 Mar continued its assault into the southern leg of the woods until casualties and overwhelming enemy fire checked their advance. Gen Harbord, realizing the full strength of the German presence in the woods, finally made complete use of his artillery. Throughout the night of 9 June and into the morning of 10 June, allied batteries fired over 34,000 shells into the square-mile patch of woods.¹³

Attacking northward behind the rolling artillery barrage, 1/6 Mar relieved 3/6 Mar and finally captured the southern edge of the woods. On 11 June, 2/5 Mar braved devastating machinegun fire and crossed the same wheat field where 3/5 Mar was bloodied and repulsed four days earlier. Harbord's artillery preparation had reduced German strong points, allowing 2/5 Mar to penetrate the woods on its western front. After four grueling days fighting inside the woods, LtCol Frederick Wise and the Marines of 2/5 Mar had captured over 300 German prisoners, dozens of machineguns, and the southern half of the Belleau Wood.¹⁴

German resistance was far from over, however. As the Marine Brigade consolidated its gains in the southern half of the woods, the Germans responded with precise artillery fire, wreaking havoc with high explosive and mustard gas shells. Yet, in the chaos heroes emerged. GySgt Fred Stockham, of 2/6 Mar's 96th Company, seeing a wounded Marine in need of a gas mask, removed his own and gave it to the man. Saving the Marine's life, GySgt Stockham eventually succumbed to exposure and died

several days later. He was posthumously awarded the Medal of Honor for his actions.

After 10 days of intense combat, near constant artillery barrages, machine-gun fire/and poison gas, Gen Harbord pulled the crippled Marine Brigade off the line. On 18 June, the Army's 7th Infantry Regiment replaced the beleaguered Marines and spent a week trying to take the northern sector of Belleau Wood. Poorly trained and untried, the Doughboys fared terribly, and by 23 June the Marine Brigade was sent back in to finish the job. On 26 June elements of 3/5 Mar cleared the northern edge of the woods of all German resistance. Maj Maurice Shearer, 3/5 Mar's battalion commander, passed up to brigade the famous message "Woods now United States Marine Corps entirely."¹⁵ The Battle for Belleau Wood was over, but the legend had just begun.

Final lessons drawn from the Battle of Belleau Wood:

1. *Quality over Quantity: The quality of officers and enlistees in the Marine Corps during World War I was far above average for the Services with 60 percent of enlisted men having completed some college.¹⁶ While the Army's standards were lowered, the Marine Corps accepted only 60,000 out of almost 240,000 applicants, looking for candidates with high moral character, athletic abilities, and patriotism. Despite today's recruiting challenges, the Marine Corps must keep the standard high. As 21st-century missions become more complex only the best and the brightest will allow our units to adapt, improvise and overcome, like our forefathers at Belleau Wood.*

2. *Combat Arms: In 1918, the Marine Corps consisted predominantly of infantrymen, engineers, artillerymen, and machinegunners. Mission requirements today have changed those ratios, but the Corps should be careful in trimming its combat-arms element. Future conflicts have highlighted the need for increased numbers of cyber specialists, intelligence analysts, and other enablers, but near-peer threats will require troops on the ground using direct and indirect fire weapons to secure physical objectives. That will never change. Should we be worried about having enough Marines to staff*

the finance center or enough of the right Marines to hold the line when the enemy presses an attack? The Corps cannot lose its fighting edge.

3. *Recruit Training: Col Catlin claimed tactics employed by Marines were no different from the Army's during World War I. What made the Marine Corps stand apart, he said, was the esprit and pride imbued in all Marines during recruit training.¹⁷ From that pride flowed discipline, gallantry, grit, self-sacrifice, esprit de corps, and determination to accomplish the mission, all of which were poured out in that small patch of woods. Leaders have an obligation to sustain in their Marines those same ideals instilled at Parris Island, San Diego, or Quantico by use of challenging and purposeful training, exemplary leadership, professional education, and historical study and emphasis. Leaders often fail to challenge their Marines after their completion of entry-level training or formal schools. They joined for a challenge; it is our job to deliver it.*

4. *Service Above Self: Army GEN Matthew Ridgeway later cited Belleau Wood as a "prize example of men's lives being thrown away against objectives not worth the cost."¹⁸ We now know that the battle had a significant effect on halting the German's advance, yet poor tactics and misuse of combined arms did cost excess lives. What carried much of the battle was individual and unit discipline, the ability of each Marine to subjugate their own personal interests and desires for the good of the unit and the mission. Ever present at Belleau Wood, the concept of service above oneself has almost all but escaped our society and is inching its way out of our Corps. Our Nation's trending obsession over personal liberties and social movements in place of service to a greater good is eroding the patriotism and selfless service that have long been hallmarks of the American experience. Leaders at every level must curb this overt narcissism by fostering cohesion and esprit in their units. We are Marines first. The Marine Brigade was ordered to attack and, drawing on the discipline and selflessness of Marines at every level, unhesitatingly carried out the mission and captured Belleau Wood.*

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IWO JIMA: The Battle for Coordination

Part 1: Pre-Iwo Jima

by Mr. Steven D. McCloud

From its opening minutes, the battle on Iwo Jima was a *battle for coordination*. The entirety of that operation was characterized as the daily striving to win that battle for coordination.

The Japanese within the island were uncharacteristically coordinated in their efforts to tear asunder the Marine combat teams and prohibit their ability to work as one. For weeks, the Marines strove, fought, and died for the ability to work as one. To them, that meant getting the tank-infantry team together. It was the ultimate test of the right things, and the Marines passed the test.

The battle for coordination on Iwo Jima reached its apex in the northern part of the island, where its broken terrain and the enemy worked effectively as one to cast chaos on the Marines and to lure, trap, and pummel them. However, to properly embrace the nature of that struggle, it is necessary to be familiar with the efforts that led up to that event. Our case study will focus on the 4th MarDiv.

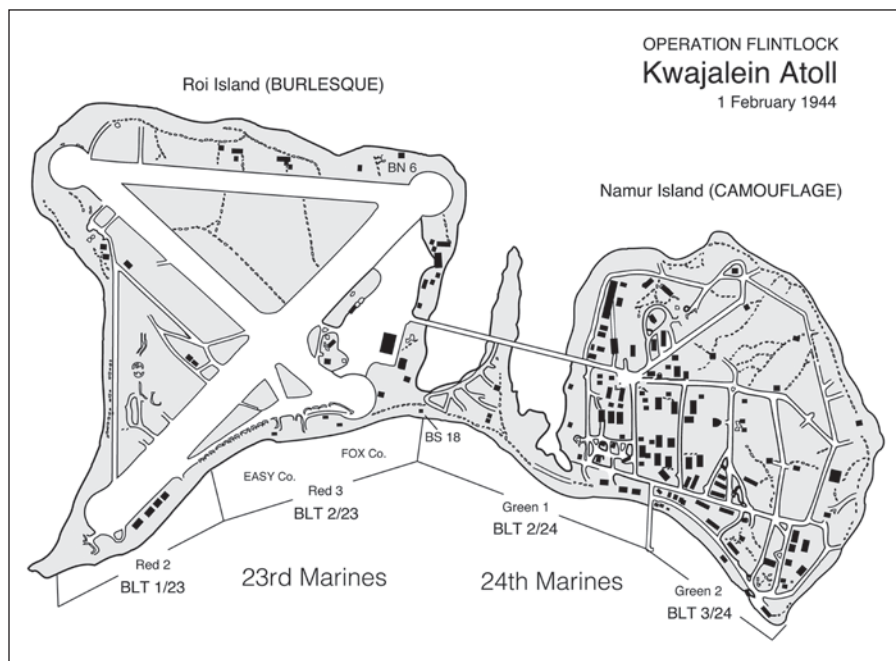
Experience in 1944: Fight for Coordination

When the new 4th MarDiv was training on the West Coast in late 1943, the word “team” was used often. Through three operations over the coming year, its meaning to those Marines evolved from what might be described as *functional cooperation* to one of *singularity*. But that evolution was not an easy one.

From Functional Cooperation ...

The division's first operation, in the Marshall Islands, brought into sharp relief, from the highest echelon to the

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Map of Roi-Namur based on Marine Corps map. (Illustrated by Steven D. McCloud.)

lowest, the shortcomings of having high expectations from mere cooperation. It highlighted the friction between *control* and *coordination* as methodologies, mindsets, and cultures. Inter-Service differences and well-intentioned trip-ups between cooperating small teams created innumerable sources of friction above and beyond those created by the enemy or the battlespace.

The amphibious operation, launched from San Diego to Kwajalein, was complex and dependent upon everything and everyone working harmoniously. But on the morning of the main assault on the conjoined islands of Roi and Namur, one of the two assault regimental combat teams, RCT-24, was without half its assigned amtracs. They had been used for the pre-assault

landings the previous day. Now on D-Day, some were overturned in the lagoon due to heavy surf; many were scattered amongst Kwajalein's northern islets out of fuel; and others were on the ocean floor, having run out of fuel after being literally turned away by naval landing ships (LSTs) from which they had not been launched.

The other assault team, RCT-23, had all its assigned amtracs on the scene. It simply could not get them into the water. One-third of those needed for the assault and support waves had been loaded by crane to the weather decks of the LSTs—as many as 26 amtracs ferried by a single vessel. Only after they were loaded did someone question whether the ship's single elevator could handle a 33,000-pound amtrac and lower it to the tank deck for launch or whether the 24-foot craft could fit through the opening of those ships that had ramps. Neither question could be answered favorably.

The 4th MarDiv's main effort in the landing was to be made at Roi Island's Beach RED 3 by Capt John J. Padley's Fox Company, 2/23 Mar. The battalion had been transferred from its troop transport to four LSTs, but all three of its rifle companies were packed into two of them—each with amtracs loaded as described above. Jack Padley's company was split between two LSTs. The armored amtracs assigned to lead Battalion Leading Team (BLT) 2/23 ashore were divided between three widely scattered LSTs that entered Kwajalein's lagoon in the pre-dawn hours through two different passages, some five miles apart.

On D-Day, 1 February 1944, it took the 5th Amphibious Corps no less than 151 minutes merely to get RCT-23's assault troops into the water. It was unclear who was in charge of sending the waves ashore, and even after a three-hour postponement, one RCT was sent toward the beach without the other even being notified.

Inter-Service cooperation did not approach a state of coordination.

As for the troop assault, a plan for a controlled, orderly combined-arms push across the pair of tiny flat islands was surely understandable after the sear-



PFC Charles A. Gray, E/2/23 BAR man, looks across the flat and open landscape on Roi-Namur.
(Photo: Sgt Bob Cooke, Marine Corps Photograph, NARA 127-GW-70564.)

ing experience at Tarawa two months earlier. However, Roi Island was 230 acres of airfield devoid of trees or cover, while Namur was heavily vegetated and home to numerous blockhouses and buildings. A rigid top-heavy fire support plan for both islands negated tactical flexibility on the ground of either.

The plan, completed while the task force was en route to the Hawaii rendezvous, was for the assault to halt

him the plan dictated that he halt his advance—right there in the middle of the airfield. Neiman argued that it was against tank doctrine for high-profile medium tanks to sit idly out in the open and present easy targets for enemy blockhouses that were just as visible as he was across the airfield. They needed to keep moving.

Neiman pressed the attack across the island. Some riflemen tried to follow him but were ordered back. Aerial observer Maj Charles Duchein saw his advance beyond the O-1 and promptly made the call for all fire support units to check fire. A flurry of "check fire" orders buzzed throughout Task Force 53 by way of the Talk Between Ships net. From that point onward, any additional fires were to be made only on call from the shore fire control parties. Like it or not, the plan had just been altered.

A half-hour later, the troops on Roi were still in large part sitting out in the open. The division commander, Maj-Gen Harry M. Schmidt, directed that the attack's second phase be launched at 1430 "or when ready on both islands." RCT-23's commander, Col Louis R. Jones, replied promptly and tried to get things moving: "This is a pip. No opposition near the beach. O-1 ours.

Inter-Service cooperation did not approach a state of coordination.

halfway across the pair of islands and await a second scheduled bombardment before resuming. The main effort from Beach RED 3 was to be supported by the brand new M4 medium tanks of Capt Robert M. Neiman's Company C, 4th Tank Battalion. (The other tank companies still operated light tanks.) Neiman landed at 1202. A half-hour later, he was at the O-1 line arguing with 2/23 Mar's commanding officer, LtCol Edward J. Dillon, who was telling

Give us the word and we will take the rest of the island.”¹ That approval was not forthcoming.

Meanwhile, Neiman’s tanks, at the north end of the island, had pinned down a cluster of enemy troops in an anti-tank ditch, but his machineguns could not depress low enough to wipe them out. He reported that no additional bombardment or delay was needed and that the island would be

Once the attack was unleashed, small teams of infantry and engineers threatened unknowingly to blow each other up while assaulting the same fortifications from opposite sides. They were aggressive, getting after the enemy, and wanted to win. None of that makes a team. They were separate teams cooperating. Working as one is difficult.

There were a great many people believing they knew what right looked like

They were separate teams cooperating. Working as one is difficult.

secured with immediate infantry help. Two hours after crossing the O-1 line, Neiman and his tanks were ordered by the threat of court-martial to return to the phase line so the second phase of the attack could be carried out according to plan. The event was written up as confusion resulting from radio interference. Neiman later described the reality to Marine historian Ken Estes.² After the battle, Col Jones reported that a phase line was probably not necessary on an island the size of Roi. (They did reprise the approach six months later at Saipan, a much larger island.)

and were doing it. But the best of intent is no substitute for coordination, and control was not going to provide it—a point underscored a few weeks later when the Commandant approved the sweeping reorganization of the Marine Corps.

... to Singularity

The Marine Corps made a move to speed the kill chain with decentralized precision a month after the 4th MarDiv reached its new base on Maui. On 27 March, Commandant Archibald Vandegrift approved the F Series tables of

organization. His own commanders at Guadalcanal, including Merritt Edson and Lew Walt, had reported wishing they had focused more on small-unit training and leadership. The message was echoed by LtGen Holland M. Smith in his 6 March after-action recommendations to the Commandant. The reorganization consolidated the BLT’s capability to better support localized lethality, not merely by altering organizational structure but by simultaneously forcing decision making down to the lowest possible level.

At the pointy end of the spear was the adoption of the four-man fire team, called a *group* in the 4th MarDiv. Overnight, this quadrupled the number of decision makers in the squad and, thus, the rifle platoon. The desired end state was, of course, greater flexibility on the Pacific-style battlefields. But for troops accustomed to twelve-man squads and a squad leader, such a move introduced an immediate opportunity for chaos.

Through the spring of 1944, the BLTs on Maui launched a focused indoctrination campaign above and beyond field training, for every Marine—especially the NCOs—to fully grasp the impact of the change. They had to figure out how to turn it not just into action but coordinated action—and then get good at it. They went to battle against chaos by developing first a shared mindset and then a shared muscle memory. It was not and could not be done by memo and manuals; it required human effort and work. This characterized the main effort of training on Maui in the spring of 1944.

The Marshalls’ experience also indicated a need for work on the tank-infantry team. Unfortunately, only Bob Neiman’s C Company had medium tanks. “Much of the training time,” explained the tankers, “was devoted to converting Companies ‘A’ and ‘B’ from light tank to medium tank companies. This was accomplished in spite of the fact that all organizational tanks were not acquired until after approximately one-half of the battalion had been loaded for Saipan.”³

The tankers rigged makeshift field phones to the rear of their tanks so the infantry could communicate with them and then hosted schools for infantry



KING KONG, Co. C, 4th Tank Bn advances through 2nd MarDiv zone down Karrabera Pass toward Tanapag Plain on 8 July 1944. (Photo: Cpl Angus Robertson, USMC Photograph, NARA, 127-GW-85832.)

officers to familiarize them with the capabilities and limitations of tanks as well as to work on such things as hand signals and directing fire. Unfortunately, the representatives sent by infantry units to attend the schools were not ones who would actually be working with the tanks in combat. The opportunity to gain the upper hand against chaos was lost. The Marines fell short in the battle for coordination and in defining what “team” really meant. The infantry and the tankers would head to Saipan as separate teams still intending unintentionally to cooperate.

Coordination Is Difficult

Combat experience on the large land masses of Saipan and Tinian, from June to August 1944, brought varied experience for the tank-infantry team. Perhaps the crowning achievement for the 4th Tank Battalion came on 8 July 1944, with the opportunity to affect a combined-arms sweep across the Saipan’s Tanapag Plain toward the ocean. It was coordinated in terms of orderly, photogenic placement reminiscent of a bombing formation and worthy of a diagram on a chalkboard, with tanks, infantry, and half-tracks moving together as one physical entity. It was one of the few such opportunities on Saipan to achieve mass and was valuable in the coming sweep across the open fields of Tinian a few weeks later. The long-term value of those maneuvers may have been the implicit reinforcement, in the hearts and souls of the Marines, that they naturally belonged together, working as one. And if they were not, something had to be done to change the situation.

In hindsight, however, the most maturing experience for the team may have come the previous six days on Saipan during the fight to reach the Tanapag Plain. For BLT 2/23, it began with the 2 July fight through an enemy strongpoint in what they dubbed as “the Gorge,” the solitary road that snaked through precipitous hills and into Saipan’s central high ground. The enemy placed a series of roadblocks and minefields at the turns in the trail and covered them with mortars, machineguns, and anti-tank positions. BLT 2/23 machinegunners



Marine tanks and infantry advancing across Tanapag Plain south of Makunshu. (Photo: Marine Corps Photograph, NARA 127-GW-87603.)

and bazooka men clawed their way to the hilltops to hammer those positions while a combat patrol was sent around the passage to flank the positions from the north; additionally, tanks added their fire support as engineers worked to clear the mines and roadblocks. It was the battalion’s first real experience

buried aerial bombs covered by sniper and machinegun fire. It was then, once on the low ground and only after that hard work was done, that the ideal formation was achieved.

The tankers returned to Maui asserting that “infantry unit commanders are still inadequately acquainted with

In hindsight, however, the most maturing experience for the team may have come the previous six days on Saipan during the fight to reach the Tanapag Plain.

in a combined concentration of force as opposed to massing, operating on coordination and maneuver more than central control. A couple of hours later, the battalion was proceeding up the road.

Four days later, the regiment tried for two days to descend from Saipan’s cliffs to the Tanapag Plain by way of Karaberra Pass, a narrow earthen cut through the island’s mountainous spine, flanked by cliffs covered with dense jungle foliage. It was the only road to the bottom—and the enemy knew it. Marine tankers, infantry, and engineers had to work together through

the capabilities, limitations, and proper tactical uses of tanks.” They also recommended that “Division Engineers conduct a school for tank personnel in recognition of and removal of mines and destruction of road blocks, and that training in the infantry-tank-engineer team be emphasized during the forthcoming training period.”⁴

Striving for Coordination

A hundred and three days after departing Maui, the division returned from the Marianas in August 1944 with no shortage of experience but a crippling shortage of personnel. RCT-23

was at roughly 60 percent strength, BLT 2/23 at 50 percent, with the heaviest losses in the rifle units. Fox Company's Capt Padley had only one lieutenant. A broad wave of promotions filled out leadership roles but left a gaping void of privates and privates first class. Furthermore, the division had little information on the condition or disposition of its Marines who had been shipped off to hospitals across the Pacific. Regardless, once the troops who were present had time to rest and recuperate, training had to proceed. And again, much focus was on the tank-infantry team.

From September through December 1944, the 4th Tank Battalion devoted 30 percent of its training period to the tank-infantry team, and they tried hosting schools again. "Conferences were held by each tank company's officers with the infantry officers of their respective combat teams," they wrote. These focused on tank capabilities and limitations, infantry-tank coordination, and liaison and communication. "All infantry companies received schooling at the tank park in the use of the tank telephone, arm and hand signals, target designation, etc. Following this indoctrination school, small-unit problems were conducted, and later problems which included firing were held with each BLT."⁵

Significantly, the 4th Tank Battalion installed SCR-300 radios into each platoon leader's tank. Utilized at the battalion rifle-company level, these sets enabled direct and reliable radio communication with infantry on the ground, especially when unable to utilize the attached field phone. Unfortunately, the 5th Tank Battalion received the SCR-300 too late to spend time with it. Their training emphasized a devised system of hand and arm signals, and they worked closely with NCOs at the rifle-platoon level to refine coordination.⁶

The combined training focused on assault against fortified positions. Two weeks before the 4th MarDiv had sailed for the Saipan operation, the Commandant of the Marine Corps had issued another directive that transferred responsibility for assault demolitions from the engineers to the rifle companies. The

result had been a hasty transfer of such equipment, including flamethrowers, to infantry units. Few opportunities for such work presented themselves on Saipan and Tinian, but back on Maui, training is now focused on this mission. Organic teams learned to work as one to get the job done—at least those Marines who were there to participate.

The combat veterans present had received plenty of individual training from the recent operations. They had developed ad hoc teams in combat on Saipan and Tinian as well as discipline in jungle patrols, night patrols, and in clearing caves. While they did require some discipline in cover and concealment, they were trained to operate every weapon in the regimental arsenal. Teams rich with experienced noncommissioned officers could operate swiftly

When BLT 2/23 embarked for Iwo Jima, 50 percent ... had been with the company for roughly 30 days.

and precisely on implicit guidance and controls, but this level of training and maturity applied only to those combat veterans. As Thanksgiving 1944 approached, their rifle squads were still half-vacant.

Maj Doyle A. Stout of BLT 3/24 on the effect this had on the struggle to achieve coordination.

Tentative plans were drawn up for a two-month intensive training of replacements when and if they should arrive. These plans were reduced to six weeks by the first of November, four weeks by the middle of the month, and when the battalion was finally filled out two days before regimental amphibious maneuvers began, a three-week program was outlined. The first week of December was devoted to amphibious training, including special emphasis on battalions landing in reserve. The new men in BLT

3/24 did not profit too much from this because they did not understand what a squad was supposed to do when it landed, and it was found practically impossible to train them in the short time allotted. Upon returning to camp from these maneuvers, BLT 3/24 instituted an intensive training program in an effort to ready the battalion for combat. Instruction was held on basic weapons, including some firing, and as much work on squad and platoon problems as possible. The lack of tanks was the most serious handicap. Three weeks was all the time available for the training of approximately three hundred men and this was very definitely proved inadequate in combat.⁷

When BLT 2/23 embarked for Iwo Jima, 50 percent of its Marines—mostly in the rifle squads—had been with the company for roughly 30 days. Achieving coordination in the coming operation had been made tremendously difficult.

Notes

1. Headquarters Fourth Marine Division, Fleet Marine Force, *Division Journal during Assault Phase FLINTLOCK, Period 0000 to 2400, D+1-day (1 Feb44)*.
2. Robert M. Neiman and Kenneth W. Estes, *Tanks on the Beaches* (College Station: Texas A&M University Press, 2003).
3. *Fourth Marine Division Operations Report Saipan, 15 June–9 July 1944, Annex K, Report of the 4th Tank Battalion*.
4. Ibid.
5. Fourth Marine Division Operations, *Report Saipan, 15 June–9 July 1944, Annex K, Report of the 4th Tank Battalion, Planning and Preparation*.
6. Action Report, Iwo Jima Operation, 5th Tank Battalion Report, 24 April 1945, Preparation and Training.
7. *Final Report on IWOJIMA Operation, Battalion Landing Team 3/24 report, 20 April 1945, Section 1, Planning and Preparations, Training*.



