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MASTER OF MILITARY STUDIES

TITLE:
Marine Corps Reserve Officer Manpower Modifications during the Long War:
A Case to Achieve Parity with the Active Component

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

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AY 07-08

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Date: 5 May 2008
**Title:** Marine Corps Reserve Officer Manpower Modifications during the Long War: A Case to Achieve Parity with the Active Component

**Performing Organization:** United States Marine Corps, Marine Corps Combat Development Command, Command and Staff College, Marine Corps University, 2076 South Street, Quantico, VA, 22134-5068

**Abstract:** Approved for public release; distribution unlimited

**Security Classification:**
- Report: unclassified
- Abstract: unclassified
- This Page: unclassified

**Limitation of Abstract:** Same as Report (SAR)

**Number of Pages:** 37
Executive Summary

Title: Marine Corps Reserve Officer Manpower Modifications during the Long War: A Case to Achieve Parity with the Active Component

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Thesis: Marine Corps Reserve Officers must achieve parity in rank and command selection and obtain similar leadership and training experiences in order to command a Reserve Battalion on par with an Active Component Battalion in order to help win the Long War.

Discussion: The Marine Corps Reserve has served the nation well during the Long War and will continue to provide significant contributions to the Total Force in the future. In order to be more effective as commanders and leaders, reserve officers need to achieve parity in rank and command selection through education, leadership experiences, and training opportunities. Combining the promotion and command selection boards with the active component is the first step in achieving parity. Further, the reserve commander needs to achieve unity of command within his unit by being mobilized for that position and conducting a Permanent Change of Station (PCS) move with his family for the duration of the period of command. Second, policy modification would reflect that the reserve officer does not necessarily need to be promoted at the pace of the active component and could remain in the reserves as a captain or major, for example, without being forced out because of time in service and time in grade requirements. With the policy modification, the newly instituted National Security Personnel System (NSPS) pay system would be authorized to compensate reserve officers who are engaged in the Select Marine Corps Reserve (SMCR). Using the NSPS pay system prevents this group of reserve officers from being penalized monetarily because they have not attained the requisite experience, education, or training to serve successfully in the next billet. Third, the Marine Corps needs to put forth an increased effort to recruit and induct officers into the reserve force. The effort needs to be an informative process from the beginning of the recruiting pipeline and continue as a recurring event during an officer’s career. Further, the informative education will help the career officer to be familiar with the reserve force so he or she can intelligently advise young officers of their opportunities in the reserves, should the young officer desire to enter the reserves. The increased pool of qualified officers in the Marine Corps Reserves will improve the availability of officers to serve in critical positions in support of the nation.

Conclusion: The Commandant expects a viable long-term employment capacity from the Marine Corps Reserve, and by enacting espoused reforms during the Long War, the position of the reserve officer will be substantially improved as will the capability within the Total Force. Unity of Command and Unity of Effort are the bedrock of Marine Corps leadership principles, and the above policy modifications will significantly improve the Marine Corps and its success to win the Long War.
DISCLAIMER

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

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Preface

I became interested in the improvements of the Select Marine Corps Reserve during my tour as a company level Inspector-Instructor (I&I). Due to my co-location with the Battalion I&I in Devens, Massachusetts I had a much greater opportunity to observe potential means and method to do so. I realized how much the Marine Corps Reserves had to offer the Corps and the nation, but without modification its full potential would never be realized. When 1st Battalion, 25th Marines was preparing for mobilization, I was selected to serve as the operations officer and that allowed me to observe the reserves as an insider too. The subsequent 18 months were consumed with pre-deployment preparation in order to mobilize Marines across the country, train at initial locations (ILOC) in Devens, Massachusetts and 29 Palms, California, and then in March 2006, deploy the battalion to Fallujah, Iraq for seven months of counterinsurgency operations (COIN). With that, I view this paper as a continuum of the most pertinent issues concerning the Select Marine Corps Reserves.

As you will see in the Appendices, there was a wide range of officers who had the potential to participate in the survey; however, the majority of the respondents were combat arms officers. The respondents' Military Occupational Specialty (MOS), coupled with my own experiences, cause the paper to have an infantry focus and may not apply equally across the war fighting functions in Marine Forces Reserve, but the tenants remain and should be viewed in that light and implemented with a common starting point in mind.

This project would have never gotten started if it were not for the officers, reserve and active, who participated in the qualitative survey which became the basis of my research. I am deeply indebted to them. Their thoughts, reflections, and poignant insights were harvested with a non-attribution policy and will remain so.

I would also like to thank my mentor Dr. Douglas McKenna for his patience, assistance, and guidance in the completion of this project. Additionally, the process would not have gotten any traction without the support and direction of Dr. Patrice Scanlon and Ms. Andrea Hamlen of the Leadership Communication Skills Center, Marine Corps University, for the development of the questionnaire. Finally, to my family, a particular sense of gratitude for enduring the entire process from the beginning of I&I duty to the completion of this project.
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>DISCLAIMER</td>
<td>i</td>
</tr>
<tr>
<td>PREFACE</td>
<td>ii</td>
</tr>
<tr>
<td>TABLE OF CONTENTS</td>
<td>iii</td>
</tr>
<tr>
<td>INTRODUCTION</td>
<td>1</td>
</tr>
<tr>
<td>ON PROMOTION AND COMMAND SCREENING - COMBINING THE PROCESS</td>
<td>3</td>
</tr>
<tr>
<td>COMBINING THE BOARDS</td>
<td>4</td>
</tr>
<tr>
<td>A GRADUATED APPROACH</td>
<td>5</td>
</tr>
<tr>
<td>EXPECTATION MANAGEMENT</td>
<td>6</td>
</tr>
<tr>
<td>ON COMMAND SCREENING BOARDS</td>
<td>8</td>
</tr>
<tr>
<td>ON IMPROVING THE SMCR BATTALION COMMANDER'S POSITION</td>
<td>9</td>
</tr>
<tr>
<td>ON SMCR OFFICER TRAINING AND EDUCATION</td>
<td>15</td>
</tr>
<tr>
<td>ON TRAINING</td>
<td>16</td>
</tr>
<tr>
<td>ON EDUCATION</td>
<td>17</td>
</tr>
<tr>
<td>ON SMCR OFFICER RETENTION</td>
<td>18</td>
</tr>
<tr>
<td>CONCLUSIONS</td>
<td>19</td>
</tr>
<tr>
<td>CITATIONS AND ENDNOTES</td>
<td>22</td>
</tr>
<tr>
<td>APPENDIX A: SURVEY</td>
<td>23</td>
</tr>
<tr>
<td>APPENDIX B: SURVEY DEMOGRAPHICS</td>
<td>27</td>
</tr>
<tr>
<td>GLOSSARY</td>
<td>28</td>
</tr>
<tr>
<td>BIBLIOGRAPHY</td>
<td>29</td>
</tr>
</tbody>
</table>
Our Reserves have once again performed with grit and determination — and we may have to ask them to do more. — General James T. Conway

