

Distributed Operations: Manpower Policies for Developing Small Unit Leaders

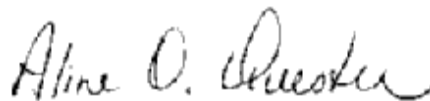
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Approved for distribution:

March 2007

A handwritten signature in black ink that reads "Aline O. Quester". The signature is written in a cursive style with a large initial 'A' and 'Q'.

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Executive summary

Since April 2005 when the Commandant of the Marine Corps (CMC) approved “A Concept for Distributed Operations,” the Distributed Operations (DO) Implementation Working Group and DO Transition Task Force have been developing and operationalizing the concept. The primary focus has been on the training and equipment that will be required. The Center for Naval Analyses (CNA) was asked to determine what changes to manpower policies and processes would be needed to ensure successful DO implementation. We focus on infantry 0311s who will serve as Rifle Squad and Fireteam Leaders in 1 of the 24 infantry battalions. The DO requirements are for these Rifle Squad Leaders to be sergeants (E-5s) in at least their 5th through 7th years of service (YOS). We will, however, offer a quick look at an alternative course of action (COA) that uses 0369 staff sergeants as Rifle Squad Leaders (see appendix A).

With DO pushed down to execution at the small unit level, the Marine Corps will have to continue to train, educate, and equip Marines so that they can defeat the enemy across a full spectrum of conflicts, not just in current battles and counterinsurgencies as part of the Global War on Terrorism (GWOT). The small unit leader—in this case, the sergeant Rifle Squad Leader—will require skills and experiences that the average squad leader today does not possess. These include, but are not limited to, the following:

- Qualifications in the employment of combined arms (both direct and indirect fires)
- Mastery of command and control systems that permit a greater dispersion of small units down to the rifle squad level (possibly 10 kilometers from platoon headquarters)
- Management of additional squad-level logistical assets.

For the Marine Corps to meet the CMC’s directive for institutionalizing the DO concept, there needs to be a holistic reconsideration of

specific manpower management policies that do not support fulfilling the 5th through 7th year requirement for the Rifle Squad Leader. Thus, to ensure that manpower policies support DO requirements, we propose a fairly dramatic departure from the current approach for managing this select portion of the force—infantry battalion 0311s.

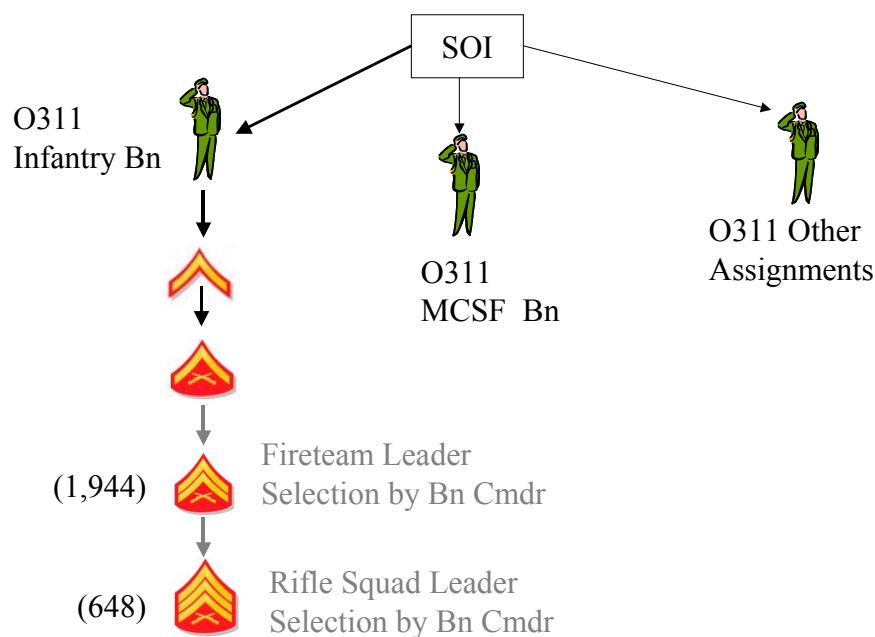
If sergeant Rifle Squad Leaders are to be in at least their 5th to 7th YOS, we believe that they should have been assigned to an infantry battalion—preferably, the *same* battalion—for their first 7 years in the Corps. The question is: How can this be achieved?

We propose “fencing off” 0311 Marines who are assigned directly to battalions from 0311s who are assigned to other duties. Currently, 0311 Marines already are separated at the enlistment point since those who will go to Marine Corps Security Force (MCSF) battalions are enlisted under 5-year contracts, and other 0311s are enlisted under 4-year contracts. They are further separated at the Schools of Infantry (SOIs), where it is determined which Marines will go to units other than infantry battalions. We suggest offering a new enlistment program for a percentage of 0311 recruits designated for infantry battalions—one that will have the option of a 6-year enlistment.

We also suggest changes to the promotion policy for infantry battalion 0311s by fencing off sufficient corporal (E-4) and sergeant promotion allocations for those who will fill Fireteam and Rifle Squad Leader positions. The Battalion Commander, given the authority, would direct promotions for those positions. He also would promote and appoint the Rifle Squad Leader from among the current Fireteam Leaders in the battalion after the Marine has successfully completed the Infantry Squad Leader Course (ISLC). Battalion Commanders would have priority over ISLC quotas.

The number of Marines sent to the ISLC would be expected to decrease under our COA because (a) the only Marines going to the ISLC would be those Fireteam Leaders chosen to fill upcoming Rifle Squad Leader vacancies, and (b) they would fill those billets through their 7th year of service. This is good because it is likely that DO squad leader training will have to be more comprehensive than current squad leader training. Figure 1 illustrates our proposal.

Figure 1. Proposal for building DO sergeant squad leaders



To ensure that these 0311 Rifle Squad Leaders remain in the Marine Corps for at least 7 years of service, various incentives and contractual relationships will have to be reviewed. We have suggested 6-year enlistment contracts as an option for some recruits entering the Marine Corps as 0311s destined for initial infantry battalion assignments. It also will be necessary to review and modify the retention policy to permit Career Retention Specialists (CRSs) and Battalion Commanders to reenlist newly appointed 0311 sergeant Rifle Squad Leaders at the time of their appointment and promotion for the additional number of months and years necessary to keep them in the battalion through their 7th YOS. The Navy has successfully used early reenlistments for 6-year obligors for many years, and Army policy now allows reenlistments for all soldiers up to 2 years before the end of their obligated service.

As with the Infantry Battalion Enhancement Period Plan and all other aspects of DO implementation, the COA we propose is evolutionary; it will take time to get to the desired end-state of having DO-qualified corporals and sergeants leading fireteams and rifle squads.

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Background

In January 2005, the Commanding General, Marine Corps Combat Development Command (CG MCCDC) asked analysts at CNA to participate in the Distributed Operations Implementation Working Group (DOIWG) and to continue as members of the DO Transition Task Force (TTF). The task was to come up with ways to ensure that infantry small unit leaders, especially infantry Rifle Squad Leaders (military occupational specialty (MOS) 0311s), would be qualified sergeants (E-5s) in at least their 5th through 7th years of service. This single aspect was viewed as critical to the implementation of DO. Thus, we propose changes to allow the Battalion Commander to grow his own Fireteam Leaders and Rifle Squad Leaders. We offer ways to accomplish this through a focused course of action and compare our COA to current manpower management practices. We limit our focus to Fireteam Leaders (corporals (E-4s)) and Rifle Squad Leaders (sergeants (E5s)) needed to fill the T/O¹ billets within the 24 infantry battalions.²

On April 25, 2005, the CMC signed off on “A Concept for Distributed Operations.” In it, the CMC emphasizes the need to enhance the capabilities of all Marines—especially small unit leaders—through better equipment and advanced military education and training.

The Marine Corps’ ability to conduct DO depends heavily on the capabilities of small unit leaders in infantry (0311) MOSs—the sergeant Rifle Squad Leaders and the corporal Fireteam Leaders. Although today’s Rifle Squad Leaders are supposed to be sergeants, they often are corporals or even lance corporals.

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1. The Table of Organization, or T/O, states the billet requirements for a unit.
 2. We are aware of proposals to stand up 1/9 and 2/9, but we focus our analysis on the current 24 infantry battalions.

Current thinking on the execution of DO

Limited objective experiments (LOEs) and advanced warfighting experiments (AWEs) are taking place to determine—among other things—what levels of qualifications a Rifle Squad Leader, as well as Marines of other MOSs, will require to conduct DO. As the results of the LOEs and AWEs are finalized, Training and Education Command (TECOM) will continue to refine its training programs accordingly.

The Marine Corps also is moving toward the implementation of the Infantry Battalion Enhancement Period Plan (IBEPP). This plan improves the systemic process for equipping and training infantry battalions before and between deployments. A major part of this plan is the increased emphasis on training and qualifications for all non-commissioned officers in the battalion. In this paper, we place particular emphasis on Rifle Squad Leaders. These Rifle Squad Leaders who will execute DO should be sergeants—exceptionally qualified in all the arts of infantry squad tactics, techniques, and procedures (TTPs). In addition, they will have the qualifications and authority to bring all the elements of supporting arms to bear on the enemy in a DO environment. Supporting arms—in addition, but not limited, to the crew-served weapons already in the infantry battalion or in support of the battalion—are artillery support and close air support. Not currently addressed is naval surface fire support, but the Rifle Squad Leader likely will be required to control that in the future as well.

The amount of time and money it will take to ensure that all Rifle Squad Leaders master supporting arms qualifications is being studied and determined through experimentation and at the operational level. In addition, the IBEPP is being implemented while the Marine Corps continues to fight the GWOT and meet the requirements of Operation Enduring Freedom (OEF) and Operation Iraqi Freedom (OIF), in addition to other training and operational requirements.

Issues

For its 24 infantry battalions, the Marine Corps requires 648 Rifle Squad Leaders. At present, the Marine Corps has about 1,900 MOS 0311 sergeants, although most are not leading rifle squads.

Currently, most 0311 sergeants are promoted before they start their 5th year of service—when they are either nearing the end of their initial term and separating from the Marine Corps or have reenlisted and left the battalion for other duties. This leads to a series of questions about sergeant Rifle Squad Leaders:

- Would the Marine Corps defer the advancement to sergeant of historically meritorious achievers until they entered their 5th year of service? Would 0311s have to be trained and qualified in all DO requirements before they could advance to sergeants? Would this coincide with the 5th year of service and promotion and assignment as a DO Rifle Squad Leader?
- Since the current initial contract length for an 0311 infantryman is 4 or 5 YOS, would it be wise to identify future DO Rifle Squad Leaders early on? Should we put Marines through intensive/expensive training without knowing that they will reenlist to serve as Rifle Squad Leaders in the 5th through 7th YOS?
- Historically, infantry Marines (especially sergeants) have requested—even demanded—assignment out of the operational infantry units as a reenlistment incentive. Will special considerations and incentives have to be given to support the retention of these specially trained Marines to encourage them to serve their 5th through 7th YOS in an infantry battalion?

There are other infantry MOSs in the infantry operational forces (MOSs 0313, 0321, 0331, 0341, 0351, and 0352). These MOSs all have unique skills and qualifications applicable to the weapon systems or platforms that they operate and maintain, but none of them have to meet the requirements that a DO-capable 0311 Rifle Squad Leader will have to possess in his role as the supported, maneuver unit leader in a DO environment. In talks with former Battalion and Rifle Company Commanders, it was clear they thought that the most critical infantry billets in the battalion were the Rifle Squad Leader billets.

Background summary

As the IBEPP moves forward and the LOEs and AWEs are completed and their results analyzed, decisions will continue to be made as to

the degree to which manpower management will have to change to accommodate the DO concept—for example, whom to train, whom to promote, whom to retain, and when those actions should occur, as well as who is most responsible for those actions.