The Philippines 1942

Part II: A failure to orient on the adversary

by Mr. Jason Burgan

This article continues from a previous segment that highlighted the United States Army Forces, Far East's (USAFFE) failures of planning, force preparations, and intelligence/operations integration. Once U.S. and Filipino forces completed a successful withdrawal into the Bataan Peninsula, their tactical defeat was inevitable. In short, GEN MacArthur neither integrated warfighting functions nor sought to gain an advantage.

WPO-3 Logistics

GEN MacArthur did not adequately plan and integrate logistics requirements. On 23 December 1941, MacArthur proclaimed that his contingency plan (WPO-3) was in effect.¹ Yet, as the commander of USAFFE, he failed to ensure necessary arrangements for the execution of the contingency plan. Specifically, ground defenses were not prepared and logistics requirements—in the form of transportation and staged supplies—were not arranged. Furthermore, forces in the Philippines were not properly organized to support so drastic a shift in the direction of operations. Current Marine Corps doctrine states that “the organization of our force should reflect the conceptual organization of the plan.”² Had WPO-3 been a realistic course of action, MacArthur should have ensured the plan was logistically supportable with attached commander's decision points to enact the plan.

This lack of planning by MacArthur's staff was highlighted by the intelligence section of the Japanese Army General Staff. When wargaming U.S. reactions to an invasion of the Philippines, the idea that a strong point defense would be established on the Bataan Peninsula was not seriously considered. This course of action was

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flatly rejected because there was a lack of knowledge of any prepared defenses in the Bataan Peninsula. Furthermore, the Japanese “estimated that, if such a withdrawal took place, the enemy forces could easily be bottled up and destroyed.”³

The absence of prepared defenses on the Bataan Peninsula is striking because, tactically speaking, the inherent strengths of the defense were essentially negated. Current Marine Corps doctrine states that the “inherent strengths of the defense include the defender's ability to occupy positions before the attack, learn and understand the ground, and use the available time to prepare defenses.”⁴ None of this was conducted prior to GEN MacArthur's order to execute WPO-3.

Because WPO-3 was not taken seriously, supplies of any consequence were not pre-staged prior to MacArthur's 23 December decision to execute the plan. Morton provides a summation of the challenges faced by the quartermasters charged with staging supplies on so short notice.

By that time the number of troops to be supplied during the siege of Bataan had increased from the planned 43,000 to almost 80,000, in addition to about 26,000 civilians who had fled to Bataan to escape the invading army. Moving to Bataan enough food and supplies to keep so large a force in action for a period of 180 days would have been extremely difficult under the most favorable circumstances. To

accomplish it in about one week, during the confusion of war and retreat, proved to be an impossible task.⁵

Upon successful occupation of the Bataan Peninsula, on 5 January 1942, MacArthur ordered all forces to half rations.⁶ Wainwright clarifies that the rations were Filipino vice American rations, primarily consisting of canned fish and rice. Because of the significant consequences of degrading this already meager ration, Wainwright ordered contingents within his I Corps to hunt caribou to supplement the ration.⁷

The 4th Marines: To Corregidor

With the initial landings by the Japanese, the 4th Mar was ordered to Corregidor on 24 December and transferred to U.S. Army operational control. Col Howard had recommended the regiment be integrated into the Bataan defenses, but this idea was not approved. Instead, Col Howard reported to MG George F. Moore, commanding harbor defenses within Manila Bay, and was tasked as commander of beach defense, Corregidor.⁸

On 1 January 1942, the 1st Separate Marine Battalion was officially re-designated 3/4 Mar.⁹ The 3rd Battalion was responsible for the bottom side defenses on Corregidor. The 1st Battalion was charged with establishing defenses on the tail on the eastern end of the island, with the 2nd Battalion responsible for topside on the western end of the island.¹⁰

There was a plethora of challenges faced by the Marines. First, there was a lack of engineers and equipment to construct useful defenses. The Marines dug fighting positions and trenches and gathered wood from bombed-out buildings on the island to help reinforce trenches and bunkers. Second, the near continuous Japanese

bombings damaged or destroyed their earthen works and severed communication wire between unit positions on the island. Third, the intensive bombings severely diminished the freshwater supply, only adding to the physical strain of an ever-decreasing food ration. By the end of April, “the daily water allowance for personal use had been reduced to one canteen.”¹¹

Missed Opportunity

GEN MacArthur did not sufficiently exploit enemy weaknesses. The aftermath of what is known as the Battle of the Points is a monumental, missed opportunity on the part of GEN MacArthur. Multiple authors note the Japanese withdrawal or *the Lull* when the Japanese 14th Army had offensively culminated in February 1942.¹² However, serious questions have not been raised about why U.S. forces on Bataan were not tasked to exploit this weakness by going on the offensive. In short, MacArthur failed to exploit the shortcomings of his foe.

In February 1942, LtGen Homma’s 14th Army was losing momentum. Following tactical defeats in attempts at amphibious end runs against Wainwright’s I Corps on Bataan’s west coast and penetrations into Parker’s II Corps defenses to the east, LtGen Homma made the decision to withdraw Japanese forces, consolidate north of the main battle lines, and await reinforcements from Japan. This decision by LtGen Homma demonstrates that the Japanese 14th Army had offensively culminated.

LtGen Homma took stock of the performance of his forces and made critical adjustments. He assessed that a lack of training for combat led to an inability to quickly defeat the U.S. and Filipino forces in the Philippines. In early March, units were rotated to rear areas to conduct combat training: “Using abandoned American positions in the old Moron-Abucay line, the troops were given an intensive course of training in attack on fortified areas, following artillery barrages, close combat in jungles and gullies, and night attacks against enemy positions protected by barbed wire and emplaced in precipitous terrain.”¹³

This period of Japanese rest and replenishment was recognized by U.S. forces on the front lines. Morton records that morale was the highest it had been since the Japanese invasion. Likewise, there were isolated instances of reconnaissance in force and even talk of possible large-scale counterattacks.¹⁴ Manuel Flores, a member of the Phil-

The standing orders from MacArthur were to hold the Philippines at all cost. MacArthur also knew there were no U.S. reinforcements on the way to stave off defeat. Though the situation at the time was bleak, taking advantage of the tactical situation—the consolidating efforts of the Japanese who were unprepared for a counterattack—and build-

GEN MacArthur did not sufficiently exploit enemy weaknesses ... In short, MacArthur failed to exploit the shortcomings of his foe.

ippine Army and veteran of Bataan, recounted in a 1949 paper for the U.S. Army Command and Staff College that a counterattack was proposed by the Commanding General of the 41st Division (Philippine Army), BGen Vicente Lim, but no action was taken at the Corps-level or higher.¹⁵ Yet, Morton takes a defeatist tone in his argument for why a U.S. counterattack against a withdrawing Japanese force would have been a bad idea.

The effort required for a general offensive might well have jeopardized the primary mission of the Philippine garrison to hold Manila Bay as long as possible. To accomplish this task it was necessary to conserve carefully all human and material resources. Troops on the defensive in a static situation required less food, less gasoline, less ammunition, and less of all other supplies than those who chose to attack. Moreover, the advance, if it proved successful, would bring additional problems: it would lengthen the front line, increase the area to be defended and the line of communication, leave exposed beaches to the rear, and greatly complicate an already difficult supply situation. It was for these reasons that all proposals for an offensive, while feasible tactically and desirable for reasons of morale, were strategically unsound. The proper task for the front-line troops was to strengthen their defenses in the hope that when the next Japanese attack came it could be turned back as had the last.¹⁶

ing upon the morale of the troops may have allowed U.S. and Filipino forces on Bataan the ability to gain an advantage over Japanese forces and provide for time and space necessary to pull much-needed supplies from elsewhere in the Philippines.

Additionally, there is no mention of how remaining in the defense while the adversary is becoming more proficient—resting, refitting, and reinforcing—was advantageous to U.S. forces on Bataan. In fact, it was not. The last sentence in the above quote demonstrates the thinking of MacArthur’s command. Instead of being grounded in a warfighting philosophy that sought to maintain contact with the enemy by integrating all warfighting functions, GEN MacArthur’s command was *hoping* their forces would be able to hold out just a little while longer. Hope becomes a course of action in the absence of a well-developed and properly coordinated plan—a plan that should have been developed, even hastily, by MacArthur and his staff.

Clearly, there is no documentary evidence of a U.S. offensive being planned during this time. Neither is there any evidence of MacArthur attempting to coordinate a resupply to his forces on Bataan. In addition, MacArthur makes no mention in his *Reminiscences* of a Japanese withdrawal.

Yet, interestingly, once MacArthur evacuated to Australia, he recommended that if food fails LtGen Wainwright should have the Bataan

forces go on the offensive.¹⁷ Though only visiting Bataan on one occasion while he was still in the Philippines—on 10 January 1942—he downplayed Wainwright’s 2 April urgent request for food, noting that forces on Bataan had stocks to last to at least 1 May but “that with my departure the vigor of application of conservation may have been relaxed.”¹⁸

Wainwright Assumes Command

GEN MacArthur did not transition an acceptable command and control structure to LTG Wainwright. LTG Wainwright, by order of the War Department, became the Commanding General of U.S. forces in the Philippines once MacArthur evacuated to Australia. However, GEN MacArthur attempted to retain command of forces in the Philippines from his position in Australia, adding a greater degree of friction to an already chaotic and uncertain situation. MacArthur left behind his Chief of Staff, BG Beebe who was to serve in the capacity of senior headquarters in the Philippines. GEN MacArthur should have known this type of command-and-control structure would have caused unnecessary confusion, not only for LTG Wainwright but also for the President of the United States and the Joint Chiefs of Staff in Washington, D.C.

LTG Wainwright only briefly mentions the confusion between War Department orders and GEN MacArthur’s attempts at controlling the situation.¹⁹ Yet, more than any other warfighting function, command and control should have priority because it facilitates the proper integration of all other functions. As noted in *MCDP 6*, “No single activity in war is more important than command and control.”²⁰

The disorderly command and control structure did not stop GEN Wainwright from promptly taking command of the situation and exhausting all methods to support forces on Bataan. He notes that he “sent some of Corregidor’s food stocks over to Bataan” and tried desperately to get more supplies to Bataan via submarine.²¹ However, he was unable to turn the tide that had mounted against the defenders of Bataan. On 9

April 1942, MG King, commanding the forces on Bataan, surrendered to the Japanese. In a message to President Roosevelt, LTG Wainwright wrote, in part, “I have done all that I could have done to hold Bataan, but starved men without air and with inadequate field artillery support cannot endure the terrific aerial and artillery bombardment that my troops were subjected to.”²²

Following the fall of Bataan, LTG Wainwright sought to employ available resources to attack the Japanese in the Philippines. On 16 April, he asked GEN MacArthur to dispatch six B-25 bombers that were stationed at Mindanao to attack Japanese ship concentrations in those waters. The response from MacArthur two days later was that the aircraft had “only a limited supply of

The first Japanese landings on Corregidor took place at approximately 2300, 5 May, by the 1st Battalion, 61st Infantry. They landed in the sector of 1/4 Mar, on the northeastern end of the island.²⁷ Unfortunately, 1/4 Mar had only one company, Company A, defending the northern portion of the tail. The Japanese battalion was successful in its landing and overran the sparse positions under cover of darkness and cut off the eastern tip of the island.²⁸ It was not until 0200 that the situation was understood, “only two platoons stood between the enemy and Malinta Hill.” At this point, two companies from the 4th Mar reserve were committed.²⁹

At 0615, the last of the regiment’s reserves, the 4th battalion, was com-

... more than any other warfighting function, command and control should have priority because it facilitates the proper integration of all other functions.

gas.”²³ However, LTG Wainwright was successful in obtaining aircraft to evacuate some nurses and injured personnel from Corregidor.²⁴

The 4th Marines: Surrender

As noted above, Corregidor was under constant bombardment since December 1941. Upon surrender of Bataan defenses, Corregidor faced indirect fires positioned only two miles away on the southern tip of the Bataan Peninsula. This added to the already overwhelming threats of indirect fire located on Cavite, as well as bombardment from the air.

The 4/4 Mar was provisionally activated on 10 April 1942, composed primarily of “enlisted Navy men with a sprinkling of soldiers from Bataan.”²⁵ The other battalions in the regiment were also considerably reinforced, with the 1st and 3rd battalions each brought to a strength of approximately 1,115, and the 2nd battalion with 915. Miller notes that “by 29 April, the 4th Marines numbered 229 officers and 3,770 men, of whom only about 1,500 were Marines.”²⁶

mitted. Unfortunately, the majority of the 2nd and 3rd battalions of 4th Mar were not in the fight because they were required to remain in their positions to the west and middle of the island to defend against the threat of additional landings.³⁰ Then at 1000, the Japanese sent into action the three tanks they were able to land.³¹ This proved to be too much for LTG Wainwright. He writes, “But it was the terror that is vested in a tank that was the deciding factor. I thought of the havoc that even one of these could wreak if it nosed into the tunnel, where lay our helpless wounded and their brave nurses.”³² Thus, just before 1300 on 6 May, LTG Wainwright selected Capt Golland L. Clark Jr., of Headquarters Company 1/4 Mar, to go forward to Japanese lines under a flag of truce to coordinate the surrender of Corregidor.³³

Conclusion

To conclude, GEN MacArthur should have oriented on the adversary and better prepared for and integrated all warfighting functions to allow the forces under his command a fight-

ing chance against the Japanese. The American and Filipino troops proved their tenacity on the battlefield, forcing the Japanese 14th Army to culminate in February 1942 before LTG Homma could achieve a decisive victory. However, absent a well-developed and wargamed plan, an adequate intelligence collection plan, a concept of support to sustain the plan, and a command-and-control structure built to gain an advantage and maintain momentum, MacArthur could not harness the intrinsic combat power of his subordinate formations to achieve an advantage.

Strategically, the American and Filipino defense of Bataan and Corregidor was a victory for the United States, allowing time to plan and build combat power for the American advance across the Pacific. However, as demonstrated, the responsibility for this victory lies solely with echelons subordinate to USAFFE. Had USAFFE positively contributed to the fight, the stand in the Philippines may have been substantially prolonged.

This case study demonstrates the need for well-developed, integrated plans. As the Marine Corps pursues the concept of expeditionary advanced base operations, planners and commanders must understand the inherent risks associated with exposing forces to adversary actions without a practical plan for resupply and reinforcement. Competition with peer adversaries will require forces to fight for things previously taken for granted—freedom of maneuver, intelligence, communications, logistics, and the narrative. If we fail to properly plan and train our forces to combat peer aggression, we may again face a situation like that endured by the 4th Mar on Corregidor in 1942.

Notes

1. Louis Morton, *The Fall of the Philippines* (Washington, DC: U.S. Army Center of Military History, 1953).
2. Headquarters Marine Corps, *MCDP 6, Command and Control*, (Washington, DC: 1996).
3. U.S. Government Printing Office, *Reports of General MacArthur: Japanese Operations in the*

Southwest Pacific Area, Vol II—Part I, (Washington, DC: 1966).

4. Headquarters Marine Corps, *MCWP 3-01, Offensive and Defensive Tactics*, (Washington, DC: 2020).

5. *The Fall of the Philippines*.

6. Ibid.

7. Jonathan M. Wainwright, *General Wainwright's Story* (New York, NY: Doubleday, 1946).

8. J. Michael Miller, *FROM SHANGHAI TO CORREGIDOR: Marines in the Defense of the Philippines* (Washington, DC: Marine Corps Historical Center, 1997); and John Gordon, *Fighting for MacArthur: The Navy and Marine Corps' Desperate Defense of the Philippines* (Annapolis, MD: Naval Institute Press, 2011).

9. Ibid.

10. *Fighting for MacArthur*.

11. *The Fall of the Philippines*; and *General Wainwright's Story*.

12. This period in February to early March of 1942 is noted in the U.S. Army official history, *The Fall of the Philippines*; by MacArthur, *Japanese Operations in the Southwest Pacific Area*; by Gordon in *Fighting for MacArthur*; by Flores in his "An analytical study of the defense of Bataan;" among others.

13. Philippine Operations Record, quoted in *Reports of General MacArthur, Japanese Operations in the Southwest Pacific Area*.

14. *The Fall of the Philippines*.

15. Manuel Flores, "An analytical study of the defense of Bataan," (Command and General Staff College, 1949). The 41st Division (PA) was part of II Corps under the command of MajGen Parker. Wainwright only mentions that he sent patrols forward during the time that would match the lull in fighting. Interestingly, he specifically identifies BGen Lim as an extraordinary commander just one page prior.

16. *The Fall of the Philippines*.

17. From Rad, MacArthur to Wainwright, No. 68, 4 Apr 42, AG 384.1, GHQ SWPA, quoted in *The Fall of the Philippines*. See also *General Wainwright's Story*.

18. From Rad, MacArthur to Marshall, No. 56, April 1, 1942, WPD Ready Ref File, Phil, quoted in Morton, *The Fall of the Philippines*.

19. *General Wainwright's Story*.

20. *MCDP 6, Command and Control*.

21. *General Wainwright's Story*.

22. Ibid. Wainwright writes that he was unaware of Gen King's intentions to surrender. Though he does not criticize the decision, he had been actively trying to bring in more supplies to the forces on Bataan, with some success, when this decision was made.

23. *General Wainwright's Story*.

24. Ibid. Unfortunately, of the two aircraft to depart Corregidor, one hit an obstacle of some type while making a stop in Mindanao, and the crew was unable to fix the aircraft. Once the Japanese moved in on this area, these personnel were subsequently taken as POWs.

25. *The Fall of the Philippines*.

26. Ibid; and *FROM SHANGHAI TO CORREGIDOR*.

27. *FROM SHANGHAI TO CORREGIDOR*; and *The Fall of the Philippines*.

28. *The Fall of the Philippines*.

29. Ibid.

30. *The Fall of the Philippines*.

31. Ibid.

32. *General Wainwright's Story*.

33. *The Fall of the Philippines*. Also, *History of U.S. Marine Corps Operations in World War II: Pearl Harbor to Guadalcanal*, Appendix C lists Capt Clark serving as both the Battalion S-1 and S-2 for 1/4 Mar.

>Author's Note: A version of this article first appeared on the author's LinkedIn page. You can find it here:

- <https://www.linkedin.com/in/jasonrburgan/>.
- <https://www.linkedin.com/pulse/philippines-1942-failure-orient-adversary-jason-burgan/>.



To Be Sure of Victory ...

How smaller units have defeated larger adversaries in battle

by Capt Garrett Boyce

Gaugamela. Cannae. Alesia. Agincourt. Leuthen. Austerlitz. Chancellorsville. Rourke's Drift. Singapore. From across military history, what do these famous battles have in common? All witnessed a numerically inferior force defeat a larger aggressor, clawing victory out of the jaws of a defeat that seemed guaranteed by the "big battalions." But what factors enabled these upset victories? This was what the Marine Corps' Ellis Fellowship sought to address: how have smaller military organizations defeated larger military forces on the battlefield, and what contributed to the success of the smaller force? To uncover a potential answer, it is worth consulting a seminal treatise on warfare: Sun Tzu's *The Art of War*. Traditionally attributed to a Chinese Wu general during the Spring and Summer Annals period of Ancient China (770–476 BC), it has been consulted by military leaders across time and nationalities and serves as a key reference for the Marine Corps' capstone doctrinal publication, *MCDP 1, Warfighting*.¹ Divided into thirteen chapters, it covers topics ranging from

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strategy, tactics, troop psychology, and reconnaissance, subjects just as relevant in the age of the machinegun and drone as they were in the age of bow and horse. To address the question of the Ellis Fellowship, Sun Tzu offers this maxim in Chapter Nine, *Terrain*: "If you know the enemy and know yourself, you are sure of victory. If you know Heaven and Earth, your victory is complete."² By understanding the enemy, the capabilities and limitations of your own force, and the advantages and disadvantages of terrain, a numerically inferior unit can defeat its larger aggressor.

Know Your Adversary

What does it truly mean to understand your enemy though? Is it memo-

rizing the order of battle diagrams from your intelligence section, or being passably familiar with an adversary nation's history and key cities? Sun Tzu recommends a much deeper level of knowledge, as evidenced in the priorities he gave to spies: "The first essential is to identify by name the general in command, his attendants, his aides, his gatekeepers and bodyguards."³ Whatever a commander's intelligence priorities are, a thorough understanding of his adversary must be a priority, especially if the commander is outnumbered or outgunned. They must have a mental framework developed through years of study to analyze their foe, focusing on their culture, values, history, language, and then their order of battle and weaponry. No commander better evidenced this than the French general and Emperor Napoleon Bonaparte at his famous Battle of Austerlitz. Facing a combined Russian and Austrian army of 86,000 in December 1805 against his battalions of 70,000, Napoleon was not discouraged by his numerical disadvantage.⁴

Instead, the Emperor leveraged a deception plan that involved sending a general to "Allied headquarters with a vague message, mentioning Napoleon's desire to avoid a battle at this stage, with secret instructions to study the enemy's mood and dispositions."⁵ Additionally, Emperor Bonaparte himself interviewed a Russian count, feigning hesitation in order to observe the arrogance of his enemy's staff.⁶ Combined with the reconnaissance conducted by French pickets and cavalry, Napoleon kept track of the enemy's movements and, more importantly, understood *why* the enemy was making certain deployments. This caused the Allies to expose their own line of retreat when attempting to go after Napoleon's and set the



The French Emperor Napoleon Bonaparte relentlessly sought to understand and then deceive his opponents on the battlefield, contributing to his stunning success at the Battle of Austerlitz in December 1805. (Photo from Wikimedia Commons.)

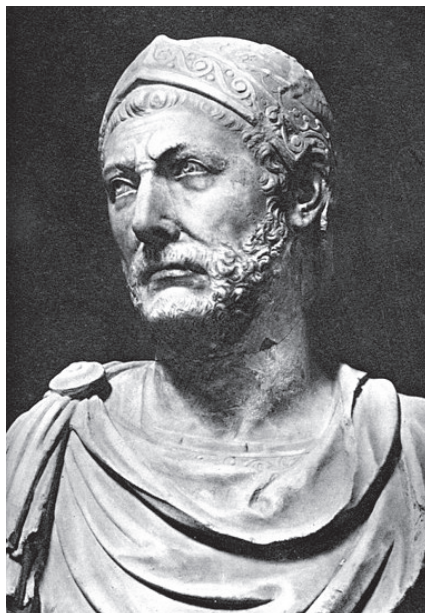
trap that resulted in Napoleon destroying the Third Coalition.⁷

Conversely, compare these actions to the French Army at the Battle of Agincourt, 390 years earlier. Here, 30,000 French knights and mercenaries faced an English army under King Henry V of only 6,000.⁸ Even though the English formations resembled the French defeats of Crécy and Poitiers earlier in the Hundred Years War, the French still made the same mistakes: their heavily armored cavalry charged unsupported by infantry into the teeth of English longbows and were cut down, with the follow-up infantry unable to fully punch through the English lines.⁹ The result was yet another French defeat due to underestimating the enemy's capabilities in spite of their smaller size and a lack of reconnaissance to determine the true status and dispositions of the English force. Both Austerlitz and Agincourt emphasize the importance of understanding your enemy before you engage in battle, especially if a commander does not have the lives of soldiers to spare for tactical mistakes.

