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### **Managing Homesteading in the USMC**

June 2023

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Prepared for the Naval Postgraduate School, Monterey, CA 93943.

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## ABSTRACT

Talent Management 2030, which was released in 2021, proposed a number of nonmonetary incentives to retain the “best” Marines and maintain the force. Within those proposed incentives, reducing the frequency of permanent change of station (PCS) moves, or “homesteading,” was declared to be no longer a negative practice but a way to reduce stress on Marines and their families. There has yet to be a policy provided to Marines to ensure homesteading is a transparent, tangible option for them. To solve this problem, and determine what benefits homesteading would offer the Marine Corps, I researched empirical studies regarding the frequency of moves as they relate to family disruptions and unit performance, as well as the benefits of nonmonetary incentives. From this research, I found that spousal employment, children’s socio-academic outcomes, marital satisfaction, unit performance, and the maintenance of habits are negatively correlated with moving. Considering these findings and utilizing current Marine Corps doctrine, I offer four policy recommendations to manage homesteading within the Marine Corps: a homestead be six years or more, almost all continental U.S. (CONUS) bases can be used, Marines should be prioritized by performance, and high-performing Marines should be given PCS geographic preference if not selected to homestead. My aim is to assist the Marine Corps in increasing retention and satisfaction, while providing a transparent policy to Marines.



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## LIST OF ACRONYMS AND ABBREVIATIONS

ASR	Authorized Strength Report
CFT	Combat Fitness Test
CMC	Commandant of the Marine Corps
CONUS	continental United States
DMDC	Defense Manpower Data Center
DOD	Department of Defense
DPG	Defense Planning Guidance
EFMP	Exceptional Family Member Program
FITREP	Fitness Report
FMF	Fleet Marine Forces
GAO	Government Accountability Office
GAR	Grade Adjusted Recapitulation
GPA	grade point average
HRDP	Human Resources Development Process
JEPES	junior enlisted performance evaluation system
LCM	low-cost move
MAGTF	Marine Air Ground Task Force
MARADMIN	Marine Admin
MBS	master brief sheet
MCO	Marine Corps Order
MEF	Marine Expeditionary Force
MM	Manpower Management
MMEA	Manpower Management Enlisted Assignments
MMOA	Manpower Management Officer Assignments
MOS	Military Occupational Specialty
NDAA	National Defense Authorization Act
NDS	National Defense Strategy
NMS	National Military Strategy
NSS	National Security Strategy
OCD	overseas control date



OCONUS	outside continental United States
PCA	primary change of assignment
PCS	permanent change of station
PDS	primary duty station
PES	performance evaluation system
PFT	Physical Fitness Test
PME	professional military education
PMOS	Primary Military Occupational Specialty
RAND	research and development
RV	relative value
SDA	Special Duty Assignment
SGM	Staffing Goal Model
SLP	School Liaison Program
SNCO	Staff Non-commissioned Officer
T/O	Table of Organization
TOS	time on station
USMC	United States Marine Corps





## EXECUTIVE SUMMARY

Talent Management 2030 was released in 2021 and proposed a number of nonmonetary incentives to retain the “best” Marines and maintain the force. Within those proposed incentives, reducing the frequency of permanent change of station moves, or “homesteading,” was declared no longer to be a negative practice, but a way to reduce stress on Marines and their families. As of this writing, a policy has yet to be provided to Marines to ensure homesteading is a transparent, tangible option for them. In response, this thesis will answer two research questions:

- (1) Acknowledging Talent Management 2030s push to age the force and increase retention, what benefit does including “homesteading” as a nonmonetary incentive offer Marines and the Marine Corps?
- (2) What policy could the Marine Corps develop and implement to systematically manage the “homesteading” process while complementing current Marine Corps doctrine?

To answer these questions, I first researched empirical studies regarding the frequency of moves as they relate to family disruptions and unit performance, as well as the benefits of nonmonetary incentives. Regarding family disruptions, I found that spousal employment is severely hindered by permanent change of station (PCS) moves (Kamarck et al., 2020; Office of People Analytics, 2023; Tong et al., 2018; U.S. Government Accountability Office, 2021), that children’s socio-academic outcomes (i.e., school GPA, depressive symptoms, and resilience) can be both positively and negatively impacted by moving (Drummet et al., 2003; Herbers et al., 2013; Lessard & Juvonen, 2018; O’Neal et al., 2022), and that PCS moves can negatively affect marital satisfaction, second only to deployment (Street et al., 2022; Tong et al., 2018; Wan et al., 2018). Furthermore, I found that unit performance and the maintenance of habits are negatively correlated with frequent turnover and moving (Bacolod et al., 2022; Hancock et al., 2013; Wood et al., 2005).

I then utilized current Marine Corps doctrine as the backbone to produce the following four policy recommendations:



1. Homesteading should be defined by the Marine Corps as *when a Marine spends at least six years in the same geographic location*. The Marine Corps should strive to maintain geographic stability for homesteaders for as long as career advancements within the area are available, however.
2. All continental U.S. (CONUS) and outside CONUS (OCONUS) locations listed in the low cost move (LCM) and No-cost permanent change of assignment (PCA) references from MCO 1300.8 should be used as the basis for homesteading geographic locations. Additionally, Yuma, AZ, Beaufort, SC, and Twentynine Palms, CA should be utilized if assignments exist.
3. The prioritization of who receives homesteading assignments should be dependent upon existing performance metrics, number of dependents, dual-military status, and Exceptional Family Member Program (EFMP) status. If the Marine Corps will not change its policy on dependent and dual-military status, I recommend it still be based on a point system derived from performance and EFMP status.
4. If a highly prioritized Marine does not receive an assignment to homestead due to the absence of staffing vacancies, I recommend they receive a priority geographic location on their PCS move.

By implementing these policy recommendations, the Marine Corps could potentially improve family disruptions. For example, enhancing geographic stability may increase spousal promotability, longevity, and experience, while decreasing lost earnings. For children, homesteading may improve GPA, feelings of friendship, and decrease depressive symptoms. Furthermore, decreasing the frequency of PCS moves has the potential to increase marital satisfaction, increasing Marine Corps satisfaction and retention.

Regarding Marine Corps units, homesteading could potentially increase performance and decrease negative impacts caused by frequent turnover. Homesteading



may also improve the maintenance of good habits in Marines, life Physical and Combat Fitness Test training.

To determine if the policy successfully increased retention, increased unit performance, and decreased family stress, policy evaluation research would have to be conducted. I recommend the retention rates and performance metrics (readiness levels and inspection results) of Marines and Marine units be compared in three categories: those that opt-out of homesteading entirely, those who requested to homestead but were not able to, and those who requested to homestead and were able to. I recommend further research also examine spousal employment, children's socio-academic well-being, leadership tracks, monetary costs or benefits of homesteading to Marines and the Marine Corps, and potential diversity lost by decreasing turnover at Marine units.

Overarchingly, introducing a transparent homesteading policy could go a long way toward increasing trust between Marines and Marine leadership. Since one of the most common responses to questions in the Marine Corps is “look in the order,” it is important to provide guidance through an official order, policy, or MARADMIN. That way, Marines will not remain in the dark on the standard operating procedures regarding homesteading assignments and assignments monitors will not be left to determine who does what individually, without a common practice.

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## **I. INTRODUCTION AND BACKGROUND: U.S. MARINE CORPS, TALENT MANAGEMENT, AND HOMESTEADING**

In 2021, General Berger, 38th Commandant of the Marine Corps, identified that today's personnel management policies no longer align with the Marine Corps' operational objectives (U.S. Marine Corps, 2021e). To combat this misalignment, he released Talent Management 2030, which includes proposed changes to these outdated personnel policies. Since releasing Talent Management 2030, the Marine Corps has started making numerous changes, including retention program additions, promotion board changes, and multiple new pilot programs for various personnel functions.

One change from Talent Management 2030 that has been less discussed is the reduction in frequency of permanent change of station (PCS) moves in the form of homesteading. Although there is no explicit definition of "homesteading" in military documents, it is commonly known across all United States branches of service as the act of staying in one geographic location to live or raise a family, rather than executing frequent moves with the traditional PCS cycle as detailed in the background of this chapter. Talent Management 2030 includes a five-paragraph section on reducing PCS frequency, identifying its negative effects on unit cohesion, training, and families, eventually declaring that "the institution will no longer view homesteading as a negative practice" (U.S. Marine Corps, 2021, p. 11). A single paragraph within the 2023 Talent Management 2030 Update touches on the subject again, informing on an increase in permanent change of assignment (PCA) moves and a decrease of non-essential PCS moves since the release of Talent Management 2030 (U.S. Marine Corps, 2023). The update did not, however, say by how much PCS moves have been reduced, or identify any policies that are planned to be implemented to further contribute to this reduction (U.S. Marine Corps, 2023). The Talent Management 2030 Update further backtracks from Talent Management 2030's original declaration as well, noting that PCS moves are "required to maintain a capable, responsive force in readiness and will remain a key characteristic of most Marine Corps careers" (U.S. Marine Corps, 2023, p. 5).



When MCO 1300.8, Personnel Assignments, was released in 2014, it included a paragraph within Chapter 1, “Overarching Assignment Policy,” directing that PCS orders only be utilized when it becomes “absolutely necessary” (U.S. Marine Corps, 2014, p. 1-1). The same paragraph states that Low-cost PCS/no-cost PCA moves within the same geographic location be utilized whenever possible within the Continental United States (CONUS) (U.S. Marine Corps, 2014). Exactly the same paragraph, included below, exists in the 2021 chapter 1 update.

PCS Orders will be directed only when it becomes absolutely necessary to meet requirements within one of the follow requirements: Outside Continental Unites States (OCONUS), Global Force Management, Special Duty Assignments, Formal Schools Training, Retention, Joint, Promotions/Command, and Inspector/Instructor Staffs. With respect to assignments within the geographic United States (CONUS), Marines will be reassigned within the same geographic area whenever possible through judicious use of a combination of Low-Cost PCS and No Cost PCA Orders. (U.S. Marine Corps, 2021a, p. 1-1)

The idea that the frequency of PCS moves within CONUS should be minimized is not a novel or new idea in the Marine Corps, as these matching paragraphs from nine years apart show. Talent Management 2030 does, however, state that homesteading is no longer viewed negatively for the first time, opening the door for further policy action (U.S. Marine Corps, 2021e). The Marine Corps does not yet have a policy to manage the homesteading process at staffing level. It is currently up to each monitor, individually, to decide who gets what orders based on their staffing goals from Manpower Management (MM) (U.S. Marine Corps, 2014, 2021c, 2021a). With that motivation in mind, I will answer the research questions within this chapter, and offer policy recommendations to assist the Marine Corps with managing homesteading, which will further incentivize Marines and their families to continue serving, retaining Marines, so the Marine Corps can maintain the force and mature it in accordance with Talent Management 2030s goals.

## **A. BACKGROUND**

To fully understand the policy recommendations in this thesis, a detailed review of Talent Management and pertinent Marine Corps policies is required. Since no other military branches have active homesteading policies to model a Marine Corps’ policy,



Talent Management 2030 and Marine Corps doctrine will provide the basis for the development of my recommendations in Chapter III. The closest Air Force program is the enlisted only, Voluntary Stabilized Base Assignment Program where Airmen are assigned to “hard to fill” locations in exchange for five year, “stabilized” tours (U.S. Air Force, 2022, p. 499). In the Army, Soldiers can request “compassionate actions” where they may be granted assignment withing the same command if personal problems exist (U.S. Army, 2019b, 2019a). Otherwise, soldiers are subject to location assignments similar to the status quo of Marines (U.S. Army, 2019b, 2019a).

First, regarding background information in Talent Management and Marine Corps doctrine, I address Talent Management 2030 as it details the “why” behind prioritizing homesteading moving forward. Second, I discuss the Human Resources Development Process (HRDP) and its relationship with the assignments process. Third, I touch on the difference between permanent change of station (PCS) and permanent change of assignment (PCA) orders because it is important in determining where homesteading is possible, as well as the different types of orders that accommodate it. Fourth, I describe the personnel assignments process, including special considerations, outlining how orders are currently assigned, and offer methods that can be adopted to create an effect homesteading policy. Fifth, I provide a detailed understanding of performance reporting on Marines is valuable to incorporate into prioritization of the “best” Marines to incentivize for retention. Sixth, I address how the different leadership tracks now offered for Marine Officers will be valuable in determining if homesteading is feasible for all Officers. Finally, I touch on the costs associated with PCS moves and current Marine Corps programs associated with PCS moves.

## **1. Talent Management 2030 and Homesteading**

Force Design 2030 and Talent Management 2030, released in 2020 and 2021 respectively, laid the foundation for changes across the Marine Corps to improve its “lethality and effectiveness” (U.S. Marine Corps, 2021, p. 2). Since its release, it has served as the initiating document on several new policies across the Marine Corps; as such, it is important to fully understand this document (U.S. Marine Corps, 2023).



Talent Management 2030 is an overhaul of the current Marine Corps talent management policies, providing the CMC’s vision for the future of personnel management in the Marine Corps. The document acknowledges that the Marine Corps is “overdue for a fundamental redesign” in its “organization, processes, and approach to personnel and talent management” (U.S. Marine Corps, 2021, p. 1). According to this document, “talent management is the act of aligning the talents of individual Marines with the needs of the service to maximize the performance of both,” including the introduction of new policies to incentivize and retain the best Marines (U.S. Marine Corps, 2021e). Therefore, Talent Management 2030 proposes that these incentives be tailored to individual Marines, to include duty station preference, or “any other action within our power to affect” (U.S. Marine Corps, 2021, p. 4).

After Talent Management 2030s declaration to incentivize Marines within any tenable means, the document suggests multiple endeavors to do so. Specifically, Talent Management 2030 speaks on nonmonetary incentives including: enhancements to parental leave, lateral move retention incentives, promotion opt-out, and a reduced frequency of permanent change of station (PCS) moves because they put an “enormous strain on families, who already sacrifice considerably to support their Marines” (U.S. Marine Corps, 2021, p. 11). This idea that incentives include duty station preference, and a reduced frequency of PCS moves to support families, feed into Talent Management 2030 proclaiming “the institution will no longer view “homesteading” as a negative practice to avoid, but rather a vehicle for improving training, increasing unit stability, and reducing the stresses we place on our families” (U.S. Marine Corps, 2021, p. 11). Including a geographic incentive for Marines to opt-in would potentially achieve both the decreased stress on families, as well as the increased retention of Marines. Without an explicit policy, however, it would likely be hard to ensure this incentive reached the Marines who want it.

## **2. Talent Management and the Human Resources Development Process**

The Marine Corps’ HRDP order, MCO 5250.1, “defines the processes used to manage both [active component] and [reserve component] human resources and illustrates how these processes are synchronized in order to support the [CMC]’s human resource





requirements and maximize operational readiness in support of institutional requirements” (U.S. Marine Corps, 2021a, p. 1). As this order is the backbone of human resources and talent management in the Marine Corps, it is imperative to understanding how homesteading can be managed within the USMC.