We expect that, at a minimum, the length of accession contracts will have to be revisited, as well as reenlistment points for certain first-term Marines. In addition, consideration by Marine Corps leadership must be given to:

- Changes to individual promotion requirements and policies that apply to the infantry occupations, especially those for 0311 corporals and sergeants
- The issue of more advanced, formal training and defined qualifications for Rifle Squad Leaders prior to promotion
- The types of incentives that can ensure that DO-qualified sergeants will reenlist in their battalions and continue to lead rifle squads through their 7th YOS
- The need to fence off 0311 Marines serving in infantry battalions from other types of duty in their first tours and, in the case of sergeant Rifle Squad Leaders, up to their first 7 YOS
- Promotion, appointment, and assignment practices within infantry battalions.

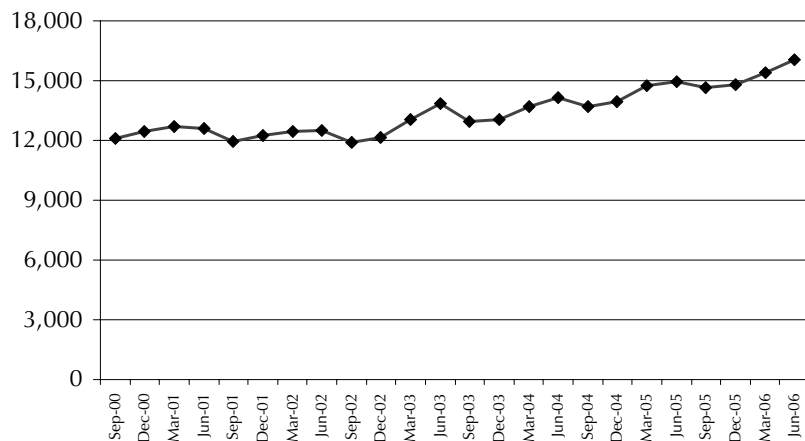
Before we discuss specific changes and our concept of how to manage DO-qualified 0311 sergeants in infantry battalions, it is important to understand how the current system works. Thus, we first describe current manpower policies and practices in the infantry community. Against that backdrop, we will discuss the manpower policy changes that we believe are necessary for the successful execution of the DO concept.

Current manpower system

Current numbers and assignments

Figure 2 shows the number of infantry 0311s from September 2000 through June 2006. There is both an upward trend and a cyclical pattern, with the number of 0311s usually peaking in March of any given year. This is because the Marine Corps ships about half of the recruits during the summer months and “street-to-fleet” training takes about 6 months.

Figure 2. Number of active-duty infantry 0311s



To begin, we examined the first full-duty assignment for infantry 0311s who were trained from FY02 to FY05 (see table 1). About 60 percent of initial assignments were to deploying (Victor) units.

Next, we looked at assignment patterns over the entire first term of service. For 0311s who had their first duty assignment in FY02, about

30 percent (1,065) were assigned to Victor units for their entire first term. Almost 85 percent, however, were assigned to Victor units for at least part of their first 4 YOS. The most common combinations were:

- MEF unit and Victor unit (27.2 percent (969 Marines))
- Security unit and Victor unit (9.1 percent (324 Marines))
- Base and Victor unit (5.0 percent (178 Marines)).

We believe that battalion readiness would be better served by more cohesion (i.e., less movement in and out of the battalion—especially for 0311s).

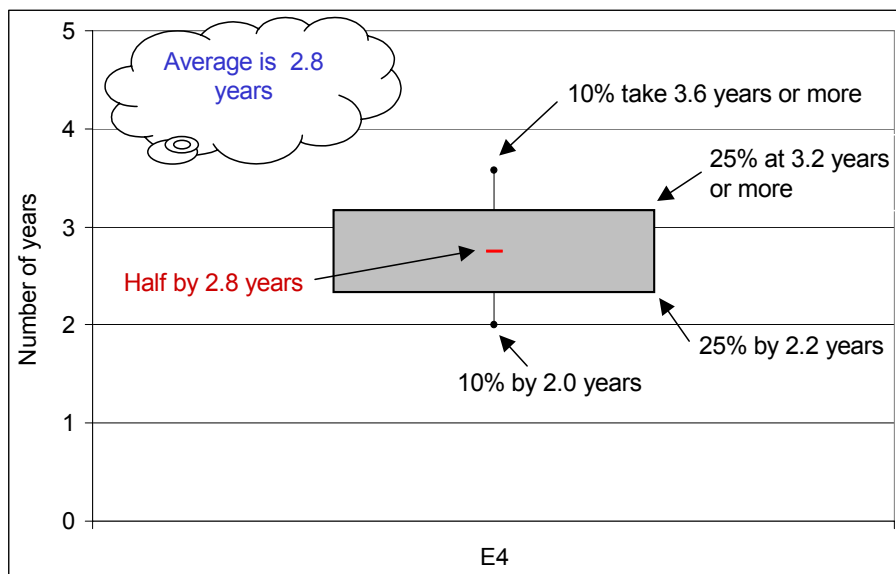
Table 1. First full-duty assignment for active-duty 0311s

	FY when started full duty			
	2002	2003	2004	2005
MCC assignment				
Victor	2,370	2,391	2,377	2,537
MEF	231	525	739	781
Security	753	551	644	454
Base	23	23	24	7
Other	181	403	303	421
Total	3,558	3,893	4,087	4,198
Percentage to Victor units	67%	61%	58%	67%

Current promotion patterns for 03s

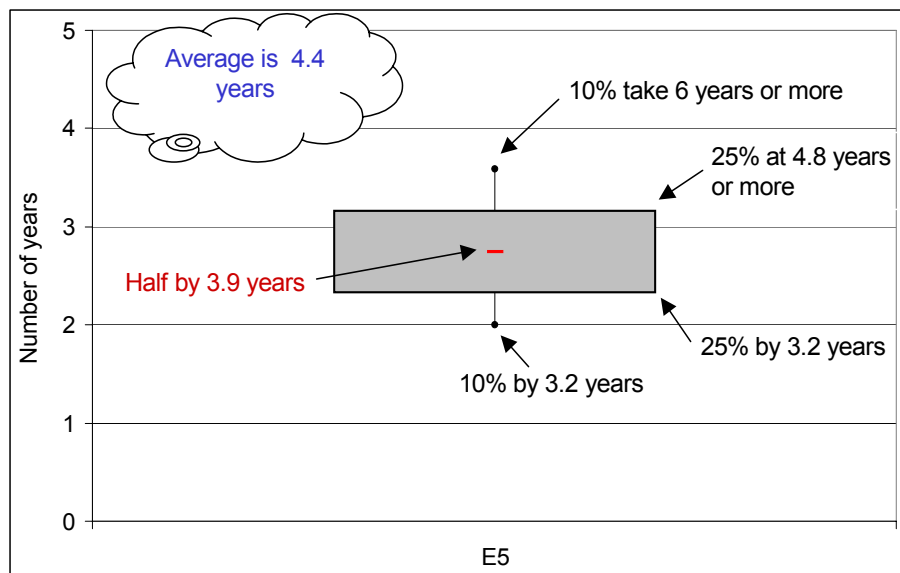
For enlisted Marines, promotions to corporal and sergeant are vacancy driven within the MOS, with a minimum composite score being a key part of the entire process. Although there is often discussion of “fast-promoting” and “slow-promoting” MOSs, there is, in fact, considerable dispersion *within* an MOS in the time to promotion. Figures 3 and 4 show the distribution in the time to corporal and time to sergeant for the 0311s promoted between October 2003 and June 2005.

Figure 3. 0311: Promotions to corporal^a



a. There were 3,637 corporal promotions for 0311s from October 2003 to June 2005.

Figure 4. 0311: Promotions to sergeant^a



a. There were 1,202 sergeant promotions for 0311s from October 2003 to June 2005.

About half of 0311 promotions to corporal occur by 2.8 YOS. There is some variation, however, because 10 percent were promoted by 2 YOS and 10 percent took 3.6 or more years to promote to corporal.

On average, 0311 promotion time to sergeant was 4.4 years, but 10 percent of the 0311 sergeants were promoted by 3.2 YOS and 10 percent were promoted at 6 or more YOS. The point in time at which half of the promotions have occurred is called the median time to promotion. The average promotion time was 4.4 years for these 0311 sergeants, but the median promotion time was 3.9 years.³

To reinforce the point that there is considerable variation in time to promotion within an MOS, consider the fact that, from October 2003 to June 2005:

- 10 percent of 0311s were promoted to sergeant by 3.2 YOS
- 25 percent of 0311s were promoted to corporal after 3.3 YOS!⁴

The most competitive Marines are promoted early. Presumably, we want the most competitive Marines to be Rifle Squad Leaders. Current promotion patterns for 0311 sergeants suggest that half of these promotions occur by 3.9 YOS, and the IBEPP supports the ISLC training and the qualification of Rifle Squad Leaders during their first term of service.

Current enlistment contracts for 03s

From FY85 to FY93, at least 10 percent of all first-term enlistment contracts were for 6 years (see table 4 in appendix B).⁵ Since the Marine Corps effectively ended 6-year enlistment contracts in the FY96–97 period, first-term infantry occupations have had 4- or 5-year contracts.

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3. As it turns out, average promotion times are always longer than median promotion times because late promotions affect the average more than they affect the median.
 4. Appendix A has similar information for E-6s, as well as some comments on changes that might need to be made for Rifle Platoon Sergeants.
 5. Six-year enlistment contracts peaked in FY87, when 21.4 percent of all initial contracts were 6-year active duty obligations.

From FY85 to FY93, however, the Marine Corps offered 4- or 6-year initial contracts to infantry recruits. In FY88, for example, 12 percent of all initial contracts in infantry occupations were 6-year contracts and 87 percent were 4-year contracts.⁶ For infantry Marines, the percentages of first-termers on 6-year initial contracts in 1988 were:

- 11.6 percent of Riflemen (0311)
- 6.9 percent of LAV Crewmen (0313)
- 12.1 percent of Machine Gunners (0331)
- 12.1 percent of Mortarmen (0341)
- 14.3 percent of Infantry Assaultmen (0351)
- 18.1 percent of Anti-tank Missilemen(0352).

From FY96 to FY03, all infantry occupations had 4-year initial obligations. In FY03, 0311s who were designated for Marine Corps Security Force (MCSF) battalions were given 5-year initial enlistment contracts. Although we will have to wait until FY08 to know how the 5-year MCSF Marines behave at the reenlistment point, we can examine the historical reenlistment behavior of 4- and 6- year obligors (see figure 5).

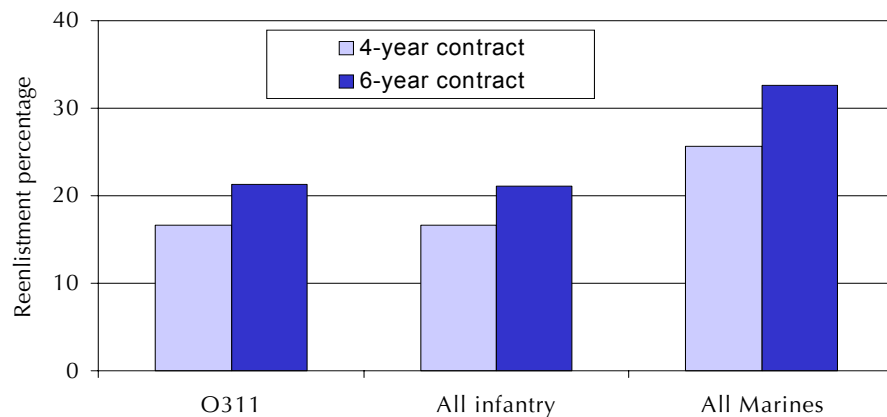
As the figure shows, reenlistment rates for 6-year obligors are considerably higher than for 4-year obligors. Some of this is undoubtedly self-selection since recruits who are most committed to the Marine Corps enlist initially for 6 years. But part of the explanation may be this: the longer a Marine has been in the Marine Corps, the more likely he is to stay. Regardless of reason, however, reenlistment rates for 6-year obligors are higher.

