Building a Culture of Loyalty

The foundation of talent management and preserving institutional longevity

by Col Keith Couch

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I recently read a piece titled "Challenge yourself to build a culture that inspires loyalty."[1] Although brief, that blog told the story of a well-known New England supermarket chain and how its highly respected and revered CEO was dismissed by the company's board of directors. On the surface, that tidbit of information does not seem all that uncommon. In fact, company boards make those types of decisions everyday with little to no fanfare. However, this situation was to be quite different and what happened next was profound. The blog conveys the story of how many of the loyal customers of this supermarket chain suddenly began to shop elsewhere. In fact, they took this one step further and even began to protest the loss of the CEO. Customers began posting their receipts on the store windows, overtly showing where they were now shopping. It did not stop there either as even the vendors now stopped deliveries to the chain. Now, by any measure of a leader's impact on an organization, this type of loyalty seems almost unattainable or based on some sort of fictional story. However, I can tell you this story is true, and it conveys the notion of an organizational climate that many not only hope to part of but also, as leaders, it conveys an environment we want to imbue and do so in such a way that those we lead would react similarly.

Unfortunately, this type of environment is rare, and sadly, very few leaders attain such a culture within their organizations, especially one that would inspire this type of intense loyalty. In fact, it is likely many have not nor ever will see this most powerful display of loyalty to leadership. However, as this story demonstrates, there is a glimmer of hope—thus re-enforcing the notion that striving for and creating this type of culture in the workplace, no matter the organization, should be a priority of any leader, regardless of their level of management. Failure to do so could garner a similar reaction to that of the supermarket chain, potentially proving detrimental to your organization. As proof, one need only do a quick *Google* search to find additional citing of this notion. In fact, there has been research and studies performed that show how failed leadership or an environment that breeds disloyalty has hugely negative impact across, up, and down an organization.

> ***... the quality that really matters most is their ability to build and engage teams ...***

For instance, an article published in the *Harvard Business Review* notes that "the top causes of disengagement and most widely-cited reasons underlying turnover intentions all have to do with people's direct manager."[2] Compounding this problem is the fact that most leaders "are selected for either technical expertise or personal charisma, when the quality that really matters most is their ability to build and engage teams."[3] These types of leaders are most often more concerned about themselves than their team, putting their personal needs above the group-narcissism at its finest and a poisonous mixture for any environment—especially one striving to keep talent. Although written a few years ago, the articles premise remains valid. This type of leadership will not only have a negative effect on the bottom line but will also tear away at the very fabric of the organization-impeding the ability to recruit, hire, and retain talent. Ultimately, it will chip away at the very foundation that determines an organization's success or failure. Like the gravitational pull of a large planet or star, leaders and organizations that maintain a culture of loyalty create a force that acts from both far away to attract and up close to retain the best and brightest talent.

Conversely, and in my experience, organizations that have fundamentally failed to create this type of culture—this gravitational pull for talent—almost always repel talent, creating an atmosphere where those in the organization want to leave, and those outside it fight to stay away. Given these realities and the consequences of failure, how can leaders, managers, and organizations create a culture of loyalty-becoming talent magnets that attract and keep the organizations best and brightest? This article explores the notion of organizational loyalty and how to build, cultivate, and sustain it—all while recognizing its importance and the consequences of not having it within your organization. Where and how should one begin this endeavor? Well, as they say, first impressions are everything!

Organizational Transparency, From Beginning to End, Must be Consistent!

There is a saying, "you never get a second chance to make a first impression," and its earliest use was noted in a 1966 ad for "Botany Suits." This somewhat simple message not only transcends time but has wide-ranging applicability; particularly when one considers the depths of the human psyche and the finality implied in its premise. Consequently, even at its most basic level, the impact a first encounter or a first experience has in developing a lasting and meaningful impression cannot be overstated. In fact, research substantiates and reinforces this notion whether in the context of human interactions with each other or, perhaps, an organization that overpromises during the recruitment process only to ultimately underdeliver during the hiring/onboarding process. The beguiling promise of benefits, possible promotions, and the many overblown expectations generated during recruitment can lead to a perceived smack in the face. This "setting of expectation" during the early stages of the hiring process is the reality that ultimately leads to disappointment down the road.

Unfortunately, this type of disappointment, or buyer's remorse, builds a wall of resentment that even the most dedicated and talented leader or manager potentially fails to overcome. In fact, "a 2016 *Glassdoor* survey stated that 90 percent of job seekers say that it's important to work for a company that embraces transparency."[4] However, the report also suggest that "only half of U.S. workers feel their employer is open and upfront with them," and that "becoming more transparent ... will lead to a healthier and more honest workplace ... as well as motivate employees to stay for the long-haul."[5]

... a tribe represents a connection and a bond that is familial in nature ...

Consequently, it is more important now than ever before to ensure, in an environment in which the fight over talent is escalating, your organization and its leadership create an atmosphere, from beginning to end, that is "as advertised," consistent, and positive. Foundationally, this type of environment is critical and ultimately creates a first impression that carries over to form a lasting sentiment for that employee throughout their tenure. After this groundwork is established, what can leaders and managers now do that will help transform employees into loyal advocates and dedicated teammates within the organization, all while becoming devoted to their team members in such a way as to resemble a "tight-knit" family?