Introduction

The Marine Corps Reserve forces are a critical element to United States national security and has been essential to the success of the Marine Corps in the "Long War." Marine Forces Reserve personnel and units have engaged in the full range of military operations, from high intensity combat operations in Operation Enduring Freedom and Operation Iraqi Freedom to the current fight in counterinsurgency operations, including a significant contribution to the critically important advisor missions as part of Military Transition Teams and Police Transition Teams in Afghanistan and Iraq. Further, Marine Forces Reserve (MFR) have increasingly conducted theater security cooperation missions instead of Active Component Forces. As the Long War continues, there should be comprehensive modifications to the Marine Corps Reserve officer force to develop an increasingly capable element in the years to come. Therefore, this paper argues that Marine Corps Reserve Officers must achieve parity in rank and command selection and obtain similar leadership, education, and training experiences in order to command a Reserve Battalion with the same skill as an Active Component Battalion.

Since September 11, 2001, MFR have been at the forefront of the "Long War" effort by filling the shortfalls in the Active Component (AC) force structure in missions and fighting side-by-side on the streets of Iraq and in the mountains of Afghanistan. Without the Select Marine Corps Reserves (SMCR), Individual Marine Augments (IMA), and Individual Ready Reserve (IRR) filling critical force structure shortfalls, the AC would have had a difficult time maintaining and sustaining the operational tempo that has been a result of force requirements in the Global War on Terror (GWOT). The ratio of deployed time to dwell time for AC units would have been decreased to less than 1:1. All Marine Corps units would be deployed for
periods beyond the seven and twelve month deployments which the Marine Corps is currently experiencing.\textsuperscript{4}

MFR has also assumed many of the theater cooperation and engagement training evolutions that Marine Expeditionary Forces (MEFs), Marine Expeditionary Units (MEUs), and Special Purpose Marine Air Ground Task Forces (SPMAGTFs) conducted throughout the world due to the AC world-wide operational commitments in support of the Long War. MFR executes the theater cooperation and engagement training exercises as an overseas annual training (AT) period which is generally in excess of the paradigm, the two-week AT. With the continual involvement of MFR in the defensive roles of the nation, beyond that of the deployments to support GWOT, this monograph explores and makes specific recommendations that, when implemented, can improve the capabilities of the Total Force.

In the quest to achieve parity in reserve units with AC units there are numerous "opinions" how to achieve the equality that is desirable within the total force and matches the expectations of the gaining force commander upon mobilization. The premise for the "opinion" being described has come from the results of the author's survey, which was conducted as a portion of this project's research.\textsuperscript{5} (See Appendix A for Survey Questionnaire.) There are a number of benefits that the reserve officer provides to waging the Long War and potentially more so to the counterinsurgency fight with their backgrounds as civil servants, first responders, infrastructure developers, etc, which are not necessarily available in an AC unit. Reserve and AC integration will strengthen the entire Marine Corps as it carries out its missions and can lead to the expanded capabilities the Marine Corps desires as a Total Force.

In order for the Marine Corps to be a more effective force, it needs to develop equivalency in the Total Force. Even though the Marine Corps is engaged in the Long War, the shift to a new
paradigm needs to occur to take advantage of the benefits of both reserve and active components before the country is committed to an additional campaign. Simple to state and something that appears obvious when studied, but challenging to achieve and to sustain, especially when there is a lull in fighting a specific type of war. In the Long War, whether in a counterinsurgency environment or a high intensity fight, the requirement for unity of command and a uniting of capability must have primacy. The Marine Corps needs to make the change in Total Force structure and function necessary to improve combat effectiveness in the short term and ensure the quality of the Corps in the long term. To make these changes a reality, the Marine Corps needs to combine all promotion boards and command screening boards to hold all officers to the same standard, ensure reserve specific precepts are included to account for their unique qualifications and training, invest in human capital with education and monetary benefits by billet and grade, and focus on proper manning and staffing of officers into both SMCR and AC units.

**On Promotion and Command Screening - Combining the Process**

On promotion and command selection, the Marine Corps needs to come to grips with the fact that the standard for promotion between the reserve force and the AC needs to be congruent to ensure that all Marines have "those officers who are best and fully qualified to meet commanding officer requirement in the operating forces and the supporting establishment" leading them as stated in the AC Command Screening Program order. In contrast to the AC, the Reserve Command Screening Program states that the board "will determine those officers who are best and most fully qualified for command." Survey respondent's comments from survey question number two illustrate the diverse thoughts on combining the boards, but not necessarily the consequences of having the "best and fully qualified" officer leading Marines.
Support for combining the boards indicated that it creates a single standard and respect among the reserve and AC force. Further, if combining the boards affords reserve officers the same opportunities for assignment and professional development as AC officers then combining the boards could be a plausible action. Contrasting views, not to combine the boards, indicated that reserve officers would not, or may not, be promoted when compared to AC officers. Some of the comments were that it would be unfair, create confusion and animosity, reduce career opportunities, become a political nightmare, and was like comparing apples and oranges.