As we argued in the background section of this research memorandum, it may be difficult to rely solely on reenlisting 4-year obligors for 3 more years of service as Rifle Squad Leaders—to encompass their 5th through 7th YOS. Reinstating 6-year initial enlistment contracts for some 0311s could lock them into the battalion for their 5th and 6th YOS, but it would not cover their 7th. Given the higher reenlistment

6. The remaining 1 percent of initial contracts was spread over 2-, 3-, and 5-year initial enlistments.

propensity of those with longer initial contracts, however, it would seem to give the Marine Corps a better chance of inducing an additional year of service in the same unit. Longer first-term contracts reduce the accession mission and mean that, for a first-term force of a fixed size, a smaller proportion of the force is in training and a larger portion of the force is in the operational forces (see appendix B).

Figure 5. First-term reenlistment rates by enlistment contract length^a



a. There have been substantial numbers of non-infantry Marines with 5-year initial enlistment contracts. Historically, their reenlistment rates have been between the reenlistment rates for 4-year and 6-year obligors.

Incentives

Additional incentives may be needed to induce infantry Marines who will become Rifle Squad Leaders to stay in the battalion through their first 7 YOS. Next, we consider the types of incentives that are available.

Selective Reenlistment Bonuses (SRBs)

The level of an SRB indicates how much a Marine will receive as a bonus. The bonus amount is determined as follows: it is the SRB level multiplied by the Marine's basic pay multiplied by the number of years of the reenlistment.

Basic pay varies by grade and YOS. At the first reenlistment point, there are significant grade differences. In FY05, the grade distribution for first-term 0311s making reenlistment decisions was:

- 18 percent lance corporals (E-3s) (497 Marines)
- 58 percent corporals (1,572 Marines)
- 23 percent sergeants (621 Marines).⁷

Given the 0311's FY05 SRB level of 3, a reenlisting lance corporal would have received \$20,304, whereas a reenlisting sergeant would have received \$25,498. Clearly, this system compensates a "fast-promoting" Rifleman more than a "slow-promoting" one, *even though the SRB level is the same.*

Historically, 0311s have received smaller SRBs than other MOSs. With the war, however, the Marine Corps felt it needed to increase SRBs for infantry occupations. In FY05, the SRB for 0311s increased from level 1 to level 3. In FY06, it increased to level 4. These SRB increases helped the Marine Corps to achieve its 0311 reenlistment goals. We will publish a history of reenlistments and SRBs for the 03 occupations as a separate document.

SRBs have been used as a targeted compensation tool to increase reenlistments in selected MOSs. Historically, SRBs have not differentiated between the rank or position of responsibility (billet) of the Marines in the MOS. The Navy, however, has tied SRBs to both Navy ratings (comparable to a Marine's MOS) and Navy enlisted classification codes (NECs). NECs are additional skills beyond the rating. Navy Seals and Explosive Ordnance Disposal (EOD) Sailors are all NEC designations for which SRBs are awarded. Other examples in the Hospital Corpsman rating include NEC 8452 (Advanced X-ray Technician) and NEC 8403 (FMF Reconnaissance Independent Duty Corpsman). If DO Rifle Squad Leader credentials were considered equivalent to an NEC, SRBs could be targeted to Marines who were qualified Rifle Squad Leaders.

7. There also were 25 E-1s/E-2s (all separations) and 9 E-6s.

One problem, however, remains: SRBs have not been tied to billets. Indeed, one complaint over the years has been that Sailors received SRBs for their NECs, even when they were detailed to billets that did not require the skills of their NEC. *If the Marine Corps tied the reenlistment of the Marine to the time the Marine completes DO Rifle Squad Leader training, assumes the Rifle Squad Leader position, and promotes to sergeant, this problem could be avoided.* This could be accomplished by creating a new MOS—we propose 0312—that these new sergeant Rifle Squad Leaders would assume at that time. This new MOS then could rate its own SRB, with a higher level if needed.

Early reenlistment

Currently, first-term Marines are allowed to reenlist at any point during the fiscal year in which their contracts end (the year of their end of active service (EAS)). In contrast, the Army allows reenlistment up to 2 years before the end of the obligation and, in fact, is considering doing away with the time limit altogether.⁸

How does this work? If a soldier had an initial 4-year obligation and reenlisted for 4 years at the 2-year point, he then would be obligated for 6 years. If the soldier's MOS was entitled to an SRB, he also would be eligible for an SRB (because the reenlistment was for 4 years) *but would receive the SRB for only the 2 additional years of obligation.*⁹ The Army pays SRBs in installments, so half of the SRB would be paid at the 2-year reenlistment point, and the rest would be paid in anniversary payments over the next 4 years.¹⁰ If the Marine Corps adopted

8. Source: Conversation with Mr. J. D. Riley (703-325-6920). SGM Scott Kuhar is also very knowledgeable about the Army's reenlistment policy, but we have been unable to reach him (703-695-7579).

9. Eligibility for an SRB by DoD rules requires a minimum of a 3-year reenlistment, but the Marine Corps requires a minimum of a 4-year reenlistment. The monies received for an SRB, however, have to be for new obligated time.

10. The Navy has programs that allow some 6-year obligors to reenlist any time after 21 months and has used these early reenlistments to turn a 6-year obligation into an 8-year obligation—paying the relevant SRB at the reenlistment point (see appendix C).

this policy and a Marine reenlisted for 4 years at the 3-year point, the Marine would then be obligated for 7 years.

Since the amount of a Marine's SRB (of any level) increases with rank, SRBs are more valuable to Marines who reenlist at higher ranks. In addition, if the SRB is tied to a billet (for example, the 0312s), the level of the SRB could differ from that of other 0311s.

Assignment Incentive Pay (AIP)

Another incentive that the Navy, Army, Air Force, and Special Forces Command have used is AIP. The law states that:

The Secretary concerned may pay monthly incentive pay under this section to a member of a uniformed service who performs service, while entitled to basic pay, in an assignment designated by the Secretary concerned.... Agreements entered into by the Secretary of a military department shall require the concurrence of the Secretary of Defense.... The maximum monthly rate of incentive pay payable to a member under this section is \$1,500.¹¹

The Navy began to experiment with an AIP pilot program in June 2003 to attract volunteers for all hard-to-fill billets, the Army and Air Force used AIP in 2004 for assignments to Korea, and the Special Operations Command (SOCOM) has used AIP for enlisted members and warrant officers with 25 or more YOS who are serving in SOCOM operator billets. AIP also has been used for voluntary and involuntary extensions in Iraq.

Although the maximum payment is \$1,500 per month, the AIP amount varies by Service, duty station, occupation, and length of assignment. For example, The Navy's AIP implementation is through a bidding system (with the lowest bid for the location by a qualified Sailor setting the amount). The voluntary extension program for Iraq pays \$300 per month, whereas the AIP for SOCOM personnel is \$800 per month.

Applied to our proposal, AIP could be used as an additional incentive to encourage sergeants to serve as Rifle Squad Leaders through their 7th year of service.

11. See U.S. Code, Title 37, 307 a.

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Managing infantry Marines in a DO environment

We propose alternative processes for managing infantry Marines assigned to infantry battalions—specifically, 0311 corporals for their first term and 0311 sergeants for their first 7 years of service. For both the 0311 corporal and sergeant, we focus on the time from initial entry through MOS training and assignment to an infantry battalion through their career progression in that battalion. It is believed that other infantry MOS communities (0313, 0331, 0341, 0351, and 0352) could be managed in a similar fashion if it is deemed necessary.¹² However, we neither recommend nor discourage such actions. We note here that the 0321 community has already adopted its own stand-alone process for managing E-1s to E-9s.

DO and the GWOT

Some argue that Marines already are executing a kind of DO in the current GWOT against an enemy of insurgents, foreign fighters of radical beliefs, terrorists, former outlawed political party members (both Baath and Taliban), and other types of criminals.

The enemy does not wear uniforms, hides and fights among civilians, and kills by the most sadistic and savage means possible. What the enemy does *not* do is fight by conventional means, employ conventional military tactics, or routinely engage Marines in large, standup encounters. The enemy does not possess air power, long-range direct and indirect fire of any real consequence, or heavy armor. These shortcomings have not made the enemy any less lethal but have required the Marine Corps to fight the current war with TTPs that may not work against a future enemy with different motivations,

12. There is already a proposal to manage 0313s from E-1 to E-9 differently.

doctrine, capabilities, and assets. Although it is critical that we train Marines to fight current battles—counterinsurgencies and the like—*we cannot ignore the fact that the future fight could be against a conventional foe.*

The DO concept requires that small units prepare to operate in the future as well as in the present—on a future battlefield against a conventional enemy that *does* wear uniforms; that has an abundance of air power, a navy, long-range missiles, and other advanced weaponry; and that can attack in massed, armored formations supported by all the same command and control, fires, and logistics systems that the Marine Corps has. Future battles could well be against an internationally recognized nation state, rather than the non-state actors that the Marine Corps faces today. In short, the probability that distinctly different types of future fights may have to be fought cannot be ignored.

Thus, the DO concept requires that we train, educate, and equip Marines so that the Corps can defeat the enemy across the full spectrum of conflicts. The small unit leader—in this case, all Infantry Rifle Squad Leaders—will have to possess skills and experiences that the average squad leader may not possess today. Such capabilities as qualifications in all the uses of combined arms (both direct and indirect), mastery of command and control systems that permit a greater dispersion of small units (up to 10 kilometers from the platoon headquarters), and management of additional squad-level logistical assets are just a few of the skills these leaders must possess. In addition, requirements that the DO sergeant be trained in cultural awareness and achieve some linguistic capability add to his ever-increasing training demands. None of this will be easily achieved, mastered, or sustained. Therefore, it is critical that the Marine Corps determine better ways to identify those 0311s it wants to train and advance to Fireteam and Rifle Squad Leader billets. It then must devise management practices to ensure that those Rifle Squad Leaders (in whom so much has been invested) remain in the battalion for up to 7 YOS.

Requirements for 0311 DO Rifle Squad Leaders

We believe that, if the DO concept is to become the pure doctrine that the Marine Corps will fight by in the future, the management of

the enlisted force—especially the 0311 community, at least through the rank of sergeant—must be changed. A review of the enhanced actions and requirements for infantry small unit leaders referred to in the DO concept makes clear that the squad will need:

- A leader whose training and qualifications must be met before assuming the Rifle Squad Leader billet
- The leadership and experience of an actual sergeant.