Build a Tribe-Establish Trust By Knowing and Valuing Your People

More than just a group bound by specifics, a tribe represents a connection and a bond that is familial in nature with a strength not easily broken or penetrated by outsiders. In the context of the larger organization, I consider tribes as groupings of small towns intertwined within a larger city. The connection, or bond, is multi-dimensional with regard to whom and what it includes and the ties that bind them. At a basic level, and in the words of Seth Godin, "a tribe is a group of people connected to one another, connected to a leader, and connected to an idea."[6] Consequently, as a leader, it is up to you to cultivate the connective tissue, influence the culture, and set the course. That journey, as alluded to earlier, will begin with the establishment of trust. Trust is the hardest to gain and the easiest to lose, which is why it must remain at the core of your interactions. Its fundamental development and sustainment must be the priority.

To begin the process of building trust, members of your tribe must know who you are, what you stand for, and where you aspire to go. Consequently, you must invest an equal amount of time getting to know each tribe member personally. You must be genuine, open, honest, and consistent with your message, personality, and your treatment of others—there is no room for favoritism as a leader as it will undermine everything you have built. Ultimately, each member must know that you value their personal success, development, input, work, and most importantly them as a person. The bond created by this type of connection will transcend the workplace, as it does within most family environments, whilst creating a solid foundation for a close-knit tribe. The next step is building upon that trust by developing a workspace that invests in its people and seeks to create a culture that supports long term positive relationships!

Develop the Environment-Invest in People and Culture

There is no single theorem or magic formula that provides an all-inclusive roadmap showing leaders and managers a path to follow that ensures their team members, or tribe, relate to each other as members of a family. In fact, most organizations/institutions are put together in such a way as to develop along with the ever-changing environments in which they exist. In other words, a one size fits all approach will likely not work. For this reason, establishing an environment that instills a system to normalize and mandate positive relationships between leaders and team brings about an atmosphere that is not only harmonious and balanced but also enduring and widely applicable. Ultimately, creating an environment that is rewarding, both personally and professionally, facilitates a sense of belonging; improves work output; improves overall morale; and is critical to developing a culture of loyalty. For instance, leaders that take an interest in helping their team members with things such as career planning and development, identifying long-term career goals, continuing education while ensuring a healthy work-life balance, or, perhaps, cultivating a "promote from within the organization first" organizational mindset are all on the right path. In fact, it is exactly this type of personal interest into each employee and the tribe that reinforces to each member of the organization their worth and their future in the organization—portraying in no uncertain terms that there is a path to success here and that the organization does care.

Equally as important as reinforcing those strong team connections forged in the workplace are those connections honed outside company walls. The balance of work and play interaction is critical and pays huge dividends as each team member is embedded and personally connected within the tribe, creating a familial environment—thus, strengthening the bond both individually and collectively. Combined with a culture of transparency and trust, the combination of personal and professional compatibility and comfortability at work is a large part of what ultimately, firmly bonds someone to an organization. In fact, "the closer the fit between the employee,"[7] their organization; and the tribe, "the stronger the links ... and the greater the potential sacrifice of leaving both, the more 'embedded' the person is"[8] and the less likely it is they will leave. In essence, leaving this job would now not just be leaving an office, building, or a company; it would entail leaving many of the things one values or even loves—personal and professional ties, friendships, social life, and a positive work environment to name a few. The more "tight-knit" the culture of the group the more challenging it will be for team members to leave. In theory and practice, creating this type of loyalty will help solidify an organization's future survival in the face of a highly competitive global business landscape where people make the difference. Once created, however, the job does not stop here; it takes work to develop this type of environment and maintaining it can be even harder!

Preserve What You've Built: Inspire, Recognize, Empower

Once you develop an environment that is transparent, bound by trust, values its people, proactively takes interest in their lives both personally and professionally, and provides clarity of purpose and vision, the next step is to preserve that which was not easily gained. As leaders and managers, we must always strive to be worthy of the loyalty we seek; we must present the model of that which we expect and "lead by example." There must be no doubt of your commitment to the welfare of each member of the tribe; this fact should be on full display, whether it is said in a conference room, symposium, one-on-one mentoring session, or in the organizational vision statement. This type of proclamation, coupled with a positive leadership example, will inspire the team. They know that not only will you be the champion of their welfare or biggest advocate, but you will also be there beside them in the trenches when times are toughest.

Hand-in-hand with this sentiment is the recognition of both team and individual performance. Affording both individuals and teams the ability to share in overall successes is another key element to instilling loyalty. As a leader, you should seek out any opportunity that allows you to reward the type of actions and performance you desire instilled throughout the tribe. This should be on a recurring basis, expected, and celebrated as teammates understand they are valued in both word and deed. This type of recognition costs very little but is pure gold with regard to the morale, esprit, and loyalty it garners.