**On Promotion - Combining of Boards**

In preparation for the promotion boards, a fiscal year Marine Administrative Message (MarAdmin) for the U.S. Marine Corps Officer Promotion Selection Boards is published for the year and details the applicable orders, regulations, responsibilities, and timelines for officer promotions. Although there are no statutory requirements for the submission of individual photos, completion of grade appropriate PME, obtaining a current physical fitness test score or ensuring all fitness reports are submitted, AC officers missing any or all of these elements are often considered not fully qualified by most board members. The annual MarAdmin is applicable to the Marine Corps Reserve; however, the same standard listed above is not necessarily applied to the reserve officer selection boards. In a recent reserve field grade promotion board, a voting member of the board described how a SMCR officer who was not PME complete and did not have a picture submitted was subsequently selected for promotion during the course of the board process. US Code Title 10 does not require an officer to be PME complete, but the AC Promotion Board is required to fully consider the competitiveness of each officer and that is why completed PME is nearly essential for promotion. The argument for reserve officer requirements for PME will be detailed in a later section of this paper.
The comments on the combination of boards are probably accurate in both cases. However, as one astute comment of a reserve officer that was in favor of combining the boards indicated, "[o]n the battlefield competency is competency and an enemy doesn’t give you a handicap for being a reservist." Considering that the enemy gets a vote on the battlefield, combining the boards with objective standards would require the consistency and objectivity necessary to move closer to achieving parity to the Total Force.

On Promotion - A Graduated Approach

As a general rule, the SMCR is a top-heavy organization because officers often exit the AC after four years of service which currently puts them near the promotion zone for captain. To compensate for this in the force structure, the SMCR permits captains to serve as platoon commanders, majors to serve as company commanders as well as the primary staff from administration and operations to communications, the battalion executive officer, and every other billet in between. Compare that to an AC unit that has captains and lieutenants serving in the company commander and platoon commander billets, respectively, and only has two or three majors in the battalion. The reserve officer serving as the battalion executive officer and operations officer are not necessarily the second and third senior officers in the unit. A SMCR officer who served very successfully as a "major" company commander in Operation Iraqi Freedom, and was three years senior to his operations officer, recently spoke about his selection and promotion to Lieutenant Colonel. He stated, "now what am I going to do for a SMCR job now that I'm only eligible to be a battalion commander and I never have served on a battalion staff position?" This is a function of the SMCR system and not the fault of the individual SMCR officer. A feasible solution will enable the SMCR to retain these qualified officers in the
unit staff ranks until they are properly educated, trained, and possess the requisite experience to
be prepared to command before they are selected for promotion and future command.\(^\text{17}\)

A number of issues arise, such as who serves in the primary staff officer billets, because of
the level of training or exposure, with the SMCR manning construct. One of the most significant
among them is the problematic functioning of the staff at the battalion level primarily due to lack
of education and exposure in earlier duty assignments. One possible solution to the dilemma
might be to authorize reserve officers to continue to serve at the company and battalion level for
a much longer period than their AC counterparts, possibly up to 20 years as a company grade
officer, if qualified.\(^\text{18}\) The construct would be based on merit, education, and training levels
 gained by the officer's service. Counter arguments for this would be that SMCR officer will not
stay if they do not get promoted.

**On Promotion - Expectation Management**

All reserve officers have numerous competing priorities in their lives. Arguably the first and
most pressing is performing well in his civilian profession, which is the primary means by which
he provides for his family. And like all other focused people who establish priorities, all other
issues and concerns become secondary in their daily life. The focus on one's primary means of
income can affect the officer's performance in the SMCR. This may not be as much of an issue
with the company grade SMCR officer as he separates from the AC and begins his civilian career
and commences his SMCR affiliation. The SMCR officer generally performs well because of
his familiarity with his billet in the SMCR based on his training and operational experiences in
the operating force. The company grade officer will require and still have a period of time to get
his feet on the ground in the SMCR, as anyone joining an organization does to manage and
establish his new personal priorities.
The SMCR officer could be promoted if he met the requisite standards for promotion under the combined promotion board proposal defined above. However, an alternative approach would be to implement the methodology of "stepped pay increases" by utilizing the U.S. Government General Service (GS) pay scale model as one method to satisfy the monetary issue facing the SMCR promotion system. Based on participation, performance, and successful completion of formal PME courses, for example, the officer would receive step pay increases. If the officer accomplished all company level PME and training by the time his AC peer by lineal number was in zone for promotion to major, then he would also be in zone for major. Then the pay grade could be equal to that as if he was to be promoted to major. To continue to increase his pay by grade, the officer would have to be promoted to major and then again sustain performance steps which would prepare him for service on the battalion staff and beyond. Therefore, the additional time in grade would present the SMCR officer an opportunity to gain experience in accordance with time served in a billet verses time in grade.

A functional model to implement the "GS pay step increase methodology" was recently enacted as the National Security Personnel System (NSPS) for security personnel serving in the U.S. Government. The NSPS has established programs that would facilitate rapid application to the reserve force, specifically to the SMCR. The three operating concepts of the NSPS performance management system are "accountability, flexibility and results." The management lifecycle is separated by five phases which are "plan, monitor, develop, rate, and reward." The Marine Corps currently employs this management cycle with the fitness report and promotion process. The specific applicability with the proposed step model is that it would allow for pay increases as the SMCR officer completed PME, attended formal schools, achieved additional professional developmental goals, and participated in mobilizations to benefit him in his primary
MOS. The NSPS model effectively rewards officers through their SMCR service financially and would not require an up or out situation because of time in service limitations.

**On Command Screening Boards**

In order to combine the component boards, the Secretary of the Navy and the Commandant of the Marine Corps would need to define strict precepts, require an appropriate mix of reserve and AC officers, and adjust the promotion order and the command screening board orders to be applicable to the Marine Corps Reserve. Currently, reserve boards are required to have AC and reserve officers as part of the selection process.\(^2\) Interesting to note and vital to achieve parity in commanders, both the reserve and active command programs need to be required to screen for the "best and fully qualified to command," which is what the American public deserves and the AC Command Screening Program orders. However, the Reserve Command Screening Program requires officers to "request" to be screened for command while the AC Command Screening Program requires officers to "opt-out" if they do not desire to be screened for command.\(^2\) The dichotomy in the way that the two officer groups are selected is that the Reserve Command Screen Program will only screen the "best and most qualified to command" of the reserve officers that "opt-in" to the screening process, but who may not be "the best or fully qualified to command."\(^2\)