Regarding talent management, MCO 5250.1 defines it as:

The institutionally faithful and transparent manpower process and policies, from recruitment through separation or retirement, where each Marine is provided the opportunity, mentorship, and guidance to develop and utilize their individual ability and continue to effective service, based upon their demonstrated performance and future potential, in accordance with the needs of the Marine Corps. (U.S. Marine Corps, 2021a, p. 1-1)

It further identifies the guiding principles of talent management as:

1. Every Marine is a Rifleman.
2. The needs of the Marines Corps are paramount.
3. Field Grade Officers are Marine Air Ground Task Force (MAGTF) experts.
4. SNCOs provide advice, technical expertise, and oversee the development, welfare, and morale of the whole Marine.
5. Identifying the best and fully qualified is the foundation of the Marine Corps promotion model.
6. Every Marine has an equal opportunity to excel, regardless of race, gender, creed, or sexual orientation. (U.S. Marine Corps, 2021a, pp. 1–1-1-2)

Overarchingly, regarding talent management, the Marine Corps aims to provide the Fleet Marine Force (FMF) and Supporting Establishments with “the right Marine, at the right time, with the right skills,” while striving to support individual and family-based career aspirations as long as the needs of the Marine Corps are met first (U.S. Marine Corps, 2021a, p. 1-4).

The HRDP is, in accompaniment to talent management, defined by MCO 5250.1 as “the process to attract, retain, and develop Marines in order to increase warfighting readiness and maximize individual potential” (U.S. Marine Corps, 2021a, p. 2-1). Additionally, “the HRDP integrates recruiting, structure requirements, manpower planning, talent management, manpower management, and training efforts to improve individual, group, and organizational effectiveness” (U.S. Marine Corps, 2021a, p. 2-1).



The process collectively consists of a sequential five phases: guidance, planning, production, assignment, and assessment (U.S. Marine Corps, 2021a). Figure 1 provides a simple view of the HRDP process and pertinent subcomponents. A detailed version of this figure from MCO 5250.1 can be found in Appendix A.

Figure 1. Overview of the five phases of the Human Resources Development Process



The **guidance** phase for HRDP is adopted from seven sources, including: the National Security Strategy (NSS; periodically outlines U.S. national security concerns), the National Defense Strategy (NDS; how the DOD will assist in achieving NSS objectives), the National Military Strategy (NMS; discusses the strategic aims of the U.S. military), the National Defense Authorization Act (NDAA; identifies the “minimum strengths necessary to enable the armed forces to fulfill a [NDS] calling for the [US] to be able to successfully conduct two nearly simultaneous major regional contingencies”), the Defense Planning Guidance (DPG; provides service branches “priorities and resource allocations for Program

Objective Memorandum development”), CMC Planning Guidance (authoritative document that “provides a common direction to the Marine Corps Total Force”), and the CMC Vision and Strategy (informs on the future of the USMC) (U.S. Marine Corps, 2021a, p. 3-1)

This extensive guidance leads into the **planning** phase of HRDP. Within the planning phase, the Authorized Strength Report (ASR) and Grade Adjusted Recapitulation (GAR) are heavily relied on for the function of the HRDP (U.S. Marine Corps, 2021a). The ASR is a semi-annual (August and February) “resource allocation tool” used to prepare staffing goals and develop the GAR (U.S. Marine Corps, 2021a, p. 4-1). The GAR acts as “a planning tool used by [Manpower Plans, Programs and Budget] and [Reserve affairs] to develop officer and enlisted inventories and is a summary of requirements by grade and [Military Occupational Specialty (MOS)]” (U.S. Marine Corps, 2021a, p. 4-1). Specifically, the GAR is used by planners to assist “in accession, promotion, and retention plans,” as well as manning allocations since it distributes non-primary MOS billets and “Free” billets to primary MOSs (U.S. Marine Corps, 2021a, p. 4-1). In addition to the ASR and GAR, the Table of Organization (T/O), is also used for manning (“portion of a unit’s T/O authorized to be filled”) decisions as a T/O “represents the unconstrained, war time personnel requirements per unit” (U.S. Marine Corps, 2021a, p. 4-2). Essentially, manning from the T/O determines the ASR and, subsequently the GAR, which leads to the staffing of Marines. Staffing, thus, is “the portion of manning to be filled with assignable inventory” (U.S. Marine Corps, 2021a, p. 4-2). To fill these determined staffing goals per unit, officer and enlisted monitors are provided a Staffing Goal Models (SGM) that dictate the “assignment targets for each unit based on the CMC’s priorities” (U.S. Marine Corps, 2021a, p. 4-2). Monitors then use the SGMs to execute staffing goals (in the assignment phase) based on their allocations (U.S. Marine Corps, 2021a).

Following planning, the **production** phase of the HRDP highlights recruit shipping (sets tempo for enlisted production process), training, distribution, and retention models, as well as the officer MOS assignments process, PMOS school production (entry-level, lateral move, and career-level schooling), and professional military education (PME) (U.S. Marine Corps, 2021a). Phase four, **assignment**, is the “optimal distribution of institutional manpower requirements and career progression opportunities for every Marine” (U.S.



Marine Corps, 2021a, p. 6-1). MCO 1300.8 provides in-depth guidance on the assignment process, which is discussed in the “Personnel Assignments” subsection of this chapter. Within MCO 5250.1, however, it identifies that Manpower Management Enlisted Assignments (MMEA) and Manpower Management Officer Assignments (MMOA) assign Marines in accordance with staffing goals provided to monitors as previously stated (U.S. Marine Corps, 2021a). It also reiterates that “combat readiness is further improved by increasing stability of Marine families and reducing PCS costs,” as well as the importance of reassignment within the same geographic location within CONUS (U.S. Marine Corps, 2021a, p. 6-1). The HRDP process ends with an **assessment** phase in order to continually assess and refine the process (U.S. Marine Corps, 2021a).

### **3. Permanent Change of Station/Permanent Change of Assignment Orders**

The Marine Corps currently assigns Marines through one of two broad types of moves—Permanent Change of Station (PCS) or Permanent Change of Assignment (PCA). A PCS assignment is when a Marine is given orders that take them from one permanent duty station (PDS) to another, including all moves where a Marine leaves or returns to their home (U.S. Marine Corps, 2021c). A PCA, on the other hand, is a transfer between Monitored Command Codes (MCCs) at the same PDS (U.S. Marine Corps, 2021c). When a Marine transfers within the same PDS, or one within 50 miles, the move is considered either a No-Cost PCA move (same PDS) or a Low-Cost Move (LCM) PCS (different PDS within 50 miles) (U.S. Marine Corps, 2021c). A Marine is not reimbursed for travel for a No-Cost PCA or LCM PCS (U.S. Marine Corps, 2021c). Since these moves do not rate travel funding, the reduction in the number of individuals receiving travel funding should, logically, lead to a reduction in the cost of moving families. Unfortunately, research on this does not exist, so the logic is untested. Currently, Marine Corps Order (MCO) 1300.8 designates LCMs as moves between the following PDSs:

1. California: MCAS Miramar, MCRD San Diego, Coronado, North Island and Camp Pendleton
2. MCCs on Okinawa, Japan if certified the Marine’s work site changes from the northern to southern housing areas or vice versa
3. North Carolina: Camp Lejeune or MCAS New River and Cherry Point



4. Washington, DC, Metropolitan Area: Pentagon, VA and Annapolis, MD; Fort Meade, MD; Indian Head, MD; or Quantico, VA.
5. Other PDSs that are located 50 miles or less from each other. (U.S. Marine Corps, 2021a, p. 1-5)

Per the same document, MCO 1300.8, No-Cost PCA orders are given if the assignments are on:

1. MCCs located within the same city, town, base, air station, or metropolitan area.
2. MCCs on Oahu, Hawaii
3. MCCs on Okinawa, Japan if the Marine's work site does not change or changes only one housing zone.
4. Washington, DC, Metropolitan Area.(U.S. Marine Corps, 2021a, p. 1-6)

These pre-established locations for PCA and LCMs will provide the backbone of homesteading areas within Chapter III.

#### **4. Personnel Assignments**

In addition to PCS/PCA orders, MCO 1300.8, Marine Corps Personnel Assignment Policy, also dictates the general and specific requirements monitors follow when handing personnel assignments to Marines. Overarchingly, “compliance with this policy improves combat readiness by controlling unit personnel turnover and ensuring equitable treatment and career development of individual Marines” (U.S. Marine Corps, 2021a, p. 1-1). It goes on to say that combat readiness is improved by family stability and a reduction in the costs of PCS moves (U.S. Marine Corps, 2021c). This subsection, therefore, reviews pertinent information regarding personnel assignments and its relevance to homesteading in the Marine Corps and my policy recommendations.

##### ***a. Time on Station Requirements***

There is no maximum tour length for CONUS tours, only a waiver-able minimum of 36 months (U.S. Marine Corps, 2021c). This time on station (TOS) minimum exists to “stabilize the movement of Marines and their families, and to reduce PCS costs” (U.S. Marine Corps, 2021a, p. 1-2). This is important because it opens the door for Marines to remain on a specific station for considerable amounts of time, and reinforces, yet again,



that families are at the backbone of reducing PCS frequencies. Furthermore, this endless maximum on tour length could also potentially improve unit cohesion, training, and performance.

***b. Officer Assignments***

Per MCO 1300.8, monitors decide on officer assignments based on the following priorities, in order:

1. Needs of the Marine Corps
2. Career Progression (Operating Forces, Supporting Establishment, Seniority)
3. Overseas Control Date (OCD)
4. Individual Preferences
5. Restricted officers (warrant officers and limited duty officers) must only be assigned to restricted officer billets within their respective MOSs. (U.S. Marine Corps, 2014, p. 2-1)

Other than this ranked list of priorities, there is no required process for monitors to assign orders and these priorities are often intertwined or conflicting. A homesteading policy can fit within priority four, intertwining with OCD and career progression, as explained in Chapter III. Regarding career progress of officers, Talent Management 2030 outlines the creation of a staff leadership track to rival the “command track” that has previously been set for all officers (U.S. Marine Corps, 2021e). This will affect career progression and homesteading opportunities for officers who prioritize one over the other, as discussed in Chapter III.

***c. Enlisted Assignments***

Enlisted Marines can already accept a “retention on station” incentive for reenlisting, which means they are guaranteed to remain in the same geographic location code for at least one year after reenlistment (U.S. Marine Corps, 2014). There is also an upcoming (FY24) opportunity, per the Talent Management 2030 Update from March 2023, where high performing enlisted Marines who are not selected for retention within their primary MOS can laterally move to a new MOS and receive alternative incentives in order to fulfill the needs of the Marine Corps (U.S. Marine Corps, 2023). This lateral move opportunity could potentially be used in conjunction with the ability to homestead,



lengthening a Marine's time in one geographic location. As discussed in Chapter III, homesteading is just an additional avenue in which these Marines can be incentivized to remain in the Corps and assist in filling service requirements.

*d. Specific Considerations Relevant to Homesteading*

The specific family considerations relevant to my homesteading policy recommendations are dual-military, single parents, and those enrolled in the exceptional family member program (EFMP). These categories are pertinent because they affect the prioritization of Marines for homesteading assignments.

Dual Military: Although the Marine Corps attempts to minimize separations of dual military households, in order for both spouses to be at the same PDS, "there must be a valid requirement (grade and MOS) for the Marine at the spouse's duty station" (U.S. Marine Corps, 2014, p. 5-1). Furthermore, although Talent Management 2030 speaks on reducing family stress due to frequent PCS moves, "preferential treatment in assignments and duty stations will not be given based on marital status" (U.S. Marine Corps, 2014, p. 5-1). Since this part of MCO 1300.8 is at odds with what the CMC has noted in Talent Management 2030, the policy recommendations proposed in Chapter II will address MCO 1300.8's direction that no preferential treatment be given, as well as the CMC's goal to reduce stress on families in favor of retention in the Chapter II, "Policy Recommendations."

Single Parents: Similar to assigning orders based on marital status, single parents are subject to the same orders process as all other Marines to avoid preferential treatment and the creation, or perception, of inequity with other Marines (U.S. Marine Corps, 2014). As such, this conflicting opinion will also be addressed in the Chapter II, "Policy Recommendations."

Exceptional Family Member Program: Per MCO 1754.4C, "EFMP is a mandatory enrollment program for active duty and active reservists, who have a family member with special medical and/or educational needs and is designed to support the PCS assignment process" (U.S. Marine Corps, 2020a). Unlike the previous two sections, there is no specific statement barring those with family members enrolled in EFMP from receiving preferential treatment. MCO 1300.8 states, "the Marine Corps recognizes the unique situations of



enrolled families in this program and every effort is made to support those members and their families in the assignment process” (U.S. Marine Corps, 2014, p. 5-3). Furthermore, Marines with dependents in EFMP are not authorized to take accompanied overseas tours if it is determined by the Family Care Branch (MFY) that the care required for the enrolled dependent is not available at the overseas location (U.S. Marine Corps, 2014).

*e. Overseas Assignments*

Ensuring all Marines fulfill their requirements for overseas service while being able to homestead is important to ensure the Marine Corps maintains its force readiness and meets its global staffing goals. For that reason, a detailed understanding of the overseas assignment process is required. Assignment to an overseas tour is largely influenced by the OCD, which is used in determining who will be considered first in reassignments outside the continental United States (U.S. Marine Corps, 2014). As such, Marines with the oldest OCD are considered first, the intent being a fair share of “the burden of major overseas deployments and overseas assignments among Marines” (U.S. Marine Corps, 2014, p. 6-24).

There are two types of overseas orders relevant to my homesteading policy recommendations. First, Marines can take an accompanied tour, with command-sponsored dependents (U.S. Marine Corps, 2014). Part of the intent behind accompanied tours is that these tours enhance stability of a unit and reduce the number of Marines who are assigned to shorter tours, like unaccompanied or dependent-restricted (U.S. Marine Corps, 2014). Marines on accompanied tours can, and are encouraged to, voluntarily extend their tours to provide continued stability to the unit’s continuity, their family, and reduce PCS costs (U.S. Marine Corps, 2014). There is also a program called the “Overseas Tour Extension Incentives Program” that offers extension incentives, including monetary benefits and additional unfunded/funded leave opportunities (U.S. Marine Corps, 2014). The second type of overseas orders relevant to this thesis are dependent-restricted tours. These tours are approximately 12 months and in areas/at units where dependents are not authorized (U.S. Marine Corps, 2014). These tours cannot be involuntarily assigned until at least 24 months after the previous one has been completed, and the Marine has returned to their





CONUS PDS (U.S. Marine Corps, 2014). These two types of overseas assignments could be utilized to honor a Marine’s wishes to homestead, as discussed in Chapter III.

## **5. “Best” Marines—The Performance Evaluation System and Fitness Reports**

Talent Management 2030 boasts about incentivizing and retaining what the Marine Corps considers the “best” Marines. The Marine Corps identifies the best Marines by using Junior Enlisted Performance Evaluation System (JEPES) for Privates (E1) through Corporals (E4), and Fitness Reports (FITREPs) for Sergeants (E5) and above. These evaluation systems will form the basis of my performance prioritization recommendation in Chapter III.

### ***a. JEPES***

JEPES was adopted in 2019, after the 38th CMC’s planning guidance was released (U.S. Marine Corps, 2020b). According to MCO 1616.1, from November 2020, this system is designed to assist in the evaluation of junior enlisted Marines, aiding in selecting those “highest quality” Marines for promotion, retention, and future assignments. JEPES produces a monthly performance evaluation score out of 1,000 points for each Marine, and is comprised of four equal categories: warfighting (rifle score and Marine Corps Martial Arts Program belt level weighed against same-rank peers), physical toughness (Physical Fitness and Combat Fitness Test scores weighed against same-rank peers), mental agility (professional military education and self-education), and command input (subjective input including character, military occupational specialty accomplishment, and leadership). JEPES scoring also offers a bonus of 100 points, obtainable through special duty assignments and recruiting incentives, to help Marines reach the max score of 1,000 total points (no score higher than 1000 is possible, even if the bonus would place a Marine at 1,050 points) (U.S. Marine Corps, 2020b). A score sheet is available in Appendix B of this document (U.S. Marine Corps, 2020b). Although JEPES is the newest iteration of performance evaluation for junior Marines, the performance evaluation score it provides has been in use for tier placement since 2011 (U.S. Marine Corps, 2011, 2020b). A performance evaluation score is used to place Marines in a “tier” for reenlistment purposes,



ranging from tier 4, or “below average,” to a tier 1, “eminently qualified” Marine (U.S. Marine Corps, 2011). Since the Marine Corps has successfully utilized this tier system for reenlistment over the last twelve years, they are a valid way to prioritize the “best” Marines in subsequent policies as well.