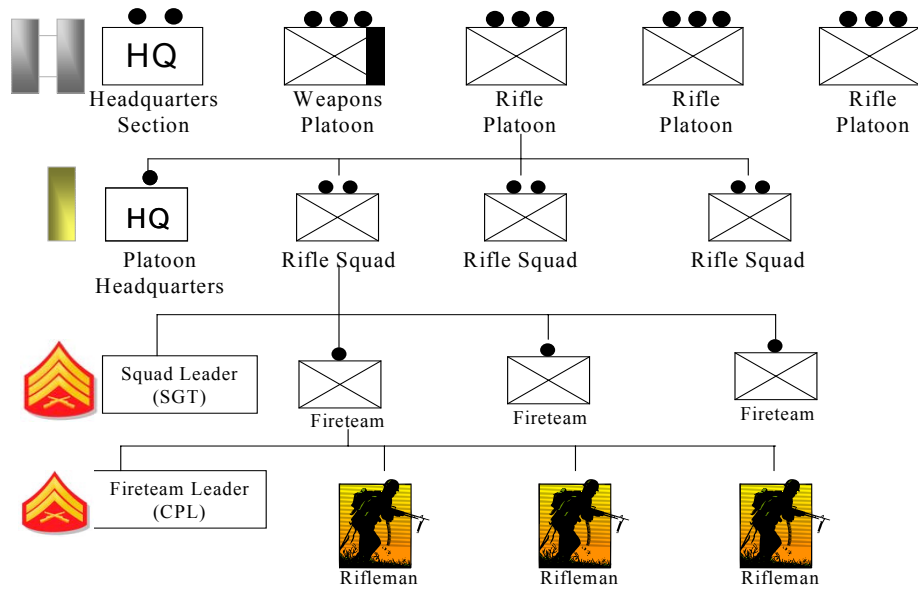
The training standards and qualifications that will be most critical and potentially will require the most effort and cost are the advanced qualifications in warfighting capabilities. These are the capabilities that qualify Rifle Squad Leaders so that commanders can grant them the authority to attack any type of enemy forces in a DO battlespace—current or future—by engaging the enemy with all aspects of supporting arms, to include attack aircraft or close air support (CAS) and, possibly, naval gunfire. Such skills are extremely difficult to master and keep current. In addition, such training is very expensive, as well as a major management of resources in its own right (in the form of aircraft sorties and ordnance). There also are difficulties associated with naval gunfire. The other indirect fires—artillery and mortars—are a little more manageable to train to and acquire qualifications in, although they are not easy. For example, more simulators will have to be made available to trainers at the SOIs. Since the infantry rifle squad is the supported unit, the Rifle Squad Leader, more than any other sergeant in other battalion MOSs, must be trained to DO standards and qualifications.

Current organization

There are 24 infantry battalions in the Marine Corps, around which the Corps most routinely task organizes, fights battles, and operates, trains, and conducts exercises. The battalion can fight as a single unit, fight as a maneuver element of a larger unit, or disperse its forces as the situation requires. The battalion consists of three infantry rifle (letter) companies, a weapons company, and a headquarters and services company. The battalion consists of numerous ground combat Marines as well as combat support and service support Marines. There are other specialty MOSs in the battalions, but almost all of the

0311s assigned to an infantry battalion are in its three rifle companies. Figure 6 shows the organization of a rifle company.

Figure 6. Marine Corps rifle company



Each rifle company consists of three rifle platoons, a weapons platoon, and a headquarters section. Currently, almost all 0311 Marines assigned to a rifle company are found in the infantry platoons. Finally, each rifle platoon is made up of three 13-man rifle squads, and each squad has three 4-man fireteams plus a Rifle Squad Leader. All are 0311s (or at least that is what they should be according to the T/O).

Based on this organization, it would take a total of 1,944 MOS 0311 corporals and 648 MOS 0311 sergeants to keep the 24 infantry battalion Fireteam and Rifle Squad Leader billets filled.¹³ There are currently almost 1,900 such sergeants on active duty—about 1,200 more

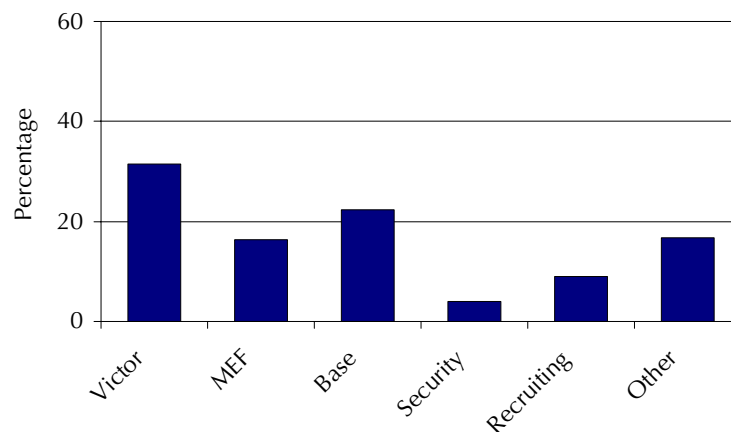
13. $(24 \text{ battalions}) * (3 \text{ rifle companies per battalion}) * (3 \text{ rifle platoons per company}) * (3 \text{ rifle squads per platoon})$ equals 648. There are 3 fireteams in a squad, so the requirement is for 1,944 Fireteam Leaders $(3 * 648 = 1,944)$.

than are needed to lead all the rifle squads in the 24 battalions.¹⁴ But for many years, infantry commanders, especially Company and Battalion Commanders, have asked, “Where are my sergeant Rifle Squad Leaders?”

Current whereabouts of 0311 infantry sergeants

Most 0311 infantry sergeants are serving in a variety of critical billets outside the infantry battalions (see figure 7).

Figure 7. 0311 sergeant assignments, June 2006^a



a. There were 1,887 MOS 0311 sergeants as of June 2006. Slightly more than 80 percent of them were careerists (in their second or later term of service).

Not all 0311 sergeants in a battalion are squad leaders; they fill a variety of other billets. In addition, the process by which the Marine Corps manages its enlisted force uses many second-term Marines (sergeants and staff sergeants) in the supporting establishment as recruiters, trainers, and other special duty assignment Marines. This

14. T/Os also call for each fireteam in each squad to be led by an 0311 corporal. To man all the rifle fireteam T/O billets in the 24 infantry battalions would take 1,944 corporals. There are currently 2,990 MOS 0311 corporals in the Marine Corps.

explanation, although accurate, has always been unacceptable to operational commanders (especially infantry Battalion Commanders). To date, however, nothing has changed institutionally to “scratch that itch.”

The T/Os for each infantry battalion require 36 MOS 0311 sergeants. We looked at 0311 manning in the 24 infantry battalions and were surprised by differences in the number of 0311 sergeants across battalions (see table 2).

Table 2. Number of 0311 E-1 to E-5 Marines in Victor units, June 2006

Unit	Number of Marines		
	E-1 to E-3	E-4	E-5
V11	238	101	55
V12	262	64	22
V13	386	57	18
V14	224	119	30
V15	289	81	33
V16	331	55	32
V17	336	88	24
V18	292	83	17
V21	341	22	22
V22	374	43	12
V23	381	69	28
V24	357	61	12
V25	414	60	31
V26	306	102	28
V27	436	42	11
V28	318	72	26
V31	300	51	24
V32	353	95	15
V33	259	62	35
V34	326	69	13
V35	219	119	29
V36	389	68	21
V37	225	80	16
V38	282	74	22
Average number	318	72	24

Our COA includes ensuring that we have qualified corporals and sergeants leading fireteams and rifle squads, respectively. As we have shown, there are more than enough 0311 corporals and sergeants to make this possible, but current policies do not seem to support it. As the table shows, in June 2006 the Battalion Commander of V11 had 55 sergeants. By T/O, he rated only 36; however, the Battalion Commander of V27 had only 11 Rifleman sergeants. The distribution of 0311 sergeants across the units is quite uneven. In addition, the average number of 0311 sergeants per Victor unit is insufficient (only 24 whereas the T/O is 36). This is viewed not as the mismanagement of Marines but rather as current personnel management policies with which the Director, Manpower Management (MM) has to comply.

We have identified at least three factors that contribute to the shortage of sergeants in the battalions:

- The timing of ISLC training for Rifle Squad Leaders
- The ranks of the Marines sent to the ISLC
- The promotion timing of some first-term 0311 sergeants.

Infantry Squad Leader Course (0311) and the timing of the ISLC training

A member of the study team visited the School of Infantry (SOI) on the east coast on two occasions (in April and July of 2006) to ensure that we understood the level of advanced training for those who were currently in or about to assume Rifle Squad Leader billets and current qualifications for course attendance. We believe that the current training—while meeting today’s requirements—will not qualify Marines to lead DO rifle squads; the span of control under DO will be much broader than it is currently. That said, the SOIs are training Rifle Squad Leaders to the TTPs of today’s curriculum—much of which is OEF/OIF-centric.

As an example, consider supporting arms training. Squad leaders going through the ISLC receive a total of 22 hours of training and performance evaluation on indirect fires. This is mostly through lectures, dry runs, and practical application on simulators. The students

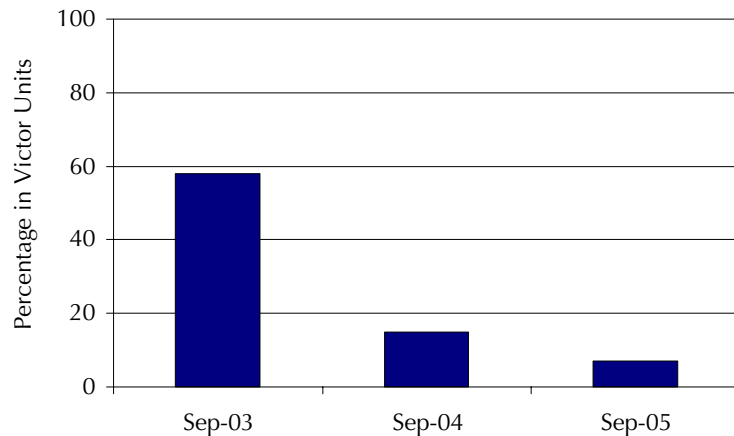
do actual calls for live fire on only four mortar rounds. There are valid reasons for this, such as a lack of available sorties and aviation ordnance. The availability of ranges and range limitations also are constraints.

There are additional issues as to who receives this training and when. Almost all Marines who attend the ISLC are on their first contract, but most reach EAS not long after receiving this training. For the 389 Marines who attended the ISLC in FY02:

- 57 percent had left the Marine Corps by September 2004
- 67 percent had left the Marine Corps by September 2005.

For those who reenlist, most receive permanent-change-of-station (PCS) orders and leave the Victor units. Figure 8 shows the number of Marines who attended the ISLC in FY02 who were in Victor units (but not necessarily in Rifle Squad Leader billets) in each subsequent September.¹⁵ The Battalion Commanders who sent those Marines to the ISLC did not receive long-term returns on that investment.

Figure 8. Percentage of Marines who attended the ISLC in FY02 who were still in Victor units in the following years



15. All infantry battalions are in Victor units.

Many of those who now attend the ISLC are, in fact, lance corporals and corporals who never make sergeant before leaving the battalion. Although we were unable to establish the grade of those attending the ISLC at the exact time of their training, we were able to establish the grade at the end of the fiscal year during which the Marines attended the ISLC (see table 3).

Table 3. Paygrade of attendees at ISLC^a

	Fiscal year of course attendance			
	FY02	FY03	FY04	FY05
Percentage of E-3s	16%	13%	20%	35%
Percentage of E-4s	65%	37%	47%	59%

a. The paygrade is as of the last month of the fiscal year in which the Marine took the course.

Table 3 helps to explain why infantry Battalion Commanders continue to ask, “Where are my sergeant Rifle Squad Leaders?”

As noted earlier, most infantry Marines are initially recruited on 4-year contracts. Furthermore, 80 percent of these Marines will separate before getting promoted to sergeant, which means they could not have served as sergeant Rifle Squad Leaders. Those Marines who do reenlist do so only on the condition that they will not continue to serve in the infantry battalion in which they have spent their first contract. Therefore, commanders often do not have enough sergeants to lead their squads, and the SOIs routinely train Marines to be Rifle Squad Leaders who are not (and never will be) sergeants.

