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### **Cream Skimming or Barrel Scraping? An Analysis of Lateral Career Moves amongst Marine Corps Officers**

March 2024

**Capt Ryan M. McCoy, USMC**

Thesis Advisors: Dr. Jesse Cunha, Associate Professor  
Jacob L. Reynolds, Lecturer

Department of Defense Management

**Naval Postgraduate School**

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

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## ABSTRACT

Force Design 2030 and subsequent associated directives have ushered in significant changes across the Marine Corps, both in personnel and equipment. One of the greatest personnel changes is the emphasis on lateral moves, in which Marines shift from one primary military occupational specialty to another. These lateral moves allow the service to align interest and talent to address manpower deficiencies. In this thesis, I analyze performance records of Marine Corps Ground Officers from 1999 to 2022 and employ regression analysis to examine pre- and post-move performance trends of officers who undertake lateral moves. This analysis aims to determine whether these moves are characterized by “cream skimming,” with high performers leaving certain fields, or by “barrel scraping,” with low performers moving. My research indicates that from 1999 to 2006 there was a modest but statistically significant negative trend in performance of those opting for lateral moves relative to their peers who did not. However, these effects were not observed during more recent time periods. Further regression results indicate a mostly negative, but statistically insignificant coefficient for performance among those who lateral move, indicating no substantial difference between them and their peers who remain in their original field. Furthermore, those that execute a lateral move tend to receive performance evaluations comparable to their peers in their new job field immediately after a lateral move.



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## LIST OF ACRONYMS AND ABBREVIATIONS

AMOS	Additional Military Occupational Specialty
BMOS	Basic Military Occupational Specialty
BOC	Basic Officer Course
CD&I	Combat Development and Integration
EBP	Enlisted Bonus Program
EDIPI	Electronic Data Interchange Personal Identifier
EMOS	Exception Military Occupational Specialty
FD2030	Force Design 2030
FFM	Fast Filling Military Occupational Specialty
FITREP	Fitness Report
FMOS	Free Military Occupational Specialty
FRA	Fitness Report Average
FTAP	First Term Alignment Plan
FY	Fiscal Year
HQMC	Headquarters Marine Corps
M&RA	Manpower and Reserve Affairs
MARADMIN	Marine Administrative Message
MCO	Marine Corps Order
MCRC	Marine Corps Recruiting Command
Memo-01	Manpower Accession and Retention Plan
MMEA	Manpower Management Enlisted Assignments
MMOA	Manpower Management Officer Assignments
MMRP	Manpower Management Records and Performance Branch
MOS	Military Occupational Specialty
MPP-20	Enlisted Plans
MPP-30	Officer Plans
MRO	Marine Reported On



NMOS	Necessary Military Occupational Specialty
OccFld	Occupational Field
PEF	Program Enlisted For
PMOS	Primary Military Occupational Specialty
RAP-2	Reserve Plans
RO	Reviewing Officer
RS	Reporting Senior
SDA	Special Duty Assignment
STAP	Subsequent Term Alignment Plan
TBS	The Basic School
T&E2030	Training and Education 2030
TFDW	Total Force Data Warehouse
TM2030	Talent Management 2030
USMC	United States Marine Corps





## I. INTRODUCTION

In March 2020, the Commandant of the Marine Corps released Force Design 2030 (FD2030), a report informed by the 2018 National Defense Strategy, to direct rapid force structure changes within the Marine Corps. These changes encompassed equipment reconfigurations and organizational transformations, with emphasis on modernizing the force and developing capabilities essential for the requirements of future combat. Two subsequent reports nested under the FD2030 initiative include *Talent Management 2030 (TM2030)* and *Training and Education 2030 (T&E2030)*, released in November 2021 and January 2023, respectively. These documents were formulated to address inherent personnel management deficiencies within the Marine Corps. The primary objective of these documents was to improve the Marine Corps' system for recruiting, developing, and retaining highly skilled Marines capable of effectively using a diverse range of skills to navigate the complex and technologically advanced future operating environment.

In *TM2030*, the Commandant describes how the evolving nature of warfare necessitates that the Marine Corps must shift away from relying predominantly on young, minimally trained recruits with limited capabilities. Instead, the Marine Corps must prioritize the retention and advancement of its most capable personnel to rebalance the recruitment and retention efforts and foster the maturation of the force across all Military Occupational Specialties (MOS) (Berger, 2021). *TM2030* and *T&E2030* keep the organization rooted in the idea that weapons and equipment are only as effective as the Marines operating them.

Annual updates to *TM2030* and *T&E2030* have directed numerous rapid changes to promotions eligibility, early reenlistment authority, MOS training, professional military education, and unit and individual skill progression among others as means to improve the human resource process and talent management system within the Marine Corps. In the *TM2030* annual update published in March 2023, a significant highlight is Line of Effort 3: Multiple Pathways to Career Success. This pivotal initiative showcases the variety of strategies available for attaining career success in the Marine Corps, emphasizing the organization's dedication to fostering diverse and flexible career paths. This section



specifically addresses developments to incentivize primary military occupational (PMOS) lateral moves, a process in which Marines are able to change job specialties entirely while maintaining rank, as a means to boost individual performance, retention, and resolve manpower shortfalls within particular PMOSs (Berger, 2023). The update states: “We must remove barriers to high-performing Marines conducting lateral moves to new MOSs. We historically over-retain Marines in certain MOSs, leading to saturation of certain occupational fields beyond our needs while other occupational fields suffer unmet requirements.” Furthermore, the annual update explains, “We will identify and remove barriers hindering lateral moves while exploiting incentives, such as fixed school dates and guaranteed follow-on orders, to help our most dedicated Marines fill gaps in critical fields” (Berger, 2023, p. 6). The PMOS lateral move process enables Marines to transfer to jobs that they desire while simultaneously addressing manpower inventory shortfalls.

#### **A. PURPOSE OF THIS STUDY**

The purpose of this research is to analyze the historical application of PMOS lateral moves within the Marine Corps and leverage this analysis to shape future policies on lateral moves. To achieve this objective, it is crucial to understand who undertakes lateral moves: whether it is the underperformers, known as “scraping the barrel,” who leave their PMOS only to continue underperforming, or if it is the top performers seeking broader opportunities, a phenomenon referred to as “cream skimming.”

Today’s Marine Corps necessitates a more adaptable personnel management model, one that aligns Marines with roles that reflect their individual interests and unique talents. This approach is vital because from the onset of a Marine’s career, there often exists a significant knowledge discrepancy between expectations of their PMOS and the realities of the role they eventually assume upon enlistment or commission. For enlisted Marines, the path to their PMOS can vary: some volunteer directly for specific assignments, while others enter under open contracts in which they receive their job assignment later on. Officers are assigned their PMOS several months after commissioning, where their personal preferences, performance, and needs of the force guide their assignment. This multifaceted approach to job allocation underscores the importance of a nuanced and



flexible system in effectively managing Marine Corps personnel to correct PMOS inventory deficiencies across the force.

## **B. SCOPE AND METHODOLOGY**

My thesis uses fitness report (FITREP) performance data provided by Manpower Management Records and Performance Branch (MMRP) of Unrestricted Officers spanning from 1999 to 2022. Through regression analysis, I examine the performance trends of Marines about to complete a PMOS lateral move in contrast to those who have not. This study further investigates the initial performance of Marines following their lateral moves. The objective is to determine whether lateral moves are primarily driven by cream skimming or barrel scraping.

## **C. RESULTS AND FINDINGS**

The regression results reveal a statistically significant negative correlation in FITREP scores for officers on the cusp of a lateral move for many job fields in the early 2000s, suggesting a barrel scraping phenomenon. However, this trend does not persist in other time periods. Moreover, while there's a slight negative correlation in FITREP scores for officers about to complete a lateral move, it lacks both statistical and practical significance, making these officers indistinguishable in terms of performance from their peers who do not complete a lateral move.

## **D. ORGANIZATION OF CHAPTERS**

This study begins with an overview of the institutional framework of the Marine Corps Occupational System, delving into force structure and the initial job assignment process before describing the PMOS lateral move process for officers and enlisted Marines. Chapter II concludes by explaining the performance evaluation mechanism of the FITREP. Chapter III delves into the existing body of civilian and military literature related to job assignments, career progression, and career transitions. Chapter IV presents the historical trends of lateral moves within the dataset and introduces the regression models employed. Chapter V discusses the study's findings and implications. The study concludes in Chapter VI, including limitations and recommendations for further research.



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## II. INSTITUTIONAL BACKGROUND

This chapter reviews the initial MOS assignment and lateral move process for both officers and enlisted personnel. It highlights the distinct processes and considerations for each group, providing insight into career development and organizational force structure.

### A. MARINE CORPS OCCUPATIONAL SYSTEM

The Marine Corps occupational system is designed around the principle of grouping occupations with similar skill, knowledge, and functional requirements. There are two key elements of the occupational system: Occupational Fields (OccFld), which describe functional areas, and MOS, which describe particular skills or knowledge. An OccFld groups related MOSs and is distinguishable by the initial two digits of a four number code, collectively organizing MOSs that exhibit similar characteristics and training requirements. An MOS, uniquely represented by a four digit code, begins with its corresponding OccFlds first two numbers, and ends with two additional digits that precisely define its specific duties and skill-knowledge requirements for billets in a units' Tables of Organization. This framework simplifies the classification and assignment process of Marines (Headquarters, Marine Corps [HQMC], 2023c). For example, a Marine with the designation of 0311 Riflemen, falls under the 03 Infantry OccFld; however, the 03 OccFld also includes the MOSs 0331 Machine Gunner, 0341 Mortarman, and 0352 Antitank Missile Gunner among others.

### B. MOS DESCRIPTION

There are five types of MOSs: Basic (BMOS), Necessary (NMOS), Free (FMOS), Exception (EMOS), Additional (AMOS) and Primary (PMOS). BMOS are assigned to entry level Marines that have not yet completed their formal school training. NMOS, EMOS, and FMOS represent specialized skill sets or training prerequisites that can only be filled by Marines that meet the requirements. The designation of an AMOS occurs when any MOS is awarded to a Marine who already maintains a PMOS. A PMOS is used to identify the primary skill-knowledge and job responsibilities for a Marine and is typically synonymous with MOS. Nearly all PMOSs are awarded via formal schooling from a



Training Command program of instruction and are completed before a Marine is assigned to a unit in the fleet (HQMC, 2023c). The remainder of this research will focus on PMOS and AMOS as a MOS lateral move constitutes a transition from one PMOS to another PMOS, typically within a different OccFld, for example moving from the 03 Infantry OccFld to the 02 Intelligence OccFld.

When Marines conduct a lateral move to a different PMOS, their originally assigned PMOS is reclassified as an AMOS. They are then assigned a new PMOS, which is formalized upon completion of their training and schooling in the new specialty. However, there may be other reasons for a PMOS to change slightly over the course of a career, even as a Marine works within the same OccFld. For example, upon the successful completion and graduation from a skill progression school like the Infantry Unit Leader Course, an E-6 with the PMOS of 0311 Riflemen will now have a new PMOS of 0369 Infantry Unit Leader. PMOS can also change as Marines promote during their careers. For example, an E-8 with the PMOS of 0231 Intelligence Specialist will receive a new PMOS of 0291 Intelligence Chief upon the promotion to E-9 (HQMC, 2023c). Therefore, while a PMOS may change throughout the course of a career, the OccFld will generally remain constant if a lateral move does not take place.

### **C. GRADE STRUCTURE**

Analysts within Combat Development and Integration (CD&I) are responsible for creating the force structure requirements and Manpower and Reserve Affairs (M&RA) is responsible for maintaining healthy inventories of personnel across PMOS. While the specific grade structure for a particular PMOS may vary, it typically follows a pyramid shape for both officers and enlisted Marines. This grade structure features a larger number of Marines in lower ranks and progressively fewer Marines occupying the higher ranks. Over time this grade structure can be modified to align with inventory requirements through various measures including accession, retention, and promotion planning. Recently, PMOS lateral moves have become an increasingly important grade reshaping tool. Figure 1 outlines an example of the pyramid grade structure, demonstrating how adjustments can increase the proportion of Marines in lower ranks while decreasing



numbers in the upper ranks to meet operational requirements (HQMC, 2021). Furthermore, for some PMOSs, the need for technical expertise and experience may lead to an expanded grade structure in the middle or senior ranks, creating a grade structure resembling a diamond rather than a pyramid.

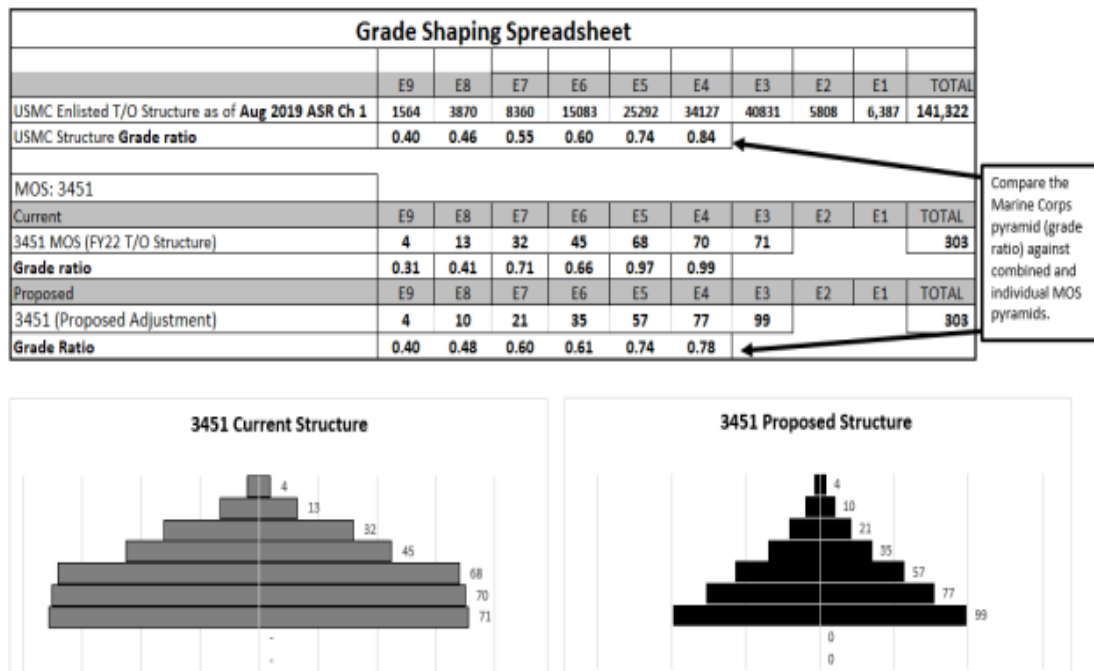


Figure 1. Grade Structure Shaping. Source: HQMC (2021).

#### D. ENLISTED MOS ASSIGNMENTS

M&RA publishes the Manpower Accession and Retention Plan (Memo-01) at the start of each fiscal year (FY), detailing the accession and retention mission to achieve the target end strength, or total Marine Corps manpower inventory as determined by the National Defense Authorization Act. This mission is based on projections from the Enlisted Plans Section (MPP-20), Officer Plans Section (MPP-30) and Reserve Plans Section (RAP-2). The Marine Corps Recruiting Command (MCRC) is tasked with fulfilling the accession mission set forth in the Memo-01 (HQMC, 2021).

For enlisted Marines, MCRC does not access recruits directly into specific PMOSs. Instead, recruits enlist under Program Enlisted For (PEF) codes, which encompass



groupings of OccFlds or PMOSs with similar skill requirements and job prerequisites. Enlistees can join any PEF code that has availability, and they are qualified for, but they are not guaranteed a specific PMOS, except in the cases of musicians, motor vehicle operators, cooks, parachute riggers, reconnaissance, combat correspondents, and chemical, biological, radiological, and nuclear defense specialists. For these particular roles, enlistees are assured of their specific PMOS upon enlistment. After completion of recruit training, and Marine Combat Training, recruits are guaranteed to be assigned to a PMOS school that falls under the PEF they enlisted for. Additionally, recruits are only eligible to enlist into a single PEF. Marines may also enlist under the PN Open Contract PEF, which means they may be assigned to any PEF after recruit training (HQMC, 2012). This enlistment PEF system provides the Marine Corps flexibility to fill manpower shortages as they occur over time within certain PMOS.