When a Marine or civilian observes a field grade officer they have certain expectations of that officer. The stakes are raised when that officer is being considered for command. There is no greater demand than we place on our leaders and owe our fellow citizens. The best way to standardize our leadership selection process is to combine the reserve and AC boards. As a result of the survey listed above, there are significant concerns for the "fairness" to the reserve officer by both AC and reserve officers. In the long run, there is a concern for the reserve officer
structure and population if there is little incentive to be able to achieve command in the Marine Corps. As survey respondents noted, the amount of training and experience that an AC officer gains in preparation for command as a result of his daily military duties far exceeds that of the SMCR officer and because of that, the AC officer would always be selected to command over the SMCR officer. 25

A combined Marine Corps Command Selection Program order and the Commandant's precept for the board would set the stage for parity, noting the unique experiences that a reserve officer gains working in the civilian community, and require that SMCR commands be reserved for SMCR officers. A final thought on selecting a commander of a unit by a combined screen program board. If the paradigm is followed and the "best and fully qualified officer" is selected for command then there certainly is a potential that a SMCR officer who is, for instance, a senior vice president of a civilian logistic company could be selected to command an AC Combat Logistic Battalion or an AC Combat Logistic Regiment if that officer had the other requisite experiences the board was required to screen. 26 In reaching parity the Marine Corps may realize an even greater level of success by on the battlefield.

**On Improving the SMCR Battalion Commander's Position**

Survey respondents also noted that the SMCR battalion commanders, as well as other SMCR staff officers, serve at a significant disadvantage compared to the AC officer due to the amount of time that they can effectively dedicate to their military profession without damaging their primary civilian job. 27 One category of SMCR officer that generally is an exception to this predicament is the "first responder" who effectively manages his time and focuses on the Marine Corps when not on a call or duty. 28 While this SMCR officer may be highly motivated and
perform very well, he still is not the sole decision maker in the unit because he is not on sight 24/7.

The field grade officer potentially has a lot to lose with his civilian employer and therefore has more at stake when serving as a SMCR battalion commander. Compared to the company grade officer, this field grade officer likely holds a higher position within his civilian organization and therefore will have much more to lose if the officer does not focus on the civilian job that "pays the bills" for his family. Also, this officer may lose job promotion opportunities because he may deploy and certainly does not have the time to donate one hundred percent of his time and effort to the leadership role he has with a SMCR unit. While it may be illegal to hold the mobilizations, annual training periods, and weekend drill periods against the reserve service member it is perceived to have occurred and therefore it tends to have the field grade officer focus his priorities on his primary (i.e., civilian) job performance.29

A significant protocol to increase the potential for the SMCR battalion commander to serve successfully would be to mobilize that officer for the period of command. If this model were used, the Marine Corps could gain numerous advantages, most notably unity of command and unity of effort.

Improving the SMCR battalion commander's position would be a relatively simple process by mobilizing the battalion commander, by increasing the AC officer T/O to include integrated operation and logistic officers' billets, by authorizing Permanent Change of Station Orders (PCS) for the SMCR battalion commander and his family to the geographic location of the battalion headquarters.30 The possible improvements in the overall leadership experience that these modifications in the structure of the SMCR battalion commander could be significant. One other modification to the SMCR battalion could be not to assign the AC I&I to the duty station. In the
effort to create unity of command and unity of effort, there only needs to be one lieutenant colonel at each battalion headquarters. Removing the AC I&I from the unit forces the SMCR battalion commander to be the commander from assumption of command to relinquishment of command. Further, when the battalion prepares to deploy as part of a larger force, the SMCR battalion commander does not have an AC I&I sitting at his side for the operation.

There are numerous advantages to this model for creating unity of command. First, there is unity of command in the unit because Marines will not be confused as to which lieutenant colonel is the battalion commander. The SMCR battalion commander would be the battalion commander on the ground for the duration of his command. Unity of command is immediately achieved; planning and staff development occurs much earlier in the battalion and there is only one lieutenant colonel, the SMCR battalion commander, at the reserve training center during a mobilization.

Second, the battalion commander can then report directly to the regimental commander for all matters within the unit. This removes the AC I&I middleman. Third, the battalion commander leads, trains, and establishes priorities the way that he thinks best for the unit and within the regimental commander's intent. If the unit mobilizes during the battalion commander's tenure then the issue of who really commands becomes even more germane when dealing with a gaining force commander who might be distant from the geographic location of the SMCR reserve training center. Mobilizing after assuming command would be a positive action and the SMCR officer could prepare his civilian employers up to a year in advance of assuming command. Further, the already mobilized SMCR battalion commander would receive more protection from his employer because of federal laws which protect him while mobilized, and he potentially would have fewer distractions from his primary responsibilities.
In contrast to the situation described above, an equal number of reserve officers and AC officers believed that that SMCR unit commander should be the AC I&I. This conviction appears predicated on the fact that the AC I&I is routinely better prepared to command and is more likely to have relevant experience to lead the battalion. However, if the SMCR officer were selected on a combined promotion board and combined Command Screening Program board, and if he were mobilized for the two year command tour, to include a PCS move, then the shift would improve the position of the SMCR battalion commander.

Let us turn now to other leadership billets in a SMCR unit, focusing on those that would truly require full-time effort, and those that can continue in the way that the SMCR units are currently staffed, with the Inspector-Instructor (I&I) table of organization (T/O). Currently, there is one AC officer assigned to each company level unit and one command slated battalion level AC I&I (lieutenant colonel) who orchestrates and facilitates all inspections, and ensures instruction is in accordance with Marine Corps regulations. Moreover, the AC I&I ensures that, when the SMCR staff and Marines arrive for a period of unit training, all support requests are filled, thereby allowing the unit to train to standard for the weekend.

Currently, the AC I&I and his staff are responsible to prepare for a drill weekend, ensuring all plans and orders the SMCR staff developed in a previous training period are prepared for them for them to execute. If the reserve staff is able to communicate with one another during the month, they will be more prepared for the weekend and know where the gaps in training or support are prior to arriving. They will not execute a plan they have not seen for 28 days. Disparity can occur when the I&I staff has been working and preparing for the drill weekend and the plan has to be altered. Then there is the potential to derail the training because the SMCR
officer does not have buy-in because he was focused on his primary job. Now he has to make
decisions with regard to the plan without having proper awareness of the weekend operation.