The SOIs will train Marines to the standards required to do the job—whether it be the current curriculum or an enhanced DO curriculum. *The Marine Corps needs to find management tools that will support the Battalion Commander’s requirement to identify and send to the ISLC only those Marines who will assume Rifle Squad Leader billets as sergeants.*

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How to grow infantry DO Rifle Squad Leaders

Contract lengths for infantry battalion 0311s

The Marine Corps recruits, trains, and qualifies about 4,600 MOS 0311 Marines each year. We believe that the Marines most critical to the successful employment of the DO concept are those assigned to the 24 infantry battalions. A sizable portion of those Marines are not initially assigned to a battalion and, in fact, may serve their entire first term (4 or 5 years) or portions of that term outside infantry battalions. In the past, the Marine Corps offered infantry recruits a choice of a 4- or 6-year initial enlistment contract, and many of those who opted for the longer contract did serve the full term in an infantry battalion. The 6-year contracts had higher qualification standards. They also offered a series of incentives that many commanders did not like, but the fact is that Marines were recruited to serve initial 6-year periods.

Since the Marine Corps needs only 648 MOS 0311 sergeants to fill the Rifle Squad Leader billets within the 24 infantry battalions, initially using 6-year active-duty contracts to access a percentage of the highly qualified 0311s who are trained each year could be a feasible option. Granted, not every recruit who signs on for 6 years would be able to qualify as a Rifle Squad Leader in an infantry battalion, but many of them would. That would at least guarantee the Marine Corps a means of having some 0311s in the battalions for a minimum of 6 years. Historically, Marine Corps Recruiting Command (MCRC) has done a masterful job of filling required accession programs.

Setting the program qualifications—creating a profile of what type of person should be recruited as a potential Rifle Squad Leader of the future—would require careful consideration. Criteria would have to be established, and the right kind of enlistment incentives and controls would have to be applied to the program. However, there are many precedents for establishing a profile of a certain type of recruit

needed to fill a certain program, such as was done in developing the 0321 accession program.

Initial 6-year contracts would not solve any immediate problems, but they would be a start on the future, and the future is DO. Since having sergeants serve in battalions for up to 7 years is a key part of the DO concept, it would be easier (with proper incentives) to persuade a sergeant to extend an operational tour for an additional year than it would be to persuade him to continue for an additional 3 years. A commitment to another type of duty after the initial 7 years could be guaranteed as an incentive, for example.

Where should newly trained/qualified 0311s do their initial tours of duty?

Units other than infantry battalions absorb a large number of the 0311s who are assessed and trained annually. The same is true for all of the 03 MOSs. However, there are adequate numbers to ensure that the 24 infantry battalions are kept fully manned. For instance, about 16,000 MOS 0311 Marines are serving on active duty (see figure 2). To man the T/O, the 24 infantry battalions need only 9,000 of them.

Under current management practices, many 0311s serve a portion of their initial contracts in other units before being reassigned to an infantry battalion to finish out their tours. We believe that this policy should be reevaluated. We are concerned about cohesion in all units, but especially in those whose primary mission is to locate, close with, and destroy the enemy by fire and maneuver. In these units, cohesion is particularly critical to the unit's success. Each year, the new 0311s who enter an infantry battalion immediately begin the cohesive association of that battalion, down to the squad and team in which they serve. They begin the individual and unit training that will ensure that they can fight and win.

Historically, most of these Marines would have stayed in their battalions throughout their first terms of service.¹⁶ We argue that Marines

16. With the current war and the need for personnel, there has been more turnover and movement between battalions.

assigned to battalions *should*, in fact, stay in their battalions to the maximum extent possible.¹⁷ Several who are top performers will become the small-unit leaders of their teams and squads. In short, introducing first-term 0311s (who have spent 24 months or more of their initial tours in units other than infantry battalions) into squads may not be the best thing to do for those battalions. We believe that it is instead better to allow Battalion Commanders to “grow their own” Fireteam and Rifle Squad Leaders.

Thus, we suggest the development of a new enlistment program for 0311 recruits designated for infantry battalions, with the option of a 6-year initial enlistment contract.

When should 0311s be trained as Rifle Squad Leaders?

Currently, the SOIs train the 0311 Infantry Rifle Squad Leader when the Marine is in the T/O billet or when he is identified as going to fill that billet. Although the SOIs would prefer to train NCOs, they train whomever shows up—regardless of grade. In addition, not all of the Marines who attend the ISLC come from infantry battalions. The current policies that manage the progression of 0311s—from the time they enter recruit training until they complete their initial tours of duty—are not systematic enough to ensure that only qualified sergeants fill Rifle Squad Leader billets. The IBEPP will help to support the solution to this problem, as well as ensure that Fireteam Leaders are better qualified to fill their leadership roles.

We believe that the Marine who is identified by the Battalion Commander to fill the next Rifle Squad Leader T/O vacancy should receive the ISLC training before promotion to the rank and appointment to the billet. We know that EAS and PCS prevent most Marines from making sergeant in time to serve in the infantry battalion as Rifle Squad Leaders. Furthermore, the current reenlistment policies for first-term Marines do not provide sufficient incentives to keep sergeant Rifle Squad Leaders in the battalion through 7 YOS. With changes to policy, it would be possible to have the Battalion

17. The Enlisted Commissioning Program would be an exception.

Commanders send to the SOIs only those corporals who are in T/O Fireteam Leader billets and are going to be appointed Rifle Squad Leaders upon completion of the ISLC. The promotion to sergeant would coincide with the assumption of the Rifle Squad Leader billet.

This sort of decentralized management at the battalion level would give the battalion leadership the ability to have formally trained and fully qualified sergeants leading rifle squads. It also would reduce the number of 0311 Rifle Squad Leaders who have to be trained each year, allowing an increase in the depth and quality of the training.

When should we reenlist sergeant Rifle Squad Leaders?

Even if the Marine Corps decides to recruit 6-year 0311 obligors, other actions still will be needed to remedy the 0311 Rifle Squad Leader problem. We know that most Marines currently are trained to become Rifle Squad Leaders at the ISLC during their initial tours of duty. Current policies require that, upon ISLC entry, the Marine have at least 12 months (which can be waived to 6 months) remaining in the Marine Corps. In fact, most Rifle Squad Leaders serving in the 24 battalions are on their first tours of duty but, as we noted previously, are not typically sergeants and often are not even corporals.

The Marine Corps' current retention policy is that first-term Marines, the First-Term Alignment Plan (FTAP) population, only can be reenlisted during the last year of their initial contracts—for most, their 4th year. Should the Rifle Squad Leader, once appointed to that position, be allowed to reenlist at that point? We argue that this option should be considered. There are precedents for this in the other Services. The Army now allows reenlistments up to 2 years before EAS, and the Navy has had early reenlistments for 6-year obligors for many years (see appendix C). It still would have to be determined which type of incentives would encourage these newly appointed Rifle Squad Leaders to reenlist in their battalions for the desired time, but SRBs and AIP incentives should be considered. Still, we know that most Rifle Squad Leaders are not sergeants now, so how do we tackle that part of the problem?

When and how should infantry battalion 0311s be promoted?

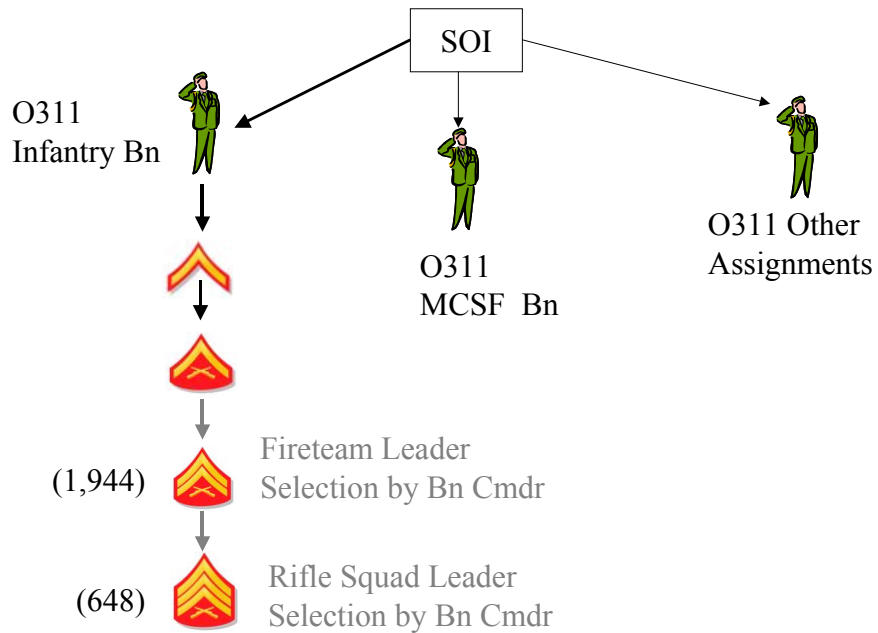
The current promotions to NCO (corporal and sergeant) are by MOS and are based on the number of vacancies throughout the entire MOS for the grade. We argue, however, that infantry battalion 0311s should be an exception to that process. Since current promotion to sergeant in MOS 0311 is to a vacancy in the MOS rather than to a vacancy in a particular battalion T/O, the promotion may not further the Marine Corps' goal of having only qualified sergeants leading rifle squads. In fact, under the current process, all 0311 corporals—regardless of where they are serving—compete for the same sergeant vacancy, providing they meet time-in-grade and time-in-service requirements. Although this is a well-proven system that usually keeps 0311 vacancies filled by the most competitive Marines, it does not guarantee that sergeants will be filling T/O billets for Rifle Squad Leaders.

Battalion T/Os also require more 0311 corporals and sergeants than are required for fireteam and squad leader billets. For example, each battalion rates 36 MOS 0311 sergeants but requires only 27 to fill the Rifle Squad Leader billets. We propose largely keeping promotions as they are but “fencing off” sufficient numbers of promotion allocations to allow Battalion Commanders to select and promote their Fireteam and Rifle Squad Leaders. Out of about 1,900 sergeant 0311 slots, 648 promotion slots could be fenced off. In addition, because 0311 corporals serving infantry battalions would feed the sergeants, 1,944 corporal slots (out of the almost 3,000 MOS 0311 corporal slots in the Corps) would have to be fenced off.¹⁸ Promotion policies for unrestricted (i.e., nonfenced) allocations would remain the same.

It also should be policy that those NCOs fenced off to fill T/O billets in infantry battalions would not be available—except for special situations—for other assignments for their entire first terms, and, in the case of sergeants, if extended or reenlisted in the battalion, throughout their initial 7 YOS. Figure 9 illustrates our proposal.

18. It will need to be established how this will affect overall 0311 corporal and sergeant promotions to ensure that the new policies meet some fairness metric.

Figure 9. Proposal for building DO sergeant Rifle Squad Leaders



Proposed promotion process for 0311 corporals and sergeants in infantry battalions

To ensure that corporals lead fireteams, which feed the Rifle Squad Leaders, and that sergeants lead rifle squads, the following alternatives to current promotion policies should be considered:

- Have the following bodies determine the minimum standards and qualifications of an 0311 Marine to lead a fireteam and a squad, respectively: Deputy Commandant, Manpower and Reserve Affairs (DC M&RA); Deputy Commandant, Combat Development Integration (DC CDI); Deputy Commandant, Plans, Policies, and Operations (DC PP&O); Commanding General, Training and Education Command (CG TECOM); and operating force (OPFOR) representatives. The specific, qualifying standards, plus the general standards that apply to leadership and moral compass, need to be described in detail in the appropriate manuals. These would then be the standards

to which Rifle Squad Leaders would be trained, and they would serve as a guide to Battalion Commanders.