Table 1 outlines the PEF and PMOS breakdown for FY23 for recruits wishing to enlist within a particular PEF. Certain PEF codes like DB Information and Communications Technology, encompass PMOSs solely within a single OccFld, such as the 06 Communications OccFld. Conversely, other PEFs, such as CB Administrative and Data Specialists, incorporate PMOS from several OccFlds, including 01 Manpower and Administration, 60 Aircraft Maintenance, and 70 Airfield Services (HQMC, 2022a).





Table 1. FY23 PEF and PMOS to Enlist. Adapted from HQMC (2022a).

PEF	PMOS	PEF	PMOS
(1) AE (Aviation Support)	6842, 7011, 7051	(18) CX (Combat Vehicle and Ordnance Repair)	2131, 2141, 2147, 3521
(2) AF (Aviation Mechanic)	6048, 6062, 6073, 6074, 6092, 6113, 6114, 6116, 6123, 6124, 6132, 6153, 6154, 6156, 6212, 6216, 6217, 6218, 6222, 6227, 6252, 6256, 6257, 6258, 6282, 6286, 6287, 6288	(19) DB (Information and Communications Technology)	0621, 0627, 0631, 0671
(3) AG (Aircrew)	6173, 6174, 6176, 6276	(20) DD (Intelligence and Planning)	0231, 0241, 0261, 0511
(4) AJ (Aviation Operations)	6531, 6541, 7236, 7242	(21) DG (Cyber and Crypto Operations)	1721, 2621, 2631, 2641, 2651
(5) AN (Air Control and Navigation)	7257, 7314, 7316	(22) HH (Infantry 5-year Option)	0311, 0313, 0331, 0341, 0352
(6) BA (Aviation Electronics Tech)	5951, 5952, 5953, 5954, 6314, 6316, 6317, 6323, 6324, 6326, 6332, 6336, 6337, 6338, 6423, 6432, 6469, 6483, 6492, 6499, 6694	(23) HZ (Reconnaissance)	0321
(7) BH (Infantry 6-year Option)	0311, 0313, 0331, 0341, 0352	(24) MG (Marine Guard)	0311
(8) BY (Electronics Maintenance)	2171, 2831, 2841, 2847, 2871, 2887, 5939, 5948, 5974, 5979	(25) MT (Motor Transport)	3531
(9) CB (Administrative and Data Specialists)	0111, 0161, 6046, 7041	(26) PN (Open Contract)	Any MOS
(10) CC (Supply, Accounting, and Legal)	3043, 3432, 3451, 4421, 6042, 6672	(27) PR (Parachute Rigger)	0451
(11) CE (Combat Support)	0811, 1833, 7212	(28) U2 (Musician)	5524
(12) CH (Combat Imagery and Social Media Operations)	4512, 4541, 4571	(29) U4 (The Commandant's Own / Drum and Bugle Corps)	5512
(13) CJ (Logistics)	0411, 0431, 0481, 2311	(30) UH (Infantry)	0311, 0313, 0331, 0341, 0352
(14) CK (Fire Direction and Control Specialists)	0842, 0844, 0847, 0861	(31) UJ (CBRN Defense)	5711
(15) CN (Service Management)	3051, 3152	(32) UT (Military Police and Corrections)	5811, 5831
(16) CO (Ground Ordnance Maintenance)	1142, 1161, 2111, 2161	(33) TO (Targeted Investment Option)	Any MOS
(17) CP (Engineering)	1141, 1171, 1316, 1341, 1345, 1361, 1371, 1391		

A distinctive element of the enlisted accession and job assignment process, which further sets it apart from the officer corps, is the availability of various monetary enlistment bonuses made available through the Enlisted Bonus Program (EBP). The specific EBP amounts may fluctuate every year and serve as a strategic tool for M&RA and MCRC to achieve accession goals, meet end strength numbers, and attract high-quality talent to areas



facing critical manpower shortages. The MPP-20 and RAP-2 sections within M&RA are responsible for determining the EBP amounts, while MCRC oversees the distribution to recruits (HQMC, 2021).

The EBP is divided into skill based bonuses conditional on a recruit enlisting in a specific PEF and shipping bonuses that are not associated with a particular PEF. Recruits are ineligible from receiving both a skill based bonus and a shipping bonus (HQMC, 2012). Importantly, not all recruits receive enlistment bonuses and eligibility is contingent on the specific terms of an individual’s enlistment contract. Table 2 describes the potential skill based and shipping bonuses available for FY23. New to the EBP for FY23 is (10) Any Targeted Investment Shipping Bonus, in which enlistees agree to begin their service obligation post PMOS school completion. This is another development that stems from *TM2030* to create a more mature and experienced force (HQMC, 2022a).

Table 2. FY23 PEF and PMOS Eligible for Enlistment Bonus. Adapted from HQMC (2022a).

PEF	Amount (Dollars)	PEF	Amount (Dollars)
(1) BH Infantry 6-year Option	\$5,000	(6) U2/U4 Music	\$6,000
(2) BY Electronics Maintenance	\$8,000	(7) UJ CBRN Defense	\$7,000
(3) CC Supply, Accounting, and Legal	\$3,000	(8) ANY Shipping Bonus	\$1,000
(4) DB Information and Comm Technology	\$5,000	(9) ANY Shipping Bonus	\$5,000
(5) DG Cyber and Crypto Operations	\$5,000	(10) ANY Targeted Investment Shipping Bonus	\$9,000



Enlisted Marines are promoted within their PMOS, undergoing evaluation and selection for advancement alongside their peers within the same specialty. The First Term Alignment Plan (FTAP) targets Marines poised for their initial reenlistment following the successful conclusion of their first contract. MPP-20 is responsible for establishing yearly FTAP requirements to balance both quantity and quality of personnel to ensure optimal staffing levels across PMOSs (HQMC, 2021). Opportunities for reenlistment, commonly referred to as boatspaces, indicate available positions within a PMOS. A PMOS is labeled as “Closed” when no further reenlistments or lateral moves are permitted, while a PMOS remains “Open” if reenlistment spaces remain available. PMOSs that traditionally experience a higher number of requests for reenlistment than have boatspaces available are known as Fast Filling MOS (FFM). Requests for reenlistment may be denied if Marines prior evaluations do not meet the standard outlined or if boatspaces have been filled (HQMC, 2010). Reenlistment for Marines serving in a FFM can be especially competitive. FTAP Marines serving in Closed PMOS that desire reenlistment are encouraged to explore lateral move opportunities (HQMC, 2023a). A similar reenlistment process occurs throughout the remainder of an enlisted Marines’ career with future enlistments beyond the first reenlistment and is referred to as the Subsequent Term Alignment Plan (STAP).

#### **E. OFFICER MOS ASSIGNMENTS**

The officer accession and PMOS assignment process varies greatly from the enlisted process. All Marine officers are college graduates and commissioned via the Naval Academy or an Officer Candidate School Program. While enlisted Marines generally have a good idea of the PMOS they are likely to ultimately be assigned, officers do not. Officer contract types are determined prior to commissioning and are divided into ground, aviation, cyber, and law. Each year more than 1,500 newly commissioned Marine Officers attend six months of training in the Basic Officer Course (BOC) at The Basic School (TBS) in Quantico, Virginia before assignment to the operating forces. All officers regardless of contract type attend training in one of the usually half dozen classes TBS conducts annually. Education at TBS is largely infantry focused and designed to instruct Second Lieutenants on the knowledge and leadership required for service as company grade officers and provisional rifle platoon commanders (Everly, 2019).



The Marine Corps system of training all officers together in an infantry focused curriculum is distinctive from the other services and contributes to the Marine Corps' unique culture. Upon completion of TBS, aviation contracts attend follow on flight training, law contracts enter service into the Judge Advocate General Corps, cyber contracts attend cyber training, and ground contracts attend follow on formal schooling at a PMOS school in one of the ground officer PMOSs. A limited number of competitive aviation and cyber contracts may be available for assignment during TBS for Marines who were originally commissioned on a ground contract. Table 3 describes the FY20 and FY21 Officer Accession Requirements for aviation, law, cyber, and ground.

Table 3. FY20 & FY21 Officer Accession Plan Source: HQMC (2021).

Officer Contract Types	FY20	FY21
Naval Aviators	410	410
Naval Flight Officers	0	0
Judge Advocates	50	50
Cyber Officers	0	10
Ground Officers	1,016	1,220
Total	1,476	1,690

Training at a PMOS school typically takes between 8 and 26 weeks depending on the MOS before the officer is assigned to an operational unit. The staff at TBS is responsible for screening, evaluating and ultimately assigning one of the 25 PMOS available to Second Lieutenants. All officer PMOSs are depicted in Table 4.



Table 4. Marine Corps Ground Officer PMOS List. Adapted from Everly (2019) and HQMC (2023c).

Marine Corps Officer PMOS List	
0102 Manpower Officer	3002 Ground Supply Officer
0203 Ground Intelligence Officer	3404 Financial Management Officer
0204 Counterintelligence/Human Source Intelligence Officer	4402 Judge Advocate
0206 Signals Intelligence Officer	4502 Communication Strategy and Operations Officer
0207 Air Intelligence Officer	5803 Military Police Officer
0302 Infantry Officer	6002 Aircraft Maintenance Officer
0402 Logistics Officer	6602 Aviation Supply Officer
0602 Communications Officer	7204 Low Altitude Air Defense Officer
0802 Field Artillery Officer	7208 Air Support Control Officer
1302 Combat Engineer Officer	7210 Air Defense Control Officer
1702 Cyberspace Officer	7220 Air Traffic Control Officer
1803 Assault Amphibious Vehicle Officer	7315 Unmanned Aircraft System MAGTF Electronic Warfare Officer
	7599 Flight Student

The Marine Corps Officer MOS assignment system is largely a legacy of changes implemented in 1977 to ensure a quality spread of Second Lieutenants across OccFlds so all OccFlds received a portion of the highest performing officers during the initial BOC training at TBS. Students are divided into a “thirds” model based upon performance, commonly referred to as upper third, middle third, and bottom third. Generally, MOSs are divided equally among the thirds. MOS assignments are determined by MOS quality distribution, student suitability, unique or additional considerations, and student preferences. Unique or additional considerations include prior enlisted Second Lieutenants that previously served in special technical fields during their enlisted service or have unique civilian experiences that make them exceptionally qualified for a particular MOS. Unique



or additional conditions may assist in the assignment of a MOS, but far from guarantee a particular assignment.

MOS assignments are typically given out during the 21<sup>st</sup> week of instruction. Some MOSs have special physical or security clearance requirements that may disqualify some officers from receiving those assignments. While the needs of the Marine Corps remain paramount, TBS makes every effort to assign officers to one of their desired MOSs and reports that 95% of officers are assigned to an MOS within their top five preferences. Table 5 presents the MOS Assignment Breakdown for a Notional BOC Company with approximately 44% of Second Lieutenants receiving their first MOS choice and 77% receiving an MOS assignment in their top three preferences (Everly, 2019). The number of slots available in each MOS for a particular TBS class varies throughout the year and depends on officer accession requirements and training seats available as determined by MPP-30 and Training and Education Command (HQMC, 2021).

Table 5. MOS Assignments for Notional BOC Company. Source: Everly (2019)

MOS Assignments for a Notional BOC Company					
CHOICE	NUMBER	PERCENTAGE	NUMBER & PERCENT	NUMBER & PERCENT	NUMBER & PERCENT
First	51	44%	89 Lieutenants 77%	109 Lieutenants 94%	116 Lieutenants 100%
Second	22	19%			
Third	16	14%			
Fourth	8	7%			
Fifth	12	10%			
6th-10th	7	6%			
11th-15th	0	0%			
16th-20th	0	0%			
21st+	0	0%			
<b>TOTAL</b>	<b>116</b>	<b>100%</b>			



## **F. ENLISTED MOS LATERAL MOVES**

Marines are not confined to their PMOS for the duration of their careers and may submit packages to change PMOSs through a systematic process referred to as a lateral move. A Marine Administrative Message (MARADMIN) is released annually detailing the specific PMOS lateral move guidance for that particular year, so the process may vary slightly year to year. Lateral moves will typically occur in conjunction with a reenlistment during the FTAP or STAP process. Unlike the officer lateral move guidance which details PMOSs eligible to apply out of and into, the enlisted lateral move guidance only specifies what PMOSs are eligible to transfer into. The FY24 Command Retention Mission MARADMIN specifically encourages lateral move opportunities in the understaffed PMOSs of 0211, 0241, 0321, 0372, 2336, 5821, and 7316, but stresses that lateral move opportunities exist in other PMOSs as well. Enlisted Marines that successfully complete a lateral move are eligible to receive the Selective Retention Bonus for that particular PMOS and count towards the retention numbers in the PMOS they are lateral moving into (HQMC, 2023b).

Each PMOS has specific requirements as listed in NAVMC 1200.1J Military Occupational Specialties Manual which may include prerequisites for citizenship, academic aptitude scores, security clearance eligibility, rank, and obligated remaining service commitments. These PMOS specific requirements may prevent some Marines from conducting a successful lateral move. Enlisted Marines begin the lateral move process by contacting their unit Career Planner. Manpower Management Enlisted Assignment (MMEA) is responsible for processing and approving all lateral move requests (HQMC, 2010).

A limited number of enlisted PMOSs are not entry level PMOSs and are strictly available via lateral move to Marines entering a second enlistment. For example, assignment to the PMOS of 0211 Counterintelligence/Human Source Specialist is only accomplished from the lateral move process. This PMOS is available to all Marines of any PMOS starting at the rank of E-4; however, each of the strictly lateral move only PMOSs have their own specific requirements.



## **G. OFFICER MOS LATERAL MOVES**

Marine Corps Order (MCO) 1290.9A establishes the policy that guides the lateral move program for Marine Officers. Similar to the enlisted lateral move program, the officer lateral move program is designed to rebalance the excess officer inventories in certain PMOSs and reassign them to PMOSs with manpower shortages (HQMC, 2020a). Each FY a lateral move program for officers is published via MARADMIN detailing lateral move guidance for that specific year. That guidance will include what PMOS are eligible to apply for a lateral move out of and what PMOS are eligible to move into.

The FY24 Lateral Move Program for Marine Officers MARADMIN stipulates career designated unrestricted officers in the rank of O-3 to O-5, including those selected for promotion to O-3, as eligible to conduct a lateral move (HQMC, 2023d). However, eligibility may fluctuate yearly. For example, in the FY23 MARADMIN, lateral moves were restricted to career designated O-3 selects and above with a special note declaring O-4 and O-5 would only be considered for a lateral move if they had relevant experience in the PMOS they desired reassignment as determined by Manpower Management Officer Assignments (MMOA) and the gaining OccFld manager or by exception only (HQMC, 2022b). Lateral moves into or out of PMOSs not listed in the annual MARADMIN are approved on a case by case basis at the discretion MMOA. Importantly, officers that are in the above zone for promotion are not eligible to apply for lateral moves unless selected for promotion (HQMC, 2023d). There may be additional stipulations such as time on station requirements or completion of utilization tours that may delay or prevent an officer from submitting packages. Table 6 and Table 7 depict the PMOS eligible to transfer out and PMOS eligible to transfer into as detailed in the FY24 MARADMIN. Notice that many of the PMOS eligible to lateral move out of reflect larger Marine Corps FD2030 force structure initiatives, specifically the divestment of tanks and reduction in engineering and police capabilities.





Table 6. FY24 PMOS Eligible to Apply for a Lateral Move Out Of.  
Adapted from HQMC (2023d).

FY24 PMOS Eligible to Apply for a Lateral Move Out Of
0302 Infantry Officer
1302 Combat Engineer Officer
1802 Tank Officer
1803 Assault Amphibious Vehicle Officer
5803 Military Police Officer
6002 Aircraft Maintenance Officer
6602 Aviation Supply Officer
7202 Air Command and Control Officer
Electronic Countermeasures Officer

Table 7. FY24 PMOS Eligible to Move Into. Adapted From HQMC  
(2023d).

