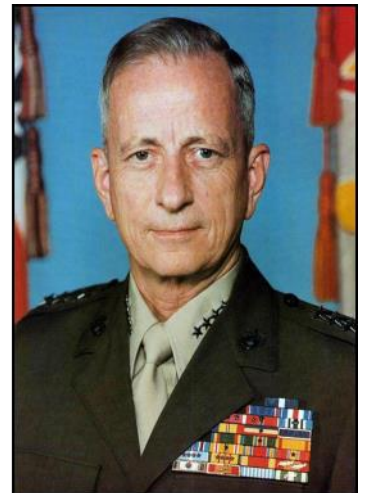




# Making Marines in the All-Volunteer Era:

## Recruiting, Core Values, and the Perpetuation of Our Ethos



November 2018



**November 2018**

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# Making Marines in the All-Volunteer Era

Recruiting, core values, and the perpetuation of our ethos

by Col William J. Bowers

The purpose of this three-part case study is to explore how the reforms of some of our most visionary Commandants—who intuitively understood that recruiting is about much more than just “recruiting,” but rather is the crafting of a strategic narrative of “who we are” to the American people—revolutionized our processes for “making Marines.” These giants of our Corps elevated the methods and quality of the recruiting force to such a degree that our Corps’ continued ability to attract, inspire, and transform young men and women of character into Marines has been, and remains, unmatched among our Nation’s Armed Services. *This can never be taken for granted!*

The all-volunteer force is entering a challenging new era: lower unemployment, the drawing down of 13 years of sustained combat operations, and a rising cohort of military-aged youth with no personal memory of 11 September 2001 are eroding our youths’ propensity to serve in uniform. These environmental factors are compounded by an alarmingly high percentage of military-aged youths (ages 16 to 21) who are not physically, mentally, or morally qualified for enlistment. In consideration of these realities, this case study is intended to serve as a tool for Marine leaders to educate and inspire their young Marines by showing them where we come from, deepen their appreciation of who we are, and better inform them of where we’re headed.

Although the Marine Corps met its manpower requirements *without* conscription in earlier times, its relatively small size, positive image, and simple entry standards allowed it to do so with

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Gen Wilson emphasized the need for top quality recruits. (Official USMC photo.)

only modest investments in its recruiting force. In contrast, the Marine Corps’ transition to an all-volunteer force (i.e., all-recruited) immediately following the Vietnam War very nearly resulted in disaster. In order to maintain the spiritually high standards the American people had come to expect of their Marines, the institution had to first learn how to recruit, and then to do it well.

Today the Marine Corps is comprised of nearly 70 percent first-term Marines. With more than two-thirds of our Marines turning over every 4 years and the operating environment plac-

ing ever-greater demands on the performance capabilities, intellect, fitness, responsiveness, and, most significantly, *character* of our young Marines, how our future Marines are recruited, enculturated, and ultimately transformed into Marines remains *fundamental* to our institutional health. There are powerful lessons to be learned here.

The Commandants discussed in this case study responded to severe strain upon the institution by *raising* enlistment standards, *toughening* boot camp, and *making* our Corps more elite. All were innovators. None steered by the wake. All had a vision for our Corps being comprised of “tough, smart, elite warriors”—both male and female—and had the leadership and moral courage to execute that vision. By doing so, they not only maintained the trust and respect of the American people, they also restored the Marines’ sense of themselves as truly “a breed apart.” *This is the real expectation the American people have for their Marines, and what has always set us apart as an institution.* This case study explores this powerful theme.

UB+MC



To read and or download the case study go to <https://www.mca-marines.org/gazette/AV-era>.

## **Shaping the Marine Corps in the All-Volunteer Era: Recruiting, Core Values, and the Perpetuation of Our Ethos**

This case study explores how the Marine Corps has sustained and perpetuated its ethos and values in the all-volunteer era. It was developed using a wide range of sources, and these are included in the detailed endnotes if further study is desired. The Marine Corps' transition to an all-volunteer force was not a smooth one. In order to maintain the mystically high standards the American people had come to expect of their Marines, the institution had to learn how to successfully recruit. In a Marine Corps comprised of nearly 70% first-term Marines, how future Marines are recruited, enculturated, and ultimately transformed into Marines is of the utmost importance to our institutional health. *The current operating environment has only amplified and magnified this importance.* The purpose of this case study is to explore how the reforms of our visionary Commandants -- who intuitively understood that recruiting was about much more than just "recruiting" but rather the crafting of a strategic narrative of "who we are" to the American people -- revolutionized our processes of "Making Marines" by professionalizing the recruiting force to give us the outstanding Marine Corps we have today.