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The final opinion I offer with regard to preserving the environment is the notion of empowerment. Without fail, most of the great leaders you read about, work with, or work for have placed their people in positions that further their development. These humble, servant leaders share their status with the team, delegate authority, and develop a sense of shared responsibility all whist creating a wonderful workspace. A recent *Wall Street Journal* article says it best by stating "humility is a core quality of leaders who inspire close teamwork, rapid learning and high performance in their teams."[9] Humility in a leader, combined with the other tenants mentioned above, will form the thread that naturally binds together a tribe-filling in any gaps that remain in the tribal fabric, and keeping the entire garment connected. If done correctly, this tribal fabric is woven tightly and densely with more than just a loosely sewn motto, a sterile slogan, or an unenergetic leader; it will be sewn with a familial thread not easily cut, torn, or pulled apart. With the tribe in-tact, what is next?

Recognize and Cultivate or Perish-A Strategic Imperative for Organizational Longevity

With the tribal garment now woven tightly together and the conditions set for a culture of loyalty to thrive, it is now up to the broader organizational leadership to recognize the imperative of this type of environment and to cultivate its values enterprise-wide. Silos of loyalty, although better than nothing, should not be the goal. In a perfect world, the organization recruits and retains the type of leaders and managers that build this type of environment and understand its importance. Moreover, they set the "organizational tone" from the beginning in strategy and vision while re-enforcing this culture throughout the enterprise at every opportunity. Gone are the days where organizational talent management can rely on a well-known brand, a fancy slogan, or recruitment and retention strategies based on what amounts to little more than an afterthought on how best to attract and keep talent. Talent management cannot be just a numbers game any longer; it must be part of the overall organizational strategy—a commitment to recruit, hire, develop, and retain the best and brightest while avoiding the idea of one isolated tribe within the larger collective. The entire organization must become one large tribe. Organizations can no longer afford to let talent seep away—the cost of developing is high, and the experience they possess in most cases cannot be replaced. Furthermore, the intrinsic value they bring is not easily measured, and the potential to fall behind the competition because of the loss is greater now than ever before. Fully integrating talent management throughout, from top to bottom at every level, while empowering and encouraging everyone is the only way to truly be effective—every voice within an organization could and should be a "cheerleader." In the end, it will be those "many" voices that are willingly part of the fabric of the tribe, make up the foundation of the organization, and ultimately form the "loyalty glue" that binds it together and ensures longevity.

Notes

1. Walt Trakowich, "Challenge Yourself to Build a Culture that Inspires Loyalty," *Walts Blog*, (December 2016), available at https://waltrakowich.com.

2. Tomas Chamorro-Premuzic, "Toxic Talent Management Habits," *Harvard Business Review*, (July 2014), available at https://hbr.org.

3. Ibid.

4. James Clark, "5 Reasons to Make Your Talent Management Strategy More Transparent," *Datis*, (July 2018), available at https://www.datis.com.

5. Ibid.

6. Seth Godin, *Tribes: We Need You to Lead Us*, (New York, NY: Penguin Group, 2008).

7. Lauren Keller Johnson, "A New Approach to Keeping Your Best on Board," *Harvard Business Review*, (February 2008), available at https://hbr.org.

8. Ibid.

9. Sue Shellenbarger, "The Best Bosses Are Humble Bosses," *Wall Street Journal*, (October 2018), available at https://www.wsj.com.

Civilian-Marine Talent Management

Applying equal rigor to the civil service workforce

by Capt Abe Male

The Commandant's vision for *Force Design 2030* discusses the sweeping changes the Marine Corps must make to combat our pacing threats. Our senior leaders have released dozens of strategic documents detailing and justifying the vision for the Marine Corps in 2030 and the hard decisions required to get us there. However, there is one crucial problem that is being overlooked that will continue to prevent us from accomplishing our goals: our byzantine talent management system for civilian Marines. It is no secret that it is not only possible but probable that America could lose the next war against a peer threat. Just as the Service tirelessly drives to reform military talent management to compete, we need the same rigor applied on the civilian side.

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> ***The Marine Corps employs over 35,000 civilians, which is more than many Fortune 500 companies. The dozen or so HQMC organizations ... that lead our Service are a majority civilian workforce.***

I am a reserve Marine who has spent the last decade in private industry doing management consulting, investment banking, corporate strategy, and running the finance and operations of a startup. I was given the opportunity to activate for two years at HQMC in the Pentagon working on modernizing our network and information technology. I was fortunate enough to get to work on many fascinating problems with great leaders, but none struck me as so crucial, so broke, and so antiquated as our civilian talent management system. The scariest part is this third rail of public conversation never gets talked about in an official capacity. It is a vital issue that our leaders will only talk about behind closed doors and yet so many know to be a tremendous problem.

There are many ways to begin reformation, such as term limitations (similar to Defense Advanced Research Projects Agency or Defense Digital Service), a better evaluation system, and a simpler and quicker hiring and termination system. This article will not explore in depth the numerous possible solutions. Rather, it will focus on the imperative of reforming civilian talent management if we are to climb our way back up the technology curve and assure military dominance over a peer threat.