The issue is unity of command and the vignette related above highlights the need to have the
SMCR battalion commander mobilized and in place as a commander. The battalion commander
has full command authority. The most expedient manner to offset the disparity described above
is to ensure unity of command within a unit. Some reserve and AC officers recommend that the
AC I&I should be the battalion commander and should not have a SMCR counterpart other than
the battalion executive officer. An AC battalion commander (formerly the AC I&I) could
certainly solve that problem and limit any further unity of command issues. He could also be
available to make critical decisions hours or days earlier than the SMCR battalion commander,
thereby further reducing the negative impact upon the Marines in the unit. However, with a
SMCR battalion commander, promoted and command screened on combined boards, firmly in
command of the SMCR unit, the same outcome could be achieved.

If AC I&I officers did not have to be assigned to SMCR, they could be utilized by the Marine
Corps to fill requirements elsewhere. Further, the regimental commander and his staff have the
ability to directly assist the SMCR battalion commander, even though geographically separated
from the SMCR battalion headquarters. This manpower modification could streamline the chain
of command and focus the effort within the battalion and regiment. A combined Command
Screening Board would only assign officers that would be mobilized for the tour of their duty.
This could eliminate the mobilization concerns for the SMCR battalion commander of the future.
In the effort to maintain unity of command, if the SMCR officer does not mobilize upon being
selected to command, then the AC officer should become the battalion commander.
To ensure success within the unit with the mobilized SMCR battalion commander a few things need to be in place. At a minimum, the unit needs an integrated AC operations and logistic officers. This can facilitate the planning process and coordination actions with the regiment and/or the gaining force commander. This relationship among the battalion commander, operations officer, and logistic officer can be very beneficial by establishing the learning process early in the pre-mobilization period. They can jointly attend planning meetings with the gaining force commander and, most importantly, the unity of command is maintained. The monitors at Headquarters Marine Corps would be required to screen the AC officer to ensure he would meet the requirements to serve as an operations officer or logistic officer in the dynamic environment in a SMCR battalion. The formation of this relationship will be critical to the continued success of the battalion.

A SMCR battalion commander can have significant impact on the daily operations of the battalion and staff in a number of ways. First, assuming the duties from the AC I&I will immediately thrust the SMCR officer into the daily operations of the unit as they prepare for the next drill weekend and allow for concurrent planning for future operations. Additionally, when the SMCR staff arrives for the training evolution, the SMCR battalion commander will have a better grasp of the functioning of the staff, enabling him to provide guidance and mentorship to his subordinates throughout the training period. On the surface this may not sound like much benefit, but opposed to a cold start at the beginning of a drill weekend, certainly when considering that he may not necessarily have had the opportunity to prepare appropriately due to the requirements of his civilian occupation, and having a 28 day gap in his interaction with Marines, this seemingly minor change may reap enormous benefits.
Similarly, SMCR officers can perform an important role in the modification of the AC staff structure by serving as assistants to the primary staff officer billets. The purpose of integration of a one year mobilization and deployment of specific SMCR officers in an AC unit is twofold. First, the integration provides the SMCR officer an environment to learn and benefit from the experience of the AC officer and return to his parent SMCR battalion as a much more qualified and capable staff officer to carry out the duties he is assigned. The benefits will be realized in training evolutions and future deployments. The secondary role of the SMCR officer integrating with the AC unit for a combat deployment is to take a level of civilian expertise to that unit that may not normally reside there. Further, this exposes the AC officer to the SMCR and the AC officer can logically inform others about the reserves.

**On SMCR Officer Training and Education**

It is necessary here to differentiate between training--preparing people, individually or collectively, to carry out specific tasks--and education--the development of mental powers. Training is appropriate preparation for the predictable; but for the unpredictable, education is required...Developing minds in this way is most decidedly not something that can be achieved as part of predeployment training.\(^3^4\)

Reserve officer military skills can atrophy as he pursues his civilian career. The closer the officer is to performing as he did at the platoon and company level, the more commensurate the performance is in the SMCR unit. As officers rise in grade and billet the training and education disparity becomes more obvious. The task of training and sustaining a battalion staff on integrating the warfighting functions or lines of operations is a serious and continuing challenge.

Officers serving in the SMCR are most capable in the billets that resemble those that the officer served in while in the AC, such as platoon commander and company executive officer. Not surprisingly, the farther that a SMCR Marine officer departs from the platoon and company level, without additional training and education, the greater the likelihood of diminished
effectiveness. Part of the explanation may lie in the fact that untrained SMCR officers are selected to serve in battalion level positions without the educational background or opportunity to attend a full length career and intermediate level school. Additionally they may lack interaction with a local counterpart AC unit that many AC officers' enjoy to assist in their duties. Another effect on this officer may be that he is serving beyond his comfort level because he was promoted due to time in service and not necessarily because he was truly prepared to assume more responsibility. For example, the SMCR officer may only have seen one battalion level operation during an annual training (AT) period before he is "fleeted up" to the operations shop from a company position. This is a function of the system, and by investing in human capital in training and education the reserve officer could move closer to achieving parity with the AC officer.

**On Training**

When an officer leaves active service and chooses to serve in the SMCR, he has a number of choices, including joining a unit for which he does not have the requisite military occupational specialty (MOS). The SMCR officer can "lateral move" to a new MOS if there is a billet vacancy at that unit. For example, a lawyer can join an infantry battalion as a MOS mismatch and within 18-months he is required to attend a two-week Reserve Infantry Officer Course. Upon the completion of the two-week course, versus the initial MOS producing course which is ten-weeks, that officer is then "qualified" to serve and deploy with that unit as a primary billet holder. The flaw in this paradigm is that this officer is not necessarily properly trained after a two-week course in any MOS to execute all assigned tasks in a combat environment. The Marine Corps needs to continue to access officers in the SMCR as MOS mismatches. However, the two-week courses need to be disbanded and Training and Education Command (TECOM)
needs to support attendance at the full-length MOS producing courses for all Marine officers within 18-months of the officer joining a specific unit. TECOM has been supportive of the SMCR officer attending the full-length course. However, the two-week courses still exist.