FY24 PMOS Eligible to Move Into
0102 Manpower Officer
0202 Intelligence Officer
0402 Logistics Officer
0602 Communications Officer
1702 Cyberspace Warfare Officer
3002 Ground Supply Officer

Officer lateral move applications for FY24 require the submission of a NAVMC 10274 Administrative Form, endorsed by the first O-6 or O-5 in the chain of command as appropriate. Additionally, applicants must submit at least one letter of recommendation and personal statement explaining desire and unique experiences relevant to a lateral move into their requested PMOS. MMOA processes all lateral move applications and prepares them for evaluation with other stakeholders within M&RA (HQMC, 2023d).



The Director Manpower Management is the overall authority for lateral move package approval (HQMC, 2020). Upon approval, which typically occurs within 90 days, officers execute orders to their new PMOS school at the earliest available date or as directed by MMOA. All officers who conduct a lateral move incur a 36-month service obligation upon completion of PMOS training, with the exception of the 1702 Cyberspace Warfare Officer PMOS; these officers incur a 72-month service obligation (HQMC, 2023d).

## **H. FITREPS**

This study directly compares the FITREP scores of Marines who have undertaken a PMOS lateral move with those who have not, making it essential to understand how the Marine Corps FITREP is written and scored. Enlisted Marines in the rank of E-5 and above, along with all officers from O-1 to O-8 are evaluated under the Performance and Evaluation System as described in MCO 1610.7B. This system delineates the policies and procedures for reporting requirements of performance, conduct, and character. FITREPs serve as the primary means for these evaluations, playing a crucial role in decisions regarding promotion, retention, and job assignments. FITREPs are categorized into Observed Reports, which are scored evaluations, and Not Observed Reports, which do not provide a score and are used to administratively track and provide continuity to a Marines' career, typically during temporary training or academic periods. While Not Observed Reports can provide valuable insights into a Marines' performance and future potential, Observed Reports are the primary determinant for promotions (HQMC, 2023e). FITREPs are administered at irregular but frequent intervals, known as reporting occasions, which are depicted in Table 8. Marines may receive multiple Observed Reports per year depending on their specific circumstances, with instances of more than a year between Observed Reports being exceptionally rare beyond entry level training.



Table 8. FITREP Reporting Occasions. Adapted From HQMC (2023e).

FITREP Reporting Occasions
Grade Change
CMC Directed
Change of Reporting Senior
Transfer
Change of Duty
To Temporary Duty
From Temporary Duty
End of Service
Change in Status
Annual (Active Component)
Annual (Reserve Component)
Semiannual (Lieutenants only)
Reserve Training

The Marine that is evaluated in the FITREP is known as the Marine Reported On (MRO). Evaluations for the MRO are conducted by the direct superior in the chain of command, known as the Reporting Senior (RS). When conducting an Observed Report, the RS assesses the MRO across 14 observable attributes, sub-divided into five sections: Mission Accomplishment, Individual Character, Leadership, Intellect and Wisdom, and Fulfillment of Evaluation Responsibilities. The RS rates the MRO from “A” (lowest) to “G” (highest) in each of these attributes. Each alphabetical score corresponds with a numerical value: “A” equals 1, “B” equals 2, progressing to “G,” which represents the highest score of 7 (HQMC, 2023e). The FITREP scores are averaged across each of the attributes to create FITREP Averages (FRA), with higher FRA indicating better performance. The current FITREP process was implemented in 1999, directed primarily to address inflated evaluations from supervisors (Clemens et al., 2012). The Appendix provides an example of a FITREP.



The marks of “A,” “F,” or “G” require additional justification and are rarely used. Any score of “A” across any attributes immediately renders the report adverse, reflecting severe substandard performance or misconduct from the MRO. Any marks of “F” or “G” represent exceptional performance. Each RS applies their own personal scale when evaluating MRO performance, leading to potential variations in FRA scores across different RSs. To mitigate FRA variability, each FITREP receives two types of Relative Values, processing and cumulative, which are used to benchmark an MRO’s performance against Marines of the same rank previously evaluated by the RS at time of evaluation and later over the course of their career. Lastly, the RS is also able to provide written comments describing the MRO’s performance, accomplishments, and potential for future service (HQMC, 2023e).

After the RS completes their evaluation, the FITREP is reviewed by the next officer in the chain of command, known as the Reviewing Officer (RO). Unlike the RS, who assigns scores across 14 attributes, the RO employs an 8 level “Christmas Tree” shaped comparative assessment tool for evaluating the MRO (HQMC, 2023e). This model prompts the RO to reflect on all Marines of the same rank they have previously evaluated, encouraging them to position the majority near the base or mid-section, reserving the top for only the truly exceptional performers. Similar to the RS, the RO also provides written comments to create a word picture describing the MRO’s performance.

## **I. BACKGROUND CONCLUSION**

The Marine Corps’ human resource process is a multifaceted process that requires the collaboration of numerous stakeholders to maintain optimal staffing across PMOS. Both the enlisted and officer recruitment, accession, and assignment process underscore the challenges associated with assigning job roles early in a Marine’s career, when detailed knowledge of specific job duties or skills may be lacking. To address these challenges, the Marine Corps recently placed a stronger emphasis on PMOS lateral moves than it has in the past. This flexibility allows Marines to refine career paths in alignment with evolving interests and skills, while allowing the Marine Corps to redirect talent to manpower gaps.



### III. LITERATURE REVIEW

There are few studies evaluating the direct effects of PMOS lateral moves on individual outcomes in the Marine Corps. This chapter reviews civilian and military literature on job skills, job satisfaction, career progression, and performance to inform my analysis of PMOS lateral moves in the Marine Corps.

#### A. JOB MATCHING

Organizations should systemically match individuals' qualifications and unique talents with positions within the organization, strategically placing them where success directly contributes to the organization's overall benefit. Both military and civilian recruiters alike actively seek suitable candidates, striving to match them not only to the position for which they are applying, but also to other roles that fulfill the organization's specific needs in a process known as job matching. However, frequently employees and employers engage in imperfect information exchanges due to factors like unclear communication, mismatched expectations, and inadequate feedback mechanisms, leading to less than ideal work performance.

Many studies suggest effective job matching can affect productivity. For example, Greenberg and Greenberg (1980) found that workers in low and high turnover industries that are job matched within the first 6 months of employment outperform those workers that were not job matched. They also identified an increased difference in performance after 14 months of employment. Bishop's (1993) research on job matching also identifies an increase in performance of workers that are properly job matched and notes the costs of firms that conduct poor initial matching in training and wages. Bishop's analysis of a survey of managers from over 2,500 small and medium firms regarding worker performance and attributes of recent hires identified significant disparities in worker productivity at six months of employment compared to expectations at time of hire. On average, the productivity of the recently hired workers was 12% less than expected, and more than a quarter of these workers underperformed by 25% or more. These differences of observed and predicted productivity indicate performance attributes were poorly



predicted at hiring. Bishop's regression analysis concluded that enhanced assessments of work habits, occupational expertise, and the ability to acquire new job-specific competencies as promising measures to reduce discrepancies between employees and their assigned roles. Ultimately, these measures can decrease both dissatisfaction and turnover within the organization.

## **B. CAREER TRANSITIONS**

Mooney and Cook (2004) analyzed the Navy's method of redistributing excess officer inventory to communities experiencing shortages. Their data included officer records from 1987 through 2003, from which 2,280 officers were selected for a lateral transfer and redesignation from Unrestricted Line communities with excess inventory like Surface Warfare to fill shortages within the Restricted Line and Staff Corps. Nearly 50% of those selected came from Surface Warfare, a community that experienced extremely large excess inventory at the O-1 and O-2 pay grades. Furthermore, Mooney and Cook's analysis found that those that transfer after attaining the rank of O-3 tend to stay in the service and promote to O-4, yet officers that transfer before attaining O-3 tend to exit the service. They argue a more flexible lateral transfer and redesignation process could better facilitate transitions and increase the Navy's return on investment by retaining high performing officers.

## **C. CAREER PROGRESSION AND RETENTION**

Organizational behavior suggests that when employees have a sense of autonomy and control over their career paths, they not only excel in performance but also show a greater tendency to remain with the same organization for extended periods. This concept is further substantiated by two theses from the Naval Postgraduate School, which explore the impact of Marine MOS and duty station assignment preference on performance outcomes. These studies confirm that when Marines' career aspirations and personal preferences are taken into consideration in their job or duty assignments, there is a noticeable improvement in their performance and retention.

Bailey (2021) examined the career impacts of MOS assignment preference received from newly commissioned Marine Corps Officers on future performance and retention.



Using data from Marine Corps Training and Education Command and the Total Force Data Warehouse (TFDW), the study included approximately 16,400 Second Lieutenants from 2010 to 2020 at TBS during their initial six month training. Controlling for commissioning source, demographic variables, prior service, TBS performance, and TBS class year, his regression analysis finds a statistically significant relationship between PMOS preference received and performance on evaluation markings in the operating forces later on in a career. Interestingly, his study did not find PMOS preference to be a statistically significant predictor of length of service. This literature suggests that the Marine Corps can improve performance by closely aligning Marine interests with their ultimate occupation assignment but may require additional incentives to retain them.

Likewise, White (2021) applied a difference-in-differences methodology with fixed effects regression on Marine data spanning 2013 to 2020. This approach aimed to assess the impact of duty station preferences on performance. White found that enlisted Marines that are assigned to their desired duty stations early in their careers perform on average 0.213 points higher on FITREPs relative to their peers. Marines who successfully received their preferred assignment within the operating forces demonstrated a notable performance advantage, outperforming their peers an average of 0.537 points.

As interests change over time, so do career goals and intentions, often resulting in a significant shift in the trajectory of one's ultimate professional aspirations and objectives. Herdt (2023) identified that within the U.S. Navy, there is a traditional obvious career path marked with milestones to achieve O-5 command, however for those that are overlooked for certain billets, the path to a successful career is often unclear and may impact future service decisions. Herdt noted that historically in Naval Aviation only 20% of eligible officers are selected for operational O-5 command, but those that were selected to previously serve in a career enhancing department head tour experienced a selection rate of 30%. This results in approximately 100 officers not being offered operational O-5 command annually. Those not selected for operational command remain less competitive on promotion boards, yet their diverse experience and skills can still be useful to the fleet. He argues that a flexible career with multiple paths for opportunity is required, particularly with lateral transfers and differentiating assignments that better align sailors to their talents



and interests. Further, he notes the Marine Corps recent implementation in January 2022 that allowed officers up for promotion to O-4, O-5, and O-6 to delay promotion consideration in order to provide flexibility within one's career as an example of military services making dramatic changes to their human resource processes.

As previously noted, while personal preference and career satisfaction play significant roles in retention, they may not be the most influential factors in determining successful long-term retention within the Marine Corps. Norville (2021) scrutinized the Marine Corps retention process design and advocates for improving retention quality by implementing a pre-approval model for reenlistments during FTAP. Norville analyzed Marine data from TFDW of individuals whose first contracts expired in FY16 to FY20 and compared those that were successfully retained to those that either did not request a reenlistment or had the request denied. Using a binary logistic regression, Norville created a model that correctly predicts reenlistment pre-approval with over 98% accuracy to the historical outcomes and finds low Non-Judicial Punishment counts and selection for meritorious promotion are the most significant predictors of reenlistment approval. Notably, this study does not find correlation between the number of reenlistments made available each year for each particular PMOS, as measured by boat space capacity, and reenlistment requests. This suggests that Marines' decisions to seek reenlistments in their PMOS is not influenced by boat space availability, which has additional application when studying the decision to conduct a PMOS lateral move.

#### **D. METHODOLOGICAL APPROACHES**

Special Duty Assignments (SDA) are three year tours for enlisted Marines that are assigned to recruiting, drill instructor, or embassy security guard. During an SDA, Marines perform duties outside of their PMOS, before returning back to their original PMOS post-SDA. Many Marines choose to volunteer for SDA; however, some non-volunteers are selected to meet manning requirements. Studying the potential human capital impacts of assignment to SDAs can provide insights to promotion, retention, and performance tradeoffs within the Marine Corps.





Using data on enlisted Marines from 2009 to 2021, McGee (2023) found that Marines in 36 month SDAs received 1.3 points lower on FITREP performance evaluation markings compared to their non-SDA peers. His event study used difference-in-differences and linear regression with person and time-period fixed effects, thereby ensuring a closely matched comparison that effectively controlled for changes in the sample population and time trends. Despite these lower performance evaluations, Marines that served in an SDA were retained and promoted at higher rates. Additionally, those that served in an SDA received lower performance evaluations for an additional two years post-SDA, before they eventually surpassed their non-SDA peers in performance. Furthermore, SDA Marines are retained at higher rates, while also experiencing reduced civilian educational achievement levels. A key shortcoming of McGee’s study is that he is unable to distinguish SDA volunteers from those mandated into SDA assignments, thus making it difficult to distinguish performance and retention outcomes between the two groups.

McGee provides a similar methodological framework when conducting an event study on the performance and retention impacts of Marines that conduct a PMOS lateral move to those that do not. Balancing the human capital tradeoffs arising from assignment to SDAs or during the initial stages of a PMOS lateral move presents a challenge for the Marine Corps to first identify and subsequently promote and retain the most talented and capable.

## **E. LITERATURE REVIEW CONCLUSION**

My research integrates established best practices of occupation mobility and talent management from the civilian sector with the distinctive challenges and constraints of the Marine Corps. While improvements to PMOS selection or assignment during the enlisted recruiting process and TBS officer training have been made, there remains an inherent disconnection of external perception with the internal realities of work within a particular career field as a Marine. The Marine Corps job matching process will never be perfect, however improved manpower models to align personnel with their interests and talents may improve performance and retention in the long term.



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## IV. DATA AND METHODOLOGY

### A. DATA DESCRIPTION

The data for this study came from Manpower Management Records and Performance Branch (MMRP) in the form of a comma-separated values file. The MMRP supplied panel data consisted of all individual FITREPs, with one observation for each FITREP, for all active duty and reserve Marines from 1998 to 2022. The dataset included both enlisted personnel E-5 and above and all officers across all ranks from O-1 to O-8. The frequency of observations and period of observation varied with each individual and was based upon reporting occasion requirements as outlined in the MCO 1670.7B. The data included both observed FITREPs, which are scored, and not observed, which remain unscored.

Each row in the dataset is organized by the unique individual identifier, the Electronic Data Interchange Personal Identifier (EDIPI). The remaining variables correspond directly to information about the Marine evaluated in the FITREP, including Rank, Date of Rank, PMOS, Occasion From Date, Occasion To Date, Occasion Code, Physical Fitness Test scores, and numeric scores across the 14 attributes of evaluation. Although the dataset included information from the RS, such as the average and highest FITREP scores they assigned at processing and cumulatively, this information was excluded from the analysis due to inconsistencies in these variables. A limitation of the dataset is its lack of individual descriptive information that may be associated with FITREP outcomes. The original file contained 3,993,539 observations of 33 variables.

### B. DATA CLEANING

R Studio 4.3.2 was used to clean and analyze the data. Figures and tables were produced with R Studio 4.3.2 and Microsoft Excel.

To initiate the data cleaning process, I first created variables to distinguish officers and enlisted personnel, and to capture the start year and month for each FITREP reporting period. Given the current FITREP scoring system was introduced in 1999, I removed all entries from 1998 present in the dataset to ensure relevance and accuracy throughout the



study. I then created a subset containing entries for officers to narrow my focus. To quantitatively assess performance, I established the FRA variable, representing the average FITREP score across the 14 attributes based on which the RS conducts an evaluation. As the core objective of this study is to evaluate the effects of PMOS lateral moves, this necessitated the exclusion of not observed FITREPs that lacked an FRA score. The initial phase of data cleaning resulted in a total of 634,199 observed officer FITREPs.

The officer subset initially contained a plethora of erroneous PMOS codes, totaling 524 distinct entries. Many of these were either codes for enlisted personnel or simply non-existent. To refine this subset, I filtered for all EDIPIs that included at least one instance of a valid ground PMOS code. This step effectively omitted records for pilots, naval flight officers, and EDIPIs with exclusively invalid PMOS codes. Where obvious data entry errors were apparent, such as omitted leading zeros in PMOS codes, I made the necessary corrections. Instances of a missing PMOS for an EDIPI were corrected by inferring the PMOS from consistent entries in rows before and after the missing entry. Afterward, I filtered the subset to ensure it included only rows with valid ground officer PMOS entries.