Know Yourself

What does it mean to truly understand your own force? Robert Leonhard in *The Art of Maneuver*, when explaining the concept of combined arms, states: "By combining the various combat arms into single organizations (i.e., functioning under one commander), we can compensate each arm's weakness through another arm's strength."¹⁰ But how do you identify a combat arm's weakness or strength? Is it knowing the range of each weapon system or the training status of each of its individuals? Or does a commander have to consider the morale, experience, intended purpose, and past performance of subordinate units? To understand and know how to employ one's own fighting formation demands a great deal of study and direct observation in training and combat conditions; a sole understanding of an organization's doctrine, organization, training, material, leadership, personnel, facilities, and policies will not suffice on any past or future battlefield.

Hannibal Barca, commander of Carthaginian forces in Italy during the Second Punic War against the Roman Republic, understood this. At his most celebrated victory of Cannae in 216 BC, Hannibal leveraged the diverse capabilities of his multi-national force to defeat the larger Roman legions. By having his elite Numidian cavalry harass and then pursue their Roman counterparts; his aggressive Gaul warriors receive and hold the initial Roman infantry assault; and finally his steady, veteran Libyan infantry pin the Roman flanks, Hannibal expertly tasked each unit to play their part in encircling and destroying the Romans by double envelopment.¹¹



In 216 BC, Carthaginian general Hannibal Barca masterfully combined the strengths and weaknesses of his subordinate units to crush a larger Roman army at Cannae.
(Photo from Wikimedia Commons.)

Furthermore, he placed himself with the warriors that would receive the most vicious assault (the Gauls), demonstrating that he could identify the point of friction for his forces and be present there.¹²

Contrast Hannibal's understanding of his own forces with the abilities of American Continental Army General Horatio Gates, during the American Revolution. An amateur commander, Gen Gates' earlier victory at Saratoga against the British Empire had been the work of heroic subordinates vice

his own leadership. When he assumed command of the Continental Army forces in the Southern colonies, his ignorance of how to employ his troops was revealed. According to Michael Stephenson in *Patriot Battles*: "he informed his cavalry commander, William Washington, that cavalry was irrelevant to warfare in the South, and this in some of the finest horse country of the land, and the only theater of war in which cavalry played an important role."¹³ His understanding of militia and regular troop employment was just as disastrous. At the Battle of Camden, where Gen Gates' force of 5,000 regulars and militia opposed Lord Charles Cornwallis's army of 2,239 redcoats, he proceeded to divide his army into neat halves, with his entire left flank made up of unreliable militia, unleavened by any of the regulars on his right.¹⁴

Consequently, when Cornwallis lined his own force directly across from the Americans, his tough veterans on his right smashed the militia wing, and immediately set the whole Continental formation to panic and then rout. Because of Gates' inability to understand the maxim of knowing the capabilities and weaknesses of one's own force, he suffered one of the worse American defeats of the Revolution and nearly lost the entire war in the South to the British. Consequently, both his defeat at Camden and Hannibal's smashing success at Cannae, separated by nearly 2,000 years of warfare, inform the modern commander of knowing the capabilities of their own force and seeking, or avoiding battle, when they are outnumbered by their adversary.

Know Your Future Battlespace

Finally, what does it mean to know "Heaven and Earth," or the terrain and battlespace that one must conduct battle within? Sun Tzu himself devotes two entire chapters of *The Art of War*, in addition to numerous other injects across the book, to the correct understanding and exploitation of terrain features on a battlefield.¹⁵ Utilizing the acronym of KOCOAW (key terrain, observation/fields of fire, cover and concealment, obstacles, avenues of approach, weather) for a tactical estimate of the situation to

analyze terrain, or even a formal planning process such as *intelligence preparation of the battlefield* are only starting points.¹⁶ To know how to leverage the advantages offered by different types of ground requires constant study of maps, imagery, interviews with local inhabitants, and personal observation by the commander himself; a single method will not satisfy. No one better exemplifies this dedication to the understanding of terrain than Field-Marshal Viscount William Slim of the British Fourteenth Army during the Second World War, operating in the brutal jungle terrain of Burma against the Empire of Japan.

As he recounts in his autobiography, *Defeat into Victory*, Field-Marshal Slim first took command of the outnumbered Burmese Corps against the seemingly unstoppable Imperial Japanese Army in 1942. One of the first actions he took after receiving his initial orders was to do “what I always do in such circumstances—reduced the map to a rough diagram with the distances between the main places marked. When you have got such a diagram into your head you have a skeleton of the terrain and cover it with the flesh and features of further knowledge without distortion.”¹⁷ Field-Marshal Slim supplemented this appreciation of the difficult terrain of Burma with a renewed emphasis of jungle patrolling so that “the individual soldier must learn, by living, moving, and exercising in it, that the jungle is neither impenetrable nor unfriendly. When he has once learned to move and live in it, he can use it for concealment, covered movement and surprise.”¹⁸ This enabled his newly formed but still outnumbered Fourteenth Army to stop the 100,000-man Japanese offensive *U-Go* at the 1944 twin battles of Kohima and Imphal, India, and then counterattack back into Burma to reclaim the territory lost in 1942.¹⁹ Even as his forces regained the initiative, Field-Marshal Slim remained focused on using terrain to exert every advantage over the enemy: “I wanted to fight the battle on ground where our superiority in the air and in armour would have its greatest scope, that is, comparatively open country.”²⁰

American Union Gen Ambrose Burnside during the American Civil War in December 1862 did not have this same appreciation for seeking out advantageous ground for battle. As commander of the Federal Army of the Po-

... Slim supplemented this appreciation of ... Burma with ... emphasis of jungle patrolling ...

tomac (102,000 troops), his task was to sidestep the smaller Confederate Army of Northern Virginia (72,500 troops) under the command of Gen Robert E. Lee and seize the Confederate States of America capital of Richmond, VA.²¹ He attempted to do so in the town of Fredericksburg, VA. Fredericksburg sat along the Rappahannock River opposite the Union Army, with the elevated ground of Marye’s Heights to the immediate south of the town. However, Burnside was outmarched by Lee to the town, and Lee was able to deploy fully half his army under Gen James Longstreet across Marye’s Heights. Even then, Burnside was able to batter his way across the Rappahannock River and through Fredericksburg by sheer weight of numbers and massive artillery support on 12 December.²²

The intelligent use of terrain by the outnumbered British in the Second World War and the Confederates in the American Civil War allowed them to defeat significantly larger forces ...

But when he hurled multiple Union Corps at Longstreet’s units on Marye’s Heights the next day, his ignorance of the elevated terrain and the obstacles crisscrossing it doomed his soldiers.

Crouched behind a stone wall, Longstreet’s Confederates mowed down assault after assault of the Federals, with Longstreet remarking: “If you put every

man on the other side of the Potomac on that field to approach me over the same line, and give me plenty of ammunition, I will kill them all before they reach my line.”²³ The casualties suffered were so egregious that Gen Burnside’s subordinates advised him to withdraw back across the river, having only gained 12,563 casualties and no progress toward Richmond.²⁴ It was, as a Northern newspaper correspondent reported, “It can hardly be in human nature for men to show more valor, or for generals to manifest less judgement.”²⁵ The intelligent use of terrain by the outnumbered British in the Second World War and the Confederates in the American Civil War allowed them to defeat significantly larger forces that, by sheer numbers, should have overwhelmed them.

Synthesis

Having examined six battles that showcased the absolute necessity of knowing the enemy, one’s own forces, and the terrain before joining battle, what can the current-day, American commissioned or noncommissioned officer do to adhere to Sun Tzu’s maxim and ensure their smaller force can defeat a larger opponent? To study one’s enemy, the American military professional must seek out experts in their adversary’s history, culture, and values and share their knowledge for their personal development, and their subordinates.

This includes reaching out to academic experts in civilian institutions and the Marine Corps University who can provide the necessary context of an adversary’s actions and history to Marines of all ranks. Furthermore, reading adversary military publications, watching foreign, nightly newsreels, and even seeking travel to past battlefields that an

adversary had fought on centuries ago all provide opportunities to “get inside the enemy commander’s head.”

To study one’s own forces, tough, realistic training exercises provide the best opportunities to assess the capabilities of your troops. Force-on-force exercises (with a larger-sized opponent modeled on an adversary’s tactics, techniques, and procedures), sand-table or command-post exercises with communication equipment, and a focus on understanding and integrating different capabilities at the lowest level need to take priority. The administrative burden of running a unit will never disappear, but the time to prepare subordinates for the fight against a numerically superior force will always be vanishing. *Training and Education 2030* echoes this: “This means incorporating new concepts and capabilities into training venues even earlier, focused on today’s threats and those we expect to



Ignoring the complex terrain within his scheme of maneuver, Gen Ambrose Burnside led the Federal Army of the Potomac to a bloody disaster at the Battle of Fredericksburg, December 1862. (Photo from Wikimedia Commons.)

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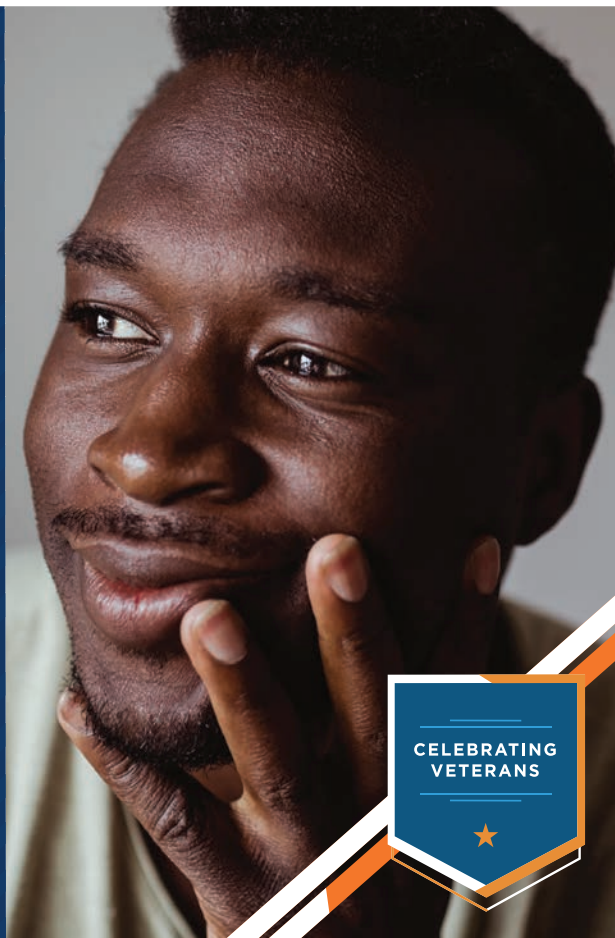
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see tomorrow,” rather than waiting for a Service-level training exercise to determine if subordinate units are fully integrated and ready to fight as one team.²⁶ Bottom line: the study and training of your force must be ruthlessly conducted in the field leveraging all assets you may have on your deployment, rather than simply theorizing about their harmonization in the classroom or with a planning team.

Finally, to study and appreciate the use of terrain in battle, staff rides on both past battlefields and potential battlefields, such as towns, river crossings, and airports, are a necessity. These do not need to replicate an exercise at a Command and Staff College; simply taking your subordinate leaders to an unfamiliar piece of terrain and stating: *a larger enemy force will attack here in six hours; here are our resources, how will we defend?* will provide critical training for military professionals to seek out and exploit the right terrain to withstand an enemy onslaught. Additionally, consider the fact that Marines have not fought outnumbered in a jungle environment since the Vietnam War or in sustained urban combat since the first half of the War on Terror. Both terrain types will be ever-present in the Indo-Pacific Region, and Marines need to re-learn the advantages and dangers of each to be able to fight effectively outnumbered. Maybe the next time your unit is sent on a Unit Deployment Program to Okinawa, consider taking your subordinates out to downtown Kadena and Naha, or the Jungle Warfare Training Center and focus solely on weapon employment and maneuver in these compartmentalized, limited visibility environments.

Conclusion

So, how does a smaller unit defeat its larger adversary? By outperforming them in the understanding of their opponent’s actions and composition, the capabilities and limitations of their own force, and the dangers and opportunities of the terrain on their battlefield. To accomplish all of this, every member of the smaller force must consistently study their future enemy, the weapons and tactics of their comrades, and the

layout of their prospective area of operations; no rank is exempt from this. Leaders must provide the motivation, opportunity, and time to their subordinates to achieve these difficult tasks in order to make their smaller force capable of success. Additionally, there must be a willingness to demonstrate institutional humility and be able to discern both valid and archaic best prac-

... a willingness to learn and adapt ... is even more necessary for the smaller force ...

tices from previous conflicts; nowhere is this more apparent than in the Marine Corps, where small-unit leaders need to embrace the fact that a future conflict in the Indo-Pacific will be nothing like what their seniors witnessed throughout the Global War on Terror. Humility cannot just stop as well if bullets start flying; a willingness to learn and adapt to the larger adversary is even more necessary for the smaller force to maintain its initiative and tempo in battle. Otherwise, an American military force risks being faced by a “big battalion” of the enemy on a future battlefield and finding itself unprepared to snatch the victory from the jaws of a defeat.

Notes

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8. *Battles That Changed History*.

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12. Ibid.

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Finally, I want to personally thank you for being steadfast members of the Marine Corps Association. We truly appreciate your dedication and continued support for the future of our Marines and the Corps.

Semper Fidelis,

Charles G. Chiarotti
Lieutenant General, USMC (Ret)
President & CEO

Benefits of Project Portfolio Management

Increasing efficiency and effectiveness

by Maj Lee Jones

Marines of all ranks are asked to complete tasks that are within their ability. How one completes the task is not always the primary driver of the successful completion of the task but simply mission accomplishment. This means a task can either be inefficient, efficient, or take too little or too much time, as long as Marines complete the mission of the task on hand. I argue that because mission accomplishment is paramount for Marines above all else, Marines take greater pride in being a leader rather than a manager. The focus of this article is to introduce the management principle of portfolio management and discuss the benefits of implementation and the common mistakes seen during the use of the management technique in order to build efficiencies at all levels, thereby increasing an organization's effectiveness.

The Project Management Institute defines portfolio management as the coordinated management of one or more portfolios to achieve an organization's strategies and objectives.¹ The management practice standardizes interrelated organization processes by creating and using tools that are common in many different companies providing a foundation on which success may be created. Although the tools are a standard, they may be modified and adapted to fit the needs of unique organizations. Overall, the main objective of portfolio management is to ensure that projects are evaluated, selected, prioritized, and

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provided necessary resources to obtain the strategic objectives of the organization.²

Benefits of Portfolio Management

In today's world of increased competition, continuous changes in the market, and shorter product life cycles, companies (and the Marine Corps is a company) must find ways to better themselves and ensure they are always staying ahead of the competition. Portfolio management is one of the tools that allow a business to stay ahead of its competition while also ensuring that the projects they are choosing align with strategic objectives, use less money to complete, reduce the cost of completion, and improve the quality of the product being delivered.

The first goal to gain the benefits of portfolio management is to create a portfolio management mindset in the organization. The mindset of a company must be started from the executive level and pushed down to gain the buy-in necessary for implementation. Executive buy-in to portfolio management will position the practice and create it as value added to the company. Once employees begin to understand

the benefits of portfolio management and how it applies to their success, they will also start to understand that with its use, projects will now be properly resourced, documented, staffed, and funded in order to complete the objective that aligns with the strategy of the organization. The change in the organization may take time to shape the mindset that is needed to be successful in portfolio management, but through continual focus from the executive level and project management office, the maturity level of the company will grow. In the modern era of decreasing military budgets and consistent pressure to do more with less, the Project Management Institute has proven that organizations with mature project portfolio management practices complete 35 percent more of their programs successfully and also fail less often and waste less money.³

Proper project selection is another key element to portfolio management success. Project selection must be done at the executive level to ensure that projects are aligned with the strategic goals of the company. Lou Pack, the Senior Vice President of ICF International, once said, "In today's competitive business environment, a portfolio management process improves the linkage between corporate strategy and the selection of the 'right' projects for investment."⁴ Selecting the correct project also provides focus and helps by ensuring the most efficient and effective use of available resources. Additionally, choos-

ing the right project benefits the organizations because the projects within the portfolio are aligned to the goals, and when they are aligned to the goals, they receive more buy-in from the people on the projects. Moreover, it helps those who are assigned to complete projects understand the priority and how they really relate to the company and what the company's doing.⁵

Once project selection is understood and the organization starts to mature in portfolio management, they may want to consider the implementation of ideation portfolio management and how it can contribute to the success of portfolio management in companies for the long term. Ideation portfolio management is the concept of developing these ideas in a way that allows for a sufficient flow of project proposals that generates high value and the implementation of the developed strategic goals. Ideation portfolio management ensures the proposed ideas also fit within the construct of the business's targeted time and their acceptable risk.

Wilderich Heising discusses that innovation projects lead to contributed success and additional revenue for companies.⁶ The downfall of project and portfolios are often found in the beginning and initiation of the project because the outcome of the project is often unclear and uncertain without a defined scope or outcomes (this will be discussed further). Also, immature companies will try to take on every innovative project and creative idea without the forethought of the benefits that are realized by the company strategically. Because of the multitude of stages involved at the beginning of project initiation and creation, the ambiguity of future projects is where portfolio management systems are needed to ensure that the project selection fits into the portfolios and aligns with the company's strategic objectives.

To assist and expedite the decision-making process for executive-level leadership, the correct information must be available and easy to understand. Portfolio management enables this faster decision making by presenting the most critical information in the simplest way possible, benefiting executives whose

time is valuable.⁷ This is easily completed as the organization matures and the project portfolio management system that is in place has the effective tools at its disposal to assist the decision-making process. Rad and Levin wrote that with the right backdrop, the decision on initiating, continuing, or abandoning the project will now be based upon articulated logic and rational data, rather than being based upon emotion and politics (which is a common mistake and will be discussed in the next section).⁸

The tools needed to broadcast and make decisions may be broad or detailed as well as simple or extremely complex. Whatever tools are picked, they should convey the necessary information to the decision makers, be repeatable, and be in a standard format that will assist with future reports. Additionally, the objective of the reports should be to benefit the company in deciding whether to start, continue, or cancel a project.

Lastly, using project portfolio management as a negotiation and bargaining tool and as a structural reconfiguration tool will generate more benefits than using the standard structure of project portfolio management itself. Project portfolio management as a negotiation and bargaining tool eliminates the first two common mistakes seen when practicing project portfolio management by allowing the managers to apply influence between the people and the organization. Finally, viewing project portfolio management as structural reconfiguration will remove the third common trend by not being static and ensuring the relationships between the project and the organization's goals are always being viewed which drives that organization to reconfiguration.⁹

Common Mistakes in Portfolio Management

When there are pros and benefits to portfolio management, there must be an inverse of the cons and downfalls. The majority of mistakes that are made in project portfolio management are derived from misunderstandings of the root and applicability of project portfolio management as well as using the practice in a way that benefits individuals and not the organization as

a whole. The objective is to be able to recognize the shortcoming and come up with solutions to mitigate the risk that can be seen.

Marinsuo summarized in his 2013 paper multiple sources that show the mistakes often made with project portfolio management. He noted the three major trends and mistakes within the practice are:

1. Decision making on project and portfolio selection is less planned and rational and, instead, more political and path dependent.
2. There is a crucial role of the competencies and activities of the project and portfolio manager as well as top managers in how portfolio management is played out in the day-to-day practice.
3. Project portfolio management needs to be applied appropriately to each situation and, thereby, it is not something that can be considered as static.¹⁰

When examining the first major trend of decision makers being more political and guiding projects down a path that may not necessarily be good for the project or the company, we have to understand the basis of how that company is organized and how mature they are in the portfolio management world. All organizations are different and made up of individuals with their own personality traits that can cause conflict or sway toward a direction that is not beneficial to the company as a whole. Companies that are not mature in executing portfolio management may have project/program managers who are susceptible to undue influence from leaders on the executive board. These leaders must be able to build their soft skills to a point where they can take the influence or persuasion out of the decision-making process and focus the board on tangible metrics that will lead to decisions that will benefit the company as a whole.

Irwin discusses that politics are not necessarily a bad thing to have in portfolio management and should actually be a tool for the manager to use in order to navigate the ever-changing environment of projects.¹¹ He continues to write that the bottom line is that individuals, groups, and business units

all use politics as a means of wielding influence to achieve their goals, and in most organizations, project managers do not hold significant formal authority. This in turn means that the project managers must be able to use politics or other formal means to influence the outcome they are seeking.

More importantly, is to understand that thinking of politics in a negative context because of the shadows that are often cast by multiple media outlets and points of view as politicians being deceitful and possibly corrupt is not the context of success. In portfolio management, we have to change the context of politics to a positive being political simply means adapting your leadership style to what is necessary at that moment in the project. This ability will pay dividends to the overall company, personnel that are being led, and projects in the end.¹²

The second common mistake as discussed by Marinsuo is how projects, programs, and portfolios are intertwined in the day-to-day and how each of their roles plays significant factors to the other.¹³ I argue that this trend is the result of a lack of education on each of the three trends and because companies jump into the thought of management principles without proper training or understanding of the baseline principles.

For a company to start to understand the relationship between the three different areas, they must understand that although each is different, they are mutually related to each other. Figure 1 shows the relationship between organization strategies and priorities and how they are each linked and have relationships between portfolios and programs as well as between programs and individual projects. Each of the relationships will require a level of management from the executive leadership boards, to the Project Management Office, to the individual projects, and program managers.

Table 1, created by Praveen Malik, provides a good understanding and baseline education of the individual roles and responsibilities of each member of a company in relationship to their portion of the management principle.