- Change current promotion policies so that the total authority to promote these Marines would rest with the Battalion Commander, subject to appropriate level review.¹⁹ The Battalion Commander's decision to promote these Marines would be based on the recommendations of the company leadership and would be the result of the Marine being appointed to fill an open T/O Fireteam Leader or Rifle Squad Leader billet.
 - The promotion to sergeant could not occur until the Marine has met all of the qualifications—with the completion of the ISLC being the “gold standard.” Should the Marine be demoted, the vacancy would be considered permanent, and another appointment and promotion would be authorized.
 - An appointment and promotion would not occur within the battalion due to a temporary assignment of the Marine, nor would the Battalion Commander be able to exceed through promotion authority the numbers of 0311 corporals and sergeants needed to fill the T/O Fireteam Leader and Rifle Squad Leader billets.
 - Under this course of action, the 0311 corporals and sergeants promoted by the direction of the Battalion Commander would serve only in Fireteam Leader and Rifle Squad Leader billets. All other promotions in the battalion would be in accordance with current policy.
- It should be understood that, even among Marines who have met all of the requirements and have been recommended and approved for appointment and promotion, the occasional bad decision will be made.
 - The Battalion Commander should be allowed to make the appointments and promotions probationary. The length of this probationary period would be set by policy but could,

19. This will need to be determined.

for example, be 3 months for a Fireteam Leader and 6 months for a Rifle Squad Leader. During this time, the Marine would be entitled to all of the pay, allowances, and benefits associated with that rank. However, it would allow the Battalion Commander to revert the Marine to the lower rank (sergeant to corporal or corporal to lance corporal) within that time without the board actions required under current policies.²⁰

- Once the probationary period has expired, the Marine's promotion would become permanent and future administrative and/or punitive reduction would have to be in accordance with current policies.²¹
- The appointment and promotion of the Marine would correspond with the Marine being fully qualified to fill a Rifle Squad Leader T/O billet.

Summary

The implementation of our proposed COA will require different personnel management—both for all 0311s and for 0311s in infantry battalions. The Director, Manpower Management is responsible for ensuring that battalions are properly staffed and that Marines in those battalions are promoted fairly. The Director MM also is responsible for assignments and the retention of all Marines.

Under this COA, the Director MM still will be expected to fill infantry battalion T/O vacancies for 0311 sergeants and corporals who are not among the 27 sergeants and 81 corporals who would be the responsibility of the Battalion Commander. The actions of the commander to promote Fireteam and Rifle Squad Leaders will not exclude other

20. There is a Marine Corps precedence for temporary or probationary promotions.

21. If this COA is adopted, it would have to be determined how to manage a demoted sergeant who had reenlisted or extended to serve up to 7 years in the battalion. The payment of any SRB or AIP monies would be issues as well.

0311 lance corporals and corporals, including those in battalions, from competing for promotion across MOS 0311. There will just be fewer unrestricted promotion vacancies throughout MOS 0311.

Battalion Commanders also will be authorized to reassign their most talented Fireteam Leaders and Rifle Squad Leaders as needed within the battalion; however, they can assign them only to other vacant Fireteam and Rifle Squad Leader billets, respectively. If a battalion were to become overstaffed with 0311 corporals and sergeants, the Director MM could reassign those excess Marines as needed.

The Battalion Commander would have the authority to reenlist, at the time of promotion, those Marines he promoted to sergeant and appointed as Rifle Squad Leaders. Other 0311s who reach the end of their enlistments could still reenlist in accordance with current policies and the needs of the Corps.

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Concluding comments

We summarize a set of alternative actions that could be taken and, if implemented, could go a long way toward ensuring that future Marines serving in infantry battalion rifle squads would be led by corporals and sergeants who have met all the requirements for appointment and service in those positions. Over time, those sergeants could additionally be in those billets in their 5th through 7th YOS. As stated previously, this particular end-state will take years to reach, but the entire process from the concept to having all units fully operationally capable of conducting DO also will take years. Our alternatives follow:

- Begin creating a profile of a non-prior-service accession for MOS 0311 for MCRC and establish this as a new enlistment program. Recruits from this program would serve only in infantry battalions.
- Determine how many of those recruits would be needed per year and recruit them for 6 years of initial service. If it is determined that 6 years is not feasible, increase the number of 5-year initial contracts. A mixture of 4-, 5-, and 6-year contracts for these Marines would be an improvement over the present.
- Ensure that these Marines are programmed for service into 1 of the 24 infantry battalions. Once these recruits are assessed, classified, and trained, do not redirect those Marines to other MOSs. Manning the infantry battalions must be a priority if the ultimate goal of having the right leader of the correct rank in the right infantry battalion T/O billets is to be achieved.
- Create a committee composed of subject matter experts from at least M&RA, MCCDC (CDI and TECOM), PP&O, and OPFOR Commanders to establish the training standards and qualifications for 0311 corporals and sergeants who will lead fireteams and squads in infantry battalions. Next, determine when they should master these standards and by what means. At a minimum, attendance at the ISLC would be mandatory for

promotion to sergeant by the Battalion Commander. Finally, determine how the Marine Corps could keep those 0311 sergeants in the battalions for up to 7 years.

- Rewrite the current promotion policy so that Marines serving as Fireteam Leaders and Rifle Squad Leaders are promoted upon their appointment to the infantry battalion T/O billet of Fireteam or Rifle Squad Leader, respectively.²² The authority for the promotion will rest with the Battalion Commander based on the Marine meeting and mastering all the professional and technical requirements and standards to serve in those billets. The quality control for this can be at the appropriate level of oversight, as determined by HQMC. The Division Inspector General (IG) and HQMC IG also can be a part of that quality control and oversight.
- Review and rewrite the current retention policy to permit the career retention specialists and the infantry battalion leadership to solicit and enact the reenlistment of newly appointed 0311 sergeant Rifle Squad Leaders at the time of their appointment and promotion for the additional number of months and years necessary to keep them in the battalion through 7 YOS.
- Explore current incentives and create additional incentives if deemed necessary—both financial and nonfinancial (such as future service guarantees)—that will be needed to get these Marines to extend their service in the battalion. Remember that reenlistments for these Marines will not be under the current FTAP practice but, rather, will occur when the Marine is appointed and promoted.

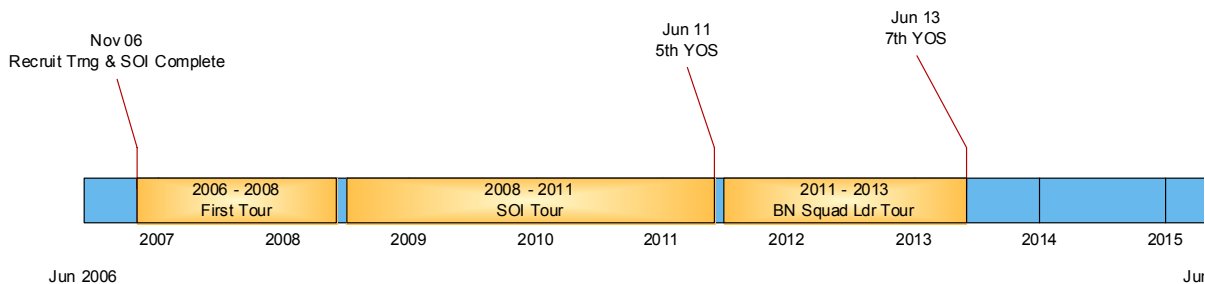
In closing, this COA is radically different from our current approach to managing the force. However, if the intent is to meet the CMC's directive for institutionalizing the DO concept, there needs to be a holistic reconsideration of policies that do not support the goal of having Rifle Squad Leaders who are sergeants leading squads in infantry battalions in YOS 5 through 7. The same holds for 0311 corporals since, under our COA, they feed the fill for sergeants.

22. Depending on what is decided, at these promotions, the MOS could change to 0312.

Appendix A: The 0369 staff sergeant

In this appendix, we describe how 0369 staff sergeants currently are managed, and we present an alternative COA for executing DO based on feedback from our Marine Corps reviewers.²³ Although we did not address it in the body of this paper, the changes that will be made for the DO-qualified Rifle Squad Leader may also affect how the Marine Corps manages Infantry Rifle Platoon Sergeants (Infantry Small Unit Leaders). At present, all infantry MOS sergeants compete for promotion to staff sergeant (E-6). If selected, they receive the MOS designation of 0369. Under this policy, any staff sergeant can then serve in any appropriate-level billet within the battalion structure.

23. Another set of reviewers suggested that we incorporate a “2-3-2” plan in addition to the COA we discuss here. In this alternative plan, the first 2 years would be an infantry battalion, then an early reenlistment for 5 years (with an SRB), followed by 3 years of special duty assignment (SDA) at the school of infantry (SOI), and the final 2 years with an infantry battalion as a DO squad leader (see time line below). Study time constraints did not allow us to pursue this COA at length, but our general impression is that it is problematic. First, the early reenlisters would not necessarily meet the requirements to serve as instructors at SOI. In addition, there are probably not sufficient numbers of SOI instructor billets to support the 648 DO squad leaders. Finally, it is not clear when the training for the DO squad leader billets would occur. The timeline seems too optimistic to encompass all these assignments.



Should this policy should remain in place for DO implementation? Just as squads are going to be disbursed from their platoons (possibly up to 10 kilometers), platoons are going to be at greater distances from the company. The question is simple:

Would it be better to have an 0369 Infantry Rifle Platoon sergeant with a background as a Rifle Squad Leader or as a Machine-gun Squad Leader?

An alternative COA

There may be a larger point here. Though not in the CMC's original guidance, it may make more sense to have staff sergeants, rather than sergeants, as the DO-qualified Infantry Rifle Squad Leaders. As the main text points out, radical manpower management policy changes are required if the Marine Corps is to have DO-qualified sergeants leading these rifle squads, especially in years 5 to 7 of their careers. Although it is still challenging, it would require fewer radical policy changes to place staff sergeants in the lead of rifle squads.

It would require 648 staff sergeants to lead the active duty rifle squads in the 24 infantry battalions. Each would have to be trained and qualified in all DO-required skills and capabilities. Infantry staff sergeants are career Marines, with the promotion usually occurring in the second term of service.

If all Infantry Rifle Squad Leaders were required to be staff sergeants (vice sergeants), the problems of experience and qualifications at the time in their careers when they would serve in these billets should not be a problem. A staff sergeant would have served his first term in the operational forces, probably had a B-billet tour in the support establishment, and then would be ready to go back to the operational forces. However, this COA would still require considerable changes to current Marine Corps manpower management. Consider the following changes that would have to be made or that would result:

- Replacement of 648 T/O sergeant (E-5) Infantry Squad Leader line numbers with staff sergeants (E-6s)
- Cost increases due to replacement of lower-paygrade Marines with more senior Marines in both paygrade and longevity

- Creation of an MOS promotion pipeline that would ensure a large enough population of 0311 sergeants to populate the increase in staff sergeant 0369 requirements.

There are also a series of questions:

- Would the USMC have to make the T/O rank requirement for Fireteam Leader a sergeant vice the current corporal (E-4)? If so, this would also generate increased costs.
- Would the USMC continue the current promotion process, allowing all 03XX sergeants to compete for staff sergeant regardless of whether they had served in infantry rifle squads?
- Would an even larger change be necessary (i.e., reevaluating and potentially changing the entire manpower management practices as they currently apply to infantry MOSs)?

These are only a few of the issues that would have to be thought through should the decision be made to make the Infantry Rifle Squad Leader a staff sergeant vice a sergeant.