Given that the EDIPI serves as the sole unique identifier for individuals in the dataset, I eliminated 3,918 observations lacking this crucial information. Furthermore, as this study concentrates on active duty officers, I excluded 29,193 FITREPs belonging to reserve officers. This study focuses on identifying which officers undertake PMOS lateral moves and assess their performance prior to moving and immediately thereafter. Since officers in the rank O-6 and above are ineligible for PMOS lateral moves, are likely distant from any such move earlier in their career, and typically do not serve in billets based on their PMOS, I excluded these entries from the analysis. This cleaning process resulted in a dataset comprising 399,111 observations with 35,164 unique EDIPIs of observed FITREPs for active duty ground officers in the ranks O-1 to O-5, spanning the years 1999 to 2022. The rank and PMOS distributions of all observations are depicted in Figure 2 and Figure 3, respectively.



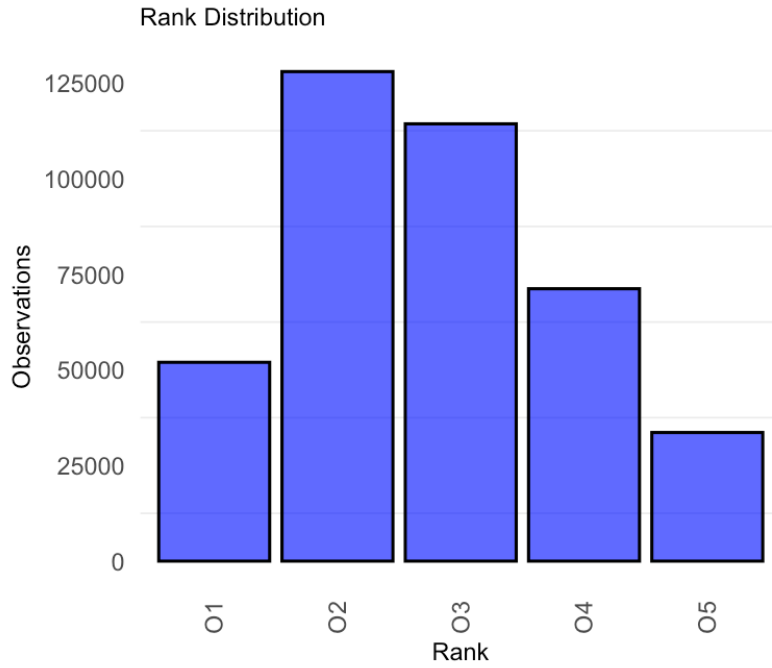


Figure 2. Rank Distribution

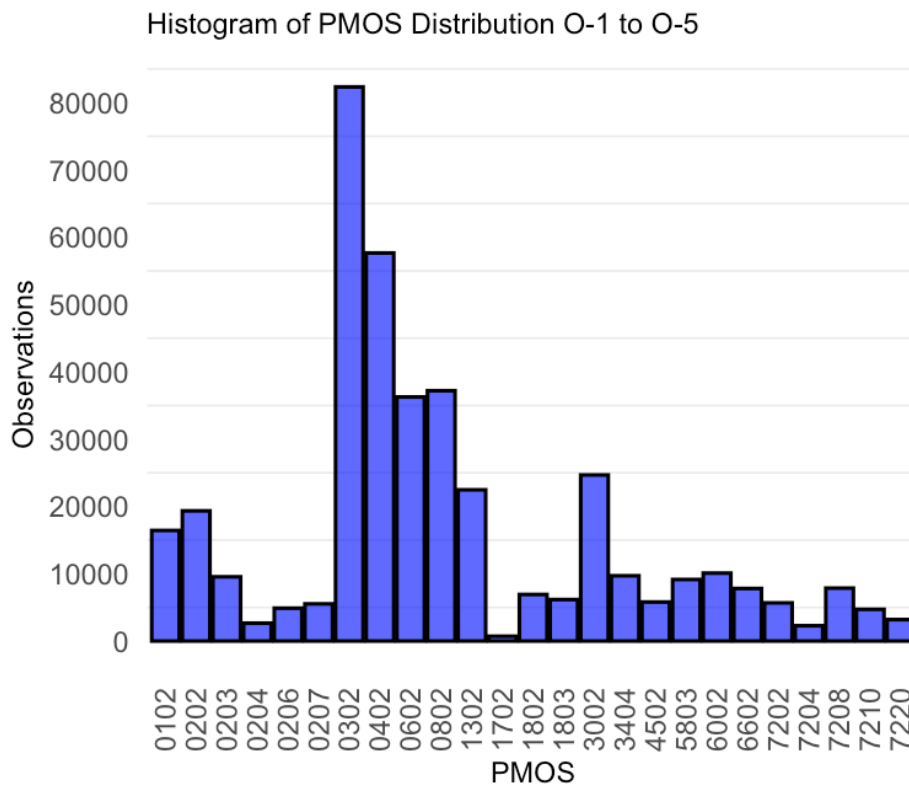


Figure 3. PMOS Distribution



As discussed in Chapter II, PMOS can change over time with promotions despite the roles and responsibilities of the job not changing. Although this type of PMOS change is more common in enlisted ranks, it still exists in the officer system as well for certain PMOS, specifically within the Intelligence and Aviation Command and Control OccFlds. Until October of 2020, all intelligence officers completed entry-level training and earned a PMOS in the subspecialties of 0203 Ground Intelligence, 0204 Counterintelligence/Human Intelligence, 0206 Signal Intelligence/Ground Electronic Warfare, and 0207 Air Intelligence. Upon the promotion to O-3, all intelligence officers were designated as 0202 Marine Air Ground Task Force Intelligence Officers. After October 2020, all intelligence officers are now designated with the PMOS of 0202 after entry-level training and receive the designation 0203, 0204, 0206, and 0207 as a NMOS (HQMC, 2020b). In the aviation command and control community, officers with the PMOS 7204 Low Altitude Air Dense, 7208 Air Support Control Officer, 7210 Air Defense Control, and 7220 Air Traffic Control are assigned the PMOS of 7202 Air Command and Control Officer upon promotion to O-4 (HQMC, 2023c).

These nuanced changes of PMOS codes, even while Marines perform similar roles within the same OccFld complicates the identification of Marines that conduct lateral moves. Therefore, for this study, a lateral move is defined as a change from one OccFld to a different OccFld. To facilitate this analysis, I used the first two digits of each Marine's PMOS to extract the OccFld and create this variable. These OccFlds categories are presented in Table 9 and the distribution of observations in each OccFld is presented in Figure 4.



Table 9. Ground Officer Occupational Fields. Adapted from HQMC (2023c).

Ground Officer Occupational Fields	
01	Manpower and Administration
02	Intelligence
03	Infantry
04	Logistics
06	Communications
08	Field Artillery
13	Engineer, Construction, Facilities, and Equipment
17	Information Maneuver
18	Tank, Assault Amphibious Vehicle and Amphibious Combat Vehicle
30	Supply Chain Material Management
34	Financial Management
45	Communication Strategy and Operations
58	Military Police, Investigations, and Corrections
60	Aircraft Maintenance
66	Aviation Logistics
72	Aviation Command and Control Operations

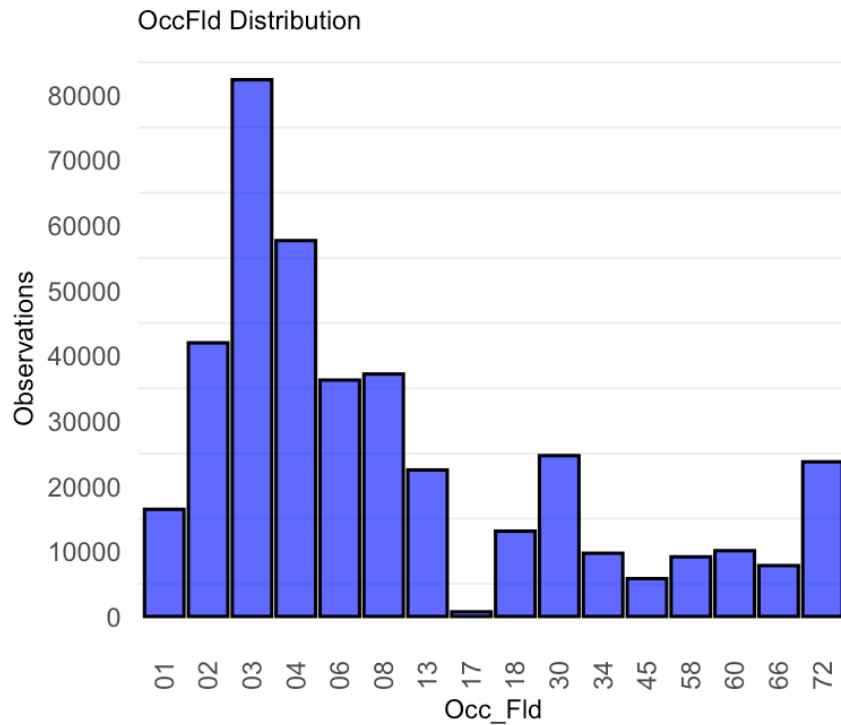


Figure 4. OccFld Distribution



### C. LATERAL MOVE IDENTIFICATION STRATEGY

To identify Marines who conducted a lateral move, I developed a function that detects changes in OccFld for each EDIPI. After organizing the data by EDIPI and FITREP date, the function iterated through the OccFld values for each EDIPI, searching for changes between successive rows. For a change in OccFld to be recognized as a lateral move, the function required that the new OccFld value appear in at least two consecutive occurrences, confirming the move's consistency. Additionally, the function ensured that there would be no reversion to any previously observed OccFld for the same EDIPI after establishing the new OccFld, thus confirming sustained change over time and eliminating chances for false positives. When these conditions were met, the function generated an indicator variable at the first row with the new OccFld to mark the instance of a lateral move. Simultaneously two additional indicator variables marked all subsequent rows after a lateral move and the row immediately before the lateral move, facilitating a detailed analysis of pre and post-move trends and behaviors. In total, this function identified 814 instances of individuals completing a lateral move for all ranks O-1 to O-5 as depicted in Figure 5.

Rank	Count
O1	1
O2	105
O3	504
O4	166
O5	38
Total	814

Figure 5. Lateral Moves by Rank

Recent MARADMINs regarding lateral moves have limited such opportunities to officers holding the ranks of O-2, O-3, and O-4. Lateral moves among officers at the O-5 level are notably rare, accounting for only 4.6 percent of the lateral moves observed in the dataset.





#### D. STATISTICS OF LATERAL MOVES

Lateral moves strategically adjust grade structures and address manpower shortfalls in specific areas, resulting in a non-uniform distribution of lateral moves across different OccFlds. Figure 6 showcases the distribution of individual Marines who conducted a lateral move into various OccFlds, displaying that lateral moves occurred across every OccFld. The 02 Intelligence OccFld, which often faces manpower shortfalls, saw the highest number of lateral moves. Meanwhile, the 17 Information Maneuver OccFld, despite being the dataset's smallest OccFld in terms of personnel, experienced the second highest number of lateral moves. Established in just 2018, the 17 OccFld has relied heavily on lateral moves to build its initial manpower inventory.

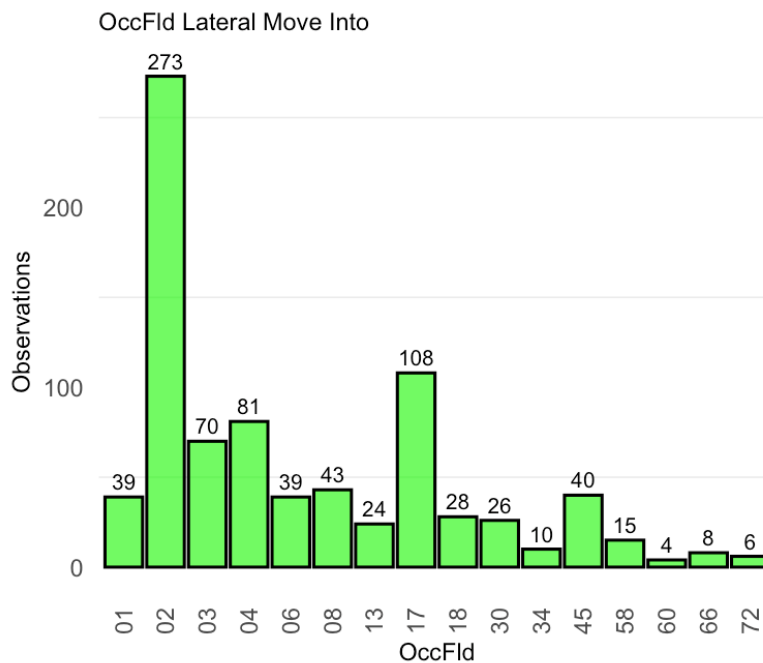


Figure 6. OccFld Lateral Move Into

Similar to the varied distribution observed in the OccFlds that officers lateral move into, the pattern of OccFlds from which Marines execute lateral moves from is also non-uniform and includes all OccFlds, with the exception of the 17 OccFld as seen in Figure 7. Predominantly, the 03 Infantry, 06 Communications,

and 72 Aviation Command and Control witnessed the highest exodus of Marines. This discrepancy suggests strategic or needs-based motivations behind the moves, potentially reflecting the evolving demands and priorities within the Marine Corps. Further analysis could explore the underlying factors contributing to these trends, such as changes in manpower requirements, shifts in importance of certain skills, or the impact of new technology and doctrine on the composition and focus of the Marine Corps.

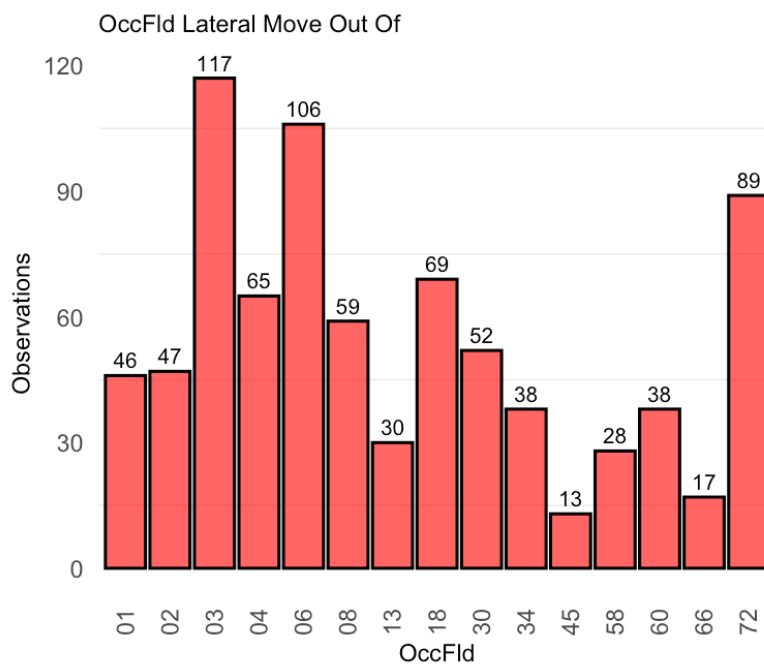


Figure 7. OccFlds Lateral Move Out Of

Overall, certain OccFlds witness a higher influx of officers through lateral moves, while others predominately experience departures. This dynamic is vividly depicted in the stacked histogram of Figure 8, where the disparities in lateral moves across various OccFlds are markedly pronounced. Notably, aviation-related fields such as 60 Aircraft Maintenance, 66 Aviation Logistics, and 72 Aviation Command and Control Operations demonstrate the most significant discrepancies between the number of officers transferring in versus those leaving. This trend could underscore



the unique challenges and opportunities within these aviation fields, potentially indicating targeted areas for manpower adjustments or policy improvements.