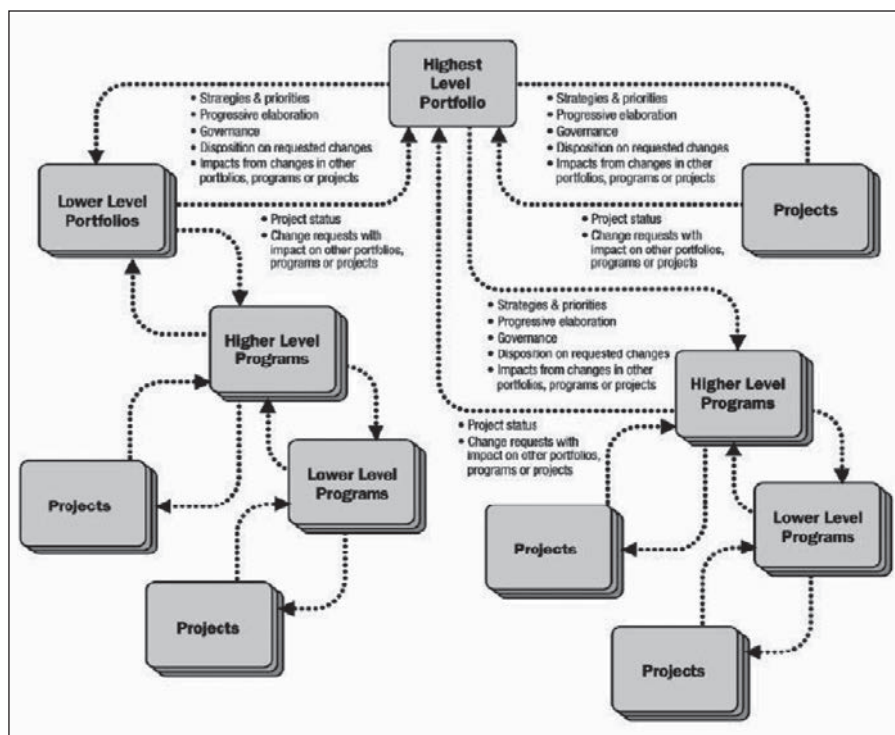


Figure 1. (Figure provided by author.)

	Project	Program	Portfolio
Keywords	Temporary. Unique.	Related projects. Shared goal.	Collection of Projects, Programs, and Operations. Strategic business objectives.
Major Tasks	Identifying project requirements. Managing stakeholders. Completing project scope. Balancing project constraints.	Coordination among related projects. Controlling inter-dependencies among relate projects.	Selection of the right programs and projects. Prioritization of work. Optimization of organizational cost, resources, etc. Maximization of organiza- tional profits.
Benefits	Final product, service, or result.	Meeting the program goal.	Organizational benefits like reduction in costs, increase in profits, and a good return on investments.

Table 1.

Table 1 is just the surface of the understanding of what is required at all levels of management. Once education and understanding become more mature in an organization, only then will we stop making the mistakes of inexperienced managers. This will lead to a daily battle rhythm that will allow more companies to complete more projects, more often, and be more aligned with

the true strategic goals of the company.

Finally, we will discuss the third common mistake, the inability of managers to apply appropriate techniques to each project and situation and ensure they are adapting to the always-changing project environment. All projects are different in that each is unique and has a beginning and ending date. Martinsuo argues that the current

trend we are seeing is that project types are not being taken into account and that the leadership of companies has to use proper portfolio techniques when selecting projects with portfolio management practices in order to obtain the end objective.¹⁴ Not all projects are created equal.

A portfolio manager must be able to monitor changes and understand the company's objectives and organization's strategies and how each of the different projects selected for the portfolio supports them.¹⁵ Governance of the portfolio

overnight. It is a continual process that can improve upon itself and must be actually attempted for it to succeed. Success with portfolio management is not a one-man show either because it takes all levels of management in the unit to make it successful, and the buy-in to portfolio management is continuous and an ever-changing learning environment. Mistakes will be made and challenges will be faced, but using the tool to the best of the ability for a company will only benefit them in the long run of the company.

Whatever the reason may be to implement portfolio management ... it will not be a decision that any organization will regret ...

lio is often completed by executive-level leadership created as a governing body that understands the different divisions or departments of the company. With multiple differences come different projects that each have their own specific needs to achieve completion. The governing body must be able to understand and dedicate resources to the approved projects, continually evaluate ongoing projects, and make decisions on if a project should start, continue, or be terminated. The "how" of the projects must be governed by the Project Management Office to meet the decisions created by the governing body.¹⁶

Another key factor to remember is that project, program, and portfolio management is not a simple process that can be completed easily. They are complex, ever-changing, and unique tasks that must be taken into account as a holistic element where the sum is greater than the individuals' elements that make up the whole. A goal for managers is to understand and figure out a way to navigate the complexities that each project, program, or portfolio has and create the proper techniques to complete the objectives.¹⁷

Conclusion

Portfolio management is a challenging task that cannot be completed

Companies that want to stay around for a long period of time have shifted towards the implementation of portfolio management techniques in their company. A major reason could be because they have read the reports on Project Portfolio Management, and that the market size for 2019 was estimated at USD 4.3 billion and estimated to reach USD 9.1 billion by 2027.

Maybe the main reason is that portfolio management has continually proven to be a model for successful businesses to follow. With the implementation of portfolio management into a company more projects, programs, and portfolios have an increased chance of successful completion as well as contribute to the bottom line of the company's strategic goals and objectives. Whatever the reason may be to implement portfolio management, one thing is for certain, it will not be a decision that any organization will regret if done properly.

Notes

1. Information available at <https://www.pmi.org>.
2. Ibid.
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Note to Self: Individual Morale

Sustaining your own transformation

by LtCol Christina R. Henry (Ret) & SCPO Elliott Fabrizio

Bottom Line Upfront: Adopt the Habits You Expect of Others

In the Navy and Marine Corps, leadership development begins immediately. We learn to lead and lead to learn. The purpose of this article is to stimulate a discussion about leading yourself with an emphasis on individual morale. In this article, we define individual morale as your part in sustaining your transformation. It is the act of practicing command over yourself.

The Lejeune Leadership Institute's Leadership Continuum Model (See Figure 1, modified by LtCol Henry) starts with our ability to lead ourselves. The leadership loop is continuous. In theory, it begins at the most junior ranks (lead self) and progresses through the senior ranks (lead change [to be addressed in a future article]) as you are trained and educated and gain experience. Leading yourself is a constant evolution of

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growth to be a better (not perfect) teammate in the office and in your personal life. The *Navy Leadership Development Framework-Version 3.0* articulates a path of three lanes—competence, character, and connections—also sustained throughout a career.¹ The Navy and Marine Corps are well aligned, and the message is clear. Great leaders are not recruited; rather, are developed, and that development is sustained over time—by, with, and through other leaders.

Rightfully so, *Sustaining the Transformation* demands that we strive to move others up the path of leadership

development while moving further up our own paths.² Winning today's battles and tomorrow's war depends on senior leaders developing young, future leaders. At this exact moment, each of us is in some position on the Leadership Continuum Model. Chapter 3 of *Sustaining Transformation* discusses individual morale and its relationship to unit cohesion and combat effectiveness.

We often speak about an individual's impact on the unit's success. Therefore, a fair amount of emphasis is placed on the leadership sustaining the transformation of others because taking care of each other is what we do. In this article, we define sustainment as, "the responsibility of the unit leaders to maintain and build upon the values and warrior spirit built by formal schools and entry-level training."³ We will pause here to take a moment to self-reflect by asking ourselves, *how do I help my leadership to sustain my transformation?* When leadership theory meets leadership reality, the below questions, discussion considerations, and "notes to self" serve to prompt self-reflection and provide an *azimuth check* that reveals true north when the path to the correct individual actions has grown cloudy.

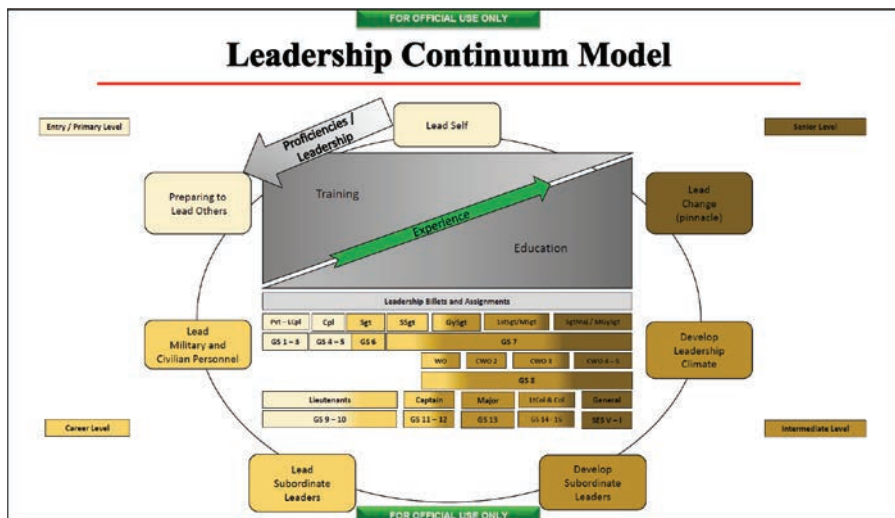


Figure 1. Leadership continuum model draft mod 1. (Figure provided by author.)

How's Your Individual Morale?

Sailors and Marines with a low state

of individual morale contribute less to the mission than those with a high state of morale. Morale starts with leadership. Rare is the sailor or Marine that comes into work happier and more motivated than their leader. That tone is set for a team by the person in charge. We, as leaders, must have a high state of individual morale to contribute to the cohesiveness of the group. We are in direct control of our behavior.

Note to self-1: You must positively influence others.

Are You a Finisher?

We should always know what we want the end result to look like; in essence, what do we want to get out of something, whether it be our careers, an operation, a school, or a healthy relationship? Work toward that goal and put as much effort into the end as you would put into getting started. Last impressions are lasting.

Note to self-2: Anyone can start strong (take any given New Year's resolution). Leaders finish strong.

Are You Prepared?

Luck favors a prepared mind. Make time to read everything—on any topic you can. There is a significant chance you will come across something life-changing, so do not wait. Read after-action reports so that you can vicariously learn from others; read policies so you can help seize opportunities for yourself and others; read the latest doctrine so that you can give counsel and feedback to decision makers; read what your leadership is publishing. And of course, read books and articles of your choosing. There is a fair chance that someone has already solved the problem you are presently struggling with, and they wrote about their struggles.

Note to self-3: Read to gain years of experience in just hours.

Do You Have a Strong Work Ethic?

Being dedicated and having honesty in your work will elevate you to the next level. As such, your hard work, coupled with strong work ethic, will take the team to the next level. Take pride in your work by turning in good products. There is no doubt that the products

you produce for the team are a direct reflection of you. The products your team produces for the organization are likewise a direct reflection of your leadership. In keeping a balanced life, your strong work ethic must apply to your personal life. Your family also deserves all of you when you are present. The other part of work ethic is having a bias for action and taking the initiative in a disciplined manner. In the naval community, we often hear people say, "Fair winds and following seas." Next time you hear that quote finish it with, "But if the winds do not serve, take to the oars." You can let things happen to you, or you can make things happen.

Note to self-4: Work ethic is something you will *feel*. Great leaders are, quite frankly, exhausted or exhilarated from their efforts.

Are You on Time?

Being on time to start and end things makes an excellent first impression and

demonstrates constant discipline. Discipline degrades when standards relax. Sometimes it is necessary to be late for something (e.g., you are helping a shipmate or family member). But do not make excuses and do not be a repeat offender. People will read volumes into your decision to be on time or late, and it is a decision.

Note to self-5: Nobody is too important to be punctual.

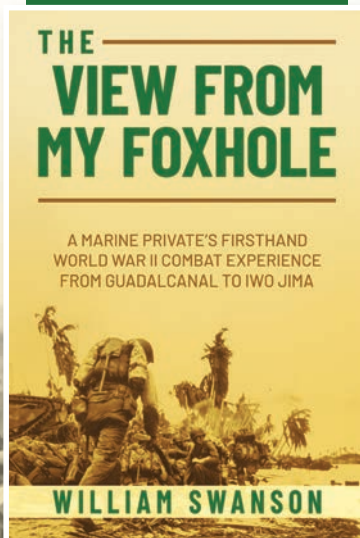
Do You Have a Positive Mental Attitude?

Sometimes there's nothing worse than being around a teammate who has a poor attitude that negatively projects onto others, which negatively impacts the command climate. A positive attitude will spark creative work, and the team with a positive and optimistic attitude will see more solutions for a given challenge. Do not be the one to stifle that creativity.

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Note to self-6: Individual negativity is a roadblock to unit cohesion. Practice having a positive mental attitude, and it will become a habit.

Do You Have Good Bearing?

Before you open your mouth, they see you. Is your body language messaging what you want to communicate with the team? Carry yourself with the utmost professionalism. Do not fake positive body language to mask what is going on in your life. Message appropriately. Get to know the individuals that work around you to the point where you can read their body language. It *speaks* volumes.

Note to self-7: Body language speaks first. Comport yourself accordingly.

Are You Motivated and Challenged?

Maybe you will complete one enlistment; perhaps this will be a career, perhaps this is your calling. Knowing why you are doing what you are doing will keep your flame burning bright. Remember to be honest with yourself. If you are no longer motivated or challenged, consider finding something else to do with your time or find a mentor or family member to help you to ignite your spark. The team is watching, and they have high expectations of you—not to be perfect but to be a good teammate.

Note to self-8: Military leadership is not a profession for those who do not want it.

Are You Giving Your Best Effort?

Always do your best. There should be no regrets about your contributions to the team. With this comes mental and physical endurance to put forth more and more and more effort over time. Repeat small efforts toward your growth day in and day out to create sustaining habits, and you will be successful. Your commitment to the larger group effort will make the team work.

Note to self-9: Inspirational leadership sounds romantic, but it is a day-to-day grind.

Are You Passionate About Something?

Be passionate but not overly emotional about the things that interest

you. This passion will be infectious to your teammates. Being emotional can blind you from seeing other perspectives. What you are passionate about may change over time, and that is okay because it may demonstrate individual growth and maturity or something else. The ability to inspire others stems from your genuine passion.

Note to self-10: As LtGen Toolan once said, “Inspire others (generate thought), ignite their hearts (create passion), illuminate the way (get out of the way).”⁴

Are You Coachable?

Have a growth mindset, not a fixed mindset. We learn from seniors, juniors, and peers alike. Listen to learn, not reply. Commit to being a life-long learner. Seek out opportunities to “take a knee” with a mentor to receive feedback. Have the courage to admit when you are wrong. Learn, then make changes to tighten up your leadership style, improve your approach, and mature as a leader.

Note to self-11: Leaders are never finished developing. (See Figure 1.)

Are You Spending Your Off-Duty Time Wisely?

Going the extra mile adds to your character. First and foremost, take care of your family and always work toward a balanced lifestyle. Next, consider volunteering during your off-duty hours. Doing so requires mental and physical endurance. Others may see this example and decide to go the extra mile as well. There is no telling how many more miles will be traveled due to your leadership example.

Note to self-12: Individual leadership is not a job accomplished in a 40-hour workweek.

Are You Decisive?

Perfect is the enemy of good. Commonly attributed to Voltaire, it challenges us to ask ourselves if we are missing opportunities through the pursuit of perfection or our resistance to proceed until circumstances align perfectly. When making decisions, you will not always have complete information when time is of the essence and or lives are at risk.

Note to self-13: The best thing you can do is always the right thing. The worst thing you can do is nothing.

In conclusion, self-reflection is a crucial component of self-improvement and to maintaining a high state of individual morale. Which individual morale skills are you lacking? Where do you occasionally fall short, and why? How are you impacting your team’s cohesion? We are not automatically a team because we work together. We are a team because we respect, trust, and care for each other, we eat together. We are a team because we want to do what is best for all, not best for me. Several of the significant opportunities we get in life will come because of the little choices we make every day in our professional and personal lives with the team in mind. Each day we are rapidly becoming the people we are going to be. Poor choices will harm our future success and affect the team’s cohesion. We fail to lead ourselves when we waste time, make comfort-based decisions, procrastinate, consistently overeat unhealthy foods, think and act on negative thoughts, ignore personal and professional development opportunities, intentionally miss family events, and unnecessarily skip exercising.

Note to self-14: Look in the mirror, for better or for worse, the next generation will be the image of you.

Notes

1. Department of the Navy, “Navy Leadership Development Framework Version 3.0,” *Media Defense*, 2019, <https://media.defense.gov/2020/May/18/2002302036/-1/-1/1/NLDF3MAY19.PDF>.
2. Headquarters Marine Corps, *MCTP 6-10A, Sustaining the Transformation*, (Washington, DC: 2016).
3. Ibid.
4. LtGen John A. Toolan Jr., “Professional Development,” Marine Corps Association Professional Dinner at Kaneohe Marine Base, Hawaii, 2015.



Fitness Reports

“Mission first, people always” or “Mission first, mission always?”

by Capt Valerie J. Cranmer

“**M**ission First, People Always” is one of those homilies you hear at least once as a military leader. In four small words, there is a moral prerogative to execute the mission but to also take care of your people. Undoubtedly, this phrase was developed as a reminder that the military organization is comprised of people, a fact that is unconsciously forgotten because it is the purpose of the military to carry out the mission. This reality sparked the counter-phrase, “Mission First, Mission Always.” More often than not, the military machine starts working and is unconcerned about how it chews up parts (people). In an attempt to rectify this phenomenon, many organizations have started speaking about “talent management,” to include the *Commandant’s Planning Guidance*, but if the structures that perpetuate the system still exist, then no change can occur. As the primary tool of talent management in the Marine Corps, the fitness report (FITREP) is the lynchpin in articulating Corps Values. However, the FITREP in its current form, and even in its proposed changes via the *Commandant’s Planning Guidance*, articulates that individual character and leadership abilities are not as important as the machine.

The Marine Corps has articulated its philosophy of leadership into the fourteen leadership traits and the eleven leadership principles. Throughout basic training, these traits and principles are drilled into the Marine. Although they ostensibly form the bulwark of Marine Corps leadership, they are not the metric by which the Marine Corps assesses leadership. Since the FITREP is the only tool used in the determination of a Marine’s leadership ability and potential, it has to be the primary vehicle for

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the articulation of Marine Corps values. Additionally, since “Sections D, E, F, G, and H [of the FITREP] comprise 14 attributes that give the RS [reporting senior] a broad cross-section of areas to evaluate the MRO [Marine reported on] that the Marine Corps deems most important,” what the FITREP is telling a Marine is that anything and everything is subordinate to the mission, including personal virtue and leadership.¹

As an officer, I have completed Army enlisted evaluation reports, United States Navy fitness reports, and New Zealand Defense Force personnel development reports, and I can say the Marine Corps FITREP is the best

... the fitness report (FITREP) is the lynchpin in articulating Corps Values.

evaluation reporting system I have encountered in any military. It is the best, not because of the information contained within the FITREP but because of the reporting senior/reporting officer profile which allows reports to fall along an ever-evolving bell curve, contextualizing the MRO with respect to other Marines of similar rank. Since the reporting senior/reporting officer profile is developed from sections D-H, I want to focus on what these sections tell a Marine about what the institution values and how they compare to

the Marine Corps leadership traits and principles.

The FITREP divides thirteen attributes into four sections: mission accomplishment, individual character, leadership, and intellect and wisdom. The hierarchy of these sections demonstrates the preeminence of the mission above all else (I have intentionally left out the attribute “fulfillment of evaluation responsibilities,” as it only refers to completing FITREPs on time and not on any leadership criteria). Even within mission accomplishment, achieving results (performance) is more important than a Marine’s actual ability to do their job (proficiency). This *ends justify the means* mentality is the reality of Marine Corps values and leadership.

Delving more into the relation (or lack thereof) of the FITREP attributes/sections with the leadership traits/principles, it is apparent that there is a disconnect. Some traits/principles are directly reflected in the FITREP grading criteria: *courage, initiative, judgment, and setting an example.*² Others take a few word changes to apply: ensuring the well-being of subordinates with “know your Marines and look out for their welfare,” proficiency and professional military education with *knowledge*, and decision-making ability with “make sound and timely decisions.” But at first glance, the FITREP addresses less than half of the stated traits and principles to make a good leader.

Looking into the definition of the FITREP attributes, you can make some more claims about how the leadership traits/principles relate. Proficiency implies that the MRO needs to “Be technically and tactically proficient.” Courage hits on “seeking responsibility and take responsibility for actions.” Effectiveness under stress ties physical and emotional *endurance* to the task. Initiative is a dou-

ble whammy, being a leadership trait to begin with and additionally outlining being *decisive*. Leading subordinates, although it talks about applying leadership principles, only hits on “keep your Marines informed.” Developing subordinates has the obvious analog of “train your Marines as a team” while also getting at “develop a sense of responsibility among your subordinates.” Setting the example, while also being a leadership principle, talks about *bearing* and implies “know yourself and seek self-improvement.” Communication skills talk about being able to “ensure the task is understood, supervised, and accomplished.” Professional military education, perhaps the attribute most commonly misunderstood, has direct applications to *knowledge* as well as “know yourself and seek self-improvement” and “be technically and tactically proficient.” Decision-making ability hits on *decisive* and *judgment*. Finally, judgment constitutes *knowledge* and “be technically and tactically proficient.”

Even with closer analysis and extrapolating from the Marine Corps order, the definitions from the FITREP attributes/sections do not address all of the traits/principles. *Dependability, enthusiasm, justice, tact, unselfishness*, and “employ your command in accordance with its capabilities” get no love. A few traits/principles are harkened back to multiple times like *initiative, judgment, and knowledge*. Based on the fact they are attributes graded against in the FITREP, as well as being reinforced by other grading criteria, these should be the most important traits to highlight.

In contrast to the Marine Corps model, all services in the New Zealand Defense Force conform to the Competency Framework. (See Figure 1.) This framework lays out a matroska doll view of leadership—beginning with individual character (live the ethos and values) and personal development (think smart), through building and mentoring teams (influence others and develop positive culture), as the systematic approach to accomplishing the mission and continuing to push the organization (mission focus and develop teams).

Within these core competencies, individual principles are applied at different levels of management. They have some enduring principles such as: supports others, including in times of adversity; reflects on own behaviors, seeks feedback; contributes to an inclusive, respectful, professional culture; takes responsibility for own work, does what they say they will; hold people accountable for the delivery of outcomes; and actively contributes to the development of the team. Other principles are predicated on the level of leadership such as: provides unvarnished truth upwards; translates strategic goals into achievable objectives; and even provides a continuum of skills such as the evolution of “makes timely, well-informed

decisions” to “makes effective decisions in ambiguous situations” to “makes effective decisions and delegates decisions appropriately.” Throughout the framework, there is no ambiguity between what New Zealand states their views of leadership are and the individual’s performance review criteria.