Current management of 0369 staff sergeants

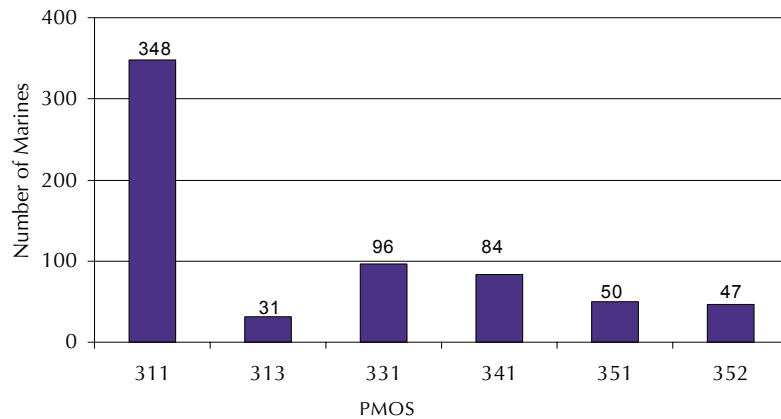
MOS 0369 begins at the grade of staff sergeant (E-6). The current promotion process permits all infantry sergeants except 0321s, regardless of their MOS and expertise, to compete and be selected for Infantry Rifle Platoon Sergeants. Thus, the following MOSs end at sergeant and feed into MOS 0369:

- Rifleman (0311)
- LAV Crewman (0313)²⁴
- Machine Gunner (0331)
- Mortarman (0341)
- Infantry Assaultman (0351)
- Anti-tank Missileman(0352).

24. Recent decisions will mean that 0313s will no longer feed into 0369, but will continue through paygrade E-9.

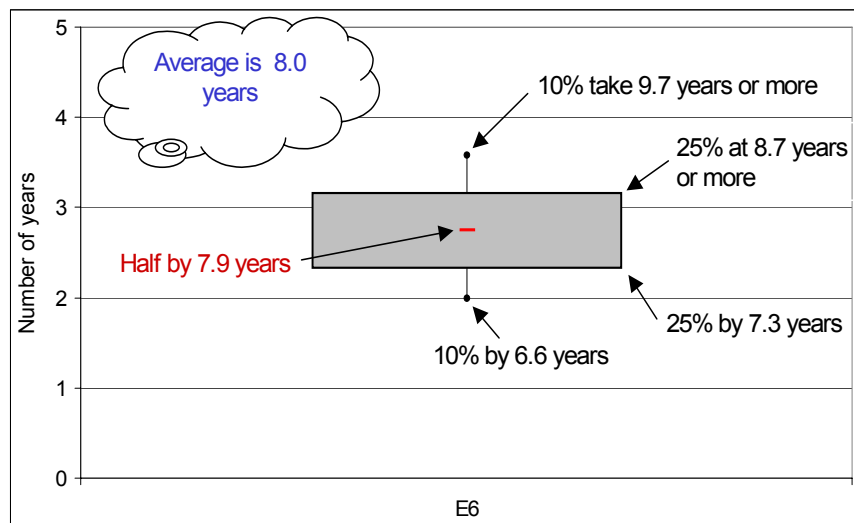
Figure 10 shows the numbers for each MOS. Figure 11 shows the time to promotion for staff sergeant 0369s, Infantry Unit Leaders. Again, there is a wide variation in the time to promotion, with the most competitive 10 percent being promoted by 6.6 YOS, whereas another 10 percent are promoted after 9.6 or more YOS.

Figure 10. Feeder MOSs to 0369s^a (data are from personnel files)



a. There were 656 E-6 promotions to 0369s during October 2003 through June 2005. In addition to the MOSs shown, one 0321 became an 0369.

Figure 11. 0369 promotions to staff sergeant^a



a. There were 656 promotions to E-6 0369s during October 2003 through June 2005.

Appendix B: Initial enlistment contract lengths: A look at 4-, 5-, and 6-year contracts

We have recommended that certain 0311s who will go to infantry battalions be given the choice of longer first-term enlistment contracts. Having some potential squad leaders on 6-year initial contracts will help ensure that we have DO-qualified sergeants in the 5th and 6th—or perhaps the 4th, 5th, and 6th—YOS. The historical reenlistment rate of 6-year 0311s was higher than that of 4-year 0311s, so the Marine Corps will have a better chance of getting the reenlistments it needs.

In this appendix, we discuss more generally the benefits to the Marine Corps of longer enlistment contracts. Since the late 1980s when the Marine Corps discontinued 6-year initial enlistment contracts, it has shortened the average length of the enlistment contract from 4.5 years to about 4.2 years. Varying the initial contract length does not change the relative sizes of the first-term and the career forces, but it does vary the experience level of the first-term force. Whereas shorter first-term enlistment contracts make for a less experienced first-term force, longer enlistment contracts do the opposite. Squad leaders operating within the DO concept need to be more experienced.

The easiest way to see the differences between shorter and longer first-term enlistment contracts is to assume that all first-termers enter with a 4-, 5-, or 6-year contract. Using historical data on continuation rates, we developed a spreadsheet model to calculate the steady-state yearly accessions required to sustain enlisted first-term endstrength at 110,000 Marines.²⁵ Specifically, we investigate how the length of the first-term contract affects the following measures:

25. Using the first-enlistment contract to define the first-term force, the size was 115,021 in September 2005 and 112,140 in June 2006. Since the Marine Corps is currently over its appropriated endstrength, we decided to use 110,000 Marines as the size of the first-term force.

- The number of accessions required to sustain the enlisted first-term force
- The non-end-of-active-service (non-EAS) and EAS attrition rates that can be expected from such a force
- The proportion of the first-term force that is in initial training and the proportion that is “usable” (finished with initial training).

Because fewer accessions are required when the length of the first-term contract increases, the recruiters’ mission falls, as does the number of new recruits that must be trained. Similarly, the number of recruits that must be trained falls; thus, training costs fall. Recruiting costs also should fall, although the cost per recruit may rise somewhat if it takes recruiters longer to find recruits willing to serve for longer periods or if more enlistment bonuses are required. Basic pay costs for the first-term force will rise with longer contracts since those in longer contracts have higher grade and more YOS.

The Marine Corps has used at least three different definitions of the first-term force. Sometimes, these definitions have been combined. The first-term force can be described as:

- Those in the first 4 YOS
- Those in paygrades E-1 to E-4 (sometimes also with a proportion of E-5s)
- Those in the first enlistment.

The last definition is the one we use for our analysis. An evaluation of the tradeoffs between first-termers and careerists necessitates a good understanding of the costs of going from “street to fleet.” We focus on these issues, both on dollar costs and the length of time Marines are undergoing initial training. Finally, we look at how the initial contract length affects the number of first-termers who are finished with training and the number of first-term Marines in Fleet Marine Force (FMF) assignments.

Time to train and training costs: The street-to-fleet process

To do this analysis, we needed to know the length of time it takes to become an MOS-trained Marine. We calculate the time from when the Marine first begins bootcamp to when the Marine is fully occupationally qualified with a primary military occupational specialty (PMOS). Thus, the time to MOS is the difference between date of entry into recruit training (“yellow footprints”) and the date an assignable PMOS is attained. Admittedly, this method yields a broad measure of time to MOS: It includes travel, time spent awaiting instruction, leave, and other time in the training progression. *However, our average for time to MOS is the **actual** average time it took to train the Marine.*

There is a distribution of time to MOS, with some Marines taking less time than others. In general, the larger MOSs will have smaller variance in the time to MOS and first duty station because they are less affected by the experiences of a few Marines.

The average street-to-fleet time varies considerably by PMOS for Marines who received their PMOS from June 2005 to May 2006. For example, the average time to the assignable PMOS was:

- 192 days for Rifleman (0311)
- 388 days for Reconnaissance Marine (0321)
- 533 days for Spanish Cryptologic Linguist (2674)
- 250 days for Helicopter Mechanic U/AH-1 (6114).

Our analysis of different experience mixes for the first-term force requires an average street-to-fleet time for all first-termers. When we averaged the time to the first assignable MOS over all Marines, we found that it was 7.7 months.²⁶ Thus, we use that as the overall average for our evaluation of costs and benefits of a first-term enlisted force of 110,000 Marines.

26. Note that this underestimates the time it takes to get to the FMF because it ignores the travel time between the final school and the first duty station.

Accession Policy in the Office of the Secretary of Defense calculates recruiting cost by Service. For FY05 accessions, the cost was \$10,800 per Marine Corps recruit.²⁷ These costs include pay for recruiters and other support personnel associated with recruiting (military and civilian), enlistment bonuses/college fund incentives, and advertising. To calculate the basic pay for the first 7.7 months of service, we multiplied the number of Marines in each month of service by FY05 pay tables.²⁸

Marines are trained by the Corps, as well as other Services, and many of the training costs are contained in accounts that encompass training as well as other activities. Thus, we analyzed various studies (older ones from the Marine Corps and some from other Services), in addition to talking extensively with Marine Corps planners at M&RA and MCCDC. In brief, we spent considerable time investigating training cost data by PMOS. We now are convinced that good, current, and comparable information does not exist. Next, we tried to figure out whether we could derive accurate training cost data within the framework of this study. We decided that we could not, and, indeed, we are relatively convinced that any effort would become outdated just as it was completed. However, the absence of such data severely limits the ability of the Corps to analyze cost-effective training options.

We still needed a “best estimate” of the cost to train. Given the uncertainties that will surround this estimate, we decided on both a lower-bound estimate and one that was a “round” number, suggesting the lack of precision. Our review of studies suggested that training costs averaged somewhat over two times the basic pay of Marines undergoing the training. Thus, we settled on two times the basic pay as the lower-bound average cost of initial skill training for Marines.

27. The average cost across all Services was \$15,500: \$13,900 for Navy recruits, \$12,900 for Air Force recruits, and \$16,800 for Army recruits.

28. We have a steady-state model that is based on historical attrition patterns. Thus, we do not multiply the number of accessions by each of the months of service. Instead, we look at the number of accessions that historically have made it to each month of service and calculate what their basic pay would be.

Results

The steady-state spreadsheet that we developed for this analysis uses historical first-term attrition rates by the length of the initial contract.²⁹ Our focus is on a first-term force of 110,000 Marines, and we look at three distinct strategies for getting these first-term Marines: 4-year, 5-year, or 6-year initial contracts. The first-term force would never be composed of only one length of enlistment contracts, but, to understand the impact of the length of the first enlistment, it is useful to focus on these extreme cases.

Over the last 20 years, the obligations under a first-term enlistment contract in the Marine Corps have varied between 3 and 6 years. In the early 1980s, contracts were for 3 or 4 years. In the mid-1980s, 3-year contracts were essentially phased out in favor of contracts primarily of 4 or 6 years (although there were some 5-year initial enlistment contracts).³⁰ In the early 1990s, the decision was made to essentially drop initial 6-year enlistment contracts, making the first enlistment length either 4 or 5 years. The proportion of 4-year contracts was over 80 percent until FY04. In FY05, 25 percent of the contracts were for 5 years and 75 percent were for 4 years (see table 4).³¹

Accession mission

As one lengthens the initial enlistment contract, the accession mission for a first-term force of 110,000 Marines drops (see figure 12). While it takes 35,416 accessions annually to build a first-term force of 110,000 Marines if the first-term contract is 4 years, the number of

29. For 4-, 5-, and 6-year obligors, respectively, we used attrition rates from the FY97–FY01, FY96–FY99, and FY86–FY93 accession cohorts (updated for the recent overall reduction in attrition). The spreadsheet model is available from the authors.

30. In this period, the general rule was that the more technical specialties with longer training tracks had 5-year contracts, whereas Marines in other MOSs were given their choice of 4- or 6-year enlistment contracts. Various incentives were offered for the longer contracts.