***b. Fitness Reports***

Sergeants and above are evaluated semi-annually or annually (rank dependent) via FITREPs. General Charles Krulak, 31st CMC, sums up the importance of FITREPs in the below quote, which is still used as the guidance for the significance of FITREPs in MCO 1610.7A today:

The completed fitness report is the most important information component in manpower management. It is the primary means of evaluating a Marine’s performance. The fitness report is the Commandant’s primary tool available for the selection of personnel for promotion, retention, career designation, resident schooling, command, and duty assignment. (U.S. Marine Corps, 2018, p. 1-2)

In order to weigh a Marine’s merit against another while making personnel assignment decisions, a metric called “relative value” (RV) is used (U.S. Marine Corps, 2018). This score falls between 80 and 100; the upper third is 93.34 and above, middle third is 86.67-93.33, and the bottom third is 80.00-86.66 (Clemens et al., 2012). The number of RVs a Marine has in each third are shown in percentage form in a cumulative summary on the Master Brief Sheet (MBS) (U.S. Marine Corps, 2018). For example, this summary would show if a Marine has 45% of reports in the upper third, 30% of reports in the middle third, and 25% of reports in the lower third. This cumulative RV summary is available at each rank, as well as a career total (U.S. Marine Corps, 2018). According to MCO 1610.7A, the RV of a FITREP reflects how the individual report’s average compares to:

- The Reporting Seniors’ (RS) average of all fitness reports written by the RS on Marines of the same grade.  
The highest fitness report average of any report written by the RS on a Marine of the same grade as the Marine Reported On (MRO). (U.S. Marine Corps, 2018, p. 8-5)



Because the RS summary shows the percentage of reports in each third, both over a career and at each rank, it can be used to easily quantify the performance of one Marine over another. For example, if one Major A has 80% of FITREP RVs in the upper third, and Major B has 80% of FITREP RVs in the middle third, it could be objectively presumed that Maj A outperforms Major B.

## **6. Command Track vs. Staff Track for Officers**

Talent Management 2030 details creating a path for staff officers to delineate from the “command track,” which is the current default path for officers (U.S. Marine Corps, 2021e). Although this delineation has yet to be mapped out, the potential changes include:

- Fitness report changes to allow Marines to indicate which path they prefer, and changes to include reporting seniors/reporting officer comments detailing which path a Marine would be better suited for.
- Selection of primary staff officer (G1, G2, G3, etc.) on the same boards as the O5/O6 command selections.

Creation of a professional staff officer path, similar to the acquisition officer pipeline, where those Marines are board-selected. (U.S. Marine Corps, 2021e)

At this time, no clear path has been chosen out of the above potentials offered, but this splitting of officer tracks could be important when determining whether an officer is recommended to opt-in or -out of a future homesteading policy (for example, an officer on the staff officer track might have more opportunities to homestead than a command-seeking officer).

## **7. Reducing PCS Frequency to Reduce PCS Costs**

In 2015, The Government Accountability Office (GAO) released a report titled “DOD Needs More Complete and Consistent Data to Assess the Costs and Policies of Relocating Personnel.” The GAO states in the report that:

OSD stated in its September 2014 report to Congress that it is planning to take actions aimed at extending servicemember’s time-on-station—actions that OSD believes could reduce PCS costs. However, in the absence of more complete and consistent data on both PCS costs and the use of exceptions



and waivers, DOD does not have the information it needs for evaluating whether the implementation of its planned actions are effected in extending time-on-station length and reducing PCS costs. (U.S. Government Accountability Office, 2015a, p. 31)

Unfortunately, no report has been released evaluating the monetary benefit of reducing PCS frequency since this report. Furthermore, all four recommendations for executive action remain in “open” status on GAO’s website (U.S. Government Accountability Office, 2015b). These “open” recommendations give some insight on the steps taken since the report, stating:

As of March 2022, DOD stated that it plans to continue collaborating with the key stakeholders to collect PCS data and to work closely with those within the department who share PCS roles and responsibilities regarding the effectiveness of PCS policies and allowances. (U.S. Government Accountability Office, 2015b, p. 1)

As the GAO already noted, it is not possible to tell if extending time-on-station requirements or decreasing the frequency of PCS moves will reduce PCS costs to the DOD. Although it is not the primary focus of this thesis to evaluate the monetary benefits of homesteading, the consideration of a monetary analysis to a larger impact on stakeholder buy-in will be discussed in the recommendations for future research section of this document.

## **8. Current Marine Corps Programs**

Currently, a few programs within the Marine Corps assist with the stresses/difficulties caused by frequent PCS moves. These programs assist with spousal employment, children’s schooling, stress in general, and a sponsorship program oriented at moving to a new base.

Regarding spousal employment, a current DOD program called the Military Spouse Employment Partnership acts as “a targeted recruitment option providing military spouses with employment resources through corporate partnership” (Department of Defense, 2018, p. 6). As of 2018, this program had hired over 114,000 military spouses since it was stood up in 2011 (Department of Defense, 2018). Unfortunately, the military spouse unemployment rate was still 21% in 2021, regardless of the efforts of this program and others (Office of People Analytics, 2023). There is also, as of 1 March 2023, a re-introduced piece of legislation in the Senate and House of Representatives to incentivize employers to hire military spouses by



amending tax codes (H.R.1277 – 118th Congress (2023-2024), 2023; S.596 – 118th Congress (2023-2024), 2023).

Additionally, the Talent Management 2030 Update addresses spousal employment, saying the Marine Corps will look to adopt a program that coordinates with businesses to help them fill employment shortages (either local or work-from-home), while also reducing spousal employment challenges (U.S. Marine Corps, 2023). As of this writing, there are no other details about this program, how it will work, or when it will begin, only that the Marine Corps will “explore” it as an option in 2023. The exploration of this program shows that the Marine Corps acknowledges the burden placed on spouses and its effect on retention but has no set solution for the problem. Where a program would be efficient in assisting spouses who must move per “needs of the Marine Corps,” homesteading, also discussed in Talent Management 2030, offers an alternate solution that will reduce this employment interruption.

Regarding military children, to assist with frequent relocations, the Marine Corps has a School Liaison Program, whose mission is to “promote awareness of the unique education needs of military connected children and facilitate successful school transitions” (U.S. Marine Corps, 2021d). Unfortunately, my research turned up no systemic research on the effectiveness of the program.

Finally, all Marines are assigned a sponsor after they receive PCS orders and prior to arrival at a new PDS to “reduce stress and challenges associated with relocating” (U.S. Marine Corps, 2016, p. 2). All Marines and families are also afforded the opportunity to utilize a number of counseling services, including the installation chaplain (confidential), Military and Family Life Counselors (confidential), the Family Advocacy Program (not confidential), TRICARE or military treatment facilities (not confidential), and external counseling services (confidential but costs money) if they feel distress due to moving (Military OneSource, 2020). Homesteading would act as an additional, new way to reduce the need for external support by maintaining geographic stability for those who need or want it.

## **B. STATUS QUO**

The current status quo regarding PCS frequency expects a Marine to PCS every 2–3 years (Tong et al., 2018). As discussed in the HRDP background subsection and summarized



in Figure 1, orders are assigned in a five phase process (U.S. Marine Corps, 2021a). Specially, a unit's T/O describes the number of Marines required in a unit (by rank and MOS) and the ASR authorizes how many of those billets will be manned (U.S. Marine Corps, 2021a). Referencing the ASR, monitors create staffing plans within their PMOS/MOS fields (U.S. Marine Corps, 2021a). In addition to PMOS FMF or supporting establishment billets, there are also Special Duty Assignments (SDA), as well as Formal Schools Training, Joint billets, Command billets, and Inspector/Instructor billets (U.S. Marine Corps, 2021a). Throughout any one year, MARADMINs are released to announce the convening of selection boards for specific assignments including: promotion, SDAs, education, recruitment, promotion, command, professional military education, and more. These boards dictate assignment to specific PDSs outside the "traditional" orders process. Therefore, when Marines are selected on a board for assignment to a specific billet/school, those Marines will usually (though exceptions exist) be taken off the movers list for billet assignment through their PMOS monitor's billet allocation. Furthermore, promotions play a role in the assignment process. Marine Corps monitors can work with a "one-up-one-down" model when it comes to staffing, but billets do have grade assignments monitors try to fill as well (U.S. Marine Corps, 2021a). Overall, monitors have to juggle a large number factors to meet their staffing goals.

### **C. RESEARCH QUESTION**

In response to the Marine Corps' release of Talent Management 2030 in 2021 and its current lack of a homesteading policy as of this writing, this thesis will answer two research questions.

- (1) Acknowledging Talent Management 2030s push to age the force and increase retention, what benefit does including "homesteading" as a nonmonetary incentive offer Marines and the Marine Corps?
- (2) What policy could the Marine Corps develop and implement to systematically manage the "homesteading" process while complementing current Marine Corps doctrine?

### **D. RESEARCH DESIGN**

To answer the above questions, I conducted a thorough literature review prioritizing civilian and military empirical research pertaining to the frequency of moving, how it affects



individual Marines and their families, and how existing Marine Corps doctrine can be utilized to develop a policy for homesteading. I chose this methodology because empirical studies can provide the most valid assistance to the Marine Corps in developing, and making the case for, a policy for homesteading, which currently does not exist. Although the majority of my policy recommendations are built off existing Marine Corps policies and practices, I also recommend changes based on Talent Management 2030s stated priorities. While the literature review reaches to civilian and government sources to provide context, the scope of these policy recommendations extend only to the Marine Corps.

## **E. CHAPTER I SUMMARY**

General Berger is working with key stakeholders to improve the Marine Corps' long-term appeal by incentivizing Marines to continue serving via nonmonetary means. Specifically, in the personnel assignments realm, the Marine Corps has declared that homesteading will no longer be viewed negatively. Although the direction to PCA Marines as much as possible has been in the personnel assignments order for nearly 10 years, his first-of-its-kind declaration is leading the Marine Corps into a new era, with the opportunity to being seen homestead as a viable opportunity for Marines and their families. Based on this opportunity of interest, I conducted a thorough literature review to research “why” and “how” homesteading in the Marine Corps can be implemented at a policy level, combating the status quo of “PCSing” every 2–3 years. Since Talent Management 2030 is not a Marine Corps Order, the opportunity to homestead is not guaranteed to even the best Marine until it exists as a policy in the Marine Corps Publications Electronic Library and is accessible to all Marines.



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## II. LITERATURE REVIEW

Military and civilian studies provide a wealth of information regarding the effects of PCS moves on service members and families, the effects on unit performance, and the usefulness of nonmonetary incentives. While research acknowledges the benefits of moving frequently, including starting over and increased resilience, most studies agree that the majority of impacts are negative for families. Studies reveal that spousal employment and earnings, military children's grades, and marital satisfaction can all be negatively impacted by the frequency of PCS moves (Drummet et al., 2003; Street et al., 2022; Tong et al., 2018; Wan et al., 2018). Furthermore, this frequent turnover can negatively impact unit performance and unit cohesion, as well as the good habits of Marines (Bacolod et al., 2022; Hancock et al., 2013; Wood et al., 2005).

### A. RESEARCH ON PERMANENT CHANGE OF STATION MOVES AND THEIR EFFECT ON MARINES AND THEIR FAMILIES

This section focuses on literature that speaks to how frequent relocation affects Marines, spouses, and children of military service members. These studies examined spousal work, school performance of children, marital satisfaction, and the psychosocial effects faced by all military family members.

#### 1. Spousal Employment

Spousal employment rates have an overwhelmingly negative relationship with frequent PCS moves (Tong et al., 2018). In 2018, Tong et al. of RAND Corporation completed a review of the disruptions faced by families during permanent change of station (PCS) moves, and the policies offered to families during these moves. Unsurprisingly, this report found that moving every 2–3 years negatively affects job opportunities within a spouse's professional field, the ability to obtain credentialing, the ability to find a job, and the length of time unemployed between jobs, causing loss of earnings, decreased satisfaction with the military, and lowered retention intentions (Tong et al., 2018). Evidence suggests that "PCSing" leads to lost earnings, unemployment, underemployment, and employment delays at a subsequent duty station. According to statistics used



throughout the report, 70% of employed spouses and 90% of unemployed spouses, when asked how difficult it was to find employment after their PCS, rated the difficulty they faced as “moderate” or higher (Tong et al., 2018). Furthermore, 61% of spouses said it took four or more months to find a job after their last PCS move; 27% of those respondents even said 10 or more months (Tong et al., 2018). Unemployment rates have not improved either, remaining stagnant from 2015–2021; military spouses had an unemployment rate over 20% from 2015–2021, compared to the 3.4% U.S. average (Office of People Analytics, 2023). According to the 2023 report from the Office of People Analytics, a PCS within the past year increased a spouse’s odds of being unemployed by 2.56 times and having PCS’d even one time in a military career increased unemployment odds by 1.68 (Office of People Analytics, 2023). Additionally, there are employment delays when spouses have to acquire new licenses/credentialing after a PCS move. For example, 50% of spouses reported 4 or more months before updated credentialing is obtained (Tong et al., 2018). In 2017, The Government Accountability Officer (GAO) found that 25% of spouses who required credentialing were unemployed, 25% who were employed were seeking employment outside their area of expertise, and 14% were underemployed, working part time due to lack of full-time opportunities (U.S. Government Accountability Office, 2021).

The difficulty a spouse faces in finding work due to PCS moves can lead to a large sum of lost earnings of a Marine’s career. According to a GAO report from 2015, the average enlisted Marine from 2008–2014 spent 32 months at one duty station prior to executing a PCS move, while an officer spent an average of 35 months at one duty station (U.S. Government Accountability Office, 2015a). If a Marine spends 20 years in the Marine Corps, that equates to 7.5/6.9 moves (I will use 7 moves for this example), respectively. Therefore, if a Military spouse moves 7 times throughout a Marine’s career, and 61% of spouses reported 4 or more months to find a job, that amounts to 2.33 years of lost earnings by the time the Marine qualifies for a normal retirement. At 10 or more months for 27% of spouses, this loss of potential earnings is astronomical. Depending on the type of work the spouse qualifies for, this loss of work can equate to tens, or hundreds, of thousands of dollars lost by the time a Marine retires. This is especially relevant since the average military spouse has a higher education level than working-age civilians (40%



of military spouses are college grads versus 30% of civilians), meaning the potential loss of quality employees and earning potential of spouses is especially high (Kamarck et al., 2020).

The difficulties spouses face finding work after a PCS impact the retention intentions of service members by decreasing spousal satisfaction (Tong et al., 2018). Research has linked spousal satisfaction to servicemember's retention intentions; according to Tong et al., as financial burdens, stress, and anxiety increase, marital satisfaction decreases, as does the intent to remain in the military (Tong et al., 2018). In this specific research, it is important to point out that Tong et al. could not find evidence of retention outcomes being affected by spouses, only retention intentions (Tong et al., 2018). Tong et al. does not cover un/underemployment psychosocial impacts on the spouse and families either, which they acknowledge are significant (Tong et al., 2018).