The MOS compatibility and training issue focuses initially on the platoon commander and the company executive officer and, in the short term, has a relatively simple fix to the problem facing the SMCR. The next significant concern for achieving parity in the reserves is the Professional Military Education (PME) opportunities available to the SMCR officer, particularly those in operations and logistic billets. The proper education of this group of officers is significant because they provide depth to the unit's primary staff and provide the pool of officers that will potentially lead the unit in the future as the operations officer, logistic officer, battalion executive officer, and ultimately as the battalion commander.

On Education

An officer leaving the AC needs to be trained to be effective in the staff billets described in the preceding paragraph. Currently, these officers do not always have the ability to attend resident career level school. A small number of reserve officers are selected to attend Expeditionary Warfare School Distance Education Program. The reserve officers that are selected to attend the distance education program courses are paid for travel and drills. This is beneficial to the SMCR officer and reinforces the importance the Marine Corps places on PME.

An additional course that would increase the capability of the group of company grade officers is to have them attend the full length Career Level School (CLS). This could be Expeditionary Warfare School (EWS) or potentially even more effective for the SMCR officer is an U.S. Army Type II "Maneuver School" such as the infantry course at Ft Benning or the armor course at Ft Knox. The Army schools are shorter in duration than EWS, focus on orders writing
at the company and battalion levels, and ensure that the officer can serve successfully as a company commander or as an assistant battalion staff officer. The officers returning to their units as graduates from CLS exponentially increase the capability and combat effectiveness of the SMCR unit, whether operating during a theater security and cooperation exercise or in a combat zone.

The educational paradigm needs to be expanded for the field grade officers at resident Intermediate Level Schools as well. The Marine Corps follows the same format for reserve field grade officers to attend the Command and Staff College Distance Education Program as the career level courses and has a limited number of school seats available for the resident Command and Staff College. Training and Education Command needs to explore expanding the enrollment of the reserve officer in the other service's intermediate level education courses to round out the reserve education process and increase the capability of the total force.

**On SMCR Officer Retention:**

As with any professional organization, accession and retention of highly qualified, motivated personnel is essential. The accession concerns for the Marine Corps Reserve are equally high. Currently, the Marine Corps does not actively promote serving in the Marine Corps Reserve to Marine officers while they serve on Active Duty. The first time that an officer is introduced to the reserves occurs during the mandatory separation briefs. The Officer Selection Officer (OSO) does not conduct the same brief and more than likely does not describe the benefits of the Marine Corps Reserve to the potential applicant. Therefore, the opportunity to plant the seed of joining the SMCR and continuing to serve after they complete their AC service is often squandered.

Long term recruiting goals need to look beyond the initial officer accession to the Marine Corps. To do this may require Manpower and Reserve Affairs and Marine Corps Recruiting
Command SMCR briefs to officers throughout their career. On the surface this may appear to be just another training event. However, the benefits could be realized in SMCR units during the Long War. Young officers need to be informed about the opportunities, incentives, and continued service affiliation as well as the roles and responsibilities of the SMCR officer and the federal laws that serve and protect him as he pursues a career in the civilian community. These briefs could also inform the senior officers as well so they can assist in the mentoring of officers.

Receiving separation briefs prior to transitioning from the AC to the civilian community should not be the first opportunity to learn about the SMCR. This short time period does not allow the young officer to make an educated decision and develop a plan to join the SMCR until after he exits active service.

Once the young officer joins a specific SMCR unit, he needs to report for duty as soon as possible so that he does not lose faith that the unit is not functioning at an acceptable level of effectiveness. It is important to manage the expectations of newly joined officer based on the stage in the deployment cycle the unit is currently operating. Second, the newly joined officer may need to be trained in his new position, based on the mission of the reserve unit that he joined. For example, when a Marine exits active duty and returns to his home of record, the closest SMCR unit many not be consistent with his MOS. Therefore, as described earlier, the officer may have to be trained in the billet he is to enter. If the decision to join the SMCR is made prior to the end of active service, then the officer knowingly joins as a MOS mismatch and is then able to seek to attend formal MOS school.

Conclusions

No one can predict the length of the Long War. However, many do see this conflict continuing for the foreseeable future. Knowing that the military will be committed in many
different locations around the world, beyond Afghanistan and Iraq, there needs to be continuous improvement in the ways we train and educate our leaders, as well as how they are selected for promotion and command.

When a Marine, officer or enlisted, observes an officer of a certain grade he intuitively has an idea of what that officer should be capable of doing. Following the recommendations outlined throughout this paper, the Marine Corps, and more specifically the reserve officer, may attain parity in that capability with his reserve counterpart.

To adopt the recommendations of this paper, clearly the commitment of the Commandant is fundamental to achieve parity in the Marine Corps Reserve in order to increase the capability of the total force. First and foremost, he must require his staff to work to develop the orders that combine the officer promotion boards to a single board for a single rank and do the same for the combined Command Selection Program.

Manpower and Reserve Affairs will also be heavily involved by tracking programs and implementing systems to improve the reserve officer and creating a direct link with Manpower Management for Officer Affairs and MFR to have officers joining new commands have the requisite training completed prior to departing active duty and affiliating with a SMCR unit. MFR and TECOM have existing protocols to communicate and receive quotas for school seats which will prepare the officer in his transition from the AC to the reserve component.

Marine Corps Recruiting Command needs to communicate the Total Force concept from the first contact with any potential Marine who is going to join the Marine Corps. The Marine Corps does not advertise the Marine Corps Reserve like the other services, which is good, but we know that all officers are not going to remain in the AC until retirement and we need to maintain the pool of talent in the reserves. The Marine Corps does not need to delay advertising the benefits
of the reserves. The way to achieve parity in the SMCR is to continue to have a pool of qualified, educated, and trained officers who are more than "ready, willing, and able to serve." The reserve officer needs to be trained, educated, promoted, and compensated so that he will remain in the reserves for the service of the Nation. By investing in the human capital early in an officer's affiliation with the reserves, "the best and fully qualified" will lead America's finest citizens into harms way with the proper tools in their professional kit bag before they become engaged in conflict. The Marine Corps will need to work to modify the laws to increase the end strength of reserve officers mobilized and serving on active duty whether or not their units are going to deploy. In the spirit of transformation and innovation, this may be less of burden and bound to ensuring the applicable laws are amended or enacted properly. Further, the approval for the policy changes to authorize the modification in both the SMCR and AC tables of organization (T/Os) modified to have additional officers serving in the other component will need to be worked through the Undersecretary of Defense for Reserve Affairs and the Office of the Secretary of Defense. The continued reliance on SMCR units conducting overseas annual training events in excess of two weeks needs to be addressed by the Undersecretary of Defense for Reserve Affairs and Congress to formally inform employers of the shift of defense strategy and the ever increasing reliance on the reserve force.