There are powerful lessons to be learned as the Marine Corps enters another transitional era. The Commandants discussed here responded to strain upon the institution by *raising* enlistment standards, *toughening* boot camp, and *making* our Corps more elite for our Marines. By doing so, they not only maintained the trust and respect of the American people in their Marine Corps, but also restored the Marines' sense of themselves as "tough, smart, elite Warriors." *This is the real standard the American people have for their Marines, and what sets us apart as an institution.* It is hoped that all Marines will come to understand -- especially as we transition from a decade of sustained combat operations -- that the Marine Corps in the all-volunteer era has always been about more than "war-fighting." We have certainly been about that, and have done it exceptionally well, but our story also includes crisis response for our Nation, and an investment in the youth who are the future of our country. By better understanding "Who We Are" and "Who the American People Expect Us to Be," we can more positively shape "Who We Will Become."

## Making Marines: Part I

Recruiting, core values, and the perpetuation of our ethos, January 1973 – May 2014

We are blessed today to serve in a Marine Corps comprised of mentally, physically, morally, and ethically fit young Marines who have volunteered to serve their country in the world's premiere crisis response force – the United States Marine Corps. These remarkable young men and women have bestowed upon their Corps a bank account of trust, respect, admiration, and goodwill on behalf of the American people that is the envy of nearly every other public institution in the world. While the Army will always celebrate their great captains; the Navy will always pay homage to their ships; and the Air Force will always be worshipping at the altar of ever newer and faster airplanes and high-technology weapons systems; the Marine Corps will always be about our *Marines*. As former Commandant Gen Charles C. Krulak once wrote, “The individual Marine IS the Corps.”

This mystical ethos of the Marine Corps was captured most eloquently by Gen Krulak's father, LtGen Victor H. “Brute” Krulak, in 1957 in response to a written question from then-Commandant, Gen Randolph McCall Pate, on why America needed a Marine Corps. In response, the “Brute” wrote:

We exist today – we flourish today – not because of what *we* know we are, or what *we* know we can do, but because of what the grassroots of our country *believes* we are and *believes* we can do....Essentially, as a result of the unfailing conduct of our Corps over the years, they believe three things about the Marines. First, they believe that when trouble comes to our country there will be Marines – somewhere – who, through hard work, have made and kept themselves ready to do something useful about it, and do it *at once*....Second, they believe that when Marines go to war they invariably turn in a performance that is dramatically and decisively successful – not most of the time, but always. Their faith and their convictions in this regard are almost mystical....The third thing they believe about the Marines is that our Corps is downright good for the manhood of our country; that the Marines are masters of a form of unfailing alchemy which converts un-oriented youths into proud, self-reliant stable citizens – citizens into whose hands the nation's affairs may safely be entrusted....I believe the burden of all of this can be summarized by saying that, while the functions which we discharge must always be done by someone, and while an organization such as ours is the correct one to do it, still, in terms of cold mechanical logic, the United States does not *need* a Marine Corps. However, for good reasons which completely transcend cold logic, the United States *wants* a Marine Corps....And, likewise, should the people ever lose that conviction – as a result of our failure to meet their high – almost spiritual – standards, the Marine Corps will then quickly disappear.<sup>1</sup>

Since the “Brute” wrote these powerful words in 1957, America's Marines have continued to reinforce and expand upon those three mystical beliefs that the American people have in their Marine Corps. But how has the Marine Corps done this through periods of social change wrought by wars, political turbulence, the advent of increasingly sophisticated technology, drastically shifting generational norms, and profound changes in what is acceptable

in youth culture? More specifically, throughout these periods of social turbulence (normally those immediately following wars, but not always) when trusted institutions have traditionally come under attack from both internal and external sources, how has the Marine Corps adapted to not only weather these social, political, and budgetary storms, but to emerge from them an even tougher, smarter, stronger, and more elite institution? In short, how has the Marine Corps managed to “flourish” through this welter of change – especially in the latter part of the 20th century and early 21st century -- by consistently *raising* its standards when so many of our institutions have compromised standards in order to make themselves more attractive to our society?

Probe deeper into the ethos and values of our Corps and we will find that the Marine Corps came under very serious institutional strain in the early stages of the country’s transition to an All-Volunteer Force (AVF) in 1973, and then again during the turbulence of the post-Cold War era in the 1990s. In many ways, our Corps is under severe strain again today, and will be so again in the future. The reforms put in place from 1975-1981 amounted to a first revolution in Marine Corps recruiting which subsequently engendered dramatic reforms in recruit training and manpower management. Yet while these reforms gave the country the Marines and Marine Corps which performed so brilliantly during Operation Desert Storm in 1991, the Marines again faced serious threats – again from both internal and external sources -- in the early 1990s, again responding with a second revolution in Marine Corps recruiting, recruit training, and manpower which gave us the Marines who have performed so brilliantly in the wars in Iraq and Afghanistan.