Overall, the instability caused by PCS moves affects Marine spousal employment by causing spouses to be out of work entirely, work outside their field of expertise, or delay employment after moving (Tong et al., 2018; U.S. Government Accountability Office, 2015a). This can cause years of lost earnings, increased stress, and decreased marital satisfaction, leading to lower retention intentions of Marines (Kamarck et al., 2020; Tong et al., 2018).

## **2. Military Children**

In addition to spousal employment, Marines' children can be negatively affected by the frequency of PCS moves (Drummet et al., 2003; Herbers et al., 2013). Although there can be positive impacts on children's resiliency and their ability to start over, moving frequently is negatively correlated with education and childhood friendships (Drummet et al., 2003; Lessard & Juvonen, 2018; O'Neal et al., 2022). Since active-duty Marines with children make up 24% of the Marine Corps, it is important to consider these negative relationships in order to retain these Marines (Department of Defense, 2021). Furthermore, since the rate of children almost doubles in every category (single with children, married with children, dual-military with children) from E1-E4 and O1-O3 to E5-E6 and O4-O6, it is even more important to consider these findings as we aim to age the force (Department



of Defense, 2021). With an increase of families in the military, Drummet et al. (2003) acknowledge that frequent relocations can have mixed effects on children of service members. Notwithstanding, a majority of researchers agree that the overall effect of long-term relocations is negative (Aronson et al., 2011; Drummet et al., 2003; Herbers et al., 2013; Lessard & Juvonen, 2018). There are multiple studies showing frequent relocations can negatively impact a child's education, affecting GPA, social networks, behavior issues, high-school drop-out rates, and more (Drummet et al., 2003; Herbers et al., 2013). According to Aronson, Caldwell, Perkins, and Pasch (2011), frequent relocations are associated with lower test scores, lower grade point averages, and an increased use of special education services.

These GPA declines can be caused by changes in social support network, peer groups, school quality, and program participation (Aronson et al., 2011; Lessard & Juvonen, 2018). Regarding changing peer groups, Lessard and Juvonen (2018), identified that friendship changes during the first year of middle school lead to GPA declines due to the lack of support and stability in adapting to the changing academic environment (Lessard & Juvonen, 2018). The same researchers found that the transition from middle to high school is also positively affected by stable friendships, promoting positive attitudes toward school, leading to higher levels of achievement (Lessard & Juvonen, 2022).

Apart from academics, this transitional period also bleeds into the socioemotional well-being of children. Some children view their social relationships as particularly fragile due to frequent moves (Drummet et al., 2003). They mourn the loss of friends and their school, while simultaneously fearing the impending change and potential social rejection at a new school (Drummet et al., 2003). The largest stress that accompanies these changes is the lack of control children have in the decision to move, change schools, and leave their friends, leading to an increase in depressive symptoms, which are higher in high-mobility children (Drummet et al., 2003; Herbers et al., 2013). In addition to increased depressive symptoms, moving to remote locations isolate children, forcing them to navigate a new culture, away from the ability to easily see family and friends (Drummet et al., 2003). To combat these negative emotions, Benner et al. identify that school belonging is the largest buffer to depressive symptoms, and an increased sense of school belonging is associated



with a decrease in loneliness and an increase in school engagement/grades (Benner et al., 2017). Although the samples in these studies were not all military children, the frequent relocations of school is still applicable as military children move schools at a high rate under the typical PCS cycle. I recommend further research into this topic in Chapter IV since military children and civilian children may face different external and internal pressures impacting their socio-emotional outcomes.

Although there is a largely negative correlation between frequency of moving and children's socio-emotional outcomes, there are a few studies documenting a positive impact on schooling if the child wishes to "start over" (Drummet et al., 2003). Children may perceive this repeated restart as a positive in the way it builds resilience, teaching them to make social connections quickly and get to know many people outside their typical peer group, further increasing the diversity in their life (O'Neal et al., 2022).

### **3. Marital Satisfaction and Psychological Health of Marines and their Families**

In addition to spousal employment and children's education and wellbeing, PCS moves can also negatively impact marital satisfaction and quality, marital stability, communication, and quality of parent-child relationships (Tong et al., 2018). Since frequent relocations within the military are an additional marital stress on top of those that civilian couples face, "normal" work-life stresses compound the stress on military couples, affecting marital satisfaction, mental health, and service attrition (Street et al., 2022; Wan et al., 2018). Positive marital quality can act as a buffer against adverse outcomes for service members, but frequent relocation is noted as the second most cited "stressful adjustment" in the lives of a military couple, following only deployment (Street et al., 2022; Wan et al., 2018). Each relocation where the couple moves can be a life changing event that requires adjustment from all family members (Wan et al., 2018). Wan et al. (2018) identified that this change can sometimes elicit positive outcomes for a couple, have no effect on a couple, or the couple can experience added stress due to a partner's difficulty adapting to new routines and surroundings. Although there are benefits to experiencing new cultures, continued moves can potentially cause cumulative negative impacts if the



couple is maladjusted and exposed to prolonged stress, leading to increased relationship conflict (Wan et al., 2018).

On top of increased marital stress, relocation causes Marines and spouses to lose social support networks, which can affect their psychological health (Drummet et al., 2003; Wan et al., 2018). For men and single-parents, in particular, the frequent relocations can cause overreliance on immediate family for support, leading to further isolation from other potential support networks in the area, or even causing children to replace adults as companions (Drummet et al., 2003). Families may also experience culture shock in a new area (i.e., a liberal northeastern family moving to small, conservative Yuma, AZ), have a hard time making friends/finding a job, and lose their sense of self (Wan et al., 2018).

Military support programs exist at all bases, and successfully assist with some of these stresses couples/individuals face while moving (Wan et al., 2018). While they are proven to be a successful intervention, the stigma associated with using support services still exists for service members, preventing some Marines from getting counseling or other services that may provide benefit (Wan et al., 2018). Given moving is the second most stressful event a military family can face, if Marines and their families can maintain their support systems at one PDS, and have the opportunity to continue serving within that same, preferred PDS, it may have large, positive impacts on marital stress/satisfaction and psychological health.

## **B. RESEARCH ON PERMANENT CHANGE OF STATION MOVES AND THEIR EFFECT ON MARINES IN THE WORKPLACE**

Marines and their families are not the only entities negatively affected by frequent change of station moves. The Marine Corps at large is negatively affected by frequent turnover, impacting Marine performance, unit productivity, and the habits of Marines in the context of the USMC.

### **1. Turnover and Performance**

Regarding turnover and performance, one meta-analysis of 48 difference samples (N = 24,943), by Hancock et al. (2013), identified that the overall correlation between turnover and performance (measured via labor productivity, customer service, quality/



safety, and financial performance) is negative, specifically noting that the “human and social capital losses” that come with turnover typically outweigh the positive effects of bringing a new employee in as replacement (Hancock et al., 2013, p. 593). They further noted that manufacturing and transportation industries, or those with “highly learned skills,” had the most negative relationship to performance, followed by “professional industries,” or those requiring high levels of knowledge (Hancock et al., 2013). Finally, Hancock et al. identified that turnover involving both nonsupervisory and supervisory positions together, as well as turnover at large firms, have a heavy, significant negative relationship with firm performance, more so than smaller organizations and those where only nonsupervisory roles face turnover at one time (Hancock et al., 2013).

Overall, the enlisted Marines that make up the majority of the force are considered to be in jobs akin to the manufacturing and transportation industries studied in Hancock et al.’s analysis, as the Marine Corps considers them subject matter experts in these areas. At the same time, officers, and some senior enlisted Marines, can be identified as those in professional industries, or the planners and/or managers. Limiting turnover to the same geographic area, especially the frequent collective turnover of both officers and enlisted, can, therefore, alleviate negativity associated with performance and turnover rates as Marines will continue serving within the same Marine Expeditionary Force (MEF) for a longer period of time. Although every Marine is equipped to serve in any MEF, and all of the MEFs are equipped with similar equipment, each one serves a different area of the globe and has a different mission statement (U.S. Marine Corps, n.d.-a, n.d.-c, n.d.-b). Therefore, if a Marine becomes intimately familiar with their MEF’s mission, performance can be honed for maximized effectiveness within that mission.

On an individual Marine level, the “best” Marines, those that Talent Management 2030 aims to retain, perform better when they work where they prefer (Bacolod et al., 2022). Bacolod, Heissel, and White (2022) found this by using a difference-in-differences approach to compare top/average/below performers’ FITREP marks (N= 31,242 Marines) with whether they were working at their preferred duty station (Bacolod et al., 2022). Bacolod et al. noted that, when dealing specifically with top-performing Marines, duty station preference could be used as an incentive to increase performance. This thinking can



extend to homesteading opportunities as those would be considered preferential locations for the most qualified Marines.

Overarchingly, frequent turnover is negatively associated with firm performance and, since allowing top-performers to choose their duty station assignments has a positive relationship with performance, incentivizing the top performers with the option to homestead could potentially even increase unit performance while maximizing the Marine Corps' top performers.

## **2. Habits**

In addition to turnover affecting performance, habits play a large role in the performance readiness of individual Marines (e.g., fitness habits to maximize a Physical Fitness/Combat Fitness Test score or a smoking habit causing someone to cough up a lung halfway through). As it turns out, changing location can also negatively impact habits, on top of productivity.

Habit formation is connected to associated learning, in which repetition of a certain thing (i.e., exercising) can be linked to certain locations, friends/people, and times of day (Wood et al., 2005). Therefore, if the habit of exercise is connected to a specific gym, a person, or a time of day, changing said circumstance can interrupt those daily practices (Wood et al., 2005). Although there is not a lot of research on circumstantial habit interruption/changes, Wood et al. (2005) followed college students before and after a University transfer to examine the effect of stimuli interruption on students' exercise habits. The results showed that a change of location where the exercise takes place, regardless of the strength of the habit, is negatively correlated with the frequency in which the student exercised (Wood et al., 2005).

Wood and Tam studied two other habits, watching TV and reading the newspaper. The most important finding from reading the newspaper was that social cues from others affected this habit (i.e., the habit was affected by a change from a solitary to a group activity or vice versa), demonstrating how habits can be "socially shared" (Wood et al., 2005). A decent translation into the military would be professional military educational reading groups, as a change in the social context can positively or negatively affect the habit of





reading and discussing. Handing some control from the monitor/Marine Corps to the Marines to maintain their circumstances, or change them (i.e., opt-out), can allow them to maintain positive stimuli or seek positive stimuli elsewhere.

### **C. NONMONETARY INCENTIVES IN THE MILITARY**

The importance placed on nonmonetary incentives (incentives other than pay that act as compensation for work) in Talent Management 2030 is not misguided (Savych, 2005). There is a plethora of evidence that nonmonetary incentives work to improve performance and satisfaction (Coughlan et al., 2014; Haider et al., 2015; Savych, 2005). This becomes increasingly more important when a Marine reaches the point at which the satisfaction from monetary compensation starts to diminish, which is different for every person (Coughlan et al., 2014). At that point, nonmonetary incentives are critical in maintaining morale and satisfaction in one's work (Coughlan et al., 2014; Haider et al., 2015).

Just as the importance of nonmonetary incentives is not misguided, including nonmonetary incentives in the military compensation framework is not a new idea. In 2005, RAND released a report evaluating ways the DOD can support a transformed force by adapting the personnel management systems within the Military (Savych, 2005). Savych stresses the importance of the military adapting nonmonetary incentives, including personnel management policies, to improve the satisfaction and performance of service members (Savych, 2005). Specifically, he recommends that service members have more say in duty or job assignments, career development, and living environment (Savych, 2005). In 2014, the implementation of nonmonetary incentives within the military was still being discussed. One study, while ensuring to outline that nonmonetary incentives are not "one size fits all," recommended potential incentives ranging from geographic stability to telecommuting opportunities, depending on the service member (Coughlan et al., 2014). Coughlan et al. went on to acknowledge that the inclusion of nonmonetary incentives could also decrease the cost of monetary military compensation if nonmonetary incentives are used on service members who value nonmonetary rewards over additional money (Coughlan et al., 2014). Implementing a homesteading policy in addition to the



nonmonetary incentives already offered by the Marine Corps could allow those who value geographic stability the opportunity to securely achieve satisfaction outside monetary benefits, increasing performance and their likelihood of accepting another tour.

#### **D. CHAPTER II SUMMARY**

Across the Marine Corps, the frequent rate of PCS moves has the potential to cause a loss of productivity and lowered unit/individual performance, while Marines and their families are hit with a multitude of problems. By moving an average of 6.9-7.5 times over a career, military spouses can lose 2.3-2.5 years of potential earnings. On top of the loss in earnings, frequent moves have been associated with GPAs and higher depressive symptoms in children. Furthermore, moving frequently can cause additional stress on marriages, removing stability, support systems, and submitting families to repetitive culture shock. While some families thrive in starting over, others struggle. The option to obtain geographic stability in homesteading should exist in policy form to ensure Marines are securely afforded more autonomy in their careers. Nonmonetary incentives like this are shown to increase satisfaction and performance, which may lead to higher retention rates and a mature Marine Corps.



### III. A USMC HOMESTEADING POLICY

This chapter first presents policy recommendations, including: (a) a length of time to be considered “homesteading,” (b) homesteading locations based on MCO 5250.1 and MCO 1300.8, (c) the prioritization of Marines based on existing performance metrics, and (d) prioritization for Marines with dependents. These recommendations align with Talent Management 2030s dedication to decrease family stress and increase the retention rate of the best Marines. Following this policy advice, I offer recommendations on how assignments monitors, Marines, and the Marine Corps can systematically work together to ensure all entities are preserved while potentially increasing satisfaction and retention. Finally, I analyze the stakeholders most affected should these policy recommendations be implemented.

The recommendations presented in this chapter are based on the literature reviewed in Chapter II. These recommendations fill a gap in the absence of Service policy for analysis on the effectiveness or management of homesteading policies. As the largest stakeholders, Marines, the Marine Corps, assignments monitors, and Marine families face both risks and potential benefits from these recommendations. Those risks include limited staffing goal allocations, decreased satisfaction if not selected to homestead, and potentially null or negative impacts on retention. While there are risks, the potential benefits include increased retention, increased satisfaction due to individualized incentives, increased geographic and economic stability, increased performance of Marines and units, improved school performance, and a potential decrease in expenses to the government caused by permanent change of station moves.

#### A. POLICY RECOMMENDATIONS

##### 1. How Long Is a “Homestead”

Given there is no research on this, my recommendation is based on decreasing the current PCS rate of every 2–3 years. Therefore, I recommend a homesteading be defined by the Marine Corps as *when a Marine spends at least six years in the same geographic location*. Ideally, a Marine and their family could spend more than six years if billets and career advancement exist within the same location, but I acknowledge the needs of the Marines



Corps will always be the prioritized first overall. I offer six years as many orders (excluding schooling and special assignments) are written for two to three (two years is the TOS requirement to PCS a Marine) years. Furthermore, I recommend Marine officers utilize the option to opt-out of promotion, per MARADMIN 011/22, if they decide to remain in one location as long to obtain a key billet in grade (U.S. Marine Corps, 2022). If promotion opt-out becomes an option for SNCOs, I recommend the same.

If a Marine needs to fulfill an overseas duty requirement, due to their OCD, I recommend they be offered a 1-year dependent-restricted tour as an option to allow their family stability within CONUS. I do not recommend these dependent-restricted assignments increase in availability, however, as there is a correlation with high turnover and unit performance/readiness. This would be on a first-come, first-served basis. If a dependent-restricted assignment is not available for a Marine, the needs of the Marine Corps outweigh a Marines' request to remain CONUS. Although it may not be possible for all homesteading Marines, the feeling of career autonomy provided by decisions like accepting dependent-restricted orders, or not, may increase Marine Corps satisfaction, and ultimately retention.