Since the Long War commenced, and certainly since September 11, 2001, the Marine Corps Reserve has been at the forefront in the conflict. Now we need to increase their capacity and capability to achieve parity with the AC so that when the Commandant asks the reserves to do more they are prepared to succeed.
CITATIONS AND ENDNOTES

2 Conway, 1. The term "Long War" is the manner that General Conway is expressing the greater Global War on Terror (GWOT). Further, the Commandant refers to Iraq and Afghanistan as campaigns in the Long War.
3 The term "operational" in this case means within the construct of a campaign while operating in Marine Expeditionary Force (MEF) under the direction of a division and regiment commander. The argument that the MEF is a tactical unit is clearly understood by the author.
4 Marine Corps units at the battalion and squadron generally deploy for seven months while regiment, group, and Marine Expeditionary Force (Forward) level units deploy for one year. The same deployment model is true for the Military Transitions Teams (MiTTs) imbedded with Iraq Army units. Those Marines assigned as advisors to Iraqi Army battalions serve for seven months and Marines assigned as advisors to Iraqi Army brigades and divisions serve for one year.
5 The survey respondent's (SR) responses were gleaned with a non-attribution policy. See Appendix A for the survey.
6 Commandant of the Marine Corps, Command Screening Program (CSP), Marine Corps Order 1300.64A, 23 Jun 2004, par 9b.
7 Commandant of the Marine Corps, Reserve Command Screening Board (RSCP), Marine Corps Order 1300R.65B, 12 Sep 2007, par 4b (5) (c).
8 Survey Respondent (SR) 2, 3, 14, 18, and 26.
9 SR 6.
10 SR 3, 8, 13, 14, 15, 17, 20, 21, 23, 24, 25, and 27.
12 Lieutenant Colonel M. Reinweld, Brownbag "Command Screening Process", 30 August 2007. Additionally, LtCol Kelly G. Dobber, "Demystifying the Promotion Board Process: What goes on behind closed doors", Marine Corps Gazette, April 2008, 17-21, describes the promotion process and applicability necessity of PME, photograph and a complete up to date official military personnel file to be fully competitive record.
13 Field Notes (FN) 2, dated 7 Dec 2007.
15 SR 19.
17 SR 26. SMCR officer proposes that officers that join the reserves should not expect to be promoted beyond major and an IMA officer, SR 1, noted that in the Canadian Forces, reserve officers remain captains.
18 SR 26.
19 FN 1.
21 NSPS website.
22 RSCP, par 4b (5a and b).
23 CSP, par 6b (5).
24 RSCP, par 4b (3a).
25 SR 2, 3, 4, 5, 6, 7, 8, 9, 11, 13, 14, 17, 18, 19, 20, 21, 22, 23, 24, 25, and 27. The response breakout is the ten reserve officer and 11 AC officers responded that the combination of boards would not be favorable to reserve officers.
26 SR 1, a Reserve officer recommended that the Commander of a SMCR battalion be the AC officer and the battalion XO be a reserve officer. If a SMCR officer were the commander of an AC unit then the unit XO should be an AC officer.
27 SR 1, 8, 14, and 17.
28 SR 17 and 23.
30 SR 1, 17, 24, and 26.
31 Fifty percent of the respondents that commented on the issue of SMCR/AC command of reserve units SR 1, 3, 5, 8, 21, 23, 24, and 26 proposed that the SMCR Bn CO be an AC officer. SR 2, 9, 10, 12, 14, 20 and 27 recommended that the status quo remains with SMCR Officer be the SMCR Bn CO. The preponderance of all officers commented that the combined boards would result with the most qualified officer being selected for promotion and command.
32 SR 1, 12, 14, 14, and 27.
33 SR 1, 2, 3, 4, 5, 8, 12, 14, 16, 17, 18, 19, 20, 23, 24, and 25. If implemented would require a change to the Table of Organization for SMCR units.
36 SR 26.
37 Marine Forces Reserve slogan.
APPENDIX A

SURVEY

Sir, 10 Jan 2008

Thank you for your willingness to participate in this research study, which will examine aspects of the Select Marine Corps Reserve (SMCR) officer manpower modifications during the Long War. The purpose of this survey is to obtain background and/or evidentiary information for an original research paper that I am required to write as a Master of Military Studies student at the Marine Corps’ Command and Staff College.

I am an active duty officer who served on I&I duty from June 2004 to June 2007 and during this period I deployed as the operations officer for the same SMCR infantry battalion. As a result of this experience, I plan to focus on the post-Operation Iraqi Freedom I timeframe; therefore, input needs to be limited to officers drilling in the SMCR and officers serving on Inspector-Instructor (I&I) duty since 2004.

Your thoughts on SMCR officer manpower modifications are greatly appreciated. Your responses are non-attribution and will be kept confidential. In addition, your responses will not be reported individually, but as aggregate information or as a cross-section of the data collected. Additionally, I would like to contact you for possible follow-up questions, clarification of your answer, or to set up an interview, if the need arises.

I would like to receive your input NLT Monday, 3 February 2008, as I intend to analyze the collected data during the following week. Responses received after 3 February 2008 will be incorporated as time allows.

Please complete this survey electronically and submit it to both of the e-mail addresses listed below my signature block.

Please provide an e-mail address if you would like to receive an electronic copy of my master’s paper. I will forward the paper to you once it has been defended and submitted to the college.