The Marine Corps employs over 35,000 civilians, which is more than many Fortune 500 companies. The dozen or so HQMC organizations (the Deputy Commandants and others) that lead our Service are a majority civilian workforce. Each organization in HQMC varies, but a typical table of organization (T/O) for a HQMC organization might have roughly 2/3 of the organization made up of civilian general schedule (GS) employees with the remainder military. Often there are contractors thrown in the mix depending on the need. This model keeps more Marines in the fleet where they are needed most and provides vital continuity and specialization. But what it also means is that we must, as a Service, pay an equal amount of attention to our civilian talent management as we do to our military talent management. These are the organizations that provide the manning, training, strategy, policy, equipment, and ultimately enable the fleet to accomplish warfighting. The *38th Commandant's Planning Guidance* (2019) spent pages talking about the manpower reforms the Service must make to military talent management, but not one word was uttered about the talent management of the 35,000 civilian Marines enabling the entire force.

The work of civilian Marines is vital to mission accomplishment, and this article by no means should be construed to attack the important role they play for our Corps and country. The fact of the matter, however, is there exists numerous issues with the human resources (HR) system. First, it makes hiring and recruitment exceedingly difficult by taking so long to recruit and select talent that highly desirable applicants often move on by the time an offer is extended. Second, the HR system does an ineffective job at promoting the most effective employees. Third, and most importantly, the current system does a poor job of weeding out sub-par talent. On the military side, we identify and process out low performers roughly every four years. Marine officers who consistently fall in the bottom third for performance will be thanked for their dedicated service and separated. Conversely, on the civilian side, job security is legendary. There is no mechanism to identify the strongest and weakest performers, and even if there were such a mechanism, there would be nothing the Corps could do about it. Civilian GS employees are not ranked against their peers, and the typical performance evaluation does not allow the Service to identify top and bottom talent enterprise wide.

Civilian GS performance evaluations only allow three grades: one, three, and five. It is essentially pass or fail. A one means fail and will likely lead to the employee being put on a performance improvement plan. It also means employee relations will get involved. A manager cannot assign a one without significant warning and documentation. For this reason, managers almost never give a one. It is much easier to just give the employee a three (meets expectations) and find someone else to do the work. Fives mean the employee exceeded expectation, but there is no limit to the amount of fives or threes you can give out. Unlike many private companies, there is no quota that requires a percent of employees must get a one or only a certain amount of fives can be given. The result is virtually everyone receives a three or a five, and top and bottom performers remain unknown.

Without any mechanism to effectively identify top and bottom talent, there is no way to process out low performing or even counterproductive employees. Sub-par performers may only meet the bare minimum expectations and, barring gross misconduct, remain in their position for decades. The ramifications of this is almost incalculable because as time goes on the competence curve bends further and further away from where it needs to be. The system has nurtured and continues to compensate a workforce that no longer has incentive to perform. Why do we accept for our civilian Marines what we would never tolerate for our uniformed Marines? In the private sector, no successful company would maintain a system like this. There must be a mechanism to identify top and bottom talent for our civilians so that we can weed out the bottom and promote and retain only the best.

In response to this critique, an HQMC HR professional would likely defend the system by correctly pointing out that all GS employees receive annual performance evaluations. If managers identify an employee who is not meeting expectations, it should be documented, and the employee can be put on a performance improvement plan. If performance does not improve, then the employee can eventually be separated. However, in reality this is a Herculean task, and to actually accomplish it, managers would need to suspend large swaths of productive work time in order to manage the work improvement action plan.[1] Thus, the subpar employee now costs the manager even more work. In addition, the time horizon to process out non-performers, is years when it should be months.

During my two years in HQMC, I became keenly sensitive to civilian talent management inefficiencies, especially after my assignments to multiple reorganization efforts for the Deputy Commandant for Information. When I asked senior military leaders (whom I considered mentors) why certain employees who were known to be subpar continued to remain in the organization, lead crucial teams, and remain in their same role, I always received the same discouraging answer: that as a manager or division head our senior officers would have to spend 20–30 percent of their time on HR and disciplinary actions to terminate said employee. It took less effort to work around them than to remove them. I similarly spoke with a HR professional with over a decade of experience in HQMC HR and was told that in all their time they had only ever seen one employee let go for poor performance.

HQMC is a kinetic environment full of short fuse taskers from general officers, the Fleet, and of course one's daily job requirements. While not always the case, military members lead HQMC organizations while the bulk of the workforce is GS civilians. Under this system, leaders simply do not have the bandwidth to dedicate a quarter of their time to HR issues for a single low-performing employee. Making it more challenging is that the civilian GS HR system is not intuitive, and on the military side, leaders have trouble understanding how to best navigate it. Perhaps most disheartening of all, leaders live with the threat of a grievance or employee relations getting involved if they give a poor performance evaluation to an employee. If that same leader wants to move an employee to a role they think would suit the employee and the organization better, they are warned that the new responsibilities might not fall within the employee's existing position description (PD). While a military member can be assigned at will within the organization, a civilian may only be assigned jobs that are specified in their PD. If a PD says the employee must supervise a team and be a branch head, then that is where they stay—even if they fall short of every competence metric. Try to move that employee, and a senior officer will face a grievance (that they will probably lose), and be bogged down in a bureaucratic labyrinth.