In addition to clearly outlining leadership and modeling performance reviews on these attributes, the Competency Framework articulates a hierarchy in contradistinction from the Marine Corps. While many of the same Marine Corps’ traits and principles are evident, the Competency Framework builds from the individual. It assumes that mission accomplishment will be met if it begins from an individual’s

LEVEL OF YOUR POSITION	Lead Self position, OCDT(E), PTE(E), Grades 0-11	Lead Teams position, 2LT(E), LCPL-CPL(E), Grades 12-14	Lead Leaders position, LT(E)-CAPT(E), SGT(E)-SSGT(E), Grades 15-17	Lead Systems position, MAJ(E), WO2(E), Grades 18-20	Lead Capability position, LTCOL(E), WO1(E), Grades 21-24	Lead Integrated Capability position, COL(E), Command WO(E), Grades SM 1-2	Lead Organisation position, BRIG(E)+, Strategic WO(E), Grades SM3
LIVE THE ETHOS AND VALUES	Supports others, including in times of adversity						
	Reflects on own behaviours, seeks feedback						
	Models the NZDF Ethics and Values, including self control						
THINK SMART	Makes timely, well-informed decisions	Makes effective decisions in ambiguous situations	Makes effective decisions and delegates decisions appropriately				
	Shares information and asks questions to improve understanding		Challenges assumptions, identifies the root cause of issues			Analyses situations from multiple lenses to produce more integrated outcomes	
			Drives continuous improvement				
		Quickly adapts to changing circumstances	Improvises with limited resources to deliver outcomes	Prioritises and improvises with limited resources to deliver outcomes			
INFLUENCE OTHERS	Finds the common ground between people to support, engage and influence others						
	Is trusted						
	Builds and maintains a diverse range of relationships					Uses networks and relationships to position NZDF as a valued partner	
	Proactively collaborates with others to achieve individual and collective outcomes						
	Adapts communication style according to the situation						
	Communicates in a clear, succinct and articulate manner					Provides the unvarnished truth upwards	
DEVELOP POSITIVE CULTURE	Provides constructive feedback	Provides timely, constructive feedback					
	Is positive, flexible and pragmatic when faced with change or setbacks						
	Contributes to an inclusive, respectful, professional culture						
	Recognises, responds to and reports inappropriate behaviour						
	Identifies and addresses inappropriate behaviour and poor performance early						
	Uses coach-like behaviours during everyday interactions						
			Takes ownership of change and communicates the benefits and impacts sensitively	Actively monitors and shapes the culture to accommodate change	Actively monitors and shapes the organisational culture required to be an integrated Defence Force	Understands and shapes the organisational culture required to enable an integrated Defence Force	
MISSION FOCUS	Determines own contribution through understanding the leader's intent and the mission				Demonstrates a focus on the long-term goals and capability of the organisation		
	Takes responsibility for own work, does what they say they will						
	Holds people accountable for the delivery of outcomes					Translates strategic goals into achievable objectives	
						Translates vision into strategic goals and communicates them across the organisation	Develops NZDF's vision and strategic plans and communicates these across the organisation
DEVELOP TEAMS	Actively contributes to the development of the team						
		Focuses team development efforts by identifying strengths and weaknesses	Supports leaders to develop individuals and teams				
	Sets clear expectations of performance (objectives and behaviours)						
	Encourages inclusive planning and decision making						
	Works with direct reports to establish development plans						

Figure 1. New Zealand Defense Force's Competency Framework for leadership. (Figure provided by author.)

embodiment of core values, their ability to think well under a variety of scenarios, and being able to transmute these traits to subordinates. To a degree, the Marine Corps subscribes to this idea: commanders who have demonstrated key personal failings are frequently removed from leadership positions for loss of confidence, even if their unit completes the mission because a unit, as a collection of individuals, can succeed despite a poor leader. However, defective personal conduct has a direct impact on a leader's effectiveness in accomplishing the mission.

At the end of the day, how the Marine Corps is articulating its values should be addressed. In its current form, the FITREP says that the mission comes first, no matter if the Marine is good at their job or lives the Corps' traits. Per the FITREP, "Leadership is the primal force that drives all military organizations ... [and is] essential to mission accomplishment." However,

as an evaluated component of Marine leaders, leadership is in the bottom half of graded metrics.³ By the repetition of traits and principles outlined in the FITREP, one could make the argument that the Marine Corps weighs *initiative*, *judgment*, and *knowledge* as the most important qualities of a Marine leader. Yet, I have never heard these traits ever articulated as the primary traits of a Marine leader—most would probably rate *courage*, *decisiveness*, and *integrity* amongst the highest.

Every Marine knows that there are many ways to define and embody leadership. The traits and principles are not the end-all-be-all of leadership. Neither is the FITREP the final decider if a Marine is a quality leader or not. However, all these tools to present leadership paint an abstract painting of bloated concepts. The values the Corps determines as the most important should be made more explicit and leaders need to be held to those standards via an

evaluation that addresses those values. At present, the FITREP muddies the water in its messaging. If the Marine Corps values the individual character of a Marine as an essential component to mission accomplishment, then it would be well worth it to consider how we articulate this priority within the evaluation context. Is the Marine Corps about the mission or individual character?

Notes

1. Headquarters Marine Corps, *MCO 1610.7A*, (Washington, DC: 2018).
2. For consistency and differentiation, leadership traits are italicized while leadership principles are contained in quotes.
3. *MCO 1610.7A*.



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Why Once an Eagle Remains Relevant for Young Marine Officers

Keep reading this classic

by 2ndLt Grant Boyes

Recently, dissenters have criticized the narrative and dismissed the tremendous instructive benefit of Anton Myrer's *Once an Eagle*, once a cherished classic in all echelons of military leadership. While the novel remains on the Commandant's Professional Reading List, not enough young officers have read the epic tale of Sam Damon, an often sorrow-filled journey that attempts to capture a modern telling of American officership and warrior heroism on par with Odysseus and Aeneas. In addition to entertaining the reader with dramatic battlefield scenes and excellent stories on love, friendship, and family, *Once an Eagle* offers an opportunity for young officers to learn why they must always seek the right and noble thing even at the expense of their careers or personal well-being. Although about the Army in the early 20th century, the Marine Corps has a strong connection to the novel's emphasis on personal leadership, courage (both moral and physical), and the human dimension. *Once an Eagle* should regain its former undisputed role as a common item of a young officer's reading because of its timeless relevance to the core of any leader's mission.

Reading great literature exposes readers to enduring lessons from the past and remarkable stories that touch the human soul to the core. In the Marine Corps, outside of formal schoolhouses, officers should be doing most of their reading on their own or in groups at their own discretion. In 2015, the

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Marine Corps University Foundation studied the widespread effectiveness of informal and incidental learning. These findings support the need for high-quality literature like *Once an Eagle* to flourish in young officer circles. The author states, "Because the learner is not formally invited to think about a specific thing, introspection on the part of the individual to reflect on the

effectiveness because they are so key to people taking the time to build relationships and help everyone who wants to develop personally and professionally do so."² When in groups, young officers have the opportunity to shape not only themselves but also their peers to be *better* and inculcate in themselves and each other the proper ways to achieve virtuous and impactful leadership. To learn how to be the best version of themselves, young officers must turn to the best literature that makes informal learning effective.

Once an Eagle stands out as an exemplar of that sort of great book that shapes the most important aspects of character. Once thought of as a be-

... Once an Eagle offers an opportunity for young officers to learn why they must always seek the right and noble thing even at the expense of their careers or personal well-being.

lessons rest entirely upon the learner."¹ Literature forces readers to confront real problems and real circumstances within an artist's creation. These stories cultivate excellent critical thinking skills and push readers to ponder right and noble actions. Also, when Marines form groups to study together, the author argues, "In other words, informal and incidental learning have an impact on

loved classic, recent years have seen former military leaders tear down the novel and tackle both its applicability and relevance to modern leaders.³ The story begins in the early 20th century in small town Nebraska where a young Sam Damon lets his mind run wild with visions of military heroism and a strong sense of destiny; these dreams soon turn into a military career. Damon enlists

as a private after being turned down at West Point due to politics and then battles his way through the trenches of France in 1918. Awarded the Medal of Honor, he earns a battlefield commission and becomes an officer at the end of the war. Serving through the inter-war years, he studies and learns around the world before he leads his men into a ferocious and unparalleled journey through the Pacific Theater of war. In the end, Damon tragically dies in a fictional Vietnam-like war. Interwoven through this perilous storied military career, he falls in and out of love with his wife, loses his child in World War II, and laments the loss of his friends Devlin and Benjamin Krisler. Throughout the novel, Anton Myrer foils Damon with the malevolent Courtney Massengale, a fellow Army officer that avoids combat yet desires to send men into it for his own glory. Though an older book, the novel offers an ancient wisdom that remains relevant today.

Once an Eagle uses the common theme of fear in different ways to demonstrate two necessities of leadership: love and courage. At the pinnacle of the Philippine campaign, Massengale plans a daring, sweeping move that wins him approval and adoration among politicians and media members but sentences Damon's division into unspeakable slaughter. After Damon warns Massengale that the soldiers will never forgive him, he gleefully remarks, "In point of fact I don't care *what* they think of me as long they fear me. That's the driving gear that turns the wheels of war."⁴ Massengale believes officership revolves around fear, an unpleasant feeling of dread and danger about possible consequences. Fear is how Massengale leads and demands his soldiers follow his instructions. Framing this as a negative character trait in Massengale, Myrer instead offers a proper alternative in Damon: lead with love. While he still leads them in destructive combat and

never lets them off easy, Damon consistently displays a proper understanding of *love your Marines*. Although he could have abandoned them numerous times, he always stays on the line and fights with them at the point of greatest influence. Damon looks after them and prays to God, "Let me not fail them"⁵ after asking deep questions about his own ability to lead his soldiers properly. Sam Damon represents a well-ordered love toward his men and demonstrates a wonderful example for young officers to pursue in their own lives.

Myrer also uses the theme of fear to illustrate what courage actually is. Early in *Once an Eagle*, Sam must endure the harassment of Sgt Merrick as a young private. Brutal and harsh, Merrick attempts to break Sam's spirit. In France, Damon's mentor, GEN Caldwell, reveals Merrick also became an officer during the war, but Caldwell relieved Merrick of his command. Caldwell says, "he has no fear. None at all. I will have

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no man in my boat who is not afraid of a whale. That's the crux of it. There's something very wrong with Merrick: he's not a *man*."⁶ Connecting the idea of fear with the essence of human beings, Caldwell's quote demonstrates that to have any real courage at all the doer of the courageous act must fear the situation in front of him. Merrick does not show any courage at all; his actions illustrate a ravenous rashness grounded in pure emotion and oriented toward bloodlust. This view of true courage originated in fear and

right solution every single time at the exact right time. Oftentimes, *Once an Eagle* faces paradoxical criticism about the perfection and imperfection of Sam Damon. Because senior leaders positioned Sam as the perfect role model for so long, many point to Damon's flaws as a reason for young officers to abandon the novel. He only spends time as a line officer doing what he wants, cheats on his wife, and does not stand up to Massengale at key moments. Yet, these flaws and personal dilemmas illustrate the very real and human character in

Warfighting explains that war is a human enterprise; because man is a political animal with a great capacity to reason, war follows as politics to its most violent extreme.

connects with *MCDP 1, Warfighting*. In the chapter "The Nature of War," the Marine Corps discusses the ever-present problem of danger, violence, and fear in war; courage, however, is the ability and will to overcome that fear and persevere. *Warfighting* states, "Leaders must study fear, understand it, and be prepared to cope with it."⁷ Leaders, especially Marine Corps officers, have to prepare themselves and their subordinates to overcome fear in all situations. *Warfighting* develops an excellent explanation of that need, and *Once an Eagle* not only supplements that understanding but also provides young officers with a very real description of true battlefield courage.

Warfighting explains that war is a human enterprise; because man is a political animal with a great capacity to reason, war follows as politics to its most violent extreme. Human beings, however intelligent or physically strong we may be, are inherently flawed and do not act the same way every time. *Warfighting* calls this the human dimension and argues that "war is shaped by human nature and is subject to the complexities, inconsistencies, and peculiarities which characterize human behavior."⁸ No human being is perfect and has the

Damon. He is not perfect, and Myrer meant to do that. Great literature reveals exceptional insights into human beings, their lives, and their place in the universe. Young officers must learn that complete perfection is unattainable, yet the pursuit of virtue and noble action is worth it for the sake of their Marines. Although Damon has his fatal flaws, he is still the hero of the novel because he seeks virtue at nearly every turn. He is a realistic model because he falls short but carries on in the face of that adversity and friction. *Once an Eagle* underlines the human dimension, its very real consequences for young officers, and the imperative to seek virtue.

At the end of the novel, Damon finds himself mentoring his old friend's son, Joey Krisler. At this point, he has accomplished everything he could as a soldier and leader; he has led soldiers into combat and commanded large forces to tremendous victories over America's adversaries. In his last words, he implores Joey, "If it comes to a choice between being a good soldier and a good human being—try to be a good human being."⁹ After this moment, an explosion goes off near the two men, and Damon dies in a fictional version of Vietnam. His last moments embody the endearing

message of *Once an Eagle*. Ultimately, the choices young officers make that cultivate and reflect their character matters the most. Young leaders should always strive to master their craft technically and tactically. However, it is only through virtuous character and true noble action that young officers will succeed as leaders. *Once an Eagle* demonstrates how different officers can make different choices as young men that will not only influence but determine what type of senior leaders they turn out to be. Young Marine officers, whether as individuals reading books or groups arguing about books, should find ways to discuss what type of officers they want to be; *Once an Eagle*, however old or outdated it appears to be, should still guide them in their journey.

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Non-Existent Turnovers

Overhauling management to adapt and progress

by Maj Corydon S. Cusack

How does the Marine Corps expect to make prominent advances in complicated concepts, such as a new force structure, divestment, investment, and focus on expeditionary advanced base operations (EABO), if we continue to repeat our previous patterns of effort? Specifically, if we continue to place little to no value in conducting a turnover upon billet transfer, multiplied by hundreds of Marines spanning multiple key billets, then we will continue to be behind the global competition power curve. The Marine Corps spends months re-learning the basics of billet requirements when we could be investing in modern mission analysis, building expeditionary training plans, and utilizing innovation focused on deftly competing or winning in conflict against a peer or near-peer in the fight now concept. Recommended remedy is making the turnover process an evaluated event.

Ask any Marine—officer or enlisted, young or old—if they have ever received or been a part of a turnover when transferring billets; nine times out of ten they will all tell you, emphatically, no. The lack of turnover comes at a cost of those new in billet spending an average of two months learning the basics of their job and the associated battle rhythm before becoming fully operationally capable and snapping in. With an average billet time of two years, this two-month price tag is nearly ten percent of the total time in the seat. Serious productivity is lost and a lack of contribution to solving complex problems ensues when turnovers are neglected. Multiply the ten percent figure across the force, and the reality sets in on just how inefficient we are as a Service.

Regulated turnovers would have always been beneficial but can now be

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How often do Marines, at any level and regardless of occupation field, get the benefit of a complete, structured turnover? This shortfall negatively impacts unit proficiency. (Photo by Cpl Karina Lopezmata.)

considered crucial in modern warfare. The Marine Corps is undergoing a significant culture shift in force structure and a change in the way we fight. Therefore, our best and brightest must be focused on bringing forth new approaches, capabilities, and methods that will empower a “bold force to exploit opportunities in an operating environment that is complex and ever changing.”¹ Key billet holders cannot “orient on competitors and exercise the campaigning mindset to generate options from the lowest level for use to

commanders in force planning with strategic implications,”² if they are mirroring in basics of turnover, or lack thereof.

In the *Commandant's Planning Guidance*, Gen Berger notes that “it is the actual implementation of our innovative concepts that translate great thoughts and concepts into action.”³ The rise of peer and near-peer competitor capabilities and tactics now requires Marines to understand the overall global operational environment and provide focus through meaningful solutions to modern warfare prob-

lems. EABO has been the focus on the implementation of the *Commandant's Planning Guidance*; however, it is not the only priority listed therein. Gen Berger also indicated a need to revamp talent management, to include revisions on the way evaluations are conducted. This was recently done for the younger Marines through the junior enlisted performance evaluation system. The staff and officer Automated Performance Evaluation System fitness report (FITREP) structure remains largely unchanged and in need of revision if the Marine Corps is to continue being America's force-in-readiness capable of lethality across the range of military operations. An administrative change can positively impact Marine Corps operational readiness.

Are turnovers required? The answer depends on who you ask, and under what circumstance. Enforcement of turnovers is currently largely personality-driven or baked into local culture and thus subject to change from unit to unit. Major subordinate commands—division, wing, and logistics groups—typically develop a policy letter requiring their subordinate O5–O6 commanders to produce a turnover via a detailed report to their commanding general outlining the unit's status of command. Further, it is a common practice for units that replace other units during contingency or crisis operations to conduct a formal turnover, in a process called relief in place/transfer of authority. We see the value in conducting turnover abroad but fail to realize the significance of the effect in garrison. Finally, *MCO 4790.2* and accompanying bulletins outline specific details required for both desk-top and turnover binders. The goal of these binders is to facilitate internal functional understanding, thus facilitating turnovers. Unfortunately, the focus has become more about having the binder prepared for an administrative inspection, than verifying its actual content and use to communicate turnover upon transfer of responsibilities. Ultimately, turnovers are not a universal requirement throughout all units, and the Service would benefit from mandatory turnovers as seen in

the unit status of command reports as well as relief in place/transfers of authority.

MCDP 7, Learning, does not speak specifically to the turnover process but does outline the benefits of a willingness to change and the expensive nature of not adapting, “Avoiding feedback, and having a fixed mindset leads to stagnation. The costs of not learning are so steep.”⁴ Applied to turnover, we

... we find a certain amount of pride in taking over a new, possibly gapped, billet with no turnover, and then making it far better than we found it.

can see that feedback via a managed turnover process enables learning and breeds growth, understanding, and positive change to a unit's status quo by eliminating the steep costs of not learning due to lack of mandated turnover. “The outcome we seek from education is to increase the ability of Marines to envision greater possibilities in competition. We need to develop an understanding of our rival if we are to create an effective plan that will help us prevail.”⁵ Simply put, there is limited time, manpower, and brainpower; therefore, it becomes difficult to generate creative solutions to complex problems against peer or near-peer competitors when Marines spend ten percent of their time in billet learning the basics of their new assignment. Institutional changes that embrace feedback, and shrug off the legacy mindset related to lack of turnover, translate into a robust ability to solve complex problems tied to peer and near-peer competitors.

The *Tentative Manual for EABO (TM EABO)* tangibly manifests the main priorities put forth for the future of the Marine Corps by Gen Berger in his *Commandant's Planning Guidance*.⁶ *TM EABO* follows the same evolutionary pattern as the *Manual for Advanced Base Operations in Micronesia 1921*, which developed into *Tentative Manual for Landing Operations* and ultimately into the *Fleet Training Publication-167*, which aided in providing

a foundation for amphibious landing doctrine during World War II. However, the *TM EABO* is expected to follow a less progressive and exponentially aggressive developmental timeline to facilitate “live force experimentation, and drive action for future force development.”⁷ This doctrine is authoritative, not definitive, and will require continual development and refinement. Such a gargantuan responsibility can

only be properly shouldered by Marines who have received deliberate turnovers which streamline basic beginning burdens and ultimately enable their focus on higher level concepts of employment to provide commanders solid options that enable the actions of a “force at the lowest level to have strategic implications.”⁸

Why does a lack of turnover persist? Clearly, this is not a newly discovered issue; Marines are, by nature, prideful, and rightly so. Though we despise never receiving turnovers, we find a certain amount of pride in taking over a new, possibly gapped, billet with no turnover, and then making it far better than we found it. Further, there is a culture whereby all Marines have simply accepted the status quo that a lack of turnover is a problem, and acknowledge it will not change. As previously mentioned, turnovers are largely dependent on personality-driven leadership and no formal method of evaluation exists to enforce them. The problem is systematic in nature, steeped in pride, low expectation management, and a lack of an associated mandatory evaluation. Recognizing the gaps left in the wake of an unmanaged turnover process is the start of solving the problem in an effort to move forward and meet great-power competition requirements.

Reviewing the Joint Lessons Learned Information System shows that a lack of turnover is a problem that persists

2. TURNOVERS. The extent to which this Marine conducted or required other to conduct accurate, detailed, and thorough turnover for key billet transfers.							
ADV	Occasionally conducted below standard turnovers. Failed to conduct one or more turnovers during this period, as assessed by reporting senior.	Prepared turnover sessions which were adequate. All turnovers during this period were conducted and met the standard. Successor's time spent learning the basic battle rhythm of their new job was cut down due to predecessor turnover, however a more detailed turnover would have gained more efficiencies.			Never failed to conduct a turnover. All turnovers were administratively correct, detailed, and thorough. Turnovers were methodical and thought out, to include a left seat observation period, and right seat soft start period. Successors were able to immediately delve into basic battle rhythm due to turnover focus by predecessor. F-G: Requires subordinates to conduct turnovers, and sets a turnover culture.		N/O
A	B	C	D	E	F	G	H
JUSTIFICATION:							

Figure 1. Suggested FITREP with additional evaluation topic on the turnover process. (Figure provided by author.)

among all Services, including Joint Service. Recommendations range from the development of continuity turnover binders and conducting turnover via email when live turnover is not possible. Additionally of note, no other Service assesses the conduct of turnovers on fitness evaluation reports.

Solution: make the turnover process an evaluated event. What gets measured matters. Specifically, add turnover as the number (15) item on a Marine's FITREP via the Automated Performance Evaluation System. Additionally, extend FITREP due dates to MMRP from 30 days to 60 days to give the reporting senior a period to assess the results of the prior subordinate's turnover process, by noting the subordinate successor's initial performance. This solution is simple to implement and is in concert with talent management priorities. When an in-person turnover is not a viable option, as is often the case, the reporting senior would advise other live, virtual, or constructive means of the Marine conducting their turnover. Recommendations include multiple telephone calls, video conferencing, as well as email communication or text messaging, coupled with a detailed turnover binder, and the use of a plan of action and milestones checklist at the very least. Moreover, thorough turnovers are more than a single binder or simple series of discussions. Effective turnovers are deliberately planned and executed events that include a preparation period consisting of read-aheads, a left-seat period of observation, and a right-seat period of monitored on-the-job training. The key takeaways are that Headquarters Marine Corps officially evaluates the turnover process via an

updated FITREP, and reporting seniors become responsible for the conduct of detailed turnovers that ultimately result in a paradigm shift and positive culture change in the Corps where significant improvements are realized in shorter periods, multiplied across the total force for maximum enhanced efficiencies.

Figure 1 provides an example framework for the administrative mechanical changes the Service should implement to gain and maintain momentum on peer and near-peer threats, in concert with talent management priorities. Adding turnovers to the FITREP recognizes and codifies a Service-wide priority. Low evaluation marks would be given to those who conducted poor or non-existent turnovers, while average marks will reflect the adequate conduct of turnovers. High evaluation marks reflect detailed turnovers, with notable and immediate results. Finally, above-average marks note that the Marine not only requires their subordinates to conduct through turnovers but further sets a turnover culture that yields enhanced results in operational readiness.

As a short counterpoint, this is a way, not the way, nor the only way. Overhauling the turnover process with an official evaluation comes with its own limitations. Supervisors would be more likely to focus on building turnover products and a turnover culture knowing that it is an item they are evaluated on themselves, but ultimately still largely subject to personality-driven leadership decision making. Other manpower management considerations include increasing contact turnover periods, but are constrained by a limited quantity of eligible backfill movers, made more complicated by rigid report dates for

other special programs. Official evaluations that encompass turnovers, make the process more universally objective and thus a higher degree of certainty for enhanced Service-level results.

Finally, in summary, the impact of first recognizing this culturally persistent problem and subsequently applying the recommended solution will yield an immense immediate and long-term positive impact on Marines and the Marine Corps. Making turnovers an evaluated event will hold subordinates accountable to a clearly set expectation and get the reporting senior involved in the process of mandating turnovers themselves. Enforcing turnovers via FITREPs will eliminate a culturally known issue and formalize a previously personality-driven event. Further, it will reduce wasted manpower in time spent learning the basic administrative requirements of new assignments and will result in a Service-wide productivity increase. Adding a layer of accountability to the turnover process will ultimately contribute to enabling key leaders' focus on solving complex problems to compete and win in conflict against a peer or near-peer adversary during a period of great-power competition.