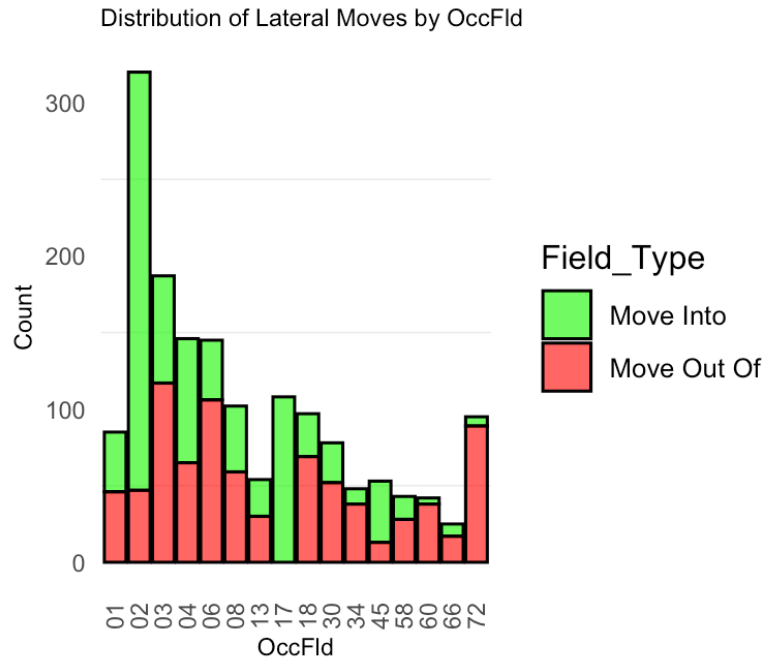


Figure 8. Comparison of Lateral Moves

The distribution of lateral moves across different OccFlds and ranks reveals a distinct pattern, with concentration of moves particularly among officers in the O-3 and O-4 ranks. Table 10 highlights these dynamics, detailing the ranks and OccFlds into which officers most frequently moved into. The 02 Intelligence OccFld, for example, has attracted 170 officers at the O-3 rank. In a similar manner, the recently established 17 Information Maneuver OccFld has quickly become a key area, drawing in 68 officers at the O-3 rank, which signifies the Corps’ efforts to build this new field. Likewise, Table 11 displays the ranks and quantities of those that leave a particular OccFld.



Table 10. Quantity of Lateral Moves Into by Rank and OccFld

Rank	O-1	O-2	O-3	O-4	O-5
01		11	23	4	1
02	1	41	170	52	9
03		5	42	21	2
04		13	47	18	3
06		4	23	9	3
08		5	27	8	3
13		1	14	6	3
17		10	68	23	7
18			21	5	2
30		2	18	6	
34		1	7	2	
45		4	26	8	2
58		2	8	3	2
60		3	1		
66		2	5	1	
72		1	4		1
Total	1	105	504	166	38

Table 11. Quantity of Lateral Move Out Of by Rank and OccFld

Rank	O-1	O-2	O-3	O-4	O-5
01		11	29	5	1
02		3	24	17	3
03	1	12	68	29	7
04		5	40	17	3
06		11	68	23	4
08		9	32	11	7
13		1	21	6	2
17					
18		14	45	7	3
30		6	31	12	3
34		6	25	7	
45		1	9	3	
58		2	14	11	1
60		6	27	5	
66		4	12		1
72		14	59	13	3
Total	1	105	504	166	38



The frequency of lateral moves has varied significantly over time, as depicted in Figure 9. There is a marked increase in lateral moves between 2003 and 2004, coinciding with combat operations in Iraq during Operation Iraqi Freedom. This suggests a possible correlation between heightened operational demands and the need for personnel realignment. Another observed peak around 2013 to 2014 aligns with the American intervention against the Islamic State of Iraq and the Levant in both Iraq and Syria, indicating another period of increased lateral moves potentially driven by operational requirements. The final surge in 2018 corresponds with the establishment of the 17 Information Maneuver OccFld. The noticeably small numbers in 1999 and significant drop off in 2021 are attributable to the methodology used to identify lateral moves. My approach required at least two observations in a new OccFld to confirm a lateral move, impacting the ability to identify and record moves at the beginning and end of the dataset period.

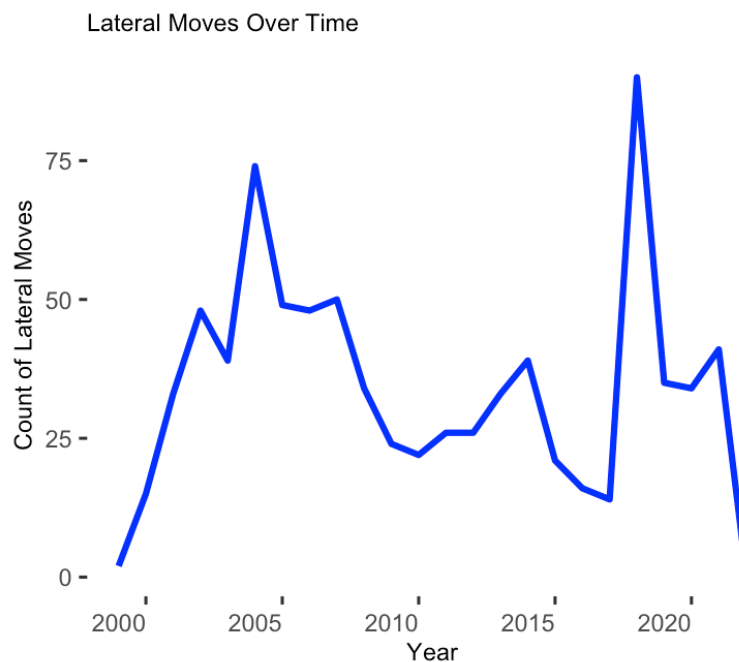


Figure 9. Lateral Moves Over Time

Figure 10 further illustrates that lateral moves predominately involve officers in the O-3 and O-4 ranks, reinforcing the notion that career transitions are most common among



early to mid-career officers. Another important point is the trend of O-5 lateral moves. Those in the rank of O-5 underwent lateral moves almost exclusively in the early 2000s and at the establishment of 17 Information Maneuver in 2018.

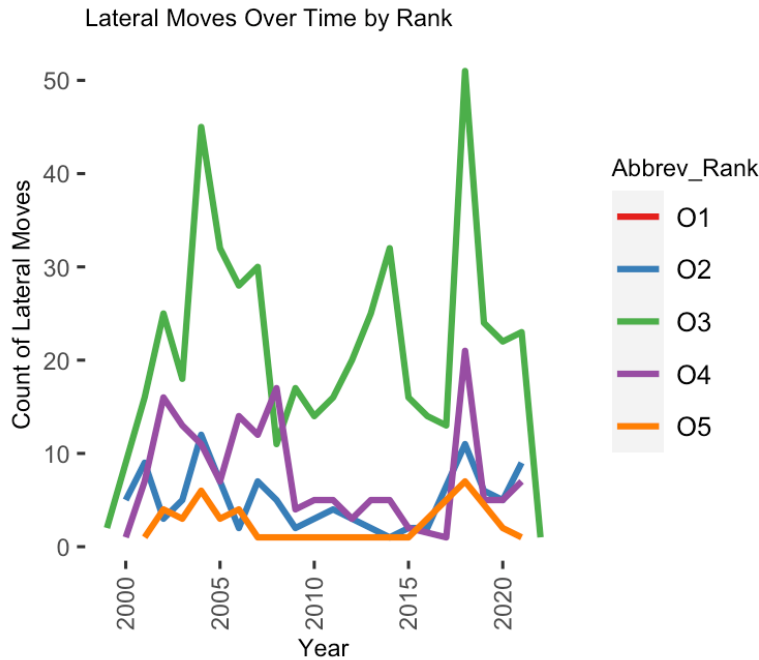


Figure 10. Lateral Moves Over Time by Rank

### E. DESCRIPTION OF FITREP AVERAGES

The Background section of this paper introduces the FRA, a composite score that averages all 14 attribute scores, effectively creating the overall FITREP score. To examine the prior performance of individuals who undertake lateral moves and to assess the impact of these moves on performance outcomes, I developed the Last 3 FRA variable. This variable calculates the rolling averages of the three most recent FRA scores for each EDIPI. Importantly, this method accommodates EDIPIs with fewer than three FITREPs, incorporating their most recent scores in the analysis, but caps the calculation to the three most recent FRA values. This approach allows for analysis on the most recent FITREP score with the FRA variable and performance trends over time analyzing the Last 3 FRA variable. The highest possible FRA is 7, however most RSs assign values that result in

FRA averages typically in the 3 to 5 range as demonstrated by the density plot in Figure 11 comparing FRA to Last 3 FRA within the dataset. As the Last 3 FRA is an average, it naturally has a smoother line than the FRA values.

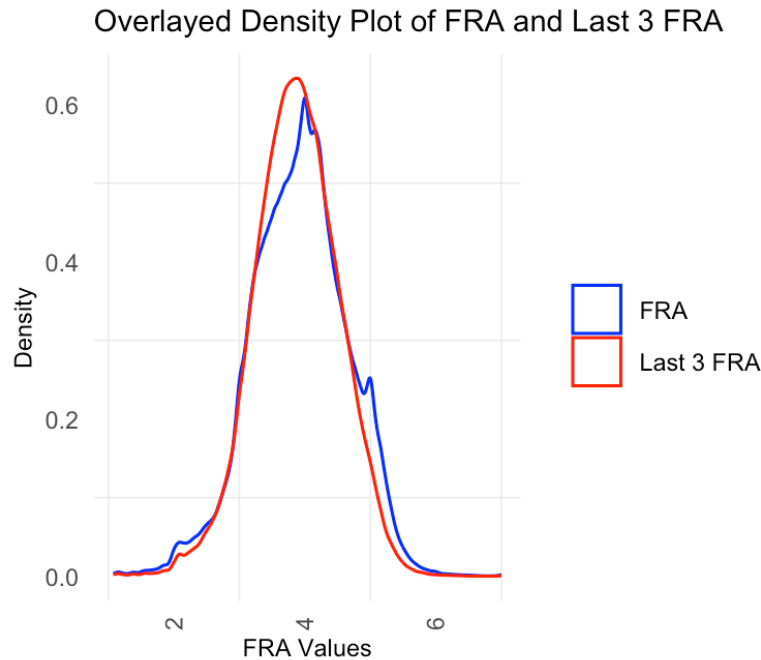


Figure 11. Density Plot of FITREP Average

An additional noteworthy observation is the relative stability of FRA values over time, suggesting minimal grade inflation in FITREP assessments within the Marine Corps. As depicted in Figure 12, FRA values started at their lowest in 1999 with an average of 3.66 points, peaked in 2004 at 4.03 points, and settled back to a comparable low in 2022 at 3.70 points. This trend indicates that the overall grading practices in conducting FITREPs have remained consistent, without significant inflation affecting the scores. Senior officers typically receive higher FRA values than lower ranking officers.

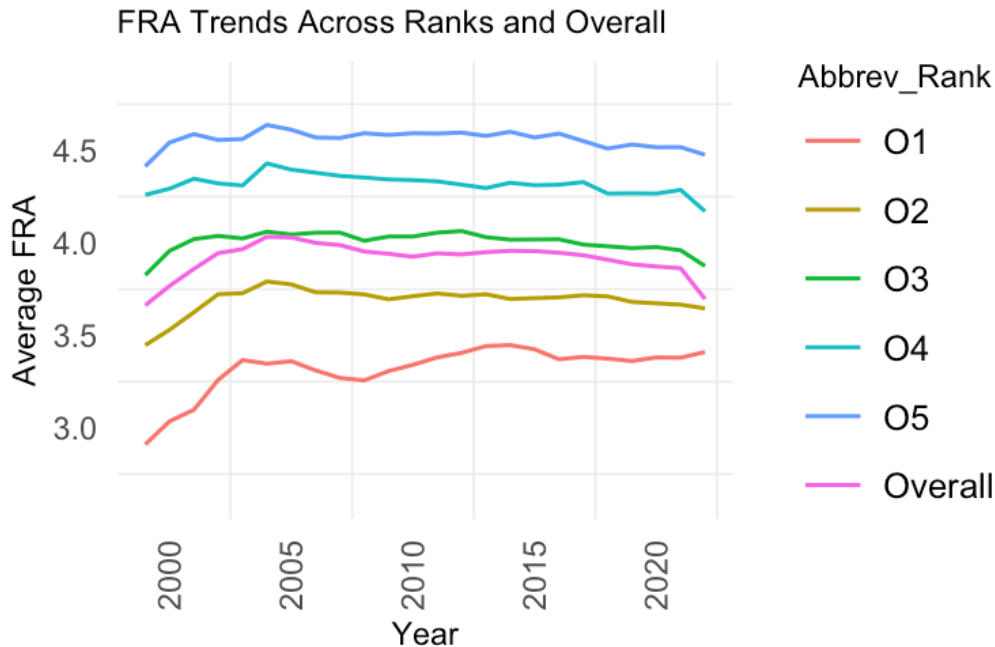


Figure 12. FITREP Average Time Trends

## F. MODELS

To address my research question, I developed three regression models designed to assess the performance trends of individuals opting for lateral moves. These models specifically aim to analyze performance immediately before a lateral move, performance leading up to a lateral move, and initial performance following the move, compared to others of similar rank that remained within their OccFld.

### 1. Models Showing Performance Prior to Lateral Move

The first two models are crafted to evaluate performance before the decision to undertake a lateral move, using the most recent FRA and the Last 3 FRA as the respective outcome variables. These models feature the Lat Move Next variable as an indicator pinpointing the observation just prior to a lateral move. They also incorporate the categorical variable OccFld, delineating the OccFld of the current observation. For individuals on the cusp of a lateral move, this effectively captures their final position within their previous OccFld. An interaction between Lat Move Next and OccFld is included to



examine how the decision to lateral move varies across OccFlds. Additionally, the models account for fixed effects associated with individual characteristics, time, and rank.

$$(1) FRA_{it} = \beta_0 + \beta_1 Lat Move Next_{it} + \Omega OccFld_i \\ + \Pi (Lat Move Next_{it} \times OccFld_i) + \alpha_i + \tau_t + \delta_{it} + \varepsilon_{it}$$

$$(2) Average of Last 3 FRA_{it} = \beta_0 + \beta_1 Lat Move Next_{it} + \Omega OccFld_i \\ + \Pi (Lat Move Next_{it} \times OccFld_i) + \alpha_i + \tau_t + \delta_{it} + \varepsilon_{it}$$

## 2. Models Showing Performance Immediately After Lateral Move

The third model is used to determine FRA immediately after a lateral move. The model includes the indicator Lat Move to identify that the lateral move has occurred, categorical variable OccFld, and the interaction between lateral move and OccFld, while incorporating the same fixed effects as the first two models.

$$(3) FRA_{it} = \beta_0 + \beta_1 Lat Move_{it} + \Omega OccFld_i + \Pi (Lat Move_{it} \times OccFld_i) \\ + \alpha_i + \tau_t + \delta_{it} + \varepsilon_{it}$$



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## V. RESULTS

This section outlines the regression results across all three models introduced in Chapter IV. For each model, two tables are provided to display the results. The first table starts with Column 1, showcasing results for the aggregate sample, and progresses through Column 2 to 5, each honing in on specific ranks as detailed. The subsequent table for each model begins with Column 6 and delineates the time period analyzed. Additional analyses for differing time periods are further represented in Columns 7 and 8, providing comprehensive overview of the time dynamics involved. The 01 Manpower and Administration OccFld is used as the reference category throughout the results.

### A. MODEL 1 RESULTS

Table 12 presents the fixed effects regression results from Model 1, focusing on the most recent FITREP scores prior to a lateral move. Please note that the final observation for each EDIPI was excluded from the analysis, as it was not possible to determine the Next Observation Lat Move. The findings reveal a statistically significant negative coefficient for FITREP scores across most OccFlds, with the greatest impacts on personnel in the 13 and 18 OccFlds, who on average received FITREP scores lower by -0.252 points and -0.207 points respectively. This suggests a more stringent evaluation process in these fields compared to others. However, the interaction between Next Observation Lat Move and Occupation Field, though mostly negative, does not yield statistically significant results. This observation holds when examining results by specific ranks in Columns 2 through 5, except for a single significant finding for O-3s entering OccFld 60. This outlier is attributed to the unique case of a single O-3 lateral moving into OccFld 60, as previously displayed in Table 10. These results indicate that on their last FITREP before undertaking a lateral move, individuals who opt for such moves perform at a level that is indistinguishable from their peers. Overall, this lack of a statistically significant difference suggests that the decision to pursue a lateral move is not predicted on prior discrepancies or superior performance that are either statistically or practically significant.