How did the Marine Corps sustain its ethos and values through these periods? More importantly, as our Corps enters another transitional period in our Nation’s history, what lessons can be drawn from the first two revolutions in Marine Corps recruiting, recruit training, and manpower, -- in short, “Making Marines” -- and what are the implications of these for the future? The Marine Corps Commandants who led the institution through these periods of profound change had a vision of our Corps for the future: theirs was a Corps comprised of “tough, smart, elite warriors” -- both male and female. They had the moral courage and leadership to sell that vision to ourselves, our civilian leadership, and the American people through their elected representatives in Congress. All were innovators. None steered by the wake. Their keels ran deep. They swam against the tide of popular opinion and, sometimes, even policy. As you delve into this case, it is worth considering the following quote from Krulak’s *First to Fight* within the context of the Nation’s transition to an AVF:

Hardly storied as studious or contemplative, the Marines have nevertheless thought up or caused to come into being some of the most exciting – and useful – developments in modern operational concepts, weaponry, and equipment.<sup>2</sup>

We cannot ever forget that the United States Marine Corps is a still developing story; ours is the ever continuing story of the challenges faced and triumphs won by the *individual Marine*, and our institution has grown ever stronger by the steady pressure of constant change. We are truly a “breed apart.” This case explores this powerful theme.

## **Biographical Information**

**Milton Friedman – Economist, University of Chicago.** In the 1970s, Milton Friedman was the best known economist in the United States. He had been a professor at the University of Chicago since 1948, and was an avid proponent of free-market economics. He was an early proponent of creating an AVF in America and argued forcefully and persuasively that the draft was “inconsistent with a free society.” He also wrote several books, papers and articles making coherent economic and intellectual arguments in favor of an all-volunteer force, ultimately earning him the moniker as the “intellectual father of the all-volunteer force.” He was a member of the Gates Commission and one of its intellectual leaders, which ultimately recommended to President Richard M. Nixon that the draft be ended. He won the Nobel Prize for Economic Sciences in 1976 and later advised President Ronald R. Reagan on the benefit of free market economics and minimal government intervention in national economies. He once stated that he considered his contribution to ending the draft and creating the all-volunteer force his greatest accomplishment.

**Martin Anderson, Campaign Advisor, Aide to President Nixon.** Anderson attended Dartmouth University as an Army ROTC student and upon graduation, served as a second lieutenant in 1958-59. A budding economist, Anderson was intrigued by discussions about the economic impact of the draft that were emanating from the University of Chicago Economics Department, where Milton Friedman was the most prominent professor. In 1963, Anderson was serving as an associate professor at Columbia University in New York City when he got into a political discussion at a dinner party with a young man who then worked for the New York Law Firm of “Mudge, Stern, Baldwin, & Todd.” Former Vice President Richard Nixon had been a partner at this law firm since 1963 following his losses in the 1960 presidential and 1962 California gubernatorial elections, and this young man suggested to Anderson that he “work for this guy Nixon” because “You think like he does.”<sup>3</sup> Anderson had written an article titled “An Analysis of the Factors Involved in Moving to an All-Volunteer Armed Force” that grabbed Nixon’s attention, who instantly saw that proposing an end to the draft could make a substantial impact on gaining young peoples’ votes in another presidential run. Upon Nixon’s election in 1968, Anderson took a job in the White House as a staffer to the new President. With Anderson’s prodding, 9 days into his Presidency Nixon sent a letter to his new Secretary of Defense, Melvin Laird, beginning, “It is my firm conviction that we must establish an all-volunteer armed force after the expenditures for Vietnam are substantially reduced.”<sup>4</sup>

**Richard M. Nixon, POTUS, 1969-1974.** Nixon was born in 1913 in Whittier, CA, to parents who owned and operated a grocery store. He had four brothers (one older, three younger) and grew up very poor. Nixon did well in school at an early age and, although having an opportunity to attend Harvard University due to his academic excellence, stayed closer to home so he could help run the family grocery business and care for his older brother, Harold, who had tuberculosis. Nixon worked very hard as a young man and subsequently won a scholarship to Duke Law School, where he was elected President of the Duke Bar Association. He and his wife moved to Washington, DC, in 1941 and after Pearl Harbor, Nixon enrolled in the U.S. Navy’s Officer Candidates School, earning his commission in 1942. He served in the Southwest Pacific Theater and although seeing no combat, served well and earned promotion to lieutenant commander before resigning his commission in 1946. He and his wife then returned to Whittier, where he won a seat in the U.S. Congress. He then won a seat to the U.S. Senate in

1950 and came to national attention for his strong anti-Communist views. Eisenhower selected him to be his running mate in 1952, but Nixon soon ran into conflict of interest allegations for a slush fund that had been maintained by his backers. Nixon's "Checkers" speech, named for a little dog presented as a gift to his 6-year-old daughter, silenced his critics and, with Nixon firmly on the ticket, the Eisenhower-Nixon team won election in 1952.