## **2. Homesteading Locations**

I recommend all areas, CONUS and OCONUS, listed within MCO 1300.8's list of LCMs and PCAs be utilized within a homesteading policy, as well as Beaufort, South Carolina, Yuma, Arizona and Twentynine Palms, California if staffing vacancies allow. Including Okinawa, the only OCONUS location on MCO 1300.8's LCM/PCA list, could potentially lower Corps' wide OCONUS PCS costs as interested Marines can remain in the area, regardless of OCD. Understandably, when Marines request to homestead in a specific geographic location, it is decided knowing they may change PDSs more than others. For example, the bases included in the LCMs list for the Quantico, VA area include Washington, D.C., and Maryland. Working at the Pentagon, for example, would logically not lead to another tour at the Pentagon immediately following the first. In this case, a Marine homesteads in the area knowing they will likely change daily commute time by working in Maryland or in Quantico following their Pentagon tour.



### 3. Prioritization of Marines

Currently, orders are primarily assigned based on SGMs provided by Manpower Management to monitors, along with meetings between monitors and Marines during annual roadshows and additional interactions (U.S. Marine Corps, 2021a). Although the billet marketplace (new billet application/assignment process) will make changes to how some orders are assigned, there is no way to tell how many Marines will find their billets via the marketplace since it is still in the works per Talent Management 2030s Update. Regardless of the integration of the marketplace in the future, a homesteading process is still an additional way to incentivize Marines since the marketplace is an unknown factor at this time. Furthermore, because the Marine Corps aims to fulfill its staffing goals across the globe, not all Marines will be able to homestead. In keeping with Talent Management 2030s guidelines to incentivize the best Marines and increase stability for families, the Marine Corps must develop a prioritization policy to fairly dictate who receives homestead orders. This policy must also account for the manning precedence levels as determined by the Deputy Commandant, Marine & Reserve Affairs. The prioritizations of Marines will be dictated via a point system based on performance, OCD, and family make-up.

As discussed in Chapter I, the personnel assignments order dictates that no prioritization be afforded for assignments based on dependents or dual-military relationships, only to families with members enrolled in EFMP. Although this part of the order has not been updated since 2014, it is still the governing document on the matter. Unfortunately, this is a contradiction to repeated declarations in Talent Management 2030 and MCO 5250.1 to decrease stress and increase stability for Marine families. If the Marine Corps will not entertain the idea of prioritizing families in homesteading, I offer that those prioritization metrics be removed from the decision-making process. In order to prevent a low-performing Marine with dependents from instantly being prioritized over a single, high-performing Marine, performance is weighted the most heavily. This mitigation technique ensures performance is the key factor incentivizing Marines.

The proposed point system in Table 1 is based on performance, OCD, number of dependents, dual-military, and EFMP in accordance with Talent Management 2030 (Option A). The proposed point system in Table 2 is only based on performance, OCD, and EFMP in



keeping with MCO 1300.8 (Option B). Figure 2 depicts the point comparison between Option A and B. Each metric is discussed in depth.

Table 1. Point Breakdown by Prioritization Metric, Families/Dual Military Prioritized (Option A)

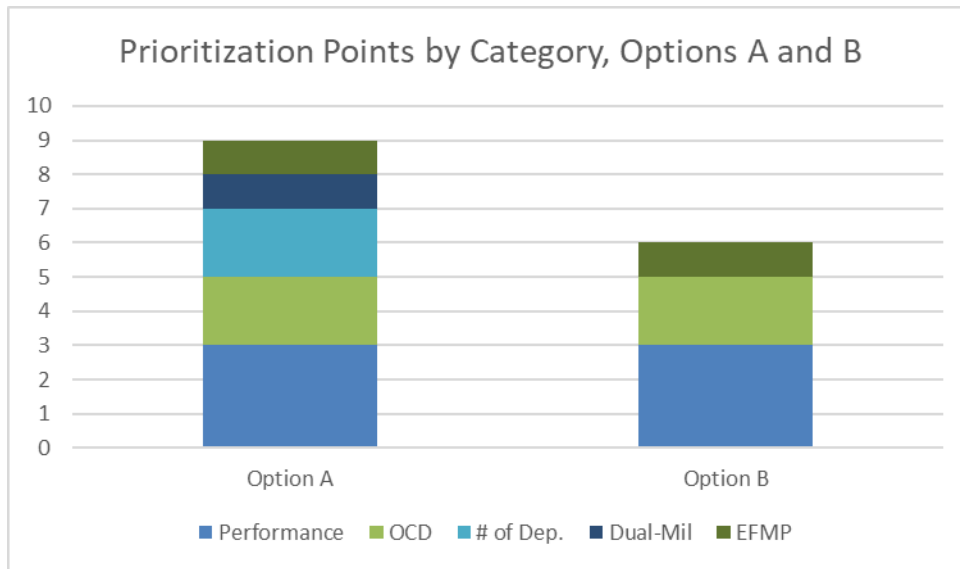
Metric	Point Breakdown
<b>Performance</b>	Upper Cu RV/Tier 1: 3 points Middle Cu RV/Tier 2: 2 points Lower Cu RV/Tier 3: 1 point Tier 4: 0 points
<b>OCD</b>	Within 2 years: 2 points 2-3 years: 1 point Over 3 years: 0 points
<b>Number of Dependents</b>	2+ Dependents: 2 points 1 Dependent: 1 point 0 Dependents: 0 points
<b>Dual-Military</b>	Dual-Military: 1 point All Others: 0 points
<b>EFMP</b>	EFMP: 1 point All Others: 0 points
<b>Total Possible</b>	Highest possible, 1 Marine: 8 points Middle score, 1 Marine: 2–6 (OCD/EFMP dependent) Lowest possible, 1 Marine: 0 points Highest possible, dual military Marine: 9 points Middle score, dual military Marine: 3–7 (OCD/EFMP dependent) Lowest possible, dual military Marine: 1 point

Table 2. Point Breakdown by Performance Metric, no Family/Dual-Military Prioritization (Option B)

Metric	Point Breakdown
<b>Performance</b>	Upper Cu RV/Tier 1: 3 points Middle Cu RV/Tier 2: 2 points Lower Cu RV/Tier 3: 1 point Tier 4: 0 points
<b>OCD</b>	Within 2 years: 2 points 2-3 years: 1 point Over 3 years: 0 points
<b>EFMP</b>	EFMP: 1 point All Others: 0 points
<b>Total Possible</b>	Highest possible: 6 points Lowest possible: 0 points



Figure 2. Prioritization points for options A and B



**a. Performance**

I recommend each Marine receive points based on either their Fitness Report Reporting Senior RV cumulative summary placement or their tier placement in JEPES, depending on rank. I recommend these two metrics because both are already utilized promotion/retention decisions to compare Marines (i.e., Marines that have majority of FITREPs in the upper third on the RV summary and Marines who are determined Tier I are considered to have performed better compared to others).

Upper Third/Tier I: If a FITREP-receiving Marine has the highest percentage of FITREPs in the upper third, they will be given 3 points for performance. Similarly, if a Corporal and below has a Tier I PES Score, they will also be awarded 3 points for performance.

Middle Third/Tier II: If a FITREP-receiving Marine has the highest percentage of FITREPs in the middle third, they will be given 2 points for performance. Similarly, if a Corporal and below has a Tier II PES Score, they will also be awarded 2 points for performance.

Bottom Third/Tier III: If a FITREP-receiving Marine has the highest percentage of FITREPs in the bottom third, they will be given 1 point for performance. Similarly, if a



Corporal and below has a Tier III PES Score, they will also be awarded 1 point for performance.

Tier IV: If a Corporal and below has a Tier IV PES Score, they will be awarded 0 points for performance.

***b. Overseas Control Date***

OCD prioritization is considered similarly to how overseas orders are assigned. If a Marine is within 24 months of their OCD, I recommend they receive two points as a Marine cannot be involuntarily handing dependent-restricted orders in that time. If a Marine is between two and three years since their OCD reset, I recommend one point as they are higher in the queue for receiving an overseas assignment. Finally, if a Marine is over three years since their OCD reset, I recommend zero points.

***c. Number of Dependents***

Number of dependents is based on a 0–2-point scale, where two points means the Marine has two or more dependents, one point means the Marine has one dependent, and zero points means the Marine is a single Marine. I recommend a difference in points between two or more dependents and one dependent because a dependent, per MCO 1751.3, can be anyone from a step-parent, to a legitimate or pre-adopted child, and more dependents would potentially require more stability for support networks, schooling, and employment (U.S. Marine Corps, 2021b).

In Table 3, this prioritization is removed due to MCO 1300.8’s objection to prioritizing a Marine for assignment or geographic location based on dependents. I recommend the prioritization be adopted and remain in place, however, as the intent behind this nonmonetary incentive is the lower the stress placed on families and increase their stability.

***d. Dual-Military***

The “dual-military” qualifier in Table 2 would be 0–1 point depending on whether the Marine is in a dual-military marriage or not. The intention behind prioritizing dual-





military couples is that by incentivizing one family with geographic stability, the Marine Corps is potentially retaining two Marines, rather than one. Each Marine's score within the couple would be quantified based on their own merit. If one/both rank near the top of the monitor's homesteading data, both monitors would work together to assign orders within the desired homestead location. If one ranks high and the other low, I recommend monitors use their discretion to find a middle ground between the two.

In Table 3, this prioritization is also removed due to MCO 1300.8's objection to prioritizing a Marine for assignment based on a dual-military status. I recommend the prioritization be adopted for homesteading and remain in place, however, due to the potential of retaining two good Marines, as stated above. If the spouse is in another branch of service, I recommend completing the assignment process as traditionally followed when two service members reside in different branches of the military due to the coordination efforts, and because these are internal, Marine Corps recommendations so we cannot expect other service branches to mirror them.

A risk to adopting this prioritization, as well as a dependent specific prioritization, is potential fraudulent marriages in an effort to receive higher priority for homesteading. This is already a rumored practice to receive medical benefits or move out of the barracks. Fortunately, similar to those who commit fraud in an effort to receive medical benefits or to get out of the barracks, Marines who get married for a leg up in geographic stability prioritization could be prosecuted under Article 124 in the Uniform Code of Military Justice, Frauds against the United States (Department of Defense, 2019).

*e. Exceptional Family Member Program*

Since MCO 1300.8 ensures Marines with family members enrolled in EFMP are protected in the orders assignment process, I recommend a 0–1 qualifier be added to the prioritization point system. This will ensure the best Marines, with a family member(s) in EFMP will easily be identified regardless of whether the dependents are counted or not.



*f. Handling Ties in Point Total*

I recommend tied point totals be broken based on the performance metric via FITREP RV summary percentage or PES Score. For example, if two Captains both score 5 points (Captain A rates a 3 for performance and 2 for dependents, while Captain B rates a 2 for performance, a 2 for dependents, and a 1 for EFMP), Captain A will be ranked above Captain B because Captain A is in the “upper” performance third, whereas Captain B is in the “middle” third. If both Captains A and B were in the “upper” third, and tied prioritization scores, I recommend the higher percentage within the “upper” third be ranked higher. Similarly, Corporals A and B will be decided on the higher point value in their JEPES profile. If two Marines have the exact same scores and there is no way to differentiate performance (i.e., composite score cannot be disaggregated), I recommend monitor discretion if two billets in the same requested geographic area are not available. I make this recommendation because it aligns with Talent Management 2030s declaration to incentivize the best Marines.

**4. Key Billets**

First and foremost, and discussed in Chapter IV, I recommend the Marine Corps analyze what a “key billet in grade” really means and reevaluate leadership paths in the USMC further than what exists in Talent Management 2030. Because these recommendations are based on current operations, that evaluation is outside the scope of my thesis. Therefore, I recommend Marine officers and enlisted Marines who need a “key billet” in a specific environment be mentored on their decision to PCS, accepting a key billet, or their request to instead homestead in a specific area. I recommend this counseling be recorded so, in the event the Marine requests a geographic location over a career advancing billet, there is a paper trail of the discussion had and mentorship given prior to the request being made. I recommend this to maintain autonomy of one’s career, should the needs of the Marine Corps allow it. If another Marine does not exist to take the assignment, the original Marine would be required to accept based on needs of the Marine Corps.



## 5. Overseas Billets

Since homesteading can potentially interfere with OCDs and overseas staffing, I recommend those who do not want to leave their CONUS geographic location first be offered one-year, unaccompanied overseas orders per MCO 1300.8 as an option to maintain a CONUS homestead for their family and reset their OCD. This separation may cause stress on the family, as discussed in Chapter II, which is why I recommend it as an option, not the default. Some families have support networks in the CONUS area and would prefer these assignments, while other families would prefer to travel overseas on accompanied orders.

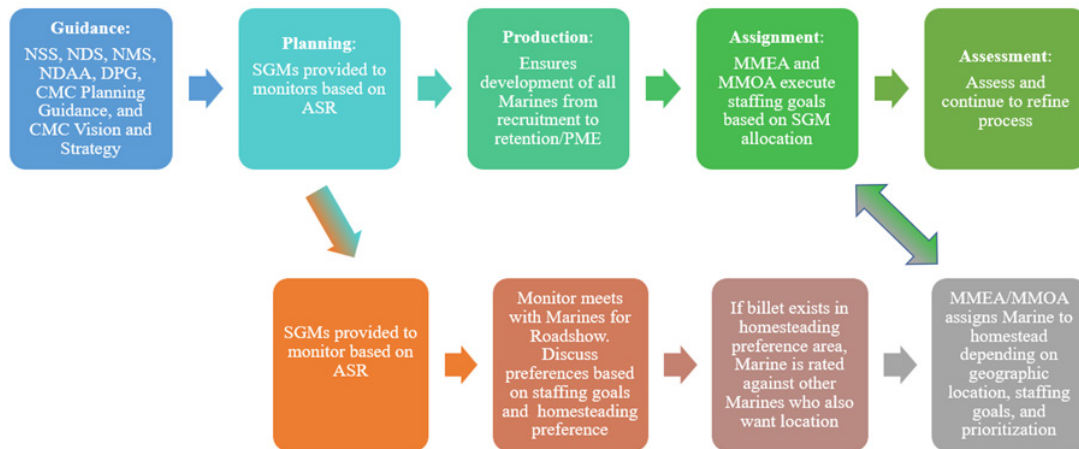
### B. PROCESS OVERVIEW AND RESPONSIBILITIES

This subsection covers the responsibilities of Marines, assignments monitors, and the Marine Corps throughout the assignments process. An overview of the recommended process from both the Marine and monitor perspectives (based on the HRDP) are in Figures 3 and 4.

Figure 3. Overview of homesteading assignment process from a Marine perspective



Figure 4. Overview of homesteading assignment process from an assignments monitor perspective (HRDP)



## 1. Marine Responsibilities

A Marine's first responsibility regarding this policy recommendation would be to familiarize themselves with the policy, ensure their information regarding dependents and EFMP are up to date, and review their performance data to know where they stand. A Marine's second responsibility would be to discuss their preferences with their family, then opt-in or opt-out of homesteading with their monitor at their next routine meeting. I recommend this choice in keeping with an individualized incentive plan for each Marine, as discussed in the literature review. I recommend a Marine's options include:

1. Opt-out entirely, normal orders process
2. Opt-in, requesting to homestead at current location
3. Opt-in, but request a new location to begin homesteading

Following this opt-in/opt-out choice, a monitor will review the Marine's data to determine if their desires match with the Marine Corps SGM allocations. Since priorities change, I recommend the Marine be afforded the option to change their decision when their next orders are due for assignment. I also recommend this Marine be offered the opportunity to homestead in addition to monetary incentives (i.e., if they rate a monetary bonus for reenlistment).