31. Usually, there are also a small number of 3-year and 6-year contracts.

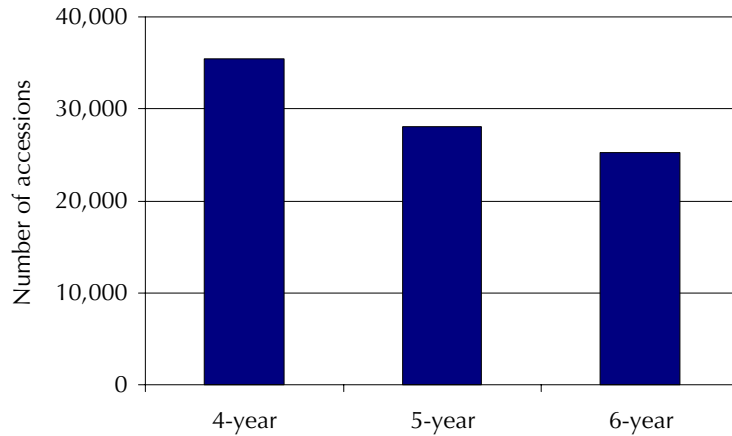
yearly accessions required drops to 28,028 if the initial contracts are for 5 years, and drops to 25,282 if the initial contracts are for 6 years. No service has first-term contracts longer than 6 years.³²

Table 4. Percentage of initial enlistment contracts by length

Accession FY	Length of initial contract				Number of accessions
	3 years	4 years	5 years	6 years	
1979	36%	63%	0%	0%	39,490
1980	35%	65%	0%	0%	40,488
1981	30%	70%	0%	0%	39,866
1982	28%	71%	0%	1%	36,839
1983	19%	79%	0%	1%	35,593
1984	7%	89%	0%	4%	38,517
1985	3%	82%	1%	14%	32,775
1986	1%	77%	2%	20%	33,715
1987	1%	72%	6%	21%	32,930
1988	0%	79%	9%	12%	34,598
1989	1%	76%	8%	16%	32,257
1990	1%	80%	8%	11%	32,338
1991	1%	81%	6%	12%	28,307
1992	0%	82%	6%	12%	31,536
1993	0%	87%	3%	10%	34,686
1994	0%	92%	5%	3%	31,993
1995	0%	92%	6%	2%	32,374
1996	0%	87%	11%	1%	32,859
1997	0%	85%	15%	0%	34,018
1998	0%	82%	18%	0%	33,678
1999	0%	82%	18%	0%	32,898
2000	0%	83%	17%	0%	31,608
2001	0%	81%	19%	0%	30,500
2002	0%	83%	17%	0%	31,813
2003	0%	84%	16%	0%	31,997
2004	0%	79%	21%	0%	29,936
2005	0%	75%	25%	0%	31,460

32. If the initial contract was longer than 6 years and if the Marine was not allowed to reenlist at the end of the initial contract, the Marine would be entitled to separation pay.

Figure 12. Yearly accessions required to support a first-term force of 110,000 Marines, by length of first-term enlistment contract

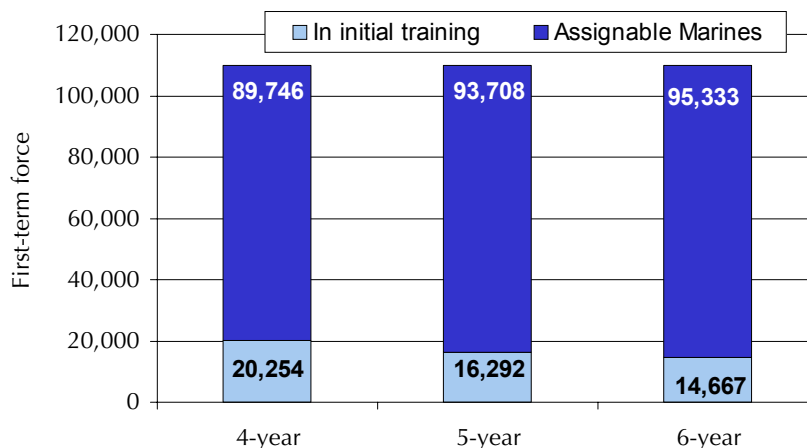


For a first-term force of a fixed size, the number of yearly accessions must equal the number of first-term EAS and non-EAS losses. Accessions are used to replace first-term losses. A first-term force of 110,000 Marines with 4-year enlistment contracts has 35,416 yearly accessions and 35,416 first-term EAS and non-EAS losses each year; with 6-year enlistment contracts, the accessions and the losses are 25,282.

Number of first-termers in training and number in the FMF

With longer first-term enlistment contracts, the proportion of the first-term force that is in initial training also falls (see figure 13). These differences are substantial. With 4-year initial enlistment contracts, 20,254 first-term Marines are in initial skill training and 89,746 are in the FMF. In short, 18 percent of the first-term force is in initial skill training at any point in time! With a 5-year initial enlistment, 15 percent (or 16,292) of the 110,000 first-term Marines are in initial skill training and 93,708 are in the FMF. With a 6-year initial enlistment, 13 percent (or 14,667) of the 110,000 first-term Marines are in initial skill training and 95,333 are in the FMF. *Moving from all 4-year first-term enlistment contracts to all 6-year first-term enlistment contracts increases the number of first-term Marines in the FMF by 5,587, which is roughly the number of enlisted Marines in three infantry regiments!*

Figure 13. Numbers of the first-term force in initial skill training and in the FMF, by length of first-term enlistment contract



Costs

Table 5 looks at the cost associated with “making Marines”—that is, the process that finds recruits, delivers them to bootcamp, trains them at bootcamp and in Marine Combat Training, and teaches them their skills in MOS schools. The aggregate street-to-fleet costs, by category, are for each of the three scenarios for a first-term force of 110,000 Marines. If all Marine Corps accessions were 6-year obligors, the street-to-fleet costs would be \$989 million. In contrast, if all Marine Corps accessions were 4-year obligors, the street-to-fleet costs would be \$1,372 million.

Table 5. Street-to-fleet costs: Three scenarios for a first-term force of 110,000 Marines

Type of costs	Cost (in millions of dollars) ^a by enlistment category		
	4-year	5-year	6-year
Recruiting ^b	382	303	273
Basic pay while in initial training ^c	330	265	239
Training costs	659	530	477
Total	1,372	1,098	989

a. We used FY05 pay tables.

b. We have taken OSD, Accession Policy’s estimates for the cost of recruiting Marines (FY05). We have not attempted to partition these into the cost of increasing recruits of different contract lengths.

c. We assume recruits enter as E-1s and are promoted to E-2 at 6 months of service.

Clearly, these street-to-fleet costs are not the whole picture. If the first-term force is all 6-year obligors, their average YOS and grade (and, thus, pay) are higher than if the first-term force is all 4-year obligors. However, these Marines will be more experienced and, thus, more capable.

Summary

For the Marine Corps, the largest benefit to longer first-term contracts has to be *increased manning in the FMF without an increase in endstrength*. To illustrate the impact of contract length on characteristics of the first-term force, our analysis focused on first-term forces composed entirely of single-length enlistment contracts. Although this is not realistic, consider a change that, while reasonably large, is probably feasible—namely, making 10 percent of first-term contracts for 6 years. Thus, the Marine Corps would:

- Change the current mix (75 percent 4-year and 25 percent 5-year) to
- 65 percent 4-year, 25 percent 5-year, and 10 percent 6-year first-term enlistment contracts.

For the same size first-term force of 110,000 Marines, such a change would *increase* the number of first-term Marines in the FMF by about 666 Marines and *decrease* the annual recruiting mission from 33,227 to 32,022 (a decrease of 1,205 recruits). The increase in the number of fully trained first-term Marines is about the number of first-term Marines in an infantry battalion.

This is a steady-state result; the Corps should see the full 666 increase in FMF Marines after 6 years, but then it will be perpetuated indefinitely if the Corps maintains the mix of first-term contract lengths.

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Appendix C: The Navy's Selective Training and Reenlistment (STAR) Program

The Navy has an interesting program that locks in Sailors at the end of the second year of service for what is an 8-year initial commitment. We think it is something the Marine Corps might consider for some of its 0311s.

STAR Program specifics

Sailors entering as "6YOs" have a 4-year enlistment to be followed by a 2-year extension.³³ For many years, the Navy has used the STAR Program to allow 6YO Nuclear Field Sailors to reenlist early and effectively turn their obligations into 8-year commitments.³⁴ Here are the conditions:

- Sailor must be recommended by his or her commanding officer; standards are higher than for a normal reenlistment

33. The Navy has never used 6-year initial enlistment contracts. All their 6YOs have an initial contract of 4 years and then an expected extension of 2 years. Probably the reason for this is that the Navy does not want to have unrated personnel (general detail, or GENDETs) beyond 4 years of service. If the Sailor should fail A-school and not get rated, he or she would not execute an extension and would leave at the end of the 4-year enlistment contract. The STAR Program is also used for Sailors in the Advanced Electronic Field, but these Sailors are allowed to reenlist only in the year their 4-year contract expires. The extension for these Sailors, however, is also abrogated and an effective 6-year obligation is turned into an 8-year obligation.

34. See MILPERSMAN 1160-100, *Selective Training and Reenlistment (STAR) Program*, 22 August 2002 (found at http://buperscd.technology.navy.mil/bup_updt/508/milpers/1160-100.htm). Also see <http://usmilitary/about.com> and search in the site for Navy STAR reenlistment program. Point of contact is LT Dave Simprini (703-693-0893).

- Sailor must have 21 months of service
- Sailors reenlist for 6 years, but only 4 years will count for selective reenlistment bonus (SRB)
 - Unexecuted part of initial 4-year contract does not count for SRB
 - Extension is canceled³⁵
- Possible promotion upon completion of schooling
- Payment of SRB does not affect payment of any initial enlistment bonuses.

If the Marine Corps incorporated a similar program, it would be able to select the most promising 0311 Marines at about 2 years of service, locking them in for the next 6 years of service.

Navy 6YO programs in general

We took the following description from an annotated briefing given by the Navy's enlisted community managers (ECMs) in June 2005:

Currently, individuals on a six-year commitment (four-year enlistment plus two-year extension) have the opportunity to reenlist at YOS four (same FY of EAS) for SRB. DoD FMR

35. From DoD FMR, 090202.A: "Additional obligated service is defined as any active service commitment beyond an existing contractual service agreement. Existing contractual service agreements include enlistments, extensions of enlistment, enlistment as extended, and reenlistments. Members, however, who entered into an extension agreement before May 10, 1974, and who cancel the extension before it becomes operative to reenlist immediately for a period of at least 2 years beyond the extension agreement, are allowed to use the period of the extension for SRB computation.

An extension of enlistment, which is cancelled by the Military Service concerned before becoming operative, is not considered as previously obligated service for SRB computation purposes. This applies only to cancellations initiated by the Military Service concerned and not to cancellations initiated by the member."

090202.A allows the use of the two-year extension for SRB computation purposes, provided the reenlistment occurs before the extension becomes operative and is for at least two years beyond the extension agreement. Additionally, DoD FMR 090502.A does not require a refund of the unearned portion of the EB provided the remaining term is included in the new reenlistment contract.

Do all 6-year Navy obligors end up with 6-year contracts?

The Navy brings in all 6-year obligors with a 4-year enlistment contract and 2-year extension. Some of these recruits do not successfully complete A-school and are sent to the fleet as non-rated (GENDET) Sailors. These GENDETs will complete their contracts at the end of 4 years and the extension will never be executed.³⁶ At the end of the 4 years, these Sailors will either reenlist or leave the Navy.³⁷

This arrangement (a 4-year contract with a 2-year extension) is something that the Marine Corps might want to consider for the new infantry battalion enlistment program. It is possible that it could be crafted so that those infantry battalion Marines who do not make Fireteam Leaders would effectively have only 4-year enlistment contracts (and the ability to leave or reenlist at the end of 4 years).

36. The GENDET could also attrite before completing the 4-year enlistment contract.

37. In general, if the Sailor has not been rated, the Sailor is denied reenlistment. Many of these Sailors, however, will have become rated through on-the-job training by the end of the 4 years.

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