Yet another factor preventing top level civilian performance is that military leaders frequently rotate in and out

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Military vs. GS Comparison	Military (Officer)	Civilian GS Marines
Time to transfer to new role	Instantaneous	Situational dependent, must fall within existing PD
Automatic Retention/Promotion Board	~Every four years	None
Can be moved to the point of need	Yes	No, must fall within existing PD
Ranked against their peers	Yes	No
Top and bottom performers are known	Yes	No
System in place to separate if performance is subpar	Yes	Yes, but extremely complex and time consuming
Provides job continuity in the organization	No	Yes

of their HQMC roles. The longest one might expect a military member to be in their role is three years, but it is often much less. Since it can easily take years to separate a non-performing employee given the appeals and grievances processes, any civilian just needs to wait it out, and within a year or two, the colonel or general will be off to a new role. In the few years, they are at HQMC, our senior military leaders are simply not equipped to manage civilian talent given the current talent management system. They have neither the time nor the comprehension of its intricacies and nuances.

It is clear that various issues exist which must be addressed by Service leadership. Just as the Marine Corps depends on a system to identify and retain/separate talent at every level for our military personnel, the Service needs something similar on the civilian GS side. If we are to compete in a modern world against modern threats, we need to modernize talent management to ensure we are only retaining and promoting the most qualified civilians.

Note

1. Separation during the initial probationary period is less daunting of a task. However, it is rarely done and the primary issue centers on employees who are mid/late career.

Improving Selection Boards

Developing a weighted relative value score

by LtCol Roy L. Miner

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In July 2019, Gen Berger, the 38th Commandant of the Marine Corps, published his *Commandant's Planning Guidance*. Within the priority focus area of force design, he addresses an array of personnel topics. One of those topics is fitness reports and the current Performance Evaluation System. There are eight elements related to the Performance Evaluation System that he states, at a minimum, need evaluation to assess whether they merit a change. Of those eight elements, at least six would assist board members in the conduct of their analysis when determining the best qualified Marines for promotion, command, education, or other assignment during a selection board. Additionally, if done correctly, those six elements can be developed into a metric that would reduce the variation of interpretation by individual board members when considering a Marine for selection. Board members use the Master Brief Sheet (MBS), individual fitness reports, and other documents within a Marine's Official Military Personnel File (OMPF) to determine eligibility for selection. It is a large array of data to review and consolidate during a three to five minute brief for other board members to determine if a Marine meets selection criteria when compared to other Marines. Yet, each member of that board will have a different interpretation of elements within each individual OMPF, and when analyzing a MBS, each board member most likely gives different credence and weight to certain data elements than other board members. There is no explicit congruency between board members. One of the byproducts at the root of the Commandant's guidance with respect to evaluating changes in the personnel evaluation system is the investigation into changes within the fitness reports that will make it easier for board members to review and evaluate quantitative data with minimal variation in interpretation. Additionally, with a majority of the analysis of the quantitative data being completed for them, board members could have more time to analyze other elements within the Marine's OMPF such as billet accomplishments detailed in a fitness report. This article will provide an example of how fitness report metrics can be developed and weighted using data resident within the Master Brief Sheet to meet the *Commandant's Planning Guidance*.

Board Member Evaluation General Process

There are a number of elements in the MBS that a board member will use to evaluate a Marine's performance in grade or over the course of their career. These elements can range from physical fitness scores to awards to education to weapons qualification. The main factors that determine a board member's evaluation are the reporting senior (RS) relative value (RV) scores, the reviewing officer (RO) comparative markings, and the RS and RO comments. The focus of this article will be the RV scores based on the RS markings. There are a number of factors a board member will take into account when evaluating the RV. One of the factors is the hourglass profile metric that breaks down the percentage of fitness reports a Marine Reported On (MRO) has in the upper, middle, and lower third and the ratio of the percentage of reports in those third when compared to each other. Also, a board member may look at the RV score at processing and the cumulative RV score, taking note of whether there was an increase or a decrease between the two scores. A board member may also take note of the number of fitness reports written by the RS and the length of the reporting period. All in all, there are a number of factors that a board member may review, note, and record from their research into the MRO's record and MBS in order to brief other members of the board concerning the MRO's consideration for selection. Yet, given the number of factors a briefer will review, it is probably unlikely that any one board member would brief the same conclusions as another member would if they were responsible for reviewing the same individual MRO's package. Where one member may note an 82 RV score from a two month long observed fitness report, another briefer may not, thinking it is self-explanatory to other board members. Additionally, when incorporating the short-observed time, low RV score into the hourglass profile metric, it will have the same weight in the overall hourglass metric as a twelve-month upper third report and a ten-month middle third report. Meaning, if there were only these three reports, the board members would see an hourglass profile metric reflecting 33 percent of reports in the upper third, 33 percent of reports in the middle third, and 33 percent of reports in the lower third. This despite in our hypothetical situation only 8.3 percent of the observed time in the MRO's career accounts for a lower third report. This hypothetical would most likely be caught by board members, but it may be more problematic to account for the contributions of reports to the hourglass metric as the MRO receives more and more fitness reports throughout their career. Hopefully, if not addressed by the briefing board member, the other board members would note it as they all have an opportunity to review the MRO's MBS during the three to five minute given brief. However, there is no guarantee, and there is most likely variance in how one board member analyzes and evaluates a MRO's package over another. The onus of the analysis and presentation of the MRO's MBS belongs to only one individual board member. The quality of the analysis and presentation is dependent on the experience and ability of the board member to succinctly articulate a Marine's career for all board members to evaluate, and every board member is a rookie at this process at least once. So, the current evaluation process in selection board proceedings requires the sharp analysis and insight on the part of the board to present the best possible brief on behalf of the MRO. However, much of this analysis can be taken into account (length of observed fitness reports, number of reports, RV) and combined into a single metric for the board to evaluate, effectively reducing the degree of variability in interpretation of the RV scores between board members.