## 2. Assignments Monitor Responsibilities

An assignments monitor's first responsibility is to ensure the Marine is aware of their options regarding homesteading during monitor-Marine discussions. Secondly, it is the responsibility of the monitor to mentor the Marine on career advancement regarding the traditional leadership path and their decision to homestead or not. If a Marine has been made aware of their options, and requests to receive the homesteading incentive, it is the monitor's responsibility to enter the Marine on a prioritization list and to maintain the prioritization lists for every LCM/PCS geographic area so they can accurately assess the capability of Marine homesteading in that area based on Marine Corps staffing. I recommend a note be added to every Marine's profile indicating whether they requested to homestead, and the date when the conversation took place. If these notes are not easily accessible or widely used, I recommend assignments monitors' discretion on a better process to note the request.

To manage the prioritization of Marines, I recommend a spreadsheet be added to the monitor's SharePoint site. I recommended it exist on SharePoint so it is easily accessible and less likely to disappear during turnover. I recommend the document to be filled in while talking with a Marine and be maintained with the following metrics for every geographic area.

1. Marine Name, Rank, EDIPI
2. Marine's rotation date
3. Marine's OCD
4. OCD Points
5. Performance Tier/PES Score/Thirds Information
6. Performance Points
7. Number of Dependents
8. Dependents Points
9. Dual-Military Qualifier
10. EFMP Qualified
11. Total Points



I further recommend the document be broken down by total points on separate pages in order to list by PES Score or Thirds summary percentage if needed. An example of the spreadsheet is located in Appendix C. If a SharePoint manager, or computer scientist, can create the proper flow or database connection without the use of a spreadsheet, I recommend that alternate option. Finally, it is the monitor's responsibility to inform the Marine why they were not assigned in the same geographic location (e.g., the Marine needs to increase performance to move up priority list or no billets available) so lines of communication remain respected. I recommend the Marine be offered a priority geographic location on their PCS move if they are a highly ranked Marine and a homesteading assignment was not available.

### **3. Marine Corps Responsibilities**

Regarding homesteading management, it is the responsibility of the Marine Corps to, first and foremost, ensure monitors adhere to the prioritization and assignments process. This is done through direct order that they follow the process recommended. This is the only way to ensure transparency between Marine, assignments monitors, and the Marine Corps' agenda. I recommend my policy recommendations be taken and transformed into a MCO or added to MCO 1300.8 and MCO 5250.1 to ensure Marines and monitors can access the information. If the Marine Corps does not adopt my recommendations, it is the responsibility of Headquarters Marine Corps to release a MARADMIN or an update to MCO 1300.8 discussing homesteading, and how it will be handled, outside Talent Management 2030. Although Talent Management succeeds as an initiating document, there has already been statement distancing the Marine Corps from homesteading in the 2023 update, and it does not hold any entity responsible for ensuring its success or failure.

### **C. STATUS QUO COMPARISON**

Following these policy recommendations would alter the status quo in five ways. First, the hierarchy of orders assignment would overarchingly remain the same per MCO 1300.8, but prioritizing career advancing billets within the same geographic location would be prioritized over PCS moves if it does not create a talent pool in one location, hindering performance at other units. Furthermore, unaccompanied, twelve-month overseas orders would become more normal for those who need to reset their OCD but have a family who



would like to remain within CONUS. Secondly, among those granted homesteading orders, the PCS frequency would decrease from every 2–3 years to six years or more, providing additional stability and unit continuity. Third, homesteading would be an optional incentive for all Marines, categorized under “Marine preferences” in personnel assignments. Fourth, my policy recommendations would require additional work to meet the staffing goals of monitors, as they would have to juggle geographic location preferences in addition to all other items mentioned within “Status Quo” in Chapter 1. As far as the HRDP goes, I predict this addition will fall after SGMs are provided to monitors to execute their staffing goals. Only those Marines who are not selected for assignment on a required board should be discussing the geographic location preference with their monitor. Finally, these recommendations will increase the transparency of the assignment staffing process, making assignments based on performance and other quantifiable metrics, rather than monitor slating.

Table 3. Status Quo Comparison

	Status Quo	Proposed Change
<b>Determination of Billet Assignment</b>	<ol style="list-style-type: none"> <li>1. Needs of the Marine Corps</li> <li>2. Career Progression</li> <li>3. OCD</li> <li>4. Individual Preferences</li> </ol>	<ol style="list-style-type: none"> <li>1. No change</li> <li>2. If career profession exists within geographic location, prioritize</li> <li>3. 1 year, overseas unaccompanied orders used for those who want to maintain CONUS homestead (first come, first served)</li> <li>4. Homestead option implemented on level of individual preferences</li> </ol>
<b>PCS Frequency</b>	Every 2–3 Years	No less than every 6 years for those with homestead incentive; ideally limited only by career advancement opportunities within location or OCD reset requirements
<b>Homesteading Option</b>	Not outlined/determined	Opt-in/out option for all Marines
<b>Billet Assignment within same geographic location (external to personnel board decisions)</b>	Determined by monitor based on their staffing goals provided by MMIB	Prioritization system transparent to every Marine, but still based on staffing goals



## D. STAKEHOLDER ANALYSIS

In order to implement effective policy recommendations for homesteading in the Marine Corps, a stakeholder analysis is necessary to ensure the interests of all those positively or negatively impacted by potential policy changes are adequately considered. The stakeholders for this policy include the Marine Corps, the monitors who assign orders, Marines, the families of Marines, companies hiring spouses, schools, and U.S. taxpayers. An overview of the analysis is offered in Table 4. If applicable, an additional subsection below will further address the importance of the issue to said stakeholders and how they may be affected by an increased rate of homesteading, positively and negatively.

Table 4. Stakeholder Analysis Overview

Stakeholder	Importance	Interests	Risks	Potential Benefits
<b>Marine Corps*</b>	High	<ul style="list-style-type: none"> <li>- “Needs of the Marine Corps”</li> <li>- Retention</li> <li>- Unit Performance</li> <li>- Monetary Cost</li> <li>- Homesteading locations</li> </ul>	<ul style="list-style-type: none"> <li>- Does nothing to increase retention/recruiting efforts</li> <li>- Staffing goals not met</li> <li>- Marines less likely to want career advancing billets/schooling</li> <li>- Decreased diversity in units</li> </ul>	<ul style="list-style-type: none"> <li>- Increased retention</li> <li>- Performance increases (via fitness reports and JEPES, inspection and training exercise evals)</li> <li>- Costs associated with moving personnel decrease</li> </ul>
<b>Assignments Monitors*</b>	High	<ul style="list-style-type: none"> <li>- Staffing goals</li> <li>- Overseas assignments</li> <li>- Prioritizing Marines who want to homestead</li> <li>- Homesteading locations</li> </ul>	<ul style="list-style-type: none"> <li>- More Marines want to homestead than staffing available</li> </ul>	<ul style="list-style-type: none"> <li>- More Marines retained to fill higher ranking assignments</li> </ul>
<b>Marine*</b>	High	<ul style="list-style-type: none"> <li>- Geographic stability choice</li> <li>- Overseas assignments</li> <li>- Homesteading locations</li> <li>- Opportunities for advancement</li> </ul>	<ul style="list-style-type: none"> <li>- Billets not available for those who want to continue to move around</li> <li>- Unable to get billet for career advancement in homesteading location</li> <li>- Unaccompanied Overseas Orders</li> </ul>	<ul style="list-style-type: none"> <li>- Increased satisfaction with Marine Corps</li> <li>- More individualized nonmonetary retention incentive</li> </ul>
<b>Marine Families*</b>	High	<ul style="list-style-type: none"> <li>- Geographic/economic stability</li> </ul>	<ul style="list-style-type: none"> <li>- Marine pulled for unaccompanied</li> </ul>	<ul style="list-style-type: none"> <li>- Geographic or economic stability in</li> </ul>





Stakeholder	Importance	Interests	Risks	Potential Benefits
		- Schooling - Homesteading locations	orders overseas to maintain geographic stability of family	the form of family support systems, schooling, and employment
<b>Civilians Employers</b>	Medium	- Workforce stability	N/A	- Hire Military families with longevity, more military hires
<b>Schools</b>	Medium	- Fostering the education and growth of students	N/A	- Students maintain skill level of school system - Decrease in student turnover mid-year or over summer
<b>U.S. Taxpayers</b>	Low	- How tax money is being spent - Marine Corps readiness	N/A	- DOD budget decreased, tax money to something they support

\* High importance level—Stakeholder risks and potential benefits reviewed in further detail.

## 1. Marine Corps

### a. Risks

As with the introduction of any change, there are risks to the organization at large in implementing a homesteading policy. If the policy does not end up increasing retention rates for the best Marines, it can be deemed a failed attempt. If the policy does not hinder retention rates, however, it should be maintained as an additional nonmonetary incentive option. As far as staffing goals and career advancing billets/schooling, the needs of the Marine Corps will always be first priority in the orders assignment hierarchy, and I am not recommending that change. I only recommend this policy be offered as an incentive if billets are available and the needs of the Marine Corps are fulfilled. Finally, and unfortunately, diversity of ideas and experiences may be more limited if Marines move less frequently. Because some Marines will prefer moving more often than others, they may prevent the loss of diversity but only future research can answer this.

### b. Benefits

As discussed within Chapter I, a choice in work location can increase work performance. Furthermore, turnover is associated with decreases in organizational



performance. Therefore, homesteading has the potential to increase the performance and continuity of Marine Corps units if it can be achieved while ensuring the staffing needs of the Marine Corps are met. This is in addition to Talent Management 2030s goal to retain more of the best Marines, which is also a potential outcome of these recommendations being adopted. Lastly, this has the potential to decrease costs relating to PCS expensive in the Marine Corps, freeing up money for other Department of Defense requirements.

## **2. Assignments Monitor**

### ***a. Risks***

The main risk for monitors is more Marines want to homestead than assignments available. However, in this case, the prioritization system will act as a black and white determination for whom to give those assignments to, eliminating the risk to monitors themselves.

### ***b. Benefits***

The potential increase in retention from these recommendations could lead to more Marines to fill higher-ranking billet assignments in the long run, ensuring all staffing goals are appropriately met.

## **3. Marine**

### ***a. Risks***

The risks to Marines in these recommendations is the inability to receive preferred assignments and unaccompanied overseas tours. The first risk is that assignments aren't available at certain PDSs for those who do not want to homestead. If a Marine does not want to homestead and is following the normal orders process, they are accustomed to receiving assignments where openings are available, so these recommendations will change nothing. Secondly, for those whose families do want to homestead, but career advancing billets are unavailable in the area, a Marine may have to sacrifice the opportunity for a geographic location preference. Although this is a career risk, the Marine should be fully informed, and it should be decided by the Marine, so they have autonomy in that decision. This could lead to less qualified Marines in key billets, or it could lead to the



discovery that the traditional route to leadership is not the only route. Additional research would have to be completed in the future. Another risk is the potential of unaccompanied overseas orders for 12-month periods if the Marines' OCD is nearing the top of the assignment queue and they do not want to move their family overseas. Again, this risk can be mitigated by allowing the Marine to choose between unaccompanied for one year, or moving the family on accompanied orders, leaving the decision up to the Marine, increasing ownership of said decision.

***b. Benefits***

On top of family stability increasing, offering Marines more individualized nonmonetary incentives could increase their satisfaction with the Marine Corps. As discussed in the literature review, nonmonetary incentives are key in increasing satisfaction when monetary incentives are no longer useful.

**4. Marine Families**

***a. Risks***

The main risk for the families of Marines is a Marine receiving an unaccompanied overseas assignment. To mitigate this risk, the decision should be on the Marine to maintain geographic stability CONUS or accept longer, accompanied orders OCONUS.

***b. Benefits***

For spouses and families, they will potentially have increased employment longevity and earnings, better school performance, increased marital satisfaction, and an overall increase in the socioemotional environment within the family/support network.

Policy recommendations will always entail risks in implementation, especially those at the institutional level. Allowing Marines ownership over their decisions and careers will mitigate many of these risks. Furthermore, the risks to the Marine Corps can largely be satisfied with "needs of the Marine Corps." Because risks associated with these policy recommendations can be mitigated, I offer that the potential positives gained outweigh the risks.



## **5. Employers, Schools, and U.S. Taxpayers**

### ***a. Risks***

I identify no risk to adopting my policy recommendations for these stakeholders.

### ***b. Benefits***

Employers, schools, and U.S. Taxpayers each have potential benefits if these recommendations are adopted. Employers may benefit from increased longevity of military members in the same geographic area because their stable talent pool will increase. Schools may benefit from a decreased student turnover mid-year or over summer, leading to a common skill level for students. This common knowledge level would decrease the attention paid by educators to students ahead or behind other children. Finally, reducing PCS moves could decrease the DOD budget, shifting taxpayer money to assist in alternate causes without hindering national defense.

## **E. CHAPTER III SUMMARY**

Marines, Marine families, monitors, and the Marine Corps have a high interest in the impact of these policy recommendations, should they be adopted. Although the potential positives of implementing these recommendations include increased satisfaction, increased retention, economic stability for spouses, increased grade performance in kids, decreased costs to the Marine Corps from PCS moves, and more, there are risks associated as well. These risks include billet assignment challenges, overseas orders challenges, and the possibility that retention rates are not increased after all. Fortunately, the first risk can be mitigated by reminding Marines that, at the end of the day, “needs of the Marine Corps” will always come first, and this is an incentive, if it works in favor of the Marine Corps and the Marine. Risks one and two can further be mitigated by passing ownership to Marines by allowing them to choose between alternatives when able. Although there is no way to mitigate the risk of not increasing retention as desired, I recommend the following policy recommendations be considered for adoption because the potential positives outweigh the risks:



1. Homesteading should be defined by the Marine Corps as *when a Marine spends at least six years in the same geographic location*. The Marine Corps should strive to maintain geographic stability for homesteaders for as long as career advancements within the area are available, however.
2. All CONUS and OCONUS locations listed in the LCM and No-cost PCA references from MCO 1300.8 should be used as the basis for homesteading geographic locations. Additionally, Yuma, AZ, Beaufort, SC, and Twentynine Palms, CA should be utilized if assignments exist.
3. The prioritization of who receives homesteading assignments should be dependent upon existing performance metrics, number of dependents, dual-military status, and EFMP status. If the Marine Corps will not change its policy on dependent and dual-military status as discussed earlier in this chapter, I recommend it still be based on a point system derived from performance and EFMP status.
4. If a highly prioritized Marine does not receive an assignment to homestead due to the absence of staffing vacancies, I recommend they receive a priority geographic location on their PCS move.

Should these recommendations be adopted, it is the responsibility of the Marine Corps to ensure these standards are enforced at the Marine Corps, assignments monitor, and Marine level. It is the responsibility of the monitors to inform Marines of their options and keep a valid, up-to-date record of Marines' choices regarding homesteading and homesteading prioritization. Finally, it is the responsibility of every Marine to remain informed of their options and ensure they are maximizing their own career opportunities.