Very Respectfully,

DGS

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Conference Group 10
U.S. Marine Corps Command and Staff College
douglas.schaffer@usmc.mil
douglas.schaffer@comcast.net
760-861-9021
APPENDIX A

Demographics

- Current Service Component
  - Select Marine Corps Reserve ___
  - Active Component ___
  - Active Reserve ___
  - Individual Marine Augment ___

- Rank ___
  - Years in current rank ___
  - Year commissioned ___

- Military Occupational Specialty (MOS) ___
  - MOS upon commissioning ___
  - MOS conversion during SMCR service ___
  - Additional MOSs held ___
  - Graduate of full-length MOS producing school ___

- Year joined SMCR ___
  - Number of years as Drilling SMCR ___
  - Years broken SMCR service ___
  - Number of years in Active Component prior to joining SMCR ___

- Year joined I&I duty ___
  - Number of years serving on I&I duty ___

- Number of years serving in AR billet ___

- Type of unit currently serving ___
  - Number of years in that unit ___
  - Current billet in unit ___
  - Previous billet in unit ___
  - Previous billet in unit ___

- Number of Years of Active Component Service ___

- Number of Years of Active Reserve Service ___

- Number of times mobilized ___
  - (1) Location and Number of Months Mobilized ___
  - (2) Location and Number of Months Mobilized ___
  - (3) Location and Number of Months Mobilized ___
APPENDIX A

1. After Action Reports and Marine Corps Center Lessons since 2004 have described the shortcomings of Select Marine Corps Reserve (SMCR) staffs and the level of training that the staffs possess. Thinking only about officer manning and staffing:

   a. If you believe that modifications should be made to make the SMCR officer billets more capable to command at the operational and tactical levels in future mobilizations, what should those modifications entail?

   b. Are there any recommendations that you would make to the Commandant of the Marine Corps (CMC) regarding how to modify the total force structure of the SMCR unit?

   c. Upon mobilization, what programs should be implemented to allow the SMCR units to achieve parity with other AD units?

2. The discussion of combining SMCR and Active Component (AC) promotion and command screening boards has occurred, but not implemented. Thinking only about promotion and screening boards:

   a. Do you think that the SMCR and AC promotion and command screening boards should be combined? Explain your answer.

   b. If the SMCR and AC promotion and command screening boards were combined, what do you think the benefits would be?

   c. If the SMCR and AC promotion and command screening boards were combined, what do you think the shortfalls would be?

   d. If the SMCR and AC promotion and command screening boards are combined, do you think the most qualified officers would continue to be selected for promotion and slated for command? Why or why not?

3. SMCR units as a whole have very few integrated AC officers - the Supply Officer in SMCR Infantry Battalions is one example. There are no SMCR billets in AC Infantry Battalions or Infantry Regiments. Based on your experience:

   a. Are there sufficient AC billets in SMCR units? Explain your answer.

   b. Is there a need for additional AC billets in SMCR units? Why or why not?

   c. What additional integrated AC billets in SMCR units would you recommend be filled? Explain your answer.

   d. Would you recommend SMCR billets in AC units? Why or why not?
APPENDIX A

e. If you recommend SMCR billets in AC units, what integrated SMCR billets would you recommend adding to an AC unit? Explain your answer.

4. Officer billet vacancies have hampered SMCR units for years. There have been initiatives to fill those shortfalls, but there are still significant gaps in some units. Based on your experience and/or conversations with other individuals:

   a. Describe programs the Marine Corps should create, fund, and/or invest human and monetary resources in order to recruit/retain officers in the SMCR ranks?

   b. What programs would best affect accession and retention of company grade officers in the SMCR? Explain your answer.

   c. What programs would best affect the accession and retention of field grade officers in the SMCR? Explain your answer.

   d. What programs do not work to access and retain company grade officers in the SMCR? Explain your answer.

   e. What programs do not work to access and retain field grade officers in the SMCR? Explain your answer.

5. Please provide any additional thoughts you may have about how the SMCR leadership could achieve parity in rank?

6. Do you have any additional recommendations regarding the improvement of the SMCR?

Thank you for your time and responses. Please return the survey to: douglas.schaffer@usmc.mil and douglas.schaffer@comcast.net.
## APPENDIX B

### SURVEY DEMOGRAPHICS

<table>
<thead>
<tr>
<th>SURVEY NUMBER</th>
<th>Current Service Component</th>
<th>RANK</th>
<th>Military Occupational Specialty (MOS)</th>
<th>Year Joined SMCR</th>
<th>Number of years serving in I-IAR billet</th>
<th>Number of times Mobilized</th>
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</table>
APPENDIX B

Demographic Norms

i) All respondents served in combat arm units.
ii) All respondents completed full length MOS schools for they were currently serving.
iii) Only four reserve officers had broken time with an average of two years.
iv) All respondents have or are serving in leadership billets as defined as company/battalion I&I or company/battalion command, or battalion/squadron operations. The colonel’s are serving in top level commands.
v) The retired LtCol exited active service Bn I&I duty in 2007.
vi) Publishing billets would violate non-attribution.

Legend

SMCR Select Marine Corps Reserve
AC Active Component
AR Active Reserve
IMA Individual Marine Augment
Ret Retired
Col Colonel
LtCol Lieutenant Colonel
Maj Major
Capt Captain

MOS Military Occupational Specialty

0180 Administrative Officer
0202 Intelligence Officer
0302 Infantry Officer
0311 Infantry Marine
0369 Infantry Specialist (Staff Sergeant to Master Gunnery Sergeant)
0402 Logistic Officer
0502 Plans Officer
0505 Marine Air Ground Task Force (MAGTF) Planner
0802 Artillery Officer
1802 Armor (Tank) Officer
3002 Supply Officer
3502 Motor Transport Officer (not utilized any longer)
5702 Nuclear Biological Chemical Officer
7565 AH-1W Cobra Pilot
7577 Weapons Tactics Instructor
8041 Command Slated Billet
8541 Scout Sniper
9910 Unrestricted Officer Billet
<table>
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<td>AC</td>
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<td>Career Level School</td>
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<td>EWS</td>
<td>Expeditionary Warfare School</td>
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<td>IMA</td>
<td>Individual Marine Augment</td>
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<td>Marine Expeditionary Unit</td>
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<td>Permanent Change of Station</td>
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<td>Training and Education Command</td>
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