Developing an Evaluation Metric Using Utility Factors

The following section describes a method that addresses the *Commandant's Planning Guidance* in weighting reports and provides board members a single evaluation metric to reduce variability in interpretation and captures the MRO's RV scores over their career. This can be done using data currently resident within the MBS of the MRO. No new data would need to be added. The fundamental idea behind what the metric is evaluating is an average weighted percentage when compared to a perfect career 100 RV for the MRO where the weights are determined by the length of the report and the number of reports a RS has written for Marines of a similar rank, and it will be shown there is no disadvantage between one Marine having a number of reports short in duration by reporting seniors with shallow profiles to another Marine with lengthy reports written by reporting seniors with large profiles.

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A weighting method for fitness reports can be employed by introducing utility functions for the length of a report and the number of reports written by a reporting senior. We can also assume that these two functions will have equal weighting in determining the final evaluation metric (i.e., each value derived from the individual functions contribute half of the final weight). The utility function for report length the author proposes in this article is f(x) = 1-e^(-2x/m) where "x" is the observed length of the fitness report in months and "m" is a utility factor that remains constant for the population of MROs in determining the weight contribution for length of reports. Additionally, the utility function for reporting seniors' total number of reports is similarly f(y) = 1-e^(-y/r) where "y" is the observed number of reports a reporting senior has written for Marines of similar rank and "r" is a utility factor that remains constant for the population of MROs in determining the weight contribution for a RS profile size. The choice of "m" and "r" and the reasons behind it can vary, but for the purposes of this article, we will assume that the constant "m" will be six months and the constant "r" will be eight reports. Table 1 depicts the utility function values for the various length of reports from one to twelve months if "m" had a value of six months. Thus, a fitness report with a reporting period of four months would have a weight of 0.7364. Table 2 depicts the utility function values for the various RS quantity of reports written from 3 to 40 if "r" had a value of 8 reports. A fitness report where the reporting senior profile size is

Report Length Utility Constant	6											
Report Length	1	2	3	4	5	6	7	8	9	10	11	12
Utility Values	0.2835	0.4866	0.6321	0.7364	0.8111	0.8647	0.9030	0.9305	0.9502	0.9643	0.9744	0.9817

Table 1.

RS Reports Utility Constant	8																			
RS Reports	3	4	5	6	...	13	14	15	16	...	23	24	25	26	...	36	37	38	39	40
Utility Values	0.3127	0.3935	0.4647	0.5276	...	0.8031	0.8262	0.8466	0.8647	...	0.9436	0.9502	0.9561	0.9612	...	0.9889	0.9902	0.9913	0.9924	0.9933

Table 2.

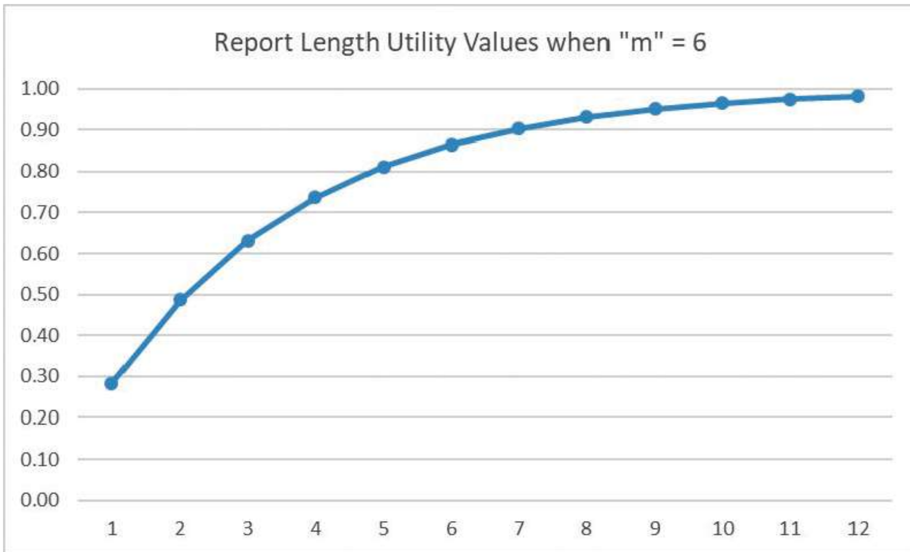

Figure 1. ***(Figure provided by author.)***

twelve reports would have a weight of 0.7769. Figure 1 demonstrates the rate at which the utility function value increases as the length of the fitness report "x" increases. Similarly, Figure 2 demonstrates the rate at which the utility function value increases as the number of reports "y" increases for an RS profile size. Note that the incremental change in utility function values decrease as the length of the report or the number of RS reports written increases. This indicates the eventual calculated weights between reports will be more similar to each other the longer the observed reporting period is or the more reports written in the RS profile. In other words, the eventual calculated difference in weight between a one-month observed report and a two-month observed report will be greater than the difference between an eight-month observed report and a nine-month observed report—similarly for the number of written reports.