Table 12. Model 1 Regression Results: Entire Sample and by Rank

Sample= Dependent Var=	Everyone	Rank			
		O-2	O-3	O-4	O-5
	Avg. Most Recent Fitrep	Avg. Most Recent Fitrep	Avg. Most Recent Fitrep	Avg. Most Recent Fitrep	Avg. Most Recent Fitrep
	(1)	(2)	(3)	(4)	(5)
Occupation Field 02	-0.178**	-0.635**	-0.484***	-0.455*	0.127
Occupation Field 03	-0.149**	-0.249*	-0.282**	0.034	0.381
Occupation Field 04	-0.075	0.219	-0.287*	-0.216	-0.059
Occupation Field 06	-0.106**	-0.025	-0.248*	-0.617*	0.654
Occupation Field 08	-0.096	0.265	-0.271*	-0.147	-0.061
Occupation Field 13	-0.252***	-0.266	-0.474**	0.029	0.305
Occupation Field 17	-0.097	0.180	-0.307**	-0.409	0.050
Occupation Field 18	-0.207***	-0.276	-0.333*	-0.556	0.217
Occupation Field 30	0.011	-0.174	-0.300	-0.211	0.013
Occupation Field 34	-0.060	-0.005	-0.423**	-0.042	0.644
Occupation Field 45	-0.106*	-0.111	-0.280**	-0.395	-0.736
Occupation Field 58	-0.031	0.423	-0.224	-0.018	0.035
Occupation Field 60	-0.035	-0.122	-0.428**	-0.052	0.971
Occupation Field 66	-0.067	-0.318	-0.243	-0.182	0.207
Occupation Field 72	-0.146**	-0.045	-0.373*	-0.208	-0.489
Lat move after current observation	0.046	-0.046	-0.252	0.060	-0.029
Next Observation Lat Move x Occupation Field 02	0.051	0.181	0.228	0.329	0.257
Next Observation Lat Move x Occupation Field 03	-0.138	-0.283	0.221	-0.544	0.109
Next Observation Lat Move x Occupation Field 04	-0.074	-0.092	0.332	0.009	0.017
Next Observation Lat Move x Occupation Field 06	-0.018	0.046	0.279	0.261	-0.962
Next Observation Lat Move x Occupation Field 08	-0.281	-0.440	0.153	-0.699	-0.344
Next Observation Lat Move x Occupation Field 13	0.087	0.390	0.238	0.276	-1.279
Next Observation Lat Move x Occupation Field 18	-0.104	-0.007	0.147	-0.114	-0.668
Next Observation Lat Move x Occupation Field 30	-0.139	-0.049	0.213	0.188	-0.036
Next Observation Lat Move x Occupation Field 34	-0.092	-0.113	0.408	0.057	
Next Observation Lat Move x Occupation Field 45	-0.338	0.171	-0.073	-0.172	
Next Observation Lat Move x Occupation Field 58	-0.177	-0.004	0.142	-0.362	
Next Observation Lat Move x Occupation Field 60	0.016	0.067	0.448*	0.021	
Next Observation Lat Move x Occupation Field 66	0.046	0.147	0.230	0.543	
Next Observation Lat Move x Occupation Field 72	-0.139	0.061	0.270	-0.494	-1.082
Mean Dependent Var	3.920	3.693	4.011	4.323	4.568
Year, Person, and Rank FE	Yes	Yes	Yes	Yes	Yes
Observations	363,947	119,901	102,922	63,327	26,644
R2	0.49265	0.52633	0.40800	0.43807	0.47962

**Notes:**

Signif. Code: \*p<0.05, \*\*p<0.01,\*\*\*p<0.001

S.E.: Clustered By Year

Data From MMRP-30

Reference Group Occupation Field 01

Table 13 describes the time trends of Model 1. From 1999–2006, a time period of intense combat operations in Operation Iraqi Freedom, there were statistically significant negative coefficients for the interaction between an impending lateral move and certain OccFlds. This was especially pronounced among personnel departing Combat Arms fields such as 08 Artillery, 03 Infantry, and 18 Tanks and Amphibious Assault Vehicles.



However, the coefficients in Columns 7 and 8 reveal an absence of statistically significant interactions between Next Observation Lat Move and OccFld. This suggests that in terms of most recent FITREP performance, since 2007 individuals poised for a lateral move are statistically indistinguishable from their counterparts who remain within their original OccFld.

Table 13. Model 1 Regression Results: Time Trends

Dependent Var=	Sample=	Time Period		
		1999-2006	2007-2014	2015-2022
		Avg. Most Recent Fitrep	Avg. Most Recent Fitrep	Avg. Most Recent Fitrep
		(6)	(7)	(8)
Occupation Field 02		-0.448***	-0.186*	-0.087
Occupation Field 03		-0.163	-0.262	-0.414**
Occupation Field 04		-0.080	-0.163	-0.092
Occupation Field 06		-0.207	-0.026	-0.114
Occupation Field 08		-0.136	-0.399	0.016
Occupation Field 13		-0.214*	-0.264	-0.544*
Occupation Field 17				-0.110
Occupation Field 18		-0.345*	-0.220	-0.079
Occupation Field 30		-0.082	0.105	-0.161
Occupation Field 34		0.009	-0.103	-0.283
Occupation Field 45		-0.226*	0.137	-0.128
Occupation Field 58		-0.074	-0.340	-0.162
Occupation Field 60		0.162	-0.141	-0.195
Occupation Field 66		0.070	-0.094	-0.086
Occupation Field 72		-0.353**	-0.120	0.053
Lat move after current observation		0.138	-0.086	0.040
Next Observation Lat Move x Occupation Field 02		0.002	0.133	0.045
Next Observation Lat Move x Occupation Field 03		-0.284*	0.110	-0.151
Next Observation Lat Move x Occupation Field 04		-0.136	0.204	-0.424
Next Observation Lat Move x Occupation Field 06		-0.368	0.085	0.066
Next Observation Lat Move x Occupation Field 08		-0.513*	0.323	-0.153
Next Observation Lat Move x Occupation Field 13		-0.061	0.134	0.304
Next Observation Lat Move x Occupation Field 18		-0.458**	0.109	0.013
Next Observation Lat Move x Occupation Field 30		-0.251	0.072	0.043
Next Observation Lat Move x Occupation Field 34		-0.387**	0.155	0.226
Next Observation Lat Move x Occupation Field 45		-0.184	-0.439	-0.296
Next Observation Lat Move x Occupation Field 58		-0.639	0.020	0.088
Next Observation Lat Move x Occupation Field 60		-0.136	0.169	0.304
Next Observation Lat Move x Occupation Field 66		0.234	0.061	-0.166
Next Observation Lat Move x Occupation Field 72		-0.158	-0.010	-0.203
Mean Dependent Var		3.914	3.948	3.896
Year, Person, and Rank FE		Yes	Yes	Yes
Observations		117,273	136,367	110,307
R2		0.52042	0.55288	0.58850

**Notes:**

Signif. Code: \*p<0.05, \*\*p<0.01, \*\*\*p<0.001

S.E.: Clustered By Year

Data From MMRP-30

Reference Group Occupation Field 01



## **B. MODEL 2 RESULTS**

Model 2, detailed in Table 14, is identical to Model 1 but instead uses the Average of the Last 3 FITREPs as the dependent variable, aiming to explore performance pre-trends over time of individuals who undertake lateral moves. Similar to the findings in Model 1, Model 2 reveals several OccFlds where the coefficients are statistically significant and negative, suggesting RSs tend to award lower FITREP scores within these fields. Upon examining the interaction between Next Observation Lat Move and OccFld, negative and statistically significant effects emerge for OccFlds 03, 30, 34, and 45. Yet, these effects do not maintain statistical significance across different ranks. The observed statistically significant effects for O-3 in OccFld 60 and O-4 in OccFld 66 both stem from single observations of transitions at these ranks and OccFlds. Overall, there is a marginal negative pre-trend in performance for those that conduct a lateral move, but it does not reach statistical or practical significance.

Examining the time trends of Model 2 in Table 15 reveals findings consistent with Model 1, particularly noting negative coefficients from 1999 to 2006 for the 03, 08, and 18 OccFlds. Additionally, Model 2 identifies the 34 and 06 OccFlds with relatively large and significant coefficients of -0.504 and -0.453 respectively. Despite these observations, it is important to note that these trends are not observed across all examined time periods.



Table 14. Model 2 Regression Results: Entire Sample and by Rank

Sample= Dependent Var=	Everyone	Rank			
		O-2	O-3	O-4	O-5
	Avg last 3 Fitreps	Avg last 3 Fitreps	Avg last 3 Fitreps	Avg last 3 Fitreps	Avg last 3 Fitreps
	(1)	(2)	(3)	(4)	(5)
Occupation Field 02	-0.188***	-0.402***	-0.326***	-0.360**	-0.075
Occupation Field 03	-0.133***	-0.091	-0.187*	0.021	0.119
Occupation Field 04	-0.079*	0.160	-0.185*	-0.061	-0.083
Occupation Field 06	-0.098**	-0.114	-0.172*	-0.359*	0.200
Occupation Field 08	-0.107**	0.062	-0.209**	-0.035	0.003
Occupation Field 13	-0.225***	-0.058	-0.285**	-0.032	0.136
Occupation Field 17	-0.049	0.035	-0.134	-0.213	0.095
Occupation Field 18	-0.188***	-0.066	-0.230*	-0.339	-0.037
Occupation Field 30	0.047	-0.104	-0.085	-0.190	0.188
Occupation Field 34	-0.037	0.116	-0.144	0.091	-0.219
Occupation Field 45	-0.029	-0.224	-0.094	-0.030	0.124
Occupation Field 58	-0.020	0.257	-0.127	-0.003	-0.065
Occupation Field 60	-0.010	-0.071	-0.290***	0.132	0.565
Occupation Field 66	-0.083	-0.119	-0.137	-0.038	-0.405
Occupation Field 72	-0.105**	-0.193	-0.156	0.041	-0.280
Lat move after current observation	0.124*	0.018	-0.048	0.050	-0.131
Next Observation Lat Move x Occupation Field 02	-0.001	0.018	0.105	0.204	0.193
Next Observation Lat Move x Occupation Field 03	-0.152*	-0.012	0.032	-0.228	-0.015
Next Observation Lat Move x Occupation Field 04	-0.143	-0.105	0.147	-0.058	0.126
Next Observation Lat Move x Occupation Field 06	-0.105	0.039	0.059	0.060	-0.103
Next Observation Lat Move x Occupation Field 08	-0.151	-0.179	0.088	-0.346	-0.051
Next Observation Lat Move x Occupation Field 13	-0.066	0.061	0.135	-0.236	-0.114
Next Observation Lat Move x Occupation Field 18	-0.121	-0.072	0.035	-0.156	0.263
Next Observation Lat Move x Occupation Field 30	-0.220**	-0.062	0.042	0.041	-0.018
Next Observation Lat Move x Occupation Field 34	-0.299*	-0.414	-0.066	0.197	
Next Observation Lat Move x Occupation Field 45	-0.275*	-0.069	-0.072	-0.386	
Next Observation Lat Move x Occupation Field 58	-0.127	-0.011	-0.005	0.097	
Next Observation Lat Move x Occupation Field 60	-0.098	-0.063	0.200*	0.314	
Next Observation Lat Move x Occupation Field 66	-0.120	-0.079	0.059	0.674**	
Next Observation Lat Move x Occupation Field 72	-0.139	-0.022	0.061	-0.152	0.193
Mean Dependent Var	3.868	3.617	3.973	4.298	4.563
Year, Person, and Rank FE	Yes	Yes	Yes	Yes	Yes
Observations	363,947	119,901	102,922	63,327	26,644
R2	0.68730	0.75268	0.65703	0.67904	0.72670

**Notes:**

Signif. Code: \*p<0.05, \*\*p<0.01, \*\*\*p<0.001

S.E.: Clustered By Year

Data From MMRP-30

Reference Group Occupation Field 01



Table 15. Model 2 Regression Results: Time Trends

Dependent Var=	Time Period		
	1999-2006	2007-2014	2015-2022
	Avg last 3 Fitreps (6)	Avg last 3 Fitreps (7)	Avg last 3 Fitreps (8)
Occupation Field 02	-0.387***	-0.221*	-0.032
Occupation Field 03	-0.153***	-0.207*	-0.269**
Occupation Field 04	-0.079	-0.166	0.006
Occupation Field 06	-0.199**	-0.088	-0.046
Occupation Field 08	-0.125**	-0.305**	-0.069
Occupation Field 13	-0.167*	-0.235*	-0.433**
Occupation Field 17			-0.006
Occupation Field 18	-0.272**	-0.267*	-0.040
Occupation Field 30	0.024	-0.047	-0.021
Occupation Field 34	0.091	-0.194	-0.183*
Occupation Field 45	-0.012	0.151	-0.035
Occupation Field 58	0.031	-0.246	-0.174
Occupation Field 60	0.218	-0.220**	-0.137
Occupation Field 66	0.003	-0.167	-0.011
Occupation Field 72	-0.255***	-0.109	0.146*
Lat move after current observation	0.143	0.128	0.024
Next Observation Lat Move x Occupation Field 02	-0.059	0.084	0.050
Next Observation Lat Move x Occupation Field 03	-0.201**	-0.147	0.092
Next Observation Lat Move x Occupation Field 04	-0.150	-0.106	-0.081
Next Observation Lat Move x Occupation Field 06	-0.453***	-0.048	0.049
Next Observation Lat Move x Occupation Field 08	-0.231*	-0.009	-0.005
Next Observation Lat Move x Occupation Field 13	-0.265	-0.053	0.252
Next Observation Lat Move x Occupation Field 18	-0.340*	0.121	0.034
Next Observation Lat Move x Occupation Field 30	-0.265*	-0.165	0.048
Next Observation Lat Move x Occupation Field 34	-0.504**	-0.137	0.153
Next Observation Lat Move x Occupation Field 45	-0.297	-0.420*	0.029
Next Observation Lat Move x Occupation Field 58	-0.467	-0.192	0.237
Next Observation Lat Move x Occupation Field 60	-0.119	-0.151	0.126
Next Observation Lat Move x Occupation Field 66	-0.144	-0.173	-0.091
Next Observation Lat Move x Occupation Field 72	-0.163	-0.076	-0.087
Mean Dependent Var	3.841	3.901	3.859
Year, Person, and Rank FE	Yes	Yes	Yes
Observations	117,273	136,367	110,307
R2	0.72018	0.76012	0.79285

**Notes:**

Signif. Code: \*p<0.05, \*\*p<0.01, \*\*\*p<0.001

S.E.: Clustered By Year

Data From MMRP-30

Reference Group Occupation Field 01





### C. MODEL 3 RESULTS

Model 3 analyzes the FITREP scores received by Marines immediately following a lateral move to a new OccFld. This model's core aim is to evaluate how well individuals adapt to and perform in their new roles. When the interaction between Lat Move and OccFld yields negative coefficients, it indicates a challenging transition to the new field. Conversely, positive coefficients for this interaction indicate that lateral movers outperform their peers in the new OccFld, highlighting a smooth and effective transition. Although Model 3 reveals a tendency towards positive coefficients for the interaction, as depicted in Table 16, they are largely insignificant. However, there are notable exceptions with some significant positive and negative coefficients observed, particularly at the O-4 and O-5 ranks, pointing to varied transitions at these levels.

The time trends displayed in Table 17 demonstrate a mix of negative and positive significant coefficients from 1999–2006, with the rest of the time period mostly unaffected by the impacts of lateral moves.