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Sexual Assault Response Training for Victims

Now is the time to implement
by Capt Matthew D. Sherman

The Corps trains Marines on how to respond to many stressful and traumatic situations, but it fails to train us how to respond to one of the most traumatic, stressful, and continuing situations happening in our Corps today—sexual assault—and it is time for that to change.

Over the last 247 years of improvising, adapting, and overcoming, the Marine Corps has developed training for a myriad of different scenarios its service members may encounter. For example, Marines of all levels are trained on how to apply a tourniquet if they take a bullet. If their rifles jam, Marines know to immediately follow the ditty *tap, rack, bang* to keep them in the fight. As a bystander, if a Marine witnesses an interaction that could become a sexual assault, he has been trained by the Marine Corps to Step-Up and apply the 3 D's: *direct action*, *distract*, and *delegate*. What if a Marine is sexually assaulted? Does a Marine know what to do if he or she becomes the victim of a sex-based crime? In the following paragraphs, I will explain what training the Corps needs to implement so any Marine will know how to respond as a victim of sexual assault, and why it is imperative for the Corps to implement this training immediately.

Victims Need to Have Sexual Assault Response Training

Sexual assault is a growing problem in the military. In 2021, the DOD received 8,886 reports of sexual assault, which is 1,050 more than it received in 2020.¹ When it comes to sexual assault, the U.S. Naval Institute reported

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that “[t]he numbers across the military branches point to the problem getting worse. Sexual assault rates are up, the percentage of people reporting sexual assault is down and trust in the military when it comes to protecting victims is at an all-time low.”²

Currently, the Marine Corps has a zero-tolerance policy for sexual assault. Its primary means of combating the ever-present issue is through bystander intervention, which is the strategy the Marine Corps believes is the most effective way to stop sexual assault.³ However, numbers do not lie and the growing sexual assault numbers tell us that the bystander intervention strategy has not been enough to win the fight against this abhorrent crime. The reason why bystander intervention alone is not enough to lower sexual assault numbers is that it can only happen before a sexual assault occurs; thus, it has no use against sexual assault after a Marine becomes a victim. Additionally, many sexual assaults in the military happen off base where there are no Marine bystanders to intervene, and in some cases, there are no bystanders to help at all.

When a terrible event such as a sexual assault occurs, the top priorities of the command should be first

and foremost to protect the victim. Ensuring the victim is physically safe, has access to medical care, and has a support network is paramount. Equally important for the institution is ensuring that the perpetrator of the crime is brought to justice via a conviction. However, convictions in sexual assault cases are particularly difficult to achieve relative to other crimes.⁴ A key factor keeping conviction rates low in sexual assault cases is that the conduct often takes place without any witnesses.⁵ In this situation, it will essentially be a “he said, she said” case, and in this context, a successful prosecution depends on the perceived truthfulness and reliability of the complainant’s evidence.⁶ Therefore, without evidence supporting the complainant’s claims, the trial will likely result in an acquittal. This fact plays a large part in the significant discrepancy between the number of sexual assaults committed in the Marine Corps and the number of resulting convictions.⁷

To stop sexual assault, the military needs more convictions. Convicting perpetrators of this heinous crime not only provides closure to the victim and their family but has the following benefits as well: deterring law-abiding Marines from criminal behavior, incapacitating the criminal to protect other Marines from future assault, and overall achieving justice for crime victims, for other citizens, and for the convict who is punished.⁸ These benefits only come from convicting a criminal. Service-wide implementation of a Sexual Assault Response Training, or SART for short, would have a direct impact on increasing convictions in sexual assault cases, ultimately decreasing the num-

ber of sexual assaults occurring in the Marine Corps. At its core, SART trains service members on how to respond to sexual assault should they find themselves to be the victim of a sex-based crime.

Sexual-Assault-Response-Training

As Marines, we can all agree on the fact that the very existence of sexual assault in our Marine Corps is a travesty and a dark blemish to our institution—Marines who commit sexual assault should be sent to prison and discharged from our Service. Unfortunately, this is not an ideal world, and sexual assault remains a pervasive issue in the Marine Corps. The implementation of SART is an unfortunate but necessary reality of today's military. SART is a succinct, yet informative, training package that is easily compatible with existing sexual assault training such as Step Up and the Victim Witness Assistance Program. SART lays out immediate action steps to take should a Marine find themselves the victim of the terrible crime of sexual assault; steps that will increase the conviction rate of sexual assault in the military.

Perhaps the most effective way to stop a perpetrator from sexually assaulting another Marine is to convict him or her for the sexual assault they committed against their previous victim. When DNA evidence is available in a sexual assault case, the odds of conviction are more than nine times greater than in cases without biological evidence.⁹ Therefore, the Marine Corps, through the implementation of SART, should train Marines to do three things to preserve evidence if they find themselves to be victims of sexual assault: (1) do not shower, (2) do not wash your sheets, and (3) do not wash your clothes.

First, should a Marine find themselves the victim of sexual assault, they should not immediately shower. This is a tough ask—whether immediately after or the next morning, the urge to clean oneself following a nonconsensual, traumatic violation is compelling. However, the perpetrator's DNA is often still attached to the victim, either through fluid samples or hair follicles.¹⁰

The difference between locking a criminal behind bars or letting them go free can be determined by whether a Marine showers after they have been sexually assaulted, washing away critical evidence.

Second, should a Marine find themselves the victim of sexual assault, they should not wash their sheets. Most sexual assault incidents in the Marine Corps happen in the barracks.¹¹ As a result, much of the evidence of sexual assault can be found on the bedsheets. In the

... SART trains service members ... should they find themselves to be the victim ...

same way victims often immediately shower after being sexually assaulted, they also often toss their sheets in the washer, destroying valuable evidence—evidence that can be used against the perpetrator.

Lastly, a victim should refrain from washing their clothes after finding themselves to be the victim of sexual assault. As with the sheets and showering, several DNA samples likely remain in the fibers of their clothes that can only remain as long as they refrain from throwing them in the washer.

Recommending that you do not wash yourself, the scene of the crime, or your clothes after a sexual assault is not a novel idea. According to the Office on Women's Health under the U.S. Department of Health and Human Services, victims of rape are advised the following:

Don't wash or clean your body. If you shower, bathe, or wash after an assault, you might wash away important evidence. Don't brush, comb, or clean any part of your body, including your teeth. Don't change clothes, if possible. Don't touch or change anything at the scene of the assault. That way, the local police will have physical evidence from the person who assaulted you.¹²

The novelty of SART comes from the Corps normalizing and standardizing reactive action training for Marines should they become sexual assault victims. In doing so, more evidence will be preserved, conviction rates will rise, and justice can be served on the perpetrators which is not only beneficial to the Marine Corps and society as a whole but is also immensely powerfully and positively impactful for victims.

Victims Can and Should Preserve Evidence

As a prosecutor, nothing is more painful or professionally frustrating than being unable to convict a known rapist or sexual assaulter due to lack of physical evidence. For some, training Marines to implement SART, should they find themselves to be victims of sexual assault, may be asking too much. It is a terrible reality that we are having a conversation about the potential merits of training Marines on how to respond to sexual assaults. However, that is the current reality of the military and the world writ large, and equipping victims with the tools and knowledge to maximize the chances that their attackers are convicted and are subsequently brought to justice *will* ensure that attackers are identified, convicted, punished, and processed out of the military. Furthermore, SART classes can even serve as a *deterrence* against potential attackers. Providing detailed information on the sheer volume of physical evidence that can be collected from a sexual assault, to include the multitude of ways evidence can be collected, processed, and linked to an attacker, is a deterrent within itself.

There is a knee-jerk reaction that many will undoubtedly have to the statement that a victim *should* or *should have to* do anything if they are sexually assaulted. No doubt this knee-jerk reaction will likely be followed by the thought that *victims should not have to do anything. Marines should just stop raping other Marines.* The belief that Marines should stop committing sexual assault and the belief that victims should take certain measures to help see their perpetrators convicted are not mutually exclusive. SART is not meant to replace Step-Up, but instead, it is intended to

act as a follow-up knockout punch in the fight against sexual assault. The moments immediately after a sexual assault are the most critical for collecting evidence of it occurring; thus, victims are uniquely situated as being the first ones to come in contact with the evidence to

SART does not need to stop after teaching victim Marines to refrain from immediately showering and washing their clothes and sheets because sexual assault comes in a variety of different ways, from unwanted sexual contact like groping to aggravated rape. A ho-

... the Marine Corps, on some level, needs to implement SART because the Marine Corps' way to react when in shock is to fall back on the training ...

preserve it. In doing so, victims play a direct part in the conviction of their perpetrator. It is empowering for victims to know that they can help catch their perpetrators, that they can protect another Marine, and that they can play a large part in curing the overall sexual assault dilemma plaguing the Marine Corps.

listic training approach would include training Marines to not delete digital messages that could be used for the conviction of their perpetrator and ways to avoid counterintuitive behavior with their accused post-incident. Nevertheless, the fact remains that the Marine Corps, on some level, needs to implement SART because the Marine Corps' way to react when in shock is to fall back on the training and so a Marine's response to sexual assault should be no different.

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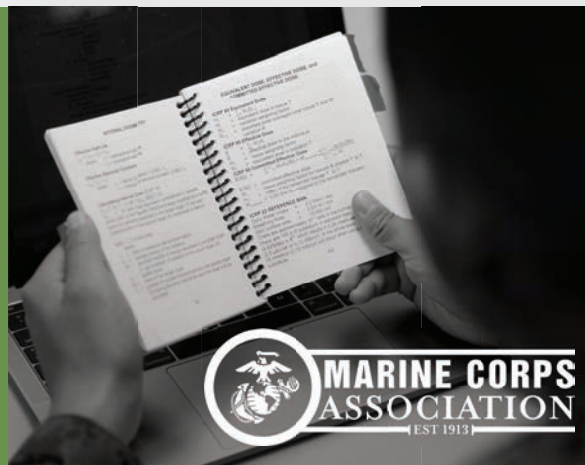
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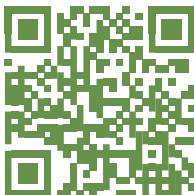
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Joint Amphibious Operations in the Baltic, 1917–18

Operation ALBION

by Mr. Joseph Miranda

Operational warfare in the 21st century can have numerous dimensions—especially when involving amphibious actions in an unstable political situation. One example of multi-dimensional conflict comes from the German campaign in the Baltic in 1917–18. A wargame on this topic is Decision Games' *Operation ALBION*, appearing in *Strategy & Tactics* #343.

Baltic Front

In 1917, World War I was at its high point. On the Eastern Front, German and Austro-Hungarian forces repeatedly defeated Russian armies. In March, Russia's Czar Nicholas II proved unable to deal with military and political crises and abdicated. Nicholas was replaced by a provisional government headed up by Alexander Kerensky. The provisional government decided to continue the war against the Central Powers to fulfill their obligation to the overall Allied war effort. In response, the German high command launched a decisive campaign to knock the Russians out of the war. This campaign would include an offensive to take the vital Baltic port city of Riga and then seize several critical islands in the Gulf of Riga. The goal was control of the Gulf of Finland, which would threaten the Russian capital at Petrograd (modern St. Petersburg) and presumably collapse the provisional government with an assist by Vladimir Lenin and his Bolshevik faction.

The German offensive commenced on 1 September 1917, led by Gen Oscar Hutier and his Eighth Army. Hutier launched a coordinated attack involving a well-planned artillery bombardment

and assault troops supported by combat engineers. The assault broke through the Russian line on the Daugava River and then exploited to take Riga on 3 September. On 12 October the Germans commenced the amphibious invasion of the Riga Gulf islands, Operation ALBION. The landings proved successful and within a week gained their objectives.

With this defeat, Kerensky's government collapsed in the face of a coup led by Lenin and the Bolsheviks who seized Petrograd on 7 November (25 October by the old Russian calendar). In the days that followed, the Bolsheviks took over more cities and thus commenced the Russian Civil War. The civil war was paralleled in Finland where Red Guards (pro-communist) fought White Guards (anti-communist). The Germans then dispatched a special division under the command of Gen Rudiger von der Goltz to support the White Finns. The Finnish-German forces won a resounding victory, thereby securing the Baltic region.

Joint Warfare in the Baltic Sea

Operation ALBION covers the entire Baltic campaign commencing in September 1917 (with the Riga offensive), through the German island landings, and concluding in May 1918 (the historical conclusion of the Finnish Civil War). The game map covers the Baltic

Sea and its littoral, including what are today Lithuania, Latvia, and Estonia, the Petrograd region, and Southern Finland. Significant map features are fortresses, towns, land areas, and the Russian capital at Petrograd.

A quick look at the game map shows that much of game's strategy revolved around littoral operations. The Baltic Sea projects three waterways into the land areas: the Gulfs of Bothnia, Finland, and Riga. Ports are indicated by anchor symbols. Control of ports is vital for basing fleet units and moving forces forward by sea.

The central game system uses Action Points (AP), a quantification of command control and logistics. Players accumulate AP for their home bases as well as controlling certain strategic locations on the map, representing forward basing and morale gains. The more AP, the more operations you can conduct, including administrative, intelligence, operational, and logistical actions.

The game's counters represent ground, naval, and air units. Ground forces can be anything from elite assault battalions up to army corps. Naval units represent divisions of capital ships, cruiser squadrons, and flotillas of light units. Air units are groups, including both fixed-wing planes and Zeppelins.

The numbers on the counters represent their various combat strengths against enemy ground units (upper

>Mr. Miranda is a prolific board wargame designer. He is a former Army Officer and has been a featured speaker at numerous modeling and simulations conferences.

left), air units (upper right), submarines (lower left), and surface ships (lower right). The parenthesized number represents the movement ability (for ground and naval units) and range (air groups). The combat system integrates the different types of combat into a single rule, returning attritional results that are accurate across the span of a campaign.

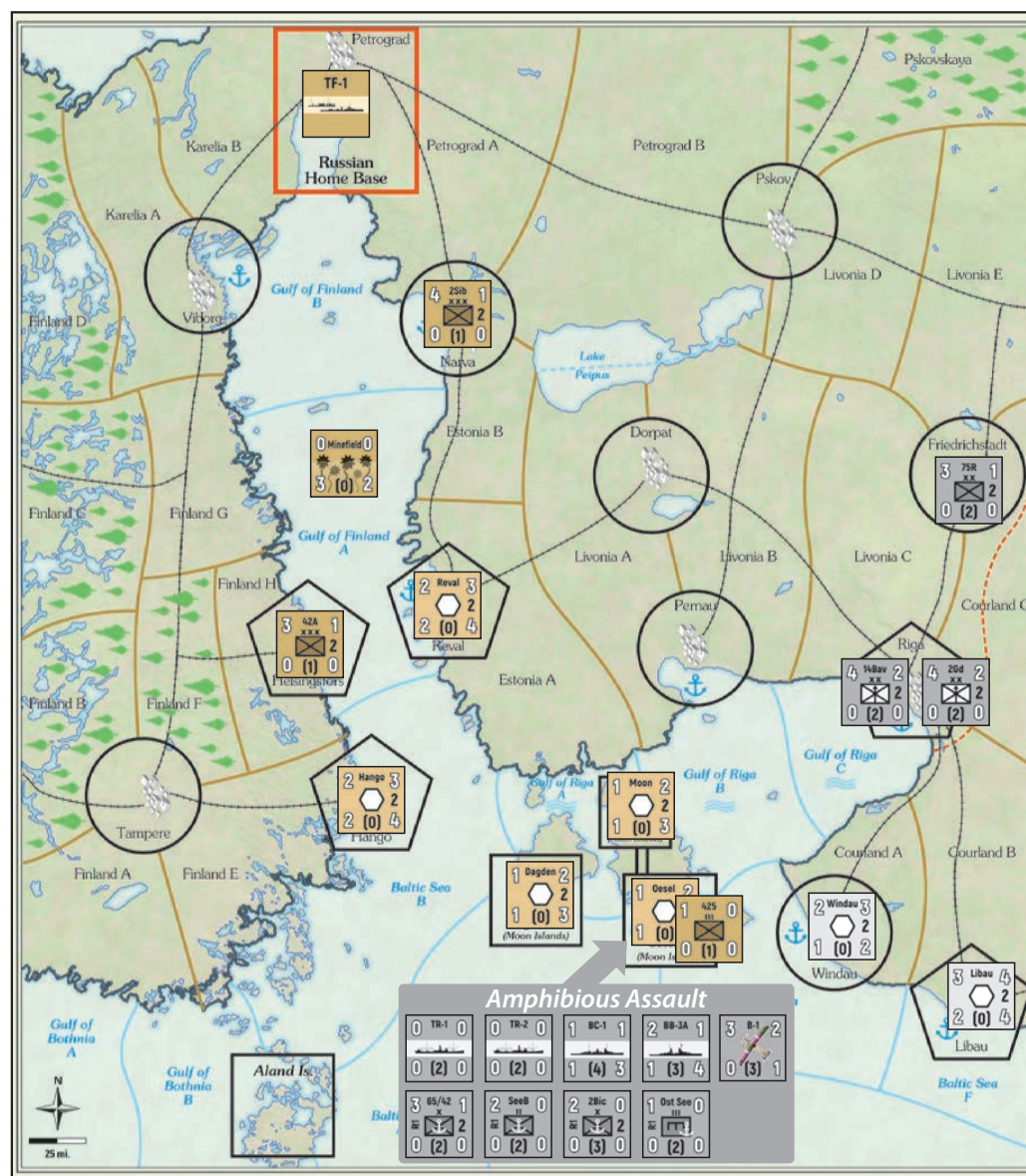
Both sides have specialized marine units. These can perform special amphibious assaults, very useful in this campaign given the extent of the sea zones on the map. There are also shock units that represent ground forces with specialized training for assaulting the

enemy line and exploiting tactical breakthroughs. The Germans also have the artillery command of Col Georg Bruchmuller, a pioneer in massed fire tactics, which enhances attacks. Having the right units at the right place enhances the offensive.

Both sides have amphibious capabilities. This requires combined (or joint) operations to work with naval and ground forces working together. The Germans have something of an edge here given they have more marine-qualified units than the Russians and an effective battlefleet. If an amphibious landing is to be made against opposing forces, support it with as much com-

bat strength as possible. Naval units are useful for clearing away enemy naval forces and opening the way for landings. Submarines can be a big danger, so include an anti-submarine flotilla in your task force. Fleet units can also provide naval gunfire support to landing troops. Various air groups provide range support.

Both players must be prepared to move fast when these events occur and exploit opportunities for joint operations. For example, the Germans can land amphibious forces deep into enemy territory to seize critical objectives before the Reds can respond. Rapid reaction to a changing situation on the



Joint amphibious assault, October 1917. Two German divisions have taken Riga. A German amphibious invasion force of three marines and one engineer regiment have landed on Oesel Island, defended by a Russian infantry regiment and fortress. The German force is supported by a battlecruiser and battleship, plus a bomber unit based in Windau. Russian forces hold southern Finland.

ground can win the game in the Baltic, 1917–18, as well as provide a lesson to be learned for potential operations today.

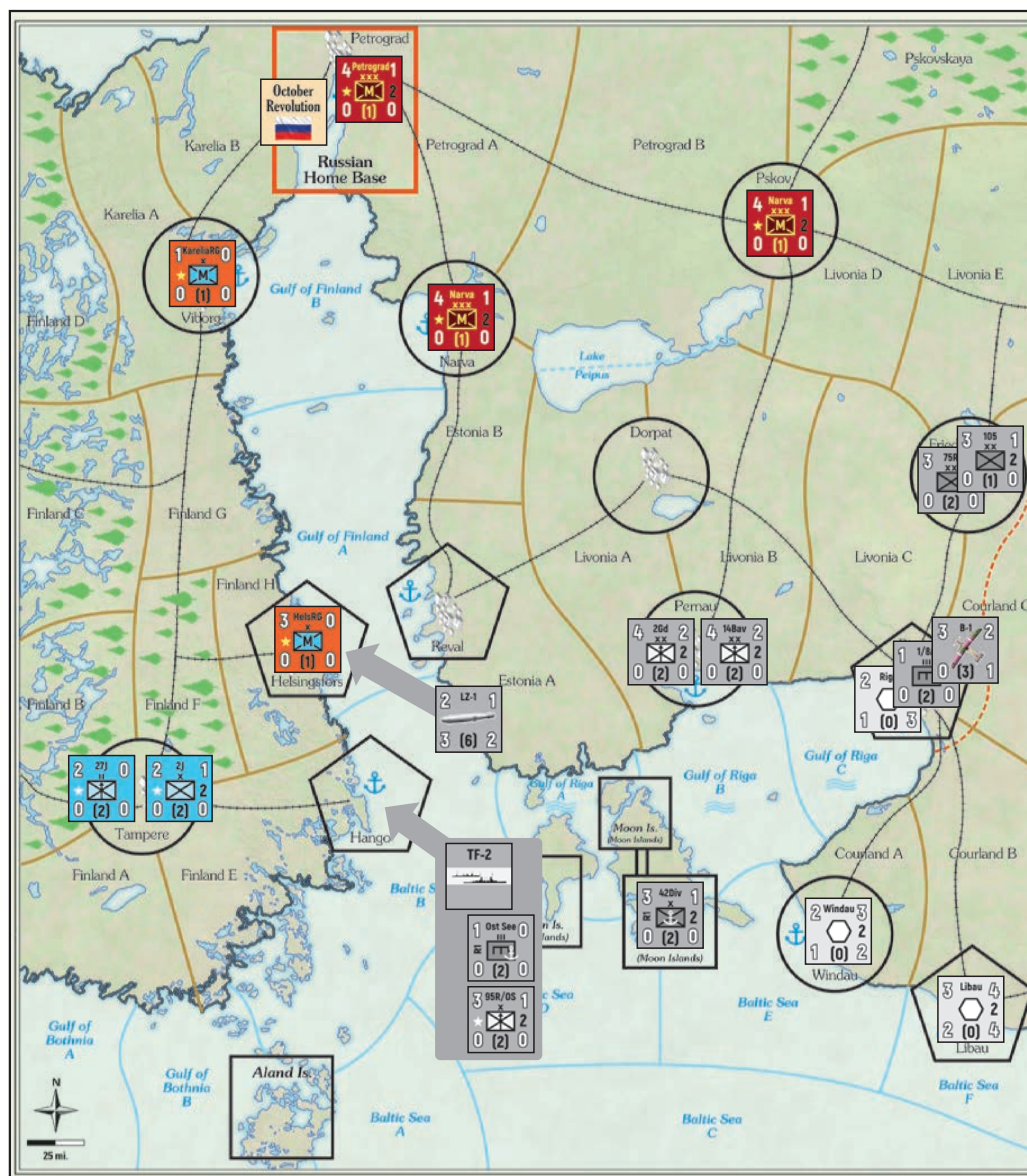
Chaos in the Baltic

War is the realm of chaos, as the military adage goes. This was especially true in the highly politicized atmosphere of the Baltic in 1917–18. In *Operation ALBION* this is quantified in the October Revolution Index, modeling the collapse of support for the provisional government. Each time the Germans take a critical town, the Index moves closer to a Bolshevik Revolution. The Index is further shifted by gaining tactical vic-

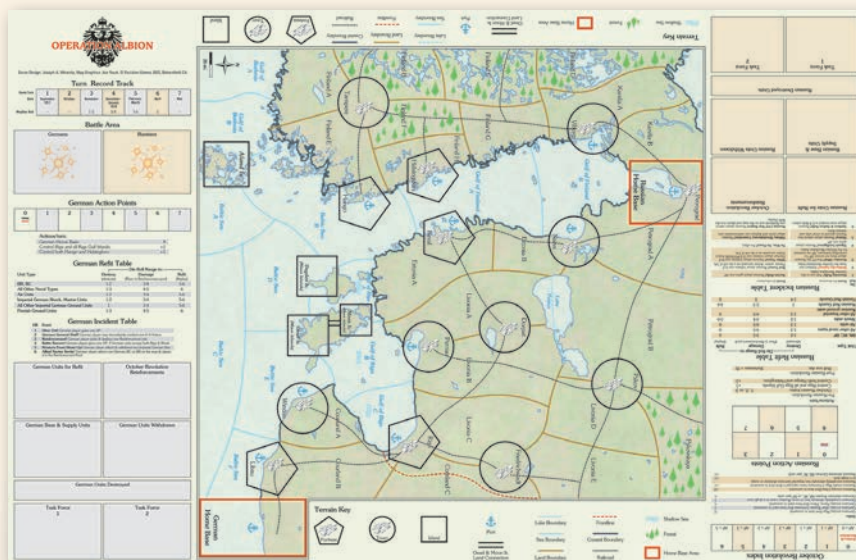
tories against Russian ground forces or sinking capital ships. Conversely, when the Russians retake critical objectives or win battles, the chances of revolution diminish. The military situation on the front therefore affects the political situation at home.