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## IV. DISCUSSION AND RECOMMENDATIONS FOR FUTURE RESEARCH

### A. DISCUSSION

The purpose of this project was to determine what potential benefit homesteading offers the Marine Corps as a nonmonetary incentive and establish a policy the Marine Corps could adopt to manage homesteading. To do this, I conducted a thorough literature review prioritizing civilian and military empirical research which resulted in my policy recommendations in Chapter III. These recommendations include:

1. Homesteading should be defined by the Marine Corps as *when a Marine spends at least six years in the same geographic location*. The Marine Corps should strive to maintain geographic stability for homesteaders for as long as career advancements within the area are available, however.
2. All CONUS and OCONUS locations listed in the LCM and No-cost PCA references from MCO 1300.8 should be used as the basis for homesteading geographic locations. Additionally, Yuma, AZ, Beaufort, SC, and Twentynine Palms, CA should be utilized if assignments exist.
3. The prioritization of who receives homesteading assignments should be dependent upon existing performance metrics, number of dependents, dual-military status, and EFMP status. If the Marine Corps will not change its policy on dependent and dual-military status as discussed earlier in this chapter, I recommend it still be based on a point system derived from performance and EFMP status.
4. If a highly prioritized Marine does not receive an assignment to homestead due to the absence of staffing vacancies, I recommend they receive a priority geographic location on their PCS move.

I also determined that my policy recommendations have the potential to assist in family disruptions caused by frequent PCS moves, leading to higher Marine Corps retention rates. Furthermore, these recommendations could improve Marine Corps



performance by reducing turnover and increasing unit and Marine stability. Both possibilities are detailed in the section below.

## **1. Family Disruptions**

Disruptions to Marines and the families of Marines can be potentially improved by the implementation of my recommendations above. Allowing Marines to choose to prioritize geographic stability for their family could reduce the stresses caused by PCS, as well as improve overall satisfaction with the Marine Corps, improving retention rates. Within the following subsection, I will address how my homesteading policy recommendations may improve spousal employment rates, the effects of frequent PCS moves on military children, and marital satisfaction.

Since spousal employment rates are negatively impacted by the frequency of PCS moves, decreasing the frequency of PCS moves may increase spousal employment stability, leading to an increase in financial stability, career experience, and a reduction of overall family stress (Tong et al., 2018). Furthermore, because increased family stress can lower retention intentions, the decrease in family stress caused by geographic stability could lead to an increase in the retention of Marines (Tong et al., 2018). Even homesteading for one iteration (i.e., doubling one's time at a PDS), could increase job longevity by three years, decrease earnings lost, increase profitability, and increase career experience. The impact of homesteading for longer periods of time, or at multiple duty stations, could potentially cut a family's losses in half or more. Furthermore, increasing time at one PDS could also increase time spent in one position, increasing experience and potentially promotability, leading to increased earnings over time. My policy recommendations have the potential to increase financial stability and employment longevity, decreasing family stress associated with frequency PCS moves, which could lead to an increased retention rate of service members.

In addition to assisting spouses on the employment front, implementing my policy recommendations for homesteading might help children of Marines get closer to achieving stability, leading to better grades, higher socio-emotional well-being, and the development of stronger feelings of friendship. Since GPA is negatively associated with frequency





moves, remaining in the same location for longer periods of time would cause children to change schools less often, potentially increasing their GPAs (Drummet et al., 2003). Furthermore, moving less frequently may strengthen friendships, leading to better school perceptions and lower depressive symptoms. For example, a military child could remain in the same location for six years, under my policy recommendations, covering their transition from middle school into high school and all the way through to graduation. This transition, as discussed in Chapter II, is improved by strong friendships, leading to better school outlooks and higher grades (Lessard & Juvonen, 2022). These friendships could also decrease depressive symptoms in kids, as children who move more frequently have higher rates of depressive systems compared to low-mobility children (Drummet et al., 2003; Herbers et al., 2013).

The work-life stresses Marines and their families face are compounded by frequent PCS moves, impacting marital satisfaction on top of spousal employment rates and child education. Allowing Marines the option to potentially decrease the number of moves their family makes during their career could decrease these work-life stresses, fostering mental health and marital satisfaction, leading to higher retention rates. Since a happy marriage can buffer adverse service outcomes, increasing this marital satisfaction through geographic stability could potentially even improve post/pre-deployment, internal family support (Street et al., 2022). It could also improve social networks within the area, leading to a tight-knit support system for when Marines and their families need external support.

Unfortunately, moving is still a characteristic of almost all Marine Corps careers and, therefore, ensuring family stability can only extend so far. Since these family members do so much to support their Marines, it's only fair the Marine Corps do its best to support Marine families. My policy recommendations, if implemented, would be one additional avenue of family support.

## **2. Unit and Marine Performance**

Decreasing the number of moves a Marine makes within their career could also increase unit performance. As discussed in Chapter II, the positions Marines primarily hold are those that fall in the categories of manufacturing/transportation and professional roles.



The literature shows that these two industries have the highest negative impacts when turnover is frequent (Hancock et al., 2013). Decreasing the number of times a Marine moves from one MEF to another will, therefore, increase the MEF's efficiency by maintaining a force that fully understands its capabilities, goals, and mission set. Understandably, some turnover will still exist when Marines change billets for rank/career advancement purposes, or to move three buildings over as needed. Minimizing these transition to within the same geographic location, or MEF, could still have a positive impact where performance is considered because the Marine maintains a knowledge of the inner-workings of that area. Moving across the country, or world, means a change in cultures, missions, and lifestyle, which can all affect a Marine's performance. Alternatively, decreasing the frequency of PCS moves could decrease diversity of experience and ideas at a unit. Although the impact on diversity is impossible to qualify without testing these policy recommendations, I offer that the Marines who do not homestead may still bring diversity to a unit.

Unit performance can also be positively or negatively impacted by a Marine's habits. If a Marine is afforded the choice to maintain good habits in a specific geographic location (i.e., a gym they regularly visit, a PME group on station they lead/attend, volunteer work they've established, etc.), there is potentially a lower chance of disrupting these habits due to a PCS. Alternatively, if a Marine feels they would benefit from leaving a geographic area where they frequently partake in bad habits like smoking, drinking, etc., this could potentially positively impact a unit by the removal of said geographic influence. Although the choice to stay in a negatively influential area is a possibility, according to my recommendations, a majority of Marines offered the homesteading incentive would be operating in the "best" performance category, which curbs the potential of Marines maintaining a residence in a negatively influential area.

Overall, reducing the frequency of PCS moves by even one standard tour of duty (36-months) has the potential to increase unit and Marine performance, especially when a great Marine continues to contribute to their unit/MEF in a positive manner.



## **B. FUTURE RESEARCH**

While the policy recommendations I made in Chapter III are based on research and current Marine Corps doctrine, there is no sure-fire way to know if developing a transparent homesteading policy will increase retention in the Marine Corps without testing it and completing a program evaluation. This evaluation can also be extended to spousal employment and child education studies. Additionally, since there is not enough research on military unit performance, diversity within units, and unit cohesion due to turnover, I recommend further research into those topics. Furthermore, I recommended researching habit maintenance over moves, conducting a cost evaluation of standing up additional resident PME locations, and the leadership effectiveness of staying in one geographic location for a long period of time. I recommend these topics be covered in future research to determine if homesteading is a long-term option for the future Marine Corps or if homesteading does not provide the intended benefits to the Marine Corps and needs to be reimagined.

To evaluate my policy recommendations, I recommend a difference-in-difference approach. After implementation, I recommend retention rates, spousal employment metrics, and child socio-academic outcomes be tracked in three categories: those who requested to homestead and did, those that opt-out of homesteading entirely, and those who requested to homestead but were not able to. Based on research from Chapter I/II, I hypothesize that successful homesteading outcomes (i.e., Marines whose request to homestead was granted) will reflect the largest spousal earnings and most positive child socio-academic correlation. I hypothesize that opting-out of homesteading entirely and successful homesteading outcomes will have around the same retention rate, as long as a fitting incentive is offered to those who do not see homesteading as their reason to remain in the Marine Corps long-term. Finally, I hypothesize that those who request to homestead but were not able to would have the lowest retention rate due to being denied, as well as higher losses in spousal earning and higher rates of child depression/lower GPAs than Marines who maintained geographic stability via homesteading. If this pattern of data were to be observed it would suggest that a homesteading choice incentive does increase retention, spousal earnings, and child well-being when fulfilled.



Regarding unit performance due to turnover, I recommend evaluating the performance of individual units and MEFs once geographic turnover rates have reduced by at least 10% due to homesteading. I recommend at least 10% so there is a sizeable difference between units or MEFs pre and post homesteading policy. These unit performance metrics can be determined through the same evaluation programs currently operational within the Marine Corps. Since the Marine Corps maintains records of these various evaluations, the point of implementation of my policy recommendations could be used as a trigger event for before and after comparisons. Studies could also consider unit cohesion as it relates to performance when Marines are in the same location for longer periods of time, as well as research into diversity of experience and ideas as it pertains to unit performance and PCS frequency. In addition to unit evaluation, I recommend PFT/CFT scores be tested before and after a PCS, and six-months later, to determine what effects a PCS has on the fitness level of Marines. Since many Marines take a full thirty days to PCS, this time lag could show the short- and long-term fitness impacts caused by PCS moves. I also recommend analysis of data about smoking, PME adherence, etc., to see whether research about potential habit loss over moving is replicable in the military. Finally, I recommend an analysis be done about teleworking and unit performance/readiness. This analysis could potentially be completed with Coronavirus Disease 2019 data since the Marine Corps did utilize teleworking more than ever before.

Longer range, I recommend the performance of Marines who homestead for a large portion of their career be compared to those who move around frequently, to determine if leadership, and performance of duties, is negatively or positively impacted by homesteading. Part of the anecdotal argument behind moving around is the diversity Marines gain by moving geographic locations, and how that betters them for leadership responsibilities. If two commanders have similar career profiles and deployments, but differ in homesteading history, this would be testable, and no longer an anecdotal argument on why moving matters.

Finally, a number of cost-benefit analyses can be completed regarding the frequency of PCS moves. In addition to determining the costs and savings from implementing a homesteading policy, there should also be research into PME locations.



For example, a cost-benefit analysis comparing the following three PME options should be done: status quo, resident PME locations opened within each MEF (Camp Pendleton, Camp Lejeune, and Okinawa), and making all PME attendance into hybrid seminar versions. The outcome of this analysis could lead to even fewer PCS moves if the hybrid option or the resident schools in all three MEFs option is determined to be the best option for the Marine Corps.

### C. CONCLUSION

Thanks to Talent Management 2030, homesteading has become an increasingly more popular topic of conversation. Although the declaration that homesteading is no longer viewed negatively has officially been made, as of this writing, the Marine Corps has not yet released a policy or process on how to handle a homesteading incentive. My investigation into the positive and negative effects of reducing the frequency of PCS moves found that family disruptions (i.e., spousal employment disruptions, child socio-academic disruptions, and marital satisfaction) and Marine/unit performance can potentially be improved by offering homesteading as a nonmonetary retention incentive to Marines.

Due to the numerous positive potential effects of offering homesteading opportunities as nonmonetary incentives aimed at increasing retention, I propose multiple policy recommendations based on current Marine Corps doctrine in Chapter III to manage homesteading at the levels of the Marine Corps, assignments monitor, and individual Marine. These recommendations include: (a) homesteading be defined as six or more years at the same PDS, (b) all PDSs within MCO 1300.8's PCA/LCM list and Yuma, Twentynine Palms, and Beaufort be utilized as locations for homesteading assignments, (c) Marines be prioritized based on performance, OCD, and family make up, and (d) the recommendation that homesteading remain an option, not a requirement, to ensure individualized nonmonetary incentive plans.

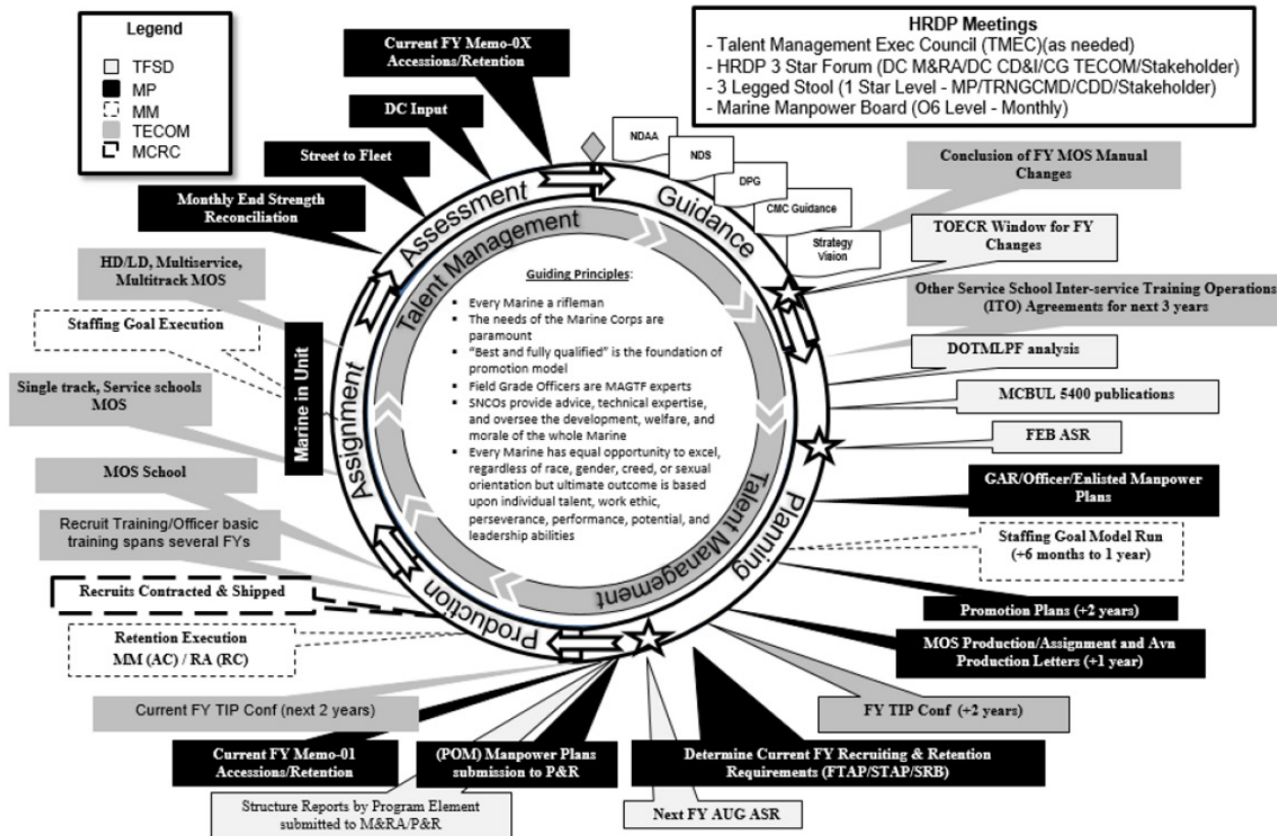
These policy recommendations have the potential to increase spousal earnings, increase child socio-academic metrics, maintain marital satisfaction hindered by PCS moves, maintain good habits of Marines, improve unit performance, and increase retention across the Marine Corps. Furthermore, introducing a transparent, official homesteading



policy could go a long way in increasing trust between Marines and Marine leadership. Since one of the most common responses to questions in the Marine Corps is “look in the order,” it is important to provide guidance through an official order, policy, or MARADMIN. That way, Marines will not remain in the dark on the standard operating procedures regarding homesteading and monitors will not be left to figure out who does what individually, without a common practice.



## APPENDIX A. DETAILED HUMAN RESOURCE DEVELOPMENT PROCESS



Source: U.S. Marine Corps (2021a).



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# APPENDIX B. JEPES SCORESHEET

MCO 1616.1  
25 Nov 2020

## Appendix B

### JEPES Manual Scoring Instructions

LCPL & Below: Use Tables 1 and 3. CPL: Use Tables 2 and 4.