Table 16. Model 3 Regression Results: Entire Sample and by Rank

Sample= Dependent Var=	Everyone	Rank			
	Avg. Most Recent Fitrep	O-2 Avg. Most Recent Fitrep	O-3 Avg. Most Recent Fitrep	O-4 Avg. Most Recent Fitrep	O-5 Avg. Most Recent Fitrep
	(1)	(2)	(3)	(4)	(5)
Occupation Field 02	-0.121**	-0.519**	-0.278**	-0.318	-0.246
Occupation Field 03	-0.175***	-0.299*	-0.195*	-0.072	-0.179
Occupation Field 04	-0.071	-0.031	-0.176	-0.175	-0.395
Occupation Field 06	-0.113**	-0.188	-0.173	-0.610*	0.038
Occupation Field 08	-0.126**	0.122	-0.197	-0.203	-0.400
Occupation Field 13	-0.259**	-0.449	-0.433**	0.070	-0.562
Occupation Field 17	-0.113*	0.025	-0.183	-0.559*	-0.322
Occupation Field 18	-0.219***	-0.348	-0.302*	-0.460*	-0.319
Occupation Field 30	-0.043	-0.356	-0.258	-0.136	-0.294
Occupation Field 34	-0.094	-0.258	-0.326*	-0.108	1.021
Occupation Field 45	-0.120*	0.229	-0.233*	-0.343	-0.906
Occupation Field 58	-0.116*	0.072	-0.186	-0.130	0.149
Occupation Field 60	-0.055	-0.132	-0.282	-0.128	0.394
Occupation Field 66	-0.070	-0.447*	-0.141	-0.189	-1.450***
Occupation Field 72	-0.182**	-0.131	-0.328*	-0.364	-0.736
Lat Move Current Observation	-0.131	-0.389**	-0.134	0.541**	-0.384
Lat Move x Occupation Field 02	-0.392**	0.048	-0.367*	-1.048***	0.145
Lat Move x Occupation Field 03	0.065	0.064	0.006	-0.466	0.640
Lat Move x Occupation Field 04	0.010	0.534**	-0.029	-0.589*	0.003
Lat Move x Occupation Field 06	0.036	0.716**	0.044	0.027	-0.044
Lat Move x Occupation Field 08	-0.106	0.015	-0.229	-0.626*	0.634*
Lat Move x Occupation Field 13	0.030	0.029	0.172	-0.889*	0.484
Lat Move x Occupation Field 17	0.229	0.390**	0.105	-0.210	0.559
Lat Move x Occupation Field 18	-0.016		0.125	-1.473***	-0.301
Lat Move x Occupation Field 30	0.132	0.397	0.150	-0.608*	
Lat Move x Occupation Field 34	0.000	0.083	-0.061	-0.059	
Lat Move x Occupation Field 45	0.148	-0.217	0.129	-0.319	0.899*
Lat Move x Occupation Field 58	0.100	0.494	-0.128	-9.2E-05	0.087
Lat Move x Occupation Field 60	-0.151	0.148	0.044		
Lat Move x Occupation Field 66	-0.060	0.830**	-0.110	0.071	
Lat Move x Occupation Field 72	0.527*	0.880***	0.758		0.344
Mean Dependent Var	3.920	3.693	4.011	4.323	4.568
Year, Person, and Rank FE	Yes	Yes	Yes	Yes	Yes
Observations	399,111	127,981	114,319	71,212	33,619
R2	0.48256	0.52379	0.42045	0.44497	0.46996

**Notes:**

Signif. Code: \*p<0.05, \*\*p<0.01,\*\*\*p<0.001

S.E.: Clustered By Year

Data From MMRP-30

Reference Group Occupation Field 01



Table 17. Model 3 Regression Results: Time Trends

Sample=	Time Period		
	1999-2006	2007-2014	2015-2022
	Avg. Most Recent Fitrep	Avg. Most Recent Fitrep	Avg. Most Recent Fitrep
	(6)	(7)	(8)
Occupation Field 02	-0.317**	-0.072	-0.027
Occupation Field 03	-0.216*	-0.197*	-0.370**
Occupation Field 04	-0.096	-0.066	-0.166
Occupation Field 06	-0.280*	0.030	-0.132
Occupation Field 08	-0.201*	-0.324	-0.027
Occupation Field 13	-0.201	-0.178	-0.505**
Occupation Field 17			-0.145
Occupation Field 18	-0.384*	-0.181	-0.112
Occupation Field 30	-0.160	0.089	-0.192
Occupation Field 34	-0.125	-0.033	-0.330
Occupation Field 45	-0.260*	0.014	-0.156
Occupation Field 58	-0.153	-0.335	-0.195
Occupation Field 60	0.127	-0.078	-0.227
Occupation Field 66	0.144	-0.017	-0.199*
Occupation Field 72	-0.432**	-0.102	-0.026
Lat Move Current Observation	-0.363*	-0.006	-0.001
Lat Move x Occupation Field 02	-0.435*	-0.196	-0.135
Lat Move x Occupation Field 03	0.199	0.091	-0.060
Lat Move x Occupation Field 04	0.301	-0.198	0.042
Lat Move x Occupation Field 06	0.450*	-0.307	0.175
Lat Move x Occupation Field 08	-0.071	-0.085	-0.006
Lat Move x Occupation Field 13	0.194	-0.151	0.216
Lat Move x Occupation Field 17			0.100
Lat Move x Occupation Field 18	0.276	-0.238	0.036
Lat Move x Occupation Field 30	0.503	-0.301	-0.087
Lat Move x Occupation Field 34	0.532*	-0.066	-0.133
Lat Move x Occupation Field 45	0.576**	0.457	-0.107
Lat Move x Occupation Field 58	0.206	0.021	0.308
Lat Move x Occupation Field 60	0.356*	-0.501	0.020
Lat Move x Occupation Field 66	-0.793	0.902*	0.520
Lat Move x Occupation Field 72	1.078*	0.160	
Mean Dependent Var	3.914	3.948	3.896
Year, Person, and Rank FE	Yes	Yes	Yes
Observations	123,070	144,791	131,250
R2	0.51935	0.54931	0.56843

**Notes:**

Signif. Code: \*p<0.05, \*\*p<0.01,\*\*\*p<0.001

S.E.: Clustered By Year

Data From MMRP-30

Reference Group Occupation Field 01



#### D. T-TEST ANALYSIS

In Models 1 and 2, the interaction between Next Observation Lat Move and OccFld predominately indicated negative effects during 1999 to 2006, many reaching statistical significance. This pattern suggests that lateral moves in this era often correlated with lower FITREP scores before making a lateral move. However, the significance of these negative effects was not observed in other time periods. The analysis shows that the FITREP scores of Marines approaching a lateral move were generally lower, yet the differences were marginal. To validate the regression findings, I divided the sample into two nearly equal groups covering roughly equal time periods: 416 lateral movers from 1999 to 2009, and 398 from 2010 to 2022, as depicted in Table 18. I then conducted a T-Test comparing the most recent FITREP scores against the Next Lat Move variable. The resulting P Values between the two groups demonstrate that in the time period 1999–2009, those that were about to complete lateral moves did not receive the same FITREP score as those that remained in their OccFld. However, from 2010–2022, the large P Value is evidence of no distinguishable difference between those that lateral move and those that do not.

Table 18. T-Test Observations

Sample=	Time Period	
	1999-2009	2010-2022
Number of Lat Movers	416	398
P Value	0.00003	0.54520
Total Observations	172,395	226,716

Furthermore, the density plots in Figure 13 and Figure 14 are vivid depictions of the variations in FITREP score by Next Observation Lateral Move. The density plot displays the differences in FRA across the entire distribution, while the regression results depicted the mean differences in FRA. The distribution of FRA is closely matched during the 2010 to 2022 time period for those about to embark on a lateral move compared to those that are not. There are substantial differences in FRA from 1999 to 2009 between the two groups.



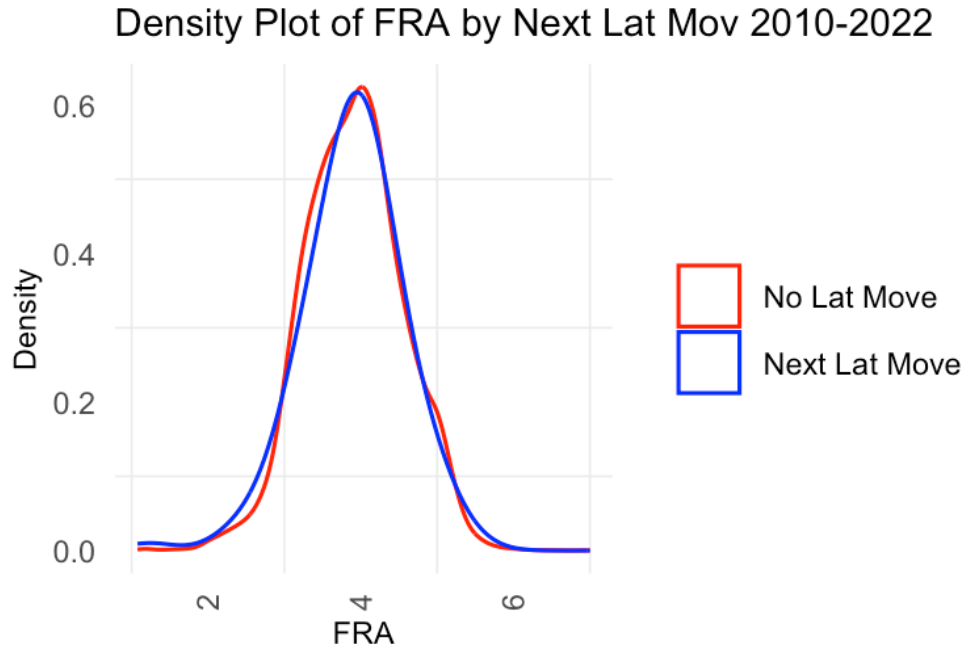


Figure 13. Density Plot of FITREP Average by Next Lat Move 2010–2022

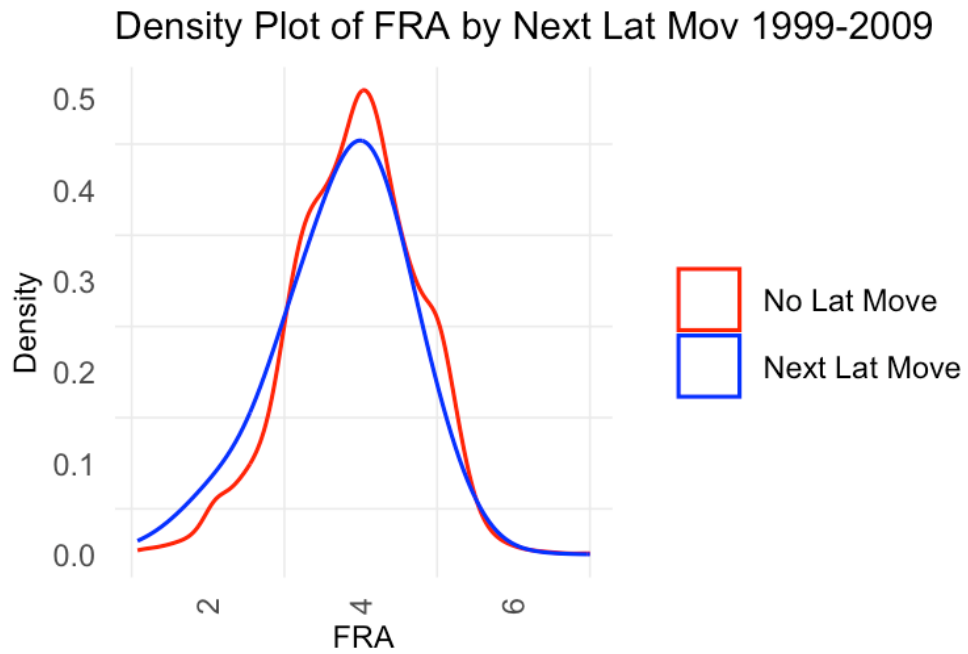


Figure 14. Density Plot of FITREP Average by Next Lat Move 1999–2009

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## **VI. CONCLUSION**

### **A. SUMMARY**

Overall, this study finds limited statistical support for the notions of barrel scraping or cream skimming over the last decade among ground officer OccFlds. It appears feasible that both phenomena may be occurring simultaneously, leading to a neutral effect. The results suggest that bottom of the barrel lateral moves were more prevalent in the early 2000s, but this trend has diminished over time. Today, individuals who undertake lateral moves are virtually indistinguishable from their counterparts who remain in their original OccFlds. Furthermore, initial FITREP scores for those who have completed a lateral move closely align with the scores of their peers.

### **B. RECOMMENDATIONS**

I recommend that the Marine Corps continue to expand the PMOS lateral move program for officers. There is sufficient evidence from civilian and military literature that control over one's career may lead to higher rates of job satisfaction, performance, and retention. By enabling more Marines to transition into roles that align with their interests and skills, the Marine Corps can harness the full potential of its personnel to achieve the objectives set out in FD2030.

### **C. LIMITATIONS**

This study's limitations include the absence of individual descriptive information that could influence FITREP performance outcomes. Additionally, it does not incorporate the use of relative value, a metric that assesses an individual's performance in comparison to peers of the same rank evaluated by the same RS, when evaluating performance before and after a lateral move. This study also does not consider the evaluations of the RO, which may provide additional perspective of Marine performance.

The absence of a comprehensive database explicitly documenting officers who have undertaken lateral moves necessitated creating a function to discern such moves. To simplify the study, the PMOSs were grouped into OccFlds, and lateral moves were defined



as moving from one OccFld to another. A key shortfall of this approach is that it does not account for any officers who may have transitioned from the PMOS of 1802 Tank Officer to 1803 Assault Amphibious Vehicle Officer following the divestment of tanks in 2021, a move aligned with the FD2030 initiative, as this change was within the same OccFld.

Another limitation of the function to identify lateral moves lies in its criteria. It necessitates that an EDIPI must display at least one observation in an OccFld, followed by a transition to a different OccFld for at least two consecutive observations without reverting to any previously used OccFld. Consequently, this method fails to capture instances of lateral moves that occur with fewer than two observations in the new OccFld. Therefore, the actual number of lateral moves in 2022 is likely underrepresented.

#### **D. FURTHER RESEARCH**

Numerous potential studies could significantly influence the Marine Corps' approach to leveraging lateral moves for optimizing personnel distribution across various PMOSs. A targeted study on pilots transitioning to ground PMOS could unveil the effectiveness and obstacles of these particular transitions. Considering the broader, more diverse, and dynamic career paths among enlisted personnel, a focused investigation into their lateral moves could reveal valuable insights for force structure and personnel management. Additionally, examining the effects of lateral moves on promotion and retention decisions could prove crucial, offering a detailed perspective on how such transitions shape career paths, thereby enhancing strategic personnel planning.