When the Index reaches the Bolshevik Revolution, the Russian government collapses, and the Bolsheviks take over. Most of the Russian forces go home and are replaced by Red Army units. Also, the Civil War breaks out in Finland and both sides deploy their Finnish forces. The campaign now shifts to the north.

Both players must be prepared to move fast when these events occur and exploit opportunities for joint operations. For example, the Germans can land amphibious forces deep into enemy territory to seize critical objectives before the Reds can respond. Rapid reaction to a changing situation on the ground can win the game, in the Baltic in 1917–18, or today.



German Finnish campaign, 1918. The Bolsheviks have seized power in Petrograd and, Finnish Reds in south-east Finland. White Finns are moving in from the northwest. A German amphibious force lands at Hango and prepares to support the White Finns. A German Zeppelin attacks Red Guards in Helsingfors (Helsinki). German units in the Baltic prepare to push northwest towards Petrograd.



OPERATION ALBION 1917 1918

Operation Albion: 1917–1918 is an operational wargame of the Baltic campaign in which the Germans captured the city of Riga and took critical islands in an amphibious operation. Operation Albion led in part to the collapse of the Russian Provisional Government and brought the final German victory in the East. The campaign was one of the few joint land-naval-air operations of World War I.

The game includes the post-Albion German intervention in the Finnish Civil War of 1919. Players conduct combat, logistical, intelligence, and other operations. All units use a similar combat system, showing the interaction of naval, air, and land forces. The rules are based on designs such as **Red Dragon Rising**, **South Seas Campaign**, and **Netherlands East Indies** which have appeared in previous DG magazines.



Players: 2 (Germany vs. Russia)
Counter Level: Land Regiments–Divisions, Air Squadrons, Ship Divisions
Map Scale: 1 inch = 25 miles (40 km)
Turn Scale: Variable
Designed by: Joseph Miranda

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Range

reviewed by GySgt Derek W. Sharp, Maj John M. Bailey &
Maj Kevin C. Druffel-Rodriguez

What is Range? You have likely heard of the “10,000-hour rule,” popularized in Malcolm Gladwell’s bestseller, *Outliers: The Story of Success*. Even if you have not, it is a familiar mantra: start early, narrow your focus, practice often, and avoid deviation from your chosen path. Tiger Woods is an easily recognizable example: he began golfing as soon as he could walk, focused entirely on one sport, practiced incessantly, and eventually dominated the sport. Well, David Epstein’s newest book, *Range: Why Generalists Triumph in a Specialized World*, is a refreshing counterargument to this popularized theory of success through hyper-specialization. Epstein offers countless examples that this single-track ascendancy to premiership as an athlete, performer, or leader is the exception, not the rule. Although less is known about the generalists’ path to success, it is not because it is less frequent or effective—it is just a less captivating story.

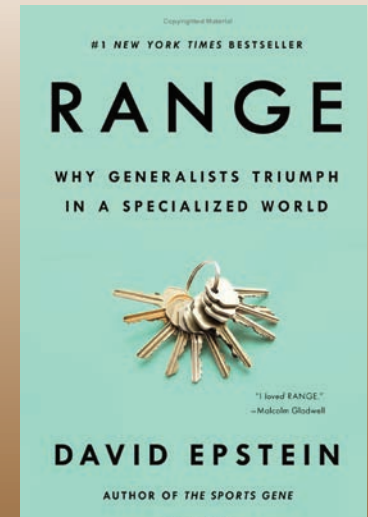
Instead, Epstein claims that generalization, the accumulation of a wide range of experience and education, is the key to success—not specialization. The true path to success lies elsewhere, in focusing broadly, gaining experience, and perhaps even quitting (under the right circumstances).

The Marine Corps needs range. This article is intended to highlight several of Epstein’s key points and to suggest how these findings may benefit the Marine Corps. In many ways, our discussion supports recent initiatives, like MCDP 7, *Learning*, and ideas proposed in the *Commandant’s Planning Guidance*. However, we argue *Range* offers key insight into how the Marine Corps should approach talent management, education, and

warfighting to confront the challenges of the future operating environment.

Understanding Epstein’s argument for range requires an understanding of Robin M. Hogarth’s distinction between “kind” and “wicked” environments. According to Hogarth, in kind environments, “patterns repeat over and over ... feedback is extremely accurate and usually very rapid,”¹ boundaries are well defined, and “similar challenges occur repeatedly.”² Golf and chess are recognizable examples. In each, the rules are clear, each action is easily observed by all participants, the feedback and consequences of each action are readily apparent, and continued participation generally leads to improvement. Quite frankly, learning is much simpler in this domain. Practice, repetition, and experience all lead to improvements, and solutions are easily achieved—often through pattern recognition or analogies to previous experiences.

By contrast, in wicked environments “the rules of the game are often unclear or incomplete, there may or may not be repetitive patterns ... and feedback is often delayed, inaccurate,



RANGE: Why Generalists Triumph in a Specialized World.
By David Epstein. New York, NY: Riverhead Books, 2019.
ISBN: 978-0735214484, 352 pp.

or both.”³ In other words, the rules are less defined, and experience may actually “reinforce the exact wrong lessons.”⁴ The treatment of coronavirus is certainly representative of the wicked domain. Feedback from medical interventions is delayed or incorrect, the appropriateness and legality of public policy solutions are unclear, and information in media reports

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>>Maj Bailey is a Logistics Officer, currently serving as the Aide-de-Camp for the Deputy Commandant, Programs and Resources. He graduated from the Naval Postgraduate school in 2021. His thesis was titled: “Marine Corps MOS Assignments: Career Impacts of Match Quality.”

>>>Maj Druffel-Rodriguez is a Combat Engineer Officer currently serving as the Aviation Ground Support Department Officer in Charge with 1st MAW. He graduated from the Naval Postgraduate School and produced a thesis titled “Foxes and Hedgehogs: Building Range in 21st Century Commanders.”

often further complicates the environment. More pertinent, China perpetuates wickedness in the South China Sea as it continues to construct and fortify islands within the nine-dash line. Despite rulings by the United Nations to curtail China's actions, they continued unabated, claiming historical rights to the territory. Lastly, our experience in the First Gulf War reinforced several inaccurate lessons about strategy and design as we approached the wars in Iraq and Afghanistan only ten years later.

Most military professionals would not liken their daily operating environment to chess or golf. Instead, we operate in a much more dynamic environment, evolving with greater complexity every day. For humans, Epstein is clear about some of the implications and the need for more generalization. Kind environments, especially those that are narrow enough and well-defined, can and will increasingly be handed over to artificial intelligence. Neural networks and computer algorithms can easily process thousands of examples, recognize patterns, adjust to negative feedback, and formulate a response, often-times faster than humans. In turn, humans must evolve or will increasingly be left with less to contribute. To do so, according to Epstein, we draw on our "greatest strength ... the ability to integrate broadly."⁵ Humans must be able to bridge the gap left by advanced technology: thinking through multiple layers of a problem set, arranging and combining information across multiple disciplines, and adapting to the updated information in realtime. To remain competitive in the wicked world, humans must take an interdisciplinary, generalized, broad approach to learning and thinking. We need range.

Range will not only help us confront the challenges of an increasingly complex world; it helps us discover our true "self." To counter the conventional wisdom of specializing early, Epstein offers psychologist Brent Roberts' research, which found that "the most momentous personality changes occur between age eighteen and one's late twenties."⁶ During this

malleable point in life, an individual is on a path of self-discovery. Epstein has a nickname for these individuals: "Dark Horses."⁷

It is important to endure this Dark Horse period in life despite the discomfort and challenge. Although it may require exposure to uncomfortable or even unwinnable situations, in the long term, we are made better off by this struggle. The idea of failure, while intimidating and unwanted, forces us to work harder and endure longer than we otherwise would have by playing it safe. It is this struggle itself that leads to growth and personal development, and according to Epstein is much more beneficial, as "learning stuff [is] less important than learning about oneself. Exploration is not just a whimsical luxury of education; it is a central benefit."⁸

Despite popular theory on early specialization, it is late specialization and generalization that grants us better personal insight and generates greater benefits in the long run. To accomplish this, we must embrace our inner Dark Horse and live, search, and explore without a map laden with boundaries. Otherwise, we sacrifice an incredible amount of potential talent, personal growth, and career success by choosing a specialty early for, according to Epstein, "a person who does not yet exist."⁹

Lastly, range—and more specifically, late specialization—gives us a greater perspective and helps us think critically. To demonstrate this point, Epstein describes the Einstellung effect as "a psychology term for the tendency of problem solvers to employ only familiar methods even if better ones are available."¹⁰ Confirmation bias is a persistent obstacle to critical thinking and hinders even the most experienced planning cells. Early specialization, while useful in solving kind problems, does not translate well when solving wicked ones. Here "knowledge is a double-edged sword. It allows you to do some things, but it also makes you blind to other things you could do."¹¹

Epstein's research found that the farther removed an individual's focus

was from the problem at hand, the more likely they were to generate a solution. This concept highlights the subtitle in Epstein's book, *Why Generalists Triumph in a Specialized World*. The value of being a late specialist is the ability to connect the work of early specialists. Epstein argues that "the more information specialists create, the more opportunity exists for curious dilettantes to contribute by merging strands of widely available but disparate information."¹² While specialists will always be needed, the ability to utilize interdisciplinary thought is what makes generalists such powerful critical thinkers.

So What?

The benefit of range does not end with athletics or academics; it is highly relevant to the Marine Corps. The wicked environment of added complexity and ill-defined rules is a close analog to the force's perception of gray-zone conflict, hybrid warfare, and maritime-conflict environments. What is more, like wicked environments, conflict of this nature continues to consume a larger segment of our operating environment. Fortunately, in many ways, the Marine Corps appears poised to confront this challenge. The *Commandant's Planning Guidance* and *Force Design 2030* are rife with technological, structural, and doctrinal proposals to meet the "increasingly complex operational environment."¹³ As *Range* focuses on generating success in the age of specialization, it provides relevant perspective on how the Marine Corps may educate, train, and organize to better meet the demands of the future operating environment.

Talent Assessment, Talent Management, Talent Retention (In That Order)

A significant problem currently facing the Marine Corps is the ability to retain talented individuals. In his official planning guidance, the Commandant of the Marine Corps, Gen David H. Berger, wisely cautioned "[We] must reverse the negative trends related to talent retention. This is not

a Marine Corps problem; but rather, a joint force problem.”¹⁴ Considering *Range’s* stance on the benefits of sampling, late specialization, job switching, and the presence of shifting preferences, correcting this issue seems like a hopeless endeavor.

To improve talent retention, the Marine Corps must first address talent assessment and understand the concept of “match quality.” According to Epstein, “‘match quality’ is a term economists use to describe the degree of fit between the work someone does and who they are—their abilities and proclivities.”¹⁵ The key is to optimize the match between an individual’s natural talents and the occupation in which they are most likely to succeed. The closer the match, the more likely an individual is to be engaged, satisfied, and ultimately remain within the field. This is not a new concept, it was originally developed by Frank Parsons in 1909 with his landmark publication, *Choosing a Vocation*.

Unfortunately, most talent assessment practices across the Joint Force, and particularly in the Marine Corps, are still trapped in the Industrial Era. MOS assignment processes primarily rely on physical fitness scores, highly subjective leadership evaluations, and classroom performance to place individuals in rank order. Then, based on an individual’s physical and academic aptitude, he is given a list of qualifying occupations and through personal introspection, or from pressure by their peers, they establish and submit a list of preferences. Processes vary by Service, and most Services then try to generate the greatest match quality between an individual’s preferences and the occupational specialties offered at the time while considering class rank.

Although this process may be an accurate assessment of an individual’s performance in a kind training environment, it does little to address the issue of match quality to ensure an individual’s long-term success and retention within the Marine Corps. Instead, processes should be implemented to better inform and prepare them for the much more consequen-

tial milestone of selecting the optimal occupational specialty.

The Army has taken significant strides in correcting this process. Even Epstein took notice of the Army Office of Economic and Manpower Analysis’ study, *Starting Strong: Talent-Based Branching of Newly Commissioned U.S. Army Officers*, published in 2016. This three-phased approach aims to optimize “a cadet’s unique talents with the branch where they are most likely to excel.”¹⁶ While operating concepts vary by officer commissioning sources, the principles remain the same. Overall, the program consists of education about each Army basic branch, a Talent Assessment Battery to measure cognitive and non-cognitive skills, feedback from cadre on a cadet’s particular talents, a review of each cadet’s full profile by human resource professionals, a list of the most ideal recommendations, (which are non-binding), followed by an eventual assignment.¹⁷

The value of the Army’s program resides in the tools, processes, and feedback that inherently serve as a proxy for the experience and sampling that cannot be afforded during a compressed training pipeline. It is an innovative workaround to optimize match quality under an austere timeline and similar methods should be considered across the joint Service.

Perhaps, getting the occupational specialty assignment right from the beginning will curtail some of the talent management challenges following occupational assignment. Even then, as individuals gain greater experience or their preferences shift over time, the military must be capable of responding appropriately and providing options rather than losing talent. The force would be wise to absorb these changes as, according to Epstein, individuals “actually have higher growth rates after switching.”¹⁸

Unlike the limited options to improve talent assessment, there are countless recommendations to improve talent management. To better manage those who are satisfied with their current MOS, greater transparency and easier accessibility to the

listing of available jobs would be a strong start. Marines desire preference and self-determination concerning their future assignment. The current system cannot efficiently present the potentially satisfying and rewarding opportunities that do exist.

Beyond these administrative modifications, the Marine Corps may also consider the Army’s advancements in talent management. Introduced in the Spring of 2020, the *Assignment Interactive Module 2.0 (AIM 2)*, is a web-based information system designed to “ensure assignment decisions are made using as much accurate data as possible and employ a regulated market mechanism to better match officer talents to unit requirements,” according to the Army’s Human Resources Command.¹⁹

The Marine Corps should continue to expand opportunities for lateral moves, to accommodate those who are interested in continued service in a different occupational specialty. More importantly, a lateral move should be accessible despite its potential negative impact on promotion. Today’s Marine is more interested in personal autonomy and less interested in strict promotion tracks and linear career road maps. Talent management models should work *with* this understanding, not against it. As the *Commandant’s Planning Guidance* states, some individuals “may be less interested in promotion,” but it does not mean they are not capable of meaningful service.²⁰

Most importantly, the Marine Corps must reverse course on addressing talent retention on the back end of an individual’s service. By this point, incentives are of little use if the individual is completely disinterested or dissatisfied with their job. Rather, talent retention efforts should be focused on where the problem originates at the beginning of a Marine’s career and then on how that talent is managed over time. Greater emphasis should be placed on updating occupational assignment processes that effectively optimize match quality to facilitate a more fulfilling and engaging experience. With greater satisfaction, individuals will be more likely

to continue service. These individual talents should be managed effectively, following current values, not those of the industrial era.

Education

The release of *MCDP 7, Learning*, was a significant step in the Marine Corps' support of life-long learning and developing range within the ranks. Unfortunately, this new doctrine only serves as a starting point for influencing the next generation of Marines in their self-studies. The Marine Corps, and the Joint Force writ large, still have an unbalanced approach to learning within its military schools. Most Services tend to practice block learning, a process that primarily draws on repetition to reinforce learning. This works well for breaking down a weapons system or programming a radio, but it hinders a Marine's ability to make decisions in a fluid environment.

Training and Education Command (TECOM) can learn from *Range* and how to more effectively educate the force for the future. David Epstein argues that students who learn under various conditions (called interleaved practice) are forced to recognize deep structural connections among various problems. This concept of "learning, fast and slow" forces students to match a strategy with a problem and creates flexibility in one's problem-solving abilities, enabling the use of structure in new domains.

One suggestion is to maintain block learning at entry-level MOS schools, where foreign skills are being taught for the first time, and institute interleaved practice at professional military education schools where the nurturing of critical thinking is the main goal. We often discuss the difference between training and education. Training is associated with *what to think* (rules and regulations), while education is the concept of *how to think* (a deeper and longer-lasting form of learning). MajGen William Mullen, former Commanding General of TECOM, recently offered a hybrid view that "the combination of training and education together

is learning; training prepares you for what you know is going to happen, education prepares you for the unknown."²¹ This view is based on a traditional building block approach to learning, which is successful, but only if it utilizes interleaved practice.

TECOM could also inject spacing (deliberately leaving time between exercises for the same knowledge) into their professional military education courses. This deliberate gap forces students to hold onto information and then recall it later, which moves information from short-term to long-term memory. This is not an argument for longer schools, but a reorganization of classes so that students can think more critically about the material they are being presented.

Additionally, TECOM should institute more open-mindedness and facilitate a culture where students view their ideas as a hypothesis in need of evaluation. There is nothing more dangerous than a leader who relies solely on familiarity. Epstein refers to this being as fooled by experience (or a hedgehog) because these types of people (specialists) become more engrained in their decisions even in the face of opposing information. Instead, we should teach our forces to be foxes or integrators who have a breadth of knowledge (though shallower than hedgehogs) and constantly amass perceptions to add to their cerebral range. This action will aid in developing a creative curiosity and an affinity for interdisciplinary thinking within our Marines that will enable them to be more effective in wicked environments.

Warfighting

If projections about the future of conflict are accurate, then the force will need Marines—both officer and enlisted—with range. On a strategic level, competitors are already able to produce equipment and technology whose sophistication rivals, matches, or even exceeds those fielded by the United States. As a result, some will undoubtedly be able to deny or mitigate the traditional aspects of American military dominance. Moreover,

given the economic might of adversaries such as China, the United States will not be able to secure military victory by simply outproducing its competitors. The decades-long hallmarks of American military power—high technology and economic preeminence—are no longer sufficient guarantees of strategic success. Instead, the Marine Corps will have to find warfighting advantages where it often has in the past—in its people.

The relative erosion of American economic and technological dominance is, however, not the only factor driving the need for a force with range. The nature and complexity of future operating environments will surely demand it. For example, as the Marine Corps develops itself to become a stand-in force in the Western Pacific, it should expect to confront scenarios where the boundaries between conventional and irregular war completely dissolve. In this maritime gray zone, Marine leaders will need to operate in an environment fraught with ambiguity and friction; where feedback is no longer immediate but is delayed or even nonexistent. Warfighting in this context will be dispersed, disorienting, and decentralized. It will depend on Marine units that are flexible, mobile, and endowed with the ability to apply lethal force at great ranges. These units must be led by Marines accustomed to wicked learning environments. Marines with range.

Though arguably harder to produce and retain, such Marines are better prepared to thrive in these wicked domains. As they favor diverse experience, operational breadth, and interdisciplinary education and training, over-specialized experience has limited utility in these environments because they lack predictable patterns and defined structures. Epstein highlights that one needs to draw on knowledge and experience from a variety of sources to thrive. Hence, the force will need leaders who can integrate diverse capabilities and not limit themselves to the confines of doctrine or their particular specialization. However, Epstein demonstrates

that the ability to synthesize disparate streams of information and discern order from disorder is not a natural phenomenon. *Range* must be purposely inculcated and encouraged to reap its rewards. As such, the implementation of Epstein's principles into the Marine Corps' education and talent management systems takes a step beyond mere prudence into the realm of warfighting necessity. In short, the Marine Corps will need range—in more ways than one.

Counterargument

The most featured counterargument to late specialization is the inherent risk of perceived failure through wasting time. People like early specialization because “it is a tidy prescription, low on uncertainty and high on efficiency.”²² Across the Joint Force, we thrive on efficiency and the golden career path that leads to success, but as John Boyd describes this thinking, we are only “trying to be somebody” and not “do something.” Experimentation is ordered chaos, but chaos, nonetheless. It is messy and frustrating. It also requires a tolerance for failure and a determination to survive long enough to learn from it. The most important aspect of being a generalist is knowing that “when you move on from an area of work or an entire domain, that experience is not wasted.”²³

Others may argue that we do not have the time and resources to expand the range of all Marines. This is an especially plausible counterargument considering the high turnover rate in the Marine Corps. Yet, this does not excuse a military leader's responsibility to return a more capable and well-rounded Marine to society upon the completion of military service. Taking care of our Marines means instilling a burning desire to consistently seek self-improvement, and this is the true essence of range. By investing in our young Marines, and in the development of range, we not only sharpen the capability of our greatest asset, but we better serve our country by returning members who are critical thinkers, accustomed to complexity, and excel in wicked environments.

This is also not a case against specialization. The world needs specialists, just like it needs generalists. We *should* take advantage of these narrow experts but rely on them for facts, not opinions.²⁴ Rather, we propose “generalism” as a mindset, as a more open approach to self-education and critical thinking. There is no right answer for everything, and under difficult circumstances, as the saying goes, “We don't rise to the occasion, we sink to the level of our education.” Maintaining a generalist mindset enables us to draw on a broad range of knowledge and skills, reduces the novelty of the situation, and enhances our insight as we encounter difficulty.