MRO NAME: \_\_\_\_\_ EDDPI: \_\_\_\_\_ RANK: \_\_\_\_\_

AFABDD: \_\_\_\_\_ Present Date of Rank: \_\_\_\_\_

Line Number

1. Warfighting (SCORE) (VALUE) (DATE OF QUAL)
  - a. Rifle Score: \_\_\_\_\_ = \_\_\_\_\_
  - b. MCMAP: (BELT LVL) (VALUE) (DATE OF QUAL)  
\_\_\_\_\_ = \_\_\_\_\_
  - c. LINE (1a + 1b) VALUE: \_\_\_\_\_
  - d. Warfighting Comp. (1c x 1.25): \_\_\_\_\_ (ROUND-MAX 250)
  
2. Physical Toughness (SCORE) (VALUE) (EFFECTIVE DATE)
  - a. PFT: \_\_\_\_\_ = \_\_\_\_\_
  - b. CFT: \_\_\_\_\_ = \_\_\_\_\_
  - c. LINE (2a + 2b) VALUE: \_\_\_\_\_
  - d. PT Comp. (2c x 1.25): \_\_\_\_\_ (ROUND-MAX 250)
  
3. Mental Agility: (SEE ATTACHED DOCUMENTATION FOR VALUE COMPUTATION) (VALUE)
  - a. MARINET courses: \_\_\_\_\_ = \_\_\_\_\_ (MAX 100)
  - b. Degrees: \_\_\_\_\_ = \_\_\_\_\_ (MAX 40)
  - (Num. Completed Courses) (VALUE)
  - c. CRS-SVS: \_\_\_\_\_ x 10 = \_\_\_\_\_ (MAX 30)
  - d. CRS-GRD: \_\_\_\_\_ x 10 = \_\_\_\_\_ (MAX 30)
  - e. LINE (3a+3b+3c+3d) VALUE: \_\_\_\_\_
  - f. Mental Agility Comp. (3e x 1.25): \_\_\_\_\_ (ROUND-MAX 250)
  
4. CMD Input (AVG SCORE IN GRADE 0.0-5.0) (VALUE)
  - a. MOS/MSN \_\_\_\_\_ x 50 = \_\_\_\_\_
  - b. Leadership \_\_\_\_\_ x 50 = \_\_\_\_\_
  - c. Character \_\_\_\_\_ x 50 = \_\_\_\_\_
  - d. LINE (4a + 4b + 4c) VALUE: \_\_\_\_\_
  - e. CMD Input Comp. (4d / 3): \_\_\_\_\_ (ROUND-MAX 250)
  
5. Bonus (Circle one) (VALUE: YES = 50, NO = 0)
  - a. DI School: YES / NO = \_\_\_\_\_
  - b. Recruiter School: YES / NO = \_\_\_\_\_
  - c. MSG School: YES / NO = \_\_\_\_\_
  - d. Combat Instructor: YES / NO = \_\_\_\_\_
  - e. MC Sec. Forces: YES / NO = \_\_\_\_\_
  - (Number)
  - f. Command Rec. Bonus: \_\_\_\_\_ x 20 = \_\_\_\_\_ (MAX 100)
  - g. LINE (5a+5b+5c+5d+5e+5f) VALUE: \_\_\_\_\_
  - h. Bonus Comp. (5g): \_\_\_\_\_ (MAX 100)
  
6. Total PES Score:
  - a. LINE (1d+2d+3f+4e+5h): \_\_\_\_\_ (MAX 1000)

B-1

APPENDIX

Source: U.S. Marine Corps (2020b).



#### Worksheet Instructions

The below instructions for manual computation of the PES score reflect automated procedures in MCTFS and the JEPES. In most cases, Marines will not be required to compute these values manually. However, this step-by-step process provides a back-up manual computation capability as well as shows Marines how to manually compute their PES score.

Points awarded for the MRO's Rifle, PFT, and the CFT scores are derived by comparing the MRO's score against peers of the same rank to produce a percentile between 0 and 100. The tables for these comparisons (tables 3 and 4) are updated yearly. Points awarded for all other attributes (MCMAP belt level, informal PME, self-education, and command input values) are not compared against peers and derived from the rules outlined in this document.

#### LINE 1: Warfighting:

##### 1a: Rifle:

- Identify current rank for MRO.
  - If Lance Corporal, use Table 3, pg. B-8.
  - If Corporal, use Table 4, pg. B-9.
- Write the MRO's current rifle score under score on line 1a (0-350).
- Using the appropriate table, find the row under the rifle columns that includes the MRO's rifle score. For example, a score of 300 will either be displayed as its specific value (i.e. 300) or as a range of values (i.e. 298-302).
- Extract that row's "value" column and write this number down under value on line 1a.
- Write down the MRO's rifle date of qualification under date of qual on line 1a.

##### 1b: MCMAP:

- Identify current rank for MRO
  - If Lance Corporal, use Table 1, pg. B-7.
  - If Corporal, use Table 2, pg. B-7.
- Write the MRO's current belt level under belt level on line 1b.
- Using the appropriate table, extract value for the selected belt level.
- Write this "value" under value on line 1b.
- Write down the MRO's MCMAP qualification date under date of qual on line 1b.

##### 1c: Sum:

- Add up the values from rows 1a and 1b.
- Write this number on line 1c.

##### 1d: Warfighting Composite:

- Multiply the number from 1c by 1.25.
- Round to the nearest whole number. If the decimal point ends in ".5" (i.e. 200.5) or above, round up (i.e. 201).
- Write this number on line 1d.
- This represents the MRO's Warfighting Composite. Valid composites are between 0 and 250.

Source: U.S. Marine Corps (2020b).



**LINE 2: Physical Toughness:**

**2a: PFT:**

- Identify current rank for MRO.
  - If Lance Corporal, use Table 3, pg. B-8.
  - If Corporal, use Table 4, pg. B-9.
- Write the MRO's current PFT score under score on line 2a (0-300).
- Using the appropriate table, find the row under the PFT columns that includes the MRO's PFT score. For example, a score of 280 will either be displayed as its specific value (i.e. 280) or as a range of values (i.e. 278-282).
- Extract that row's "value" column and write this number down under value on line 2a.
- Write down the effective date of the MRO's PFT score under effective date on line 2a.

**2b: CFT:**

- Identify current rank for MRO.
  - If Lance Corporal, use Table 3, pg. B-8.
  - If Corporal, use Table 4, pg. B-9.
- Write the MRO's current CFT score under score on line 2b (0-300).
- Using the appropriate table, find the row under the CFT columns that includes the MRO's CFT score. For example, a score of 280 will either be displayed as its specific value (i.e. 280) or as a range of values (i.e. 278-282).
- Extract that row's "value" column and write this number down under value on line 2b.
- Write down the effective date of the MRO's CFT score under effective date on line 2b.

**2c: Sum:**

- Add up the values from lines 2a and 2b.
- Write this number on line 2c.

**2d: Physical Toughness Composite:**

- Multiply the number from 2c by 1.25.
- Round to the nearest whole number. If the decimal point ends in ".5" (i.e. 200.5) or above, round up (i.e. 201).
- Write this number on line 2d.
- This represents the MRO's Physical Toughness Composite. Valid composites are between 0 and 250.

**LINE 3: Mental Agility:**

**3a: Informal PME In-Grade**

- All Marines: Find a list of eligible MarineNet courses at the following link:  
<https://www.marinenet.usmc.mil/MarineNet/Links/Points.aspx>
- For all courses listed on the above link, identify those completed by the MRO on MarineNet since present date of rank.
- For each completed course, extract the Continuing Education Unit (CEU) score listed from the link above.

Source: U.S. Marine Corps (2020b).



- Repeat for all courses listed at the above link and completed by the MRO since present date of rank.
  - Add all extracted CEU scores together (the value may not exceed 100).
  - Write this number down under value on line 3a.
- 3b: Self Education: Bachelor and Associate Degrees:
- For the MRO, identify all bachelor and associate degrees listed in MCTFS, regardless of date completed.
  - If the MRO has no bachelor (code K) or associate degrees (code D) in MCTFS, write the number 0 under value of line 3b.
  - If the MRO has one or more bachelor degrees (code K) in MCTFS, write the number 40 under value of line 3b.
  - If the MRO does not have a bachelor degree (code K) but has one associate degree (code D) in MCTFS, place the number 20 under the value column of line 3b.
  - If the MRO does not have a bachelor degree (code K) but has two or more associate degrees (code D) in MCTFS, write the number 40 under value of line 3b.
- 3c: Self Education: Off duty education course in service (CRS-SVS):
- For the MRO, identify all off-duty education courses listed in MCTFS completed and passed between MRO's armed forces active duty base date (AFADBD) and the date prior to the present date of rank.
  - Write this number under "number of completed courses" on line 3c.
  - Multiply this above number by 10. If this product is less than or equal to 30, write this number under value on line 3c.
  - If the above multiplied number exceeds 30, write the number 30 under value on line 3c.
- 3d: Self Education: Off duty education course in grade (CRS-GRD):
- For the MRO, identify all off-duty education courses listed in MCTFS completed and passed since the MRO's present date of rank.
  - Write this number under "number of completed courses" on line 3d.
  - Multiply this above number by 10. If this product is less than or equal to 30, write this number under value on line 3d.
  - If the above multiplied number exceeds 30, write the number 30 under value on line 3d.
- 3e: Sum:
- Add up the values from lines 3a, 3b, 3c, and 3d.
  - Write this number on row 3e.
- 3f: Mental Agility Composite:
- Multiply the number from 3e by 1.25.
  - Round to the nearest whole number. If the decimal point ends in ".5" (i.e. 200.5) or above, round up (i.e. 201).
  - Write this number on line 3f.
  - This represents MRO's Mental Agility Composite. Valid composites are between 0 and 250.

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Source: U.S. Marine Corps (2020b).



- LINE 4: Command Input:**
- 4a: MOS/MSN Accomplishment:
- Extract the MRO's average MOS/MSN Accomplishment score in grade (0.0-5.0).
  - Write this score under average score in grade under line 4a.
  - Multiply the above number by 50.
  - Write this number under value on line 4a.
- 4b: Leadership:
- Extract the MRO's average leadership score in grade (0.0-5.0).
  - Write this score under average score in grade under line 4b.
  - Multiply the above number by 50.
  - Write this number under value on line 4b.
- 4c: Character:
- Extract the MRO's average character score in grade (0.0-5.0).
  - Write this score under average score in grade under line 4c.
  - Multiply the above number by 50.
  - Write this number under value on line 4c.
- 4d: Sum:
- Add up the values from lines 4a, 4b, and 4c.
  - Write this number on line 4d.
- 4e: Command Input Composite:
- Divide the number from 4d by 3.
  - Round to the nearest whole number. If the decimal point ends in ".5" (i.e. 200.5) or above, round up (i.e. 201).
  - Write this number on line 4e.
  - This represents the MRO's Command Input Composite. Valid composites are between 0 and 250.
- LINE 5: Bonus:**
- 5a: DI School:
- If the MRO attended DI School at any point since the AFABDD and passed, circle "yes" on the first line and write 50 under value on line 5a.
  - If not, circle "no" and write 0 under value on line 5a.
- 5b: Recruiting School:
- If the MRO attended Recruiter School at any point since the AFABDD and passed, circle "yes" on the first line and write 50 under value on line 5b.
  - If not, circle "no" and write 0 under value on line 5b.
- 5c: MSG School:
- If the MRO attended MSG school at any point since the AFABDD and passed, circle "yes" on the first line and write 50 under value on line 5c.
  - If not, circle "no" and write 0 under value on line 5c.
- 5d: Combat Instructor:
- If the MRO is a combat instructor, circle "yes" on the first line and write 50 under value on line 5d.

Source: U.S. Marine Corps (2020b).



- If not, circle "no" and write 0 under value on line 5d.
- 5e: Marine Corps Security Forces:
- If the MRO is assigned under Marine Corps Security Forces, circle "yes" on the first line and write 50 under value on line 5e.
  - If not, circle "no" and write 100 under value on line 5e.
- 5f: Command Recruiting:
- If the MRO refers one or more applicant that subsequently enlists in the Marine Corps, SMCR, or reenlists into the regular component of the Marine Corps in accordance with MCO 1130.62B, write the number of applicants referred under number on line 5f (Marines may not carry forward recruiting bonus points to the next higher grade).
  - If not, write 0 under number on line 5f.
  - Multiply the number written under number on line 5f by 20 and write the product under value on line 5f (maximum of 100).
- 5g: Sum:
- Add up the values from lines 5a, 5b, 5c, 5d, 5e, and 5f.
  - Write this number on line 5g.
- 5h: Bonus Composite:
- Write the number from line 5g onto 5h. Note: If the value from 5g is greater than 100, write 100 on line 5h.
  - This represents the MRO's Bonus Score. Valid scores are between 0 and 100.
- LINE 6: PMS Score:**
- 6a:
- Add up the values from lines 1d, 1d, 3f, 4e, and 5h. If the sum is over 1000, use 1000.
  - Place this number on line 6a.
  - The maximum value for line 6a is 1000.

Source: U.S. Marine Corps (2020b).



## APPENDIX C. PRIORITIZATION SCORESHEET EXAMPLE

**1. Total Points is the sum of Performance, Dependent, Dual-Military, and EFMP points. Sort from largest to smallest in overall desired geographic location spreadsheet**

Last Name	First Name	M.I.	EDIPI	Rotation Date	Overseas Control Date	OCD Points	Thirds Placement	Percentage	P Points	# of Dependents	D Points	0/1 Dual-Military	0/1 EFMP	Total Points
Puller	Chesty	R	0123456791	20230603	20230503	2.00	Upper	75.4	3.00	2.00	2.00	1.00	0.00	8.00
Basilone	John	I	0123456792	20230604	20230504	2.00	Upper	88.7	3.00	3.00	2.00	0.00	1.00	8.00
Pugh	Randy	E	0123456794	20230606	20220606	2.00	Upper	60.6	3.00	4.00	2.00	0.00	1.00	8.00
Mattis	James	N	0123456793	20230605	20230405	2.00	Middle	55.1	2.00	3.00	2.00	1.00	1.00	8.00
Butler	Smedley	A	0123456790	20230602	20200402	2.00	Upper	91.3	3.00	1.00	1.00	0.00	0.00	6.00
Johnson	Opha	M	0123456789	20230601	20210601	1.00	Upper	88.2	3.00	0.00	0.00	0.00	0.00	4.00

**2. When points are tied, copy all tied point objects into second sheet.**

Last Name	First Name	M.I.	EDIPI	Rotation Date	Overseas Control Date	OCD Points	Thirds Placement	Percentage	P Points	# of Depi	D Points	0/1 Dual	0/1 EFMP	Total Poir
Basilone	John	I	0123456792	20230604	20230504	2.00	Upper	88.7	3.00	3.00	2.00	0.00	1.00	8.00
Puller	Chesty	R	0123456791	20230603	20230503	2.00	Upper	75.4	3.00	2.00	2.00	1.00	0.00	8.00
Pugh	Randy	E	0123456794	20230606	20220606	2.00	Upper	60.6	3.00	4.00	2.00	0.00	1.00	8.00
Mattis	James	N	0123456793	20230605	20230405	2.00	Middle	55.1	2.00	3.00	2.00	1.00	1.00	8.00

**3. Sort by percentage or point total, depending. If more than just "Upper/Tier 1" exist on second sheet, be sure to select only those in "Upper/Tier 1," then sort by highest to lowest percentage/point total. Once all Upper/Tier I tied point objects are assigned orders, move to Middle/Tier II, and so on.**



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