## APPENDIX. EXAMPLE FITREP

USMC FITNESS REPORT (1610) NAVMC 10835 (Rev. 7-11) (EF) PREVIOUS EDITIONS WILL NOT BE USED FOUO - Privacy sensitive when filled in.		COMMANDANT'S GUIDANCE		DO NOT STAPLE THIS FORM	
<p>The completed fitness report is the most important information component in manpower management. It is the primary means of evaluating a Marine's performance and is the Commandant's primary tool for the selection of personnel for promotion, augmentation, resident schooling, command, and duty assignments. Therefore, the completion of this report is one of an officer's most critical responsibilities. Inherent in this duty is the commitment of each Reporting Senior and Reviewing Officer to ensure the integrity of the system by giving close attention to accurate marking and timely reporting. Every officer serves a role in the scrupulous maintenance of this evaluation system, ultimately important to both the individual and the Marine Corps. Inflationary markings only serve to dilute the actual value of each report. Reviewing Officers will not concur with inflated reports.</p>					
A. ADMINISTRATIVE INFORMATION					
1. Marine Reported On:					
a. Last Name	b. First Name	c. MI	d. SSN	e. Grade	f. DOR
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
2. Organization:					
a. MCC	b. RUC	c. Unit Description			
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>			
3. Occasion and Period Covered:			4. Duty Assignment ( descriptive title ):		
a. OCC	b. From	To	c. Type		
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	
5. Special Case:		6. Marine Subject Of:		7. Recommended For Promotion:	
a. Adverse	b. Not Observed	c. Extended	a. Commendatory Material	b. Derogatory Material	c. Disciplinary Action
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Special Information:			9. Duty Preference:		
a. QUAL	d. HT(in.)	g. Reserve Component	a. Code b. Descriptive Title		
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	1st	<input style="width: 100%;" type="text"/>	
b. PFT	e. WT	h. Status	2nd	<input style="width: 100%;" type="text"/>	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	3rd	<input style="width: 100%;" type="text"/>	
c. CFT	f. Body Fat	i. Future Use			
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>			
10. Reporting Senior:					
a. Last Name	b. Init	c. Service	d. SSN	e. Grade	f. Duty Assignment
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
11. Reviewing Officer:					
a. Last Name	b. Init	c. Service	d. SSN	e. Grade	f. Duty Assignment
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
B. BILLET DESCRIPTION					
C. BILLET ACCOMPLISHMENTS					



1. Marine Reported On:				2. Occasion and Period Covered:			
a. Last Name		b. First Name		c. MI	d. SSN	a. OCC	b. From To
<b>D. MISSION ACCOMPLISHMENT</b>							
1. PERFORMANCE. Results achieved during the reporting period. How well those duties inherent to a Marine's billet, plus all additional duties, formally and informally assigned, were carried out. Reflects a Marine's aptitude, competence, and commitment to the unit's success above personal reward. Indicators are time and resource management, task prioritization, and tenacity to achieve positive ends consistently.							
ADV	Meets requirements of billet and additional duties. Aptitude, commitment, and competence meet expectations. Results maintain status quo.	Consistently produces quality results while measurably improving unit performance. Habitually makes effective use of time and resources; improves billet procedures and products. Positive impact extends beyond billet expectations.	Results far surpass expectations. Recognizes and exploits new resources; creates opportunities. Emulated; sought after as an expert with influence beyond unit. Impact significant; innovative approaches to problems produce significant gains in quality and efficiency.				N/O
A	B	C	D	E	F	G	H
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. PROFICIENCY. Demonstrates technical knowledge and practical skill in the execution of the Marine's overall duties. Combines training, education and experience. Translates skills into actions which contribute to accomplishing tasks and missions. Imparts knowledge to others. Grade dependent.							
ADV	Competent. Possesses the requisite range of skills and knowledge commensurate with grade and experience. Understands and articulates basic functions related to mission accomplishment.	Demonstrates mastery of all required skills. Expertise, education and experience consistently enhance mission accomplishment. Innovative troubleshooter and problem solver. Effectively imparts skills to subordinates.	True expert in field. Knowledge and skills impact far beyond those of peers. Translates broad-based education and experience into forward thinking, innovative actions. Makes immeasurable impact on mission accomplishment. Peerless teacher, selflessly imparts expertise to subordinates, peers, and seniors.				N/O
A	B	C	D	E	F	G	H
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JUSTIFICATION:							
<b>E. INDIVIDUAL CHARACTER</b>							
1. COURAGE. Moral or physical strength to overcome danger, fear, difficulty or anxiety. Personal acceptance of responsibility and accountability, placing conscience over competing interests regardless of consequences. Conscious, overriding decision to risk bodily harm or death to accomplish the mission or save others. The will to persevere despite uncertainty.							
ADV	Demonstrates inner strength and acceptance of responsibility commensurate with scope of duties and experience. Willing to face moral or physical challenges in pursuit of mission accomplishment.	Guided by conscience in all actions. Proven ability to overcome danger, fear, difficulty or anxiety. Exhibits bravery in the face of adversity and uncertainty. Not deterred by morally difficult situations or hazardous responsibilities.	Uncommon bravery and capacity to overcome obstacles and inspire others in the face of moral dilemma or life-threatening danger. Demonstrated under the most adverse conditions. Selfless. Always places conscience over competing interests regardless of physical or personal consequences.				N/O
A	B	C	D	E	F	G	H
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. EFFECTIVENESS UNDER STRESS. Thinking, functioning and leading effectively under conditions of physical and/or mental pressure. Maintaining composure appropriate for the situation, while displaying steady purpose of action, enabling one to inspire others while continuing to lead under adverse conditions. Physical and emotional strength, resilience and endurance are elements.							
ADV	Exhibits discipline and stability under pressure. Judgment and effective problem-solving skills are evident.	Consistently demonstrates maturity, mental agility and willpower during periods of adversity. Provides order to chaos through the application of intuition, problem-solving skills, and leadership. Composure reassures others.	Demonstrates seldom-matched presence of mind under the most demanding circumstances. Stabilizes any situation through the resolute and timely application of direction, focus and personal presence.				N/O
A	B	C	D	E	F	G	H
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. INITIATIVE. Action in the absence of specific direction. Seeing what needs to be done and acting without prompting. The instinct to begin a task and follow through energetically on one's own accord. Being creative, proactive and decisive. Transforming opportunity into action.							
ADV	Demonstrates willingness to take action in the absence of specific direction. Acts commensurate with grade, training and experience.	Self-motivated and action-oriented. Foresight and energy consistently transform opportunity into action. Develops and pursues creative, innovative solutions. Acts without prompting. Self-starter.	Highly motivated and proactive. Displays exceptional awareness of surroundings and environment. Uncanny ability to anticipate mission requirements and quickly formulate original, far-reaching solutions. Always takes decisive, effective action.				N/O
A	B	C	D	E	F	G	H
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JUSTIFICATION:							
NAVMC 10835 (Rev. 7-11) (EF)		FOR OFFICIAL USE ONLY - Privacy sensitive when filled in.				PAGE 2 OF 5	



1. Marine Reported On:				2. Occasion and Period Covered:			
a. Last Name		b. First Name	c. MI	d. SSN	a. OCC	b. From	To
<b>F. LEADERSHIP</b>							
1. LEADING SUBORDINATES. The inseparable relationship between leader and led. The application of leadership principles to provide direction and motivate subordinates. Using authority, persuasion and personality to influence subordinates to accomplish assigned tasks. Sustaining motivation and morale while maximizing subordinates' performance.							
ADV	Engaged; provides instructions and directs execution. Seeks to accomplish mission in ways that sustain motivation and morale. Actions contribute to unit effectiveness.	Achieves a highly effective balance between direction and delegation. Effectively tasks subordinates and clearly delineates standards expected. Enhances performance through constructive supervision. Fosters motivation and enhances morale. Builds and sustains teams that successfully meet mission requirements. Encourages initiative and candor among subordinates.	Promotes creativity and energy among subordinates by striking the ideal balance of direction and delegation. Achieves highest levels of performance from subordinates by encouraging individual initiative. Engenders willing subordination, loyalty, and trust that allow subordinates to overcome their perceived limitations. Personal leadership fosters highest levels of motivation and morale, ensuring mission accomplishment even in the most difficult circumstances.			N/O	
A	B	C	D	E	F	G	H
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. DEVELOPING SUBORDINATES. Commitment to train, educate, and challenge all Marines regardless of race, religion, ethnic background, or gender. Mentorship. Cultivating professional and personal development of subordinates. Developing team players and esprit de corps. Ability to combine teaching and coaching. Creating an atmosphere tolerant of mistakes in the course of learning.							
ADV	Maintains an environment that allows personal and professional development. Ensures subordinates participate in all mandated development programs.	Develops and institutes innovative programs, to include PME, that emphasize personal and professional development of subordinates. Challenges subordinates to exceed their perceived potential thereby enhancing unit morale and effectiveness. Creates an environment where all Marines are confident to learn through trial and error. As a mentor, prepares subordinates for increased responsibilities and duties.	Widely recognized and emulated as a teacher, coach and leader. Any Marine would desire to serve with this Marine because they know they will grow personally and professionally. Subordinate and unit performance far surpassed expected results due to MRD's mentorship and team building talents. Attitude toward subordinate development is infectious, extending beyond the unit.			N/O	
A	B	C	D	E	F	G	H
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. SETTING THE EXAMPLE. The most visible facet of leadership: how well a Marine serves as a role model for all others. Personal action demonstrates the highest standards of conduct, ethical behavior, fitness, and appearance. Bearing, demeanor, and self-discipline are elements.							
ADV	Maintains Marine Corps standards for appearance, weight, and uniform wear. Sustains required level of physical fitness. Adheres to the tenets of the Marine Corps core values.	Personal conduct on and off duty reflects highest Marine Corps standards of integrity, bearing and appearance. Character is exceptional. Actively seeks self-improvement in wide-ranging areas. Dedication to duty and professional example encourage others' self-improvement efforts.	Model Marine, frequently emulated. Exemplary conduct, behavior, and actions are tone-setting. An inspiration to subordinates, peers, and seniors. Remarkable dedication to improving self and others.			N/O	
A	B	C	D	E	F	G	H
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. ENSURING WELL-BEING OF SUBORDINATES. Genuine interest in the well-being of Marines. Efforts enhance subordinates' ability to concentrate/focus on unit mission accomplishment. Concern for family readiness is inherent. The importance placed on welfare of subordinates is based on the belief that Marines take care of their own.							
ADV	Deals confidently with issues pertinent to subordinate welfare and recognizes suitable courses of action that support subordinates' well-being. Applies available resources, allowing subordinates to effectively concentrate on the mission.	Instills and/or reinforces a sense of responsibility among junior Marines for themselves and their subordinates. Actively fosters the development of and uses support systems for subordinates which improve their ability to contribute to unit mission accomplishment. Efforts to enhance subordinate welfare improve the unit's ability to accomplish its mission.	Noticeably enhances subordinates well-being, resulting in a measurable increase in unit effectiveness. Maximizes unit and base resources to provide subordinates with the best support available. Proactive approach serves to energize unit members to "take care of their own," thereby correcting potential problems before they can hinder subordinates' effectiveness. Widely recognized for techniques and policies that produce results and build morale. Builds strong family atmosphere. Puts motto Mission first, Marines always, into action.			N/O	
A	B	C	D	E	F	G	H
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. COMMUNICATION SKILLS. The efficient transmission and receipt of thoughts and ideas that enable and enhance leadership. Equal importance given to listening, speaking, writing, and critical reading skills. Interactive, allowing one to perceive problems and situations, provide concise guidance, and express complex ideas in a form easily understood by everyone. Allows subordinates to ask questions, raise issues and concerns and venture opinions. Contributes to a leader's ability to motivate as well as counsel.							
ADV	Skilled in receiving and conveying information. Communicates effectively in performance of duties.	Clearly articulates thoughts and ideas, verbally and in writing. Communication in all forms is accurate, intelligent, concise, and timely. Communicates with clarity and verve, ensuring understanding of intent or purpose. Encourages and considers the contributions of others.	Highly developed facility in verbal communication. Adept in composing written documents of the highest quality. Combines presence and verbal skills which engender confidence and achieve understanding irrespective of the setting, situation, or size of the group addressed. Displays an intuitive sense of when and how to listen.			N/O	
A	B	C	D	E	F	G	H
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JUSTIFICATION:							
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<b>1. Marine Reported On:</b>				<b>2. Occasion and Period Covered:</b>			
a. Last Name		b. First Name		c. MI	d. SSN	a. OCC	b. From To
<b>G. INTELLECT AND WISDOM</b>							
1. PROFESSIONAL MILITARY EDUCATION (PME). Commitment to intellectual growth in ways beneficial to the Marine Corps. Increases the breadth and depth of warfighting and leadership aptitude. Resources include resident schools; professional qualifications and certification processes; nonresident and other extension courses; civilian educational institution coursework; a personal reading program that includes (but is not limited to) selections from the Commandant's Reading List; participation in discussion groups and military societies; and involvement in learning through new technologies.							
<b>ADV</b>	Maintains currency in required military skills and related developments. Has completed or is enrolled in appropriate level of PME for grade and level of experience. Recognizes and understands new and creative approaches to service issues. Remains abreast of contemporary concepts and issues.	PME outlook extends beyond MOS and required education. Develops and follows a comprehensive personal program which includes broadened professional reading and/or academic course work; advances new concepts and ideas.	Dedicated to life-long learning. As a result of active and continuous efforts, widely recognized as an intellectual leader in professionally related topics. Makes time for study and takes advantage of all resources and programs. Introduces new and creative approaches to services issues. Engages in a broad spectrum of forums and dialogues.				<b>N/O</b>
<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F</b>	<b>G</b>	<b>H</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. DECISION MAKING ABILITY. Viable and timely problem solution. Contributing elements are judgment and decisiveness. Decisions reflect the balance between an optimal solution and a satisfactory, workable solution that generates tempo. Decisions are made within the context of the commander's established intent and the goal of mission accomplishment. Anticipation, mental agility, intuition, and success are inherent.							
<b>ADV</b>	Makes sound decisions leading to mission accomplishment. Actively collects and evaluates information and weighs alternatives to achieve timely results. Confidently approaches problems; accepts responsibility for outcomes.	Demonstrates mental agility; effectively prioritizes and solves multiple complex problems. Analytical abilities enhanced by experience, education, and intuition. Anticipates problems and implements viable, long-term solutions. Steadfast, willing to make difficult decisions.	Widely recognized and sought after to resolve the most critical, complex problems. Seldom matched analytical and intuitive abilities; accurately foresees unexpected problems and arrives at well-timed decisions despite fog and friction. Completely confident approach to all problems. Masterfully strikes a balance between the desire for perfect knowledge and greater tempo.				<b>N/O</b>
<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F</b>	<b>G</b>	<b>H</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. JUDGMENT. The discretionary aspect of decision making. Draws on core values, knowledge, and personal experience to make wise choices. Comprehends the consequences of contemplated courses of action.							
<b>ADV</b>	Majority of judgments are measured, circumspect, relevant and correct.	Decisions are consistent and uniformly correct, tempered by consideration of their consequences. Able to identify, isolate and assess relevant factors in the decision making process. Opinions sought by others. Subordinates personal interest in favor of impartiality.	Decisions reflect exceptional insight and wisdom beyond this Marine's experience. Counsel sought by all; often an arbiter. Consistent, superior judgment inspires the confidence of seniors.				<b>N/O</b>
<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F</b>	<b>G</b>	<b>H</b>
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JUSTIFICATION:							
<b>H. FULFILLMENT OF EVALUATION RESPONSIBILITIES</b>							
1. EVALUATIONS. The extent to which this officer serving as a reporting official conducted, or required others to conduct, accurate, uninflated, and timely evaluations.							
<b>ADV</b>	Occasionally submitted untimely or administratively incorrect evaluations. As RS, submitted one or more reports that contained inflated markings. As RO, concurred with one or more reports from subordinates that were returned by HQMC for inflated marking.	Prepared uninflated evaluations which were consistently submitted on time. Evaluations accurately described performance and character. Evaluations contained no inflated markings. No reports returned by RO or HQMC for inflated marking. No subordinates' reports returned by HQMC for inflated marking. Few, if any, reports were returned by RO or HQMC for administrative errors. Section Cs were void of superlatives. Justifications were specific, verifiable, substantive, and where possible, quantifiable and supported the markings given.	No reports submitted late. No reports returned by either RO or HQMC for administrative correction or inflated markings. No subordinates' reports returned by HQMC for administrative correction or inflated markings. Returned procedurally or administratively incorrect reports to subordinates for correction. As RO nonconcurred with all inflated reports.				<b>N/O</b>
<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F</b>	<b>G</b>	<b>H</b>
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<b>USMC FITNESS REPORT</b>					<b>DO NOT STAPLE THIS FORM</b>			
NAVMC 11297 (Rev. 7-11) (EF) FOUO - Privacy sensitive when filled in.					<b>ADDENDUM PAGE</b>			
<b>A. PURPOSE</b>								
<b>1. Marine Reported On:</b>					<b>2. Occasion and Period Covered:</b>			
a. Last Name		b. First Name		c. M.I.	d. SSN	e. Grade	a. OCC	
							b. From	
							To	
<b>3. Purpose:</b>								
a. Continuation of Comments Justification		b. Accelerated Promotion Justification		c. Adverse Report MRO Statement 3rd Officer Sighter		d. Admin Review	e. Supplemental Material	f. HQMC Use
<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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<b>B. TEXT</b>								
<b>C. SUBMITTED BY</b>								
1. a. Last Name		b. First Name		c. MI	2. SSN	3. Service	4. Grade	
_____ Signature						<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> (Date in YYYYMMDD format)		
<b>D. GENERAL/SENIOR OFFICER ADVERSE REPORT SIGHTING</b>								
1. a. Last Name		b. First Name		c. MI	2. SSN	3. Service	4. Grade	
5. Title						<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> (Date in YYYYMMDD format)		
_____						Signature		
						(Date in YYYYMMDD format)		
						Signature		
						(Date in YYYYMMDD format)		
<b>FOR OFFICIAL USE ONLY - Privacy sensitive when filled in.</b>							PAGE <input type="checkbox"/> OF <input type="checkbox"/>	

Source: <https://www.hqmc.marines.mil/Portals/133/Blank%20FITREP.pdf>



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