Conclusion

Range shines a light on the distinction between *kind* and *wicked* environments and demonstrates the long-term benefit of sampling, learning, and training across multiple domains. It proves that although it may be frustrating, counterintuitive, feel like a wasted effort, and delay success in the short-term, we should embrace our creative curiosity and, more importantly, our unlikely path. Not only does this experience increase our ability to think critically, but it grants us greater personal insight and increases our satisfaction in the long run. This broad exploration develops the generalist mindset, generates interdisciplinary thought, and strengthens our ability to tackle wicked problems. This is not only applicable to athletes, musicians, or academics keen on ascending to the peak of their industry but also within the Marine Corps. Especially as it confronts the challenges of the future operating environment and attempts to recruit, train, and retain its best and brightest.

Notes

1. David Epstein, *Range: Why Generalists Triumph in a Specialized World* (New York, NY: Riverhead Books, 2019).

2. Ibid.

3. Ibid.

4. Ibid.

5. Ibid.

6. Ibid.

7. Ibid.

8. Ibid.

9. Ibid.

10. Ibid.

11. Ibid.

12. Ibid.

13. Gen David H. Berger, *38th Commandant's Planning Guidance*, (Washington DC: 2019).

14. Ibid.

15. *Range*.

16. Michael J. Colarusso, Kenneth G. Heckel, David S. Lyle, and William L. Skimmyhorn, *Starting Strong: Talent-Based Branching of Newly Commissioned U.S. Army Officers*, (Carlisle: Strategic Studies Institute, 2016).

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18. *Range*.

19. Officer Personnel Management Directorate, *Assignment Interactive Module 2.0 (AIM 2)*, (Washington DC: U.S. Army, Human Resources Command, 2017).

20. *38th Commandant's Planning Guidance*.

21. R. Evans, host, “Learn like a Marine,” *War on the Rocks* (podcast), August 18, 2020, <https://warontherocks.com/2020/08/learn-like-a-marine>.

22. *Range*.

23. Ibid.

24. Ibid.



The Impulse of Victory

reviewed by Maj Skip Crawley USMCR (Ret)

"The literature of the [Civil] war provides the interested reader with no shortage of controversy ... Every battle and campaign seemingly produced its share of disputes. Certainly, Chattanooga generated a vast amount of such debate. Sorting out fact from fiction and trying to lay bare what really happened can be a thankless task."

—The Impulse of Victory:
Ulysses S. Grant at Chattanooga

In *The Impulse of Victory: Ulysses S. Grant at Chattanooga*, David A. Powell utilizes the Battle of Chattanooga as a case study for Grant's generalship while also sorting fact from fiction regarding various aspects of the battle. Powell illustrates how Grant's "impulse of victory" took an apparently hopeless situation—an entire Union army decisively defeated and surrounded by Confederates entrenched on the high ground around it—and turned it into a decisive victory with the "remnants of [the Confederate] army in headlong retreat toward Atlanta."¹

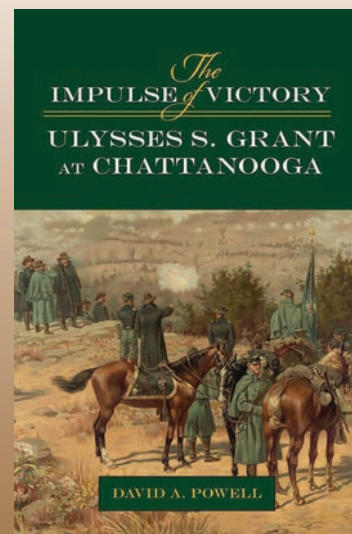
Background

After the twin victories of the Army of the Potomac at Gettysburg on 3 July 1863 and Grant's Army of the Tennessee at Vicksburg on 4 July 1863, Union morale was high. There was great optimism that the Army of the Cumberland under MajGen William Rosecrans, who had just driven Gen Braxton Bragg and his Confederate Army

>Maj Crawley is a former Infantry Officer who served during Operation DESERT SHIELD/DESERT STORM. He is currently the Central Region Network Coordinator for the Marine for Life Program.

of Tennessee out of Middle Tennessee and captured the city of Chattanooga, would "give the finishing blow to the rebellion." Rosecrans' campaign to do so started off well. However, Bragg, reinforced by troops from Lee's Army of Northern Virginia:

struck Rosecrans with tremendous force on September 19 and 20 in the battle of Chickamauga ... Rosecrans's army was broken and driven off, and it escaped actual destruction only because of a fabulous last-ditch defense directed by General George H. Thomas, who kept the defeat from becoming a total rout. By September 22 the badly beaten Army of the Cumberland was



THE IMPULSE OF VICTORY:
Ulysses S. Grant at Chattanooga. By David A. Powell. Carbondale: Southern Illinois University Press, 2020. ISBN 9780809338016, 264 pp.

back in Chattanooga, hemmed in by triumphant Confederates and beginning to wonder whether it was ever going to get out alive.²

In fact, so hopeless did the situation appear, that the Confederates "looked upon the garrison as prisoners of war" as they peered down from their seemingly impregnable position atop Missionary Ridge.³

Union Response

Back in Washington, the War Department took drastic action. Grant was appointed the Commander of a new Military Division of the Mississippi, giving him command of almost all Union troops west of the Appalachian Mountains and the overriding objective "to rescue the Army of the Cumberland at Chattanooga." Reinforcements from the Army of the Potomac under MajGen Joseph Hooker and MajGen William Tecumseh Sherman's Army of the Tennessee (Grant's

old army which he had led during the Vicksburg Campaign) were dispatched to Chattanooga to raise the siege. Lastly, Rosecrans was relieved of command and replaced by Thomas.

On his journey to Chattanooga to take command, Grant crossed paths with Rosecrans. As Grant later recalled in his memoirs:

[Rosecrans] came into my car and we had a brief interview ... in which he described very clearly the situation at Chattanooga, and made some excellent suggestions as to what should be done. My only wonder was that he had not carried them out.⁴

Grant arrived in Chattanooga “wet, dirty and well,” as was reported to the War Department, and immediately set things in motion to salvage the situation and seize the initiative from the Confederates. Four days after Grant’s arrival, key positions were wrested from Confederate control which “reestablished a viable supply route for the Army of the Cumberland”⁵ called the “Cracker Line.” Even before the Army of the Cumberland was back on full rations, Grant started thinking about how to maneuver the forces at his disposal to raise the siege.

The inaction of Rosecrans and his subordinates to do anything to improve their position contrasted with Grant’s quick, decisive action upon arriving on the scene is a good example of what is meant by “the impulse of victory.” Rosecrans and his subordinates planned but did not execute the necessary actions to raise the siege of their Army. Grant acted:

A junior Union officer spoke for most when he said that when Grant came on the scene “we began to see things move. We felt that everything came from a plan.”⁶

The Battle of Chattanooga: The Plan

Grant’s scheme of maneuver consisted of three elements. The main attack would be conducted by Sherman assaulting the right flank of the Confederate position to capture Tunnel Hill, the anchor for the Confederate right. Grant intended for Sherman to roll up Bragg’s right flank and compel him to retreat from the commanding

heights of Missionary Ridge. Hooker and his troops would attack the left flank of the Confederate position at Lookout Mountain, higher in elevation than Missionary Ridge. As with Sherman, Grant intended for Hooker to roll up the Confederate left flank. Thomas’ soldiers of the Army of the Cumberland would make demonstrations toward Missionary Ridge to keep Bragg from thinning out his main defensive line on top of Missionary Ridge to reinforce his flanks. The potential existed that “[i]f Bragg shifted troops from the center to reinforce his flanks, then Thomas could storm forward and carry Missionary Ridge against a depleted Confederate force.”⁷

As is normal in war, things did not go according to plan. Sherman completely botched his attempt to roll up Bragg’s right flank. Despite a large ad-

***As is normal in war,
things did not go according to plan.***

vantage in numbers, Sherman “never captured Tunnel Hill,” a direct result of his poor battlefield generalship. Post-battle, to cover up his poor generalship, Sherman claimed that at one point he was expecting a Confederate *attack*, which was the last thing on the minds of the Confederates defending the right flank of Bragg’s line—and certainly the last thing on Grant’s mind. Even when Thomas’ men had taken Missionary Ridge and were in the rear of the Confederates defending Tunnel Hill, Sherman still would *not* move forward.

Fortunately, while Grant’s plan unraveled for the main attack, it unraveled in the right way on the other flank and in the center. Hooker and his soldiers from the Army of the Potomac captured Lookout Mountain, in what became known as the “Battle Above the Clouds,” and started rolling up Bragg’s left flank. At about the same time, to take the pressure off

Sherman, Grant gave orders for 4 divisions of Thomas’ Army of the Cumberland—24,000 troops—to take the first line of rifle pits that the Confederates occupied at the base of Missionary Ridge, but by no means were they to attack up to the ridge itself. However, the soldiers of the Army of the Cumberland did not stop at the rifle pits but advanced all the way up to the crest of Missionary Ridge and sent Bragg’s army in full retreat—just as his army had done to them nine weeks before at the Battle of Chickamauga.

The Battle of Chattanooga: Myth Versus Reality

Assault on Missionary Ridge

There has been a lot of misunderstanding as to why Thomas’ soldiers seemingly disobeyed their orders and continued to attack up Missionary Ridge after taking the initial rifle pits. One myth is that the soldiers were tired of being laughed at by the soldiers of the other armies sent to rescue them; so, they spontaneously assaulted Missionary Ridge to prove their fellow soldiers wrong. Reality is somewhat more straightforward.

In one sense, the soldiers had no choice but to advance. Staying in the former Confederate rifle pits at the base of Missionary Ridge “offered no protection from the plunging fire” of Confederate artillery batteries on top of Missionary Ridge. As one regimental historian stated, “It was destruction to remain, it was impossible to withdraw without confusion and great loss.” Furthermore, there was confusion among the generals commanding the divisions and brigades assaulting Missionary Ridge as to “whether it was the first line to be carried or the ridge.” One division commander sent an aide back for clarification of their orders. One brigade commander understood that they were to advance all the way up Missionary Ridge; therefore, his brigade continued to move forward past the rifle pits. When other brigades and divisions saw this—coupled with the soldiers’ desire to move out of the deadly Confederate artillery fire—“all four divisions surged up the ridge.”

The above explains why the soldiers attacked all the way up Missionary Ridge, but how did they succeed in carrying a position that Grant himself considered to be impregnable?

Previous books I have read concerning the Battle of Chattanooga assert that Bragg thinned out his main line atop Missionary Ridge to reinforce his right flank to defend against Sherman's attack. However, Powell makes a convincing case that, in reality, Bragg did not send substantial troops to his right flank. Instead, Bragg's "defensive scheme ... was a recipe for disaster." Commanders "were directed to leave half their manpower at the foot of the ridge [where the rifle pits were] and the other half on the crest." Moreover, the Confederate soldiers "were ordered to avoid a standup fight in front of the ridge." Faced with 24,000 Union soldiers converging on their rifle pits, the Confederates manning the rifle pits "delivered a scattering volley ... and immediately broke and fled up the hill." "The confusion infecting the Confederates holding the lower line did not abate once they reached the upper line of entrenchments" on the crest. This and the attackers' momentum resulted in the Union soldiers taking Missionary Ridge. In short, if Bragg had put all of the 14,000–16,000 men he had available to defend Missionary Ridge on the top of the ridge, vice half in the rifle pits and half on the ridge itself, the attack would not likely have succeeded.

Sherman's Failure as A Combat Leader

Powell makes a convincing case that "Sherman stumbled badly at Chattanooga." "The dawn attack [against Tunnel Hill] Grant expected never materialized and eventually turned into a series of feeble, piecemeal jabs against a prepared enemy position that produced serious losses for no gain. When Grant forcefully demanded that Sherman renew his attack to support Thomas's surprisingly successful ascent of the ridge, nothing came of that order either." So why has Sherman's reputation not been

adversely affected? Because "it was ... in keeping with his [Grant's] character, to whom loyalty counted for so much, to excuse Sherman's stumbles." "He never received a word of criticism or blame for his multiple missteps ... from Grant."

Battle Above the Clouds

While romanticized soon after the Civil War, modern history has not been kind to the so-called "Battle Above the Clouds," agreeing with Grant's view of the battle: "The battle of Lookout Mountain is one of the romances of the war ... There was no such battle, and no action even worthy to be called a battle on Lookout Mountain. It is all poetry." In fact, as Powell notes, Hooker's energetic attack on Lookout Mountain and its subsequent exploitation "collapsed Bragg's" left flank and aided the success of Thomas' soldiers' frontal assault on Missionary Ridge. Hooker and his soldiers actually contributed more to the ultimate Union victory than Sherman did—though that is not how history has remembered it.

Grant's Generalship

Powell illustrates very effectively that Grant's generalship "provided real command strengths that tended to be very rare in Civil War Generals." "Grant demonstrated a doggedness in his maintenance of the overall objective, tactical flexibility, and perseverance in the face of setbacks ... he never suffered from that failure of nerve that ... gripped other commanders." In short, Ulysses S. Grant had "those qualities ... [that] are critical hallmarks of a great commander."

I readily agree with Powell's assessment. In my opinion, the only real failing of Grant's generalship during the entire Chattanooga campaign was his unwavering, but unfortunately, mistaken belief in the tactical abilities of his close friend, Sherman.

Conclusion

I always enjoy reading a book where I learn something new about historical events or notable historical figures I am already familiar with.

David Powell's *The Impulse of Victory* fits into this category. Powell's careful analysis of facts separates myth from reality in the Battle of Chattanooga and gives the reader a more accurate view of what took place and why. The main benefit of Powell's book for most readers of the *Gazette* is probably in its value as an examination of how Grant's leadership in a seemingly intractable situation and his "impulse for victory" turned that situation into a decisive victory. However, it is also an interesting and informative account of the Battle of Chattanooga—the battle that launched Grant to be General-in-Chief of all Union armies in 1864. I highly recommend *The Impulse of Victory: Ulysses S. Grant at Chattanooga* for both types of readers.

Notes

1. Jean Edward Smith, *Grant* (New York: Simon and Schuster Paperbacks, 2001).
2. Bruce Catton, *Grant Moves South* (New York: Open Road Media, 2015). Missionary Ridge is Southeast of the city of Chattanooga. The soldiers of the Army of the Cumberland could look up at Missionary Ridge directly in front of them.
3. I once stood on top of Missionary Ridge looking down at the city of Chattanooga. A person can easily see why conventional wisdom said Missionary Ridge was impregnable.
4. *Grant*.
5. *Ibid*.
6. *Ibid*.
7. *Ibid*.



Washington's Marines

reviewed by Col Eric L. Chase, USMCR (Ret)

Author MajGen Jason Q. Bohm, current Inspector General of the Marine Corps, starts with his modest promise that *Washington's Marines* is about "providing another view of the [Corps'] humble beginning and ... small, albeit important, contribution to creating and preserving a great nation." Put another way, during the first two years of the Revolutionary War, through the pivotal back-to-back Battles of Trenton and Princeton, Marines were vital participants in most engagements, on land and aboard vessels, but hardly the Americans' primary warfighters. But for those early contests and the Marine contributions to them, Bohm suggests, there would have been no United States by the end of the 18th century and certainly no Marine Corps.

Bohm's work thus stands as a welcome contribution to how the Corps' history began with America's founding war. By design, except for the epilogue, *Washington's Marines* ends its land combat coverage in early 1777 because "Princeton was the last time Marines received an assignment to conduct a land campaign under General Washington or the Continental Army." The compelling, often riveting, story unfolds in the first 90 pages with only scant Marine references, with the exception of the Corps' founding on 10 November 1775 "for services with the fleet," and recurrent recruitment efforts at and near Tun Tavern in Philadelphia. The overall war coverage throughout is superb, well-crafted, and descriptive.

Initially, Washington himself had opposed the formation of a Marine

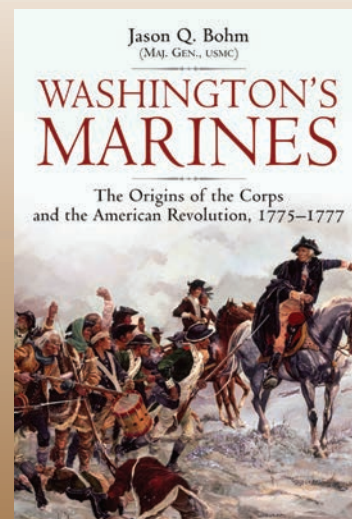
>Col Chase, an Attorney in private practice in New Jersey, served as an Infantry Platoon Commander in Vietnam and retired after more than 30 years of active and reserve service. He is a Distinguished Author of the Marine Corps Association and Marine Corps Gazette.

organization. He wrote: "[T]he Resolve to raise two Battalions of Marines will ... entirely derange what has been done." His trepidation was not well founded or accepted by the Continental Congress, and the small contingent was born. For the whole of the war (1775–1783), only "231 officers and approximately 2,000 enlisted men served honorably as Continental Marines." Thus, while Bohm enlightens readers about *where and when* Marines served from 1775 into 1777, the

Bohm's work thus stands as a welcome-contribution to how the Corps' history began ...

narrative includes no specific descriptions of their fighting, although it was surely intense and noteworthy.

Marines came to play an integral but always subordinate combat role within the American ranks, led on land by Washington (often literally at the front of the fighting, astride his horse) and by subordinate Army and Navy commanders. Names of



WASHINGTON'S MARINES:
The Origins of the Corps and
the American Revolution,
1775-1777. By MajGen Jason Q.
Bohm. El Dorado Hills, CA: Sa-
vas Beatie, 2023.
ISBN 978-1611216264, 360 pp.

Marine officers and men appear frequently in the text, but details about their actions are scarce or often lacking altogether. Written historical records by participants in revolutionary battles were crafted and maintained only sporadically, and most of the enduring combat reports describe Washington and other Army or Navy personnel—not Marines. By far, the single most prominent Marine was Captain-then-Major Samuel Nicholas, the Corps' first officer, sometimes described as the first and only Commandant of Continental Marines (although he was never a Commandant), who seemed to be physically in or near early combat, leading his Marine battalions. Neither he nor any Marine served above Nicholas although there were many officers above that rank in the Army and Navy.

Bohm's elaborate, well-footnoted research and descriptive talent make

Washington's Marines a worthy read for anyone interested in where Marines fit into early Revolutionary War history. Moreover, Bohm captures the reality that the war could easily have gone the other way. The British were poorly led and failed to seize obvious opportunities. By contrast, Washington grew in his leadership strengths to become a brilliant battlefield general, and the Marines were there to help him. He also inspired abiding loyalty and devotion from his men, persuading many of them to continue beyond their enlistment agreements and to boldly confront the world's leading military organization.

At least two unique reasons emerge to distinguish this volume from other histories. *First*, as promised, Bohm places Marines at the scenes of key battles, especially Trenton and Princ-

Johann Gottlieb Rall, and his troops were surprised and overwhelmed. In a few hours of fighting in and around Trenton, the Americans took 896 prisoners and killed several of the enemy. Rall died of his wounds a few days after the battle.

Washington then chose among several strategic alternatives to advance to Princeton. All odds of weaponry, manpower, training, and the defensive advantage favored the British there, but Washington's leadership, brilliant planning, tactical spontaneity, and his own personal bravery in contact with the enemy motivated his troops to overcome the intimidating odds. Washington had an intuitive sense to place his units, including Marines, at the times and locations most critical to the outcome. After victory at Princeton, however, Marines

in which Marines had an important role. These early years and two battles set the stage for the outcome, as the Americans went from defeat after defeat in the first months of the war, to the emergence of Washington's stellar leadership, victories at Trenton and Princeton, and decisive actions by Americans, in the face of an evermore fumbling and less aggressive British foe. Although the Continental Marines disbanded at the end of hostilities with England, starting in 1798 and thereafter, Congress would establish "the United States Marine Corps as a separate and permanent branch of military service." Bohm successfully achieves his goal of placing Marines at battle scenes in the first two years of the Revolution. These warfighters were indispensable to the creation of both the United States and the Marine Corps. Given the paucity of surviving contemporary historical records by and about Continental Marines in 1775–1777, Bohm's contribution will be an enduring one. *Washington's Marines* is an invaluable addition to the resources that Marines of all ranks will appreciate in understanding how the legacy of their Marine Corps came to be.



Bohm successfully achieves his goal of placing Marines at battle scenes in the first two years of the Revolution.

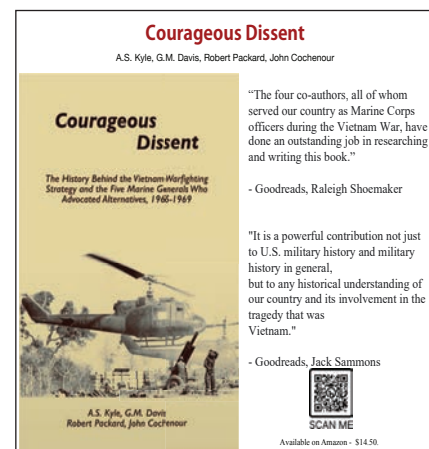
eton, where Washington's men likely turned the tide of the war from an expected easy British victory to the ultimate upset. Bohm's storytelling power is notable in these battles and their aftermath.

The Delaware crossing and victory at Trenton are well-trod history. According to Frederick the Great, "the achievements of Washington and his little band of compatriots between the 25th of December [1776] and the 4th of January [1777], a space of ten days were the most brilliant of any recorded in the annals of military achievements." Bohm's descriptions of Washington's intricate planning, legendary personal courage, intelligence gathering, the stealth of his subordinate commanders and troops in the famous Christmas 1776 crossing, and the one-sided outcome (the Americans suffered *zero* battle deaths at Trenton) will intrigue even the most historically savvy readers. England's over-confident Hessian leader, Col

"primarily reverted to their principal duties of guarding naval institutions ashore, providing ships' deployments at sea, and leading landing parties."

Second, Bohm takes the unusual but highly informative step of comparing Washington's 18th-century campaign strategies and battle tactics to Marine warfighting doctrine and principles today. That analysis confirms Washington's prowess in devising plans that enabled his forces to overcome his enemies' daunting advantages. It also corroborates the timeless enduring values of basic warfighting study and practices, with historical evidence spanning centuries.

The official end of the American Revolution came with the Treaty of Paris, signed on 3 September 1783. More than six years had passed since the Battles of Trenton and Princeton within two weeks at the end of 1776, and the start of 1777. *Washington's Marines* focuses almost entirely upon early revolutionary events





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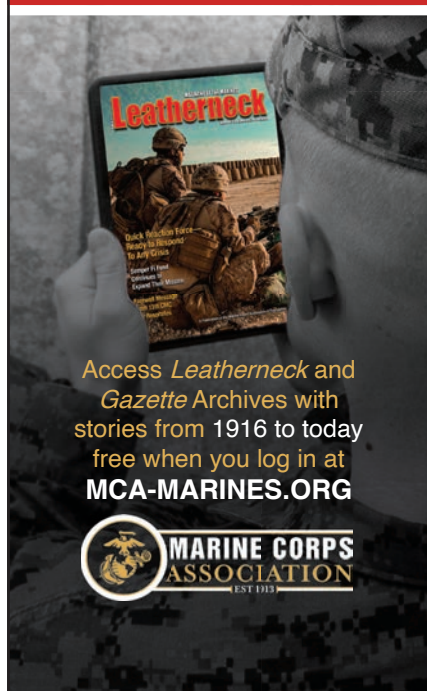
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