Next, we would multiply the RV for each individual report against the utility factors derived from the above equations and compare it to the "what if" of a 100 RV report. In our example numbers above, if a MRO had a 92.75 for an individual fitness report that was 4 months in length and was one of 12 reports, then we would calculate the metric for that individual report as 92.75(0.7364) + 92.75(0.7769) = 68.3011 + 72.0575 = 140.3586. We then compare that summation to the possibility of the fitness report having a 100 RV, which would yield 100(0.7364) + 100(0.7769) = 73.64 + 77.69 = 151.3300. And to compare how close it is to the 100 RV, we would divide the observed RV by the 100 RV calculations which yields 140.3586/151.3300 = 92.7500. So, there is no drop or increase to the RV of an individual fitness report when applying a weight to it based on the length of the report or the number of reports written by the reporting senior. An individual with a 92 RV for a report that is 2 months in length from a RS with 5 reports written in their profile will be the same as a 92 RV for a report that is 8 months in length from a RS with 15 reports written in their profile. The influence of the weight will come into effect when we aggregate all the fitness reports of a Marine's career using the above calculated methods.

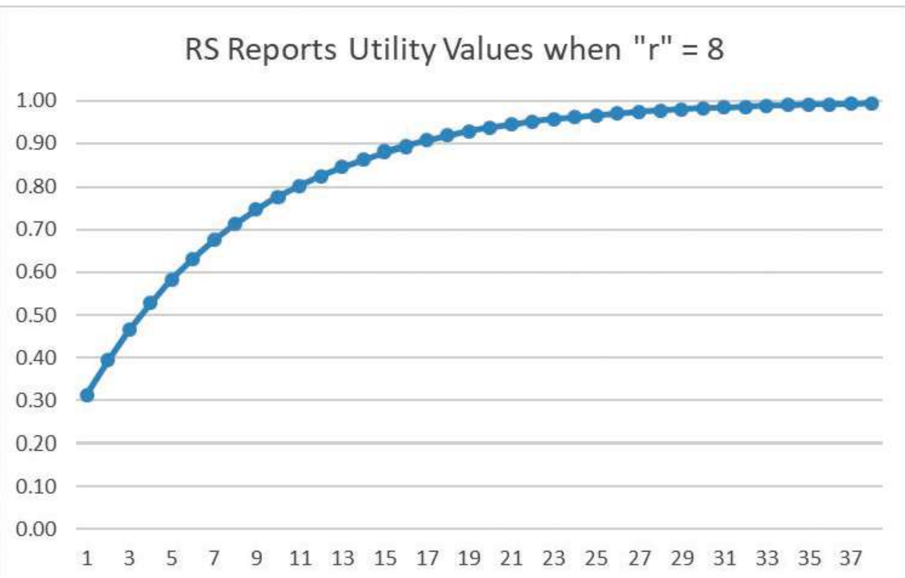

Figure 2. ***(Figure provided by author.)***

Table 3 (on following page) shows an example where we include two additional fitness reports with the example fitness report above and the resulting calculations. Let us assume in addition to the one we outlined above with the RV of 92.75, we have a fitness report with a RV of 80 that is three months in length and written by a RS with a profile size of 4. The other has a RV of 98.5 that is 10 months in length and is written by a RS with a profile size of 25. The MBS would show this as the MRO having one report in the lower third, one in the middle third, and one in the upper third. Hopefully a board member would see these three fitness reports as above average overall with some analysis and reasoning, and if you do take the average of the three RVs (each report contributing the same weight), you would have a value of 90.42. But using the utility equations and method described above would yield the metric 92.29, a high middle third value. While the difference between 90.42 and 92.29

	Report Length	# Reports Written	Rpt Avg	Report Length Utility Value	Reports Written Utility Value	Rpt Total Pts	Max Poss	Weight
FitRep1	4	12	92.75	0.7364	0.7769	140.3560	151.3273	33.9%
FitRep2	3	4	80	0.6321	0.3935	82.0472	102.5590	23.0%
FitRep3	10	25	98.5	0.9643	0.9561	189.1583	192.0389	43.1%
			Total Avg			Total All Reports	Total Max Poss	Weighted Utility Metric
			90.42			411.5616	445.9252	92.29

Table 3.

does not seem significant, on the 20 increment RV scale of 80–100 it is a 9.35 percent increase. Board members have no prescribed method of how to gauge the values in aggregate. Maybe their estimate would yield above 90, maybe below 90. In this instance the 80 RV report accounts for 23.0 percent of the weight of the metric, the 92.75 RV report accounts for 33.9 percent of the weight of the metric, and the 98.5 RV report accounts for 43.1 percent of the weight of the metric. The weight here is calculated as the percentage of the maximum possible points for an individual fitness report with the total maximum possible points. As more and more fitness reports are included, the weight each fitness report contributes to the overall metric becomes more and more distributed. If we change the first fitness report to a RV of 85, there is no change to the breakout of thirds one would see in the MBS. The average RV of the three fitness reports would now be 92.08, high middle third. The metric calculated using the utility equations would be 93.44, just cresting into the area that is considered the upper third. There would be no change to the weights. Table 4 provides an example of a metric derived from ten fitness reports and each fitness report's associated weight. As you can see, the distribution of the weights spreads out a little more evenly as more observed fitness reports are introduced into the calculation of the metric and the reports with longer report lengths and higher amounts of reports written are comparable to each other in weight. The short reports with small profiles accounts for a smaller degree of the overall weight when compared to the other reports as opposed to an even ten percent since it is one of ten reports.

There may be some arguments that this method reduces a Marine's career to just a number and board members will only focus on that number. An answer to that argument is this metric reduces the amount of analysis a board member may have to complete when reviewing the MBS. It will also reduce the variable amount of interpretation between the different board members concerning the data that is available for them to review in the MBS and how to interpret the MRO's hourglass profile. Board members will look at the numbers, regardless. But there is no guarantee that they are all looking at them in the same manner or would brief them the same way. They will look at a fitness report with a low RV value and note that it is only one or two months long. They will look at the number of Marines a RS has written on to see if that RS has a deep or shallow profile. They will look at the relative value and see if it is increasing or decreasing under the same reporting senior. They will also take into consideration whether the RV is low given it is the first fitness report in a new rank for that Marine. So the numbers can have an influence on the board member and can influence how they brief a Marine's package. Additionally, the longer the career, the more numbers there are to review and interpret for the briefer. The numbers can have an influence on how the other board members, as they listen to the brief and review the MBS, interpret the Marine's career, and the numbers determine the structure and shape of the "hourglass" profile that all board members see but may interpret differently. Additionally, there are still other elements within the MBS a board member should review before determining their final assessment for the package. Reducing the numerical analysis for board members can provide them more time to evaluate other elements of the fitness report such as billet accomplishments over the career as well as Section I and K comments over the career.

	Report Length	# Reports Written	Rpt Avg	Report Length Utility Value	Reports Written Utility Value	Rpt Total Pts	Max Poss	Weight
FitRep1	3	12	82.5	0.6321	0.7769	116.2417	140.8990	9.3%
FitRep2	3	17	92.75	0.6321	0.8806	140.3018	151.2688	10.0%
FitRep3	9	15	98.5	0.9502	0.8466	176.9905	179.6858	11.9%
FitRep4	12	25	93.25	0.9817	0.9561	180.6949	193.7747	12.8%
FitRep5	1	3	80	0.2835	0.3127	47.6944	59.6179	3.9%
FitRep6	9	15	86.75	0.9502	0.8466	155.8774	179.6858	11.9%
FitRep7	12	21	92.5	0.9817	0.9276	176.6051	190.9245	12.6%
FitRep8	3	3	90	0.6321	0.3127	85.0348	94.4831	6.2%
FitRep9	11	17	94.5	0.9744	0.8806	175.2980	185.5005	12.2%
FitRep10	6	6	96.54	0.8647	0.5276	134.4125	139.2298	9.2%
			Total Avg			Total All Reports	Total Max Poss	Weighted Utility Metric
			90.73			1389.1511	1515.0700	91.69

Table 4.

Conclusion

The above method described could also be employed to determine a weighted metric for each rank in a similar fashion the MBS does currently. Regardless, there are a number of methods that can be used to weight the fitness reports. The use of the utility functions in this article is simply one of many methods that can be employed. Should those exact utility functions be used? In the author's opinion, not necessarily. The utility constants for report length and reports written would not need to be six and eight, respectively. Those were simply arbitrary numbers picked to demonstrate the examples in this article. But the author does hold the opinion that it should be a function where the difference between the weights diminishes as the length of the report or the number of reports written by the RS increases. Thus, a function that yields a horizontal asymptotic curve with a decreasing slope as the report length and number of reports written by the RS increases.

The described method only works for the RV derived from the RS markings and profile, and this is only one aspect of data the selection board uses to make an assessment. Could you use the same type of metric for the RO's comparative assessment marking? In the author's opinion, no. A RO may not necessarily have been the MRO's RO for the full length of the reporting period—nor may they have the same direct observation time of the MRO as the RS. Ideally, they would but that is not always the case and recruiting duty can serve as a good example. Additionally, their markings do not necessarily fall out in a manner where you could have an ordinal ranking as you do with the current RV metric. Does a metric need to be developed? The answer to that question is, much like the theme of this article, whether or not the metric would assist a board member's responsibility in analyzing, understanding, and briefing the package. The goal is not to reduce the selection criteria to a number. The goal is to assist the board members in their preparation and briefing of the individual's selection package and reduce the variability in perception amongst board members when it comes to evaluating metrics. If that is the goal, then there are probably a number of ways one can analyze the collective comparative assessments from a Marine's ROs since ROs with large profiles will heavily influence the current metrics used in the hourglass profile. But that would be a separate article. The method described in this article is merely a proposal to what the Commandant published in his guidance with respect to personnel and the Performance Evaluation System.