After serving for 8 years as Eisenhower's vice president, Nixon became the Republican nominee for president in 1960 and lost a hard-fought election to John F. Kennedy. Undeterred, Nixon ran for governor of California in 1962 and again lost, this time by a large margin, causing him to proclaim afterwards, "You won't have Nixon to kick around anymore because, gentlemen, this is my last press conference." After Senator Barry Goldwater's landslide loss to President Lyndon Johnson in 1964, however, Nixon decided to give the presidency one more run. On 16 November 1967, he gave a speech at the University of Wisconsin in which he said, "What is needed is not a broad based draft, but a professional military corps. The nation must move toward a volunteer army by compensating those who go into the military on a basis comparable to those in civilian careers."<sup>5</sup> With the Democratic Party badly split over the Vietnam War, Nixon won election to the presidency in 1968 and within his first month in office, under advice from Anderson, made his campaign promise of transitioning to an AVF a top priority of his Administration.

**Gen Robert E. Cushman, Commandant of the Marine Corps 1972-1975.** Cushman was born in Minnesota and received an appointment to the United States Naval Academy while he still had a semester to go at St Paul's Central High School. He matriculated at Annapolis at the age of 16 and ended up playing varsity lacrosse and graduating near the top of his class 4 years later. After graduation from the The Basic School, Cushman served with the 4th Marines in China and at the Marine Barracks in New York and Portsmouth, VA. In 1941 he became commander of the ship's detachment aboard the USS *Pennsylvania* (BB-38) and was at Pearl Harbor when the Japanese attacked. With one third of his detachment wounded or killed, Cushman returned to Camp Pendleton and soon became the commander of 2d Battalion, 9th Marines. After jungle training on Guadalcanal, Cushman's battalion fought in the Bougainville and Guam campaigns, and he won a Navy Cross on Guam for his combat heroism. After Guam, Cushman led his battalion as it landed on Iwo Jima on 23 February 1945. His leadership proved critical in taking a key piece of terrain that came to be known as "Cushman's Pocket." After the war, Cushman attended top-level school at Quantico and stayed on as an instructor. During this time, he wrote several articles for the *Marine Corps Gazette* and *Proceedings*. In 1949, he joined the staff of the newly created Central Intelligence Agency. In 1951, he served on the staff of the Eastern Atlantic and Mediterranean fleet in Naples and completed another tour at Norfolk with the Armed Forces Staff College. In 1956, Cushman took command of the 2d Marines at Camp Lejeune.

Cushman was then assigned by the Commandant to be an aide to Vice President Richard Nixon in 1957, where he remained until 1961. Cushman took command of the 3d Marine Division in 1962 and served there for 2 years before again returning to HQMC. In 1967, he became the Deputy Commander and then Commander of the III Marine Amphibious Force in Vietnam, commanding the largest operational formation ever by a Marine up to that time. In 1969, the newly elected President Nixon appointed Cushman to be the Deputy Director of the



CIA, where Cushman had daily access to national security decision-making at the highest levels. At the time Nixon nominated Cushman to become the 25th Commandant of the Marine Corps, the general had held several important combat and headquarters commands and key positions within the national security establishment. His CIA and joint tours, however, had not afforded him extensive experience within the Marine Corps' Supporting Establishment or the entry-level training pipeline.<sup>6</sup>

**Gen Louis H. Wilson, Commandant of the Marine Corps, 1975-1979.** Wilson was a tall, lean southerner who was born in Brandon, MS, in February 1920. His father died when he was 5-years-old and the young Wilson developed a deep and lifelong sense of responsibility for his mother and sister. He excelled as an athlete in high school, playing football and running track. Upon graduation, he attended Millsaps College in Jackson, MS, and worked during the summers laying asphalt on Mississippi's many dirt roads. Upon graduation from Millsaps in May 1941, Wilson enlisted in the Marine Corps Reserves and earned his commission as a second lieutenant in November 1941 just prior to the Japanese attack on Pearl Harbor. While working on the roads one summer, Wilson had met a local high school girl named Jane Clark, who would "wait" for the young Marine officer as he went off to fight in the Pacific. With combat operations subsequently underway, Wilson joined up with the 9<sup>th</sup> Marine Regiment and received training on Guadalcanal, and then saw combat on Bougainville and during the Marianas campaign on Guam. During the Marines' attack on Guam on 25-26 July 1944, Wilson was serving as commander of Fox Company, 2<sup>d</sup> Battalion, 9<sup>th</sup> Marines when his Marines repelled and destroyed a numerically superior Japanese force that was trying to take the key high grounds of Chonito Ridge and Fonte Ridge. For his courageous leadership under fire over a 2-day period that often involved fierce hand-to-hand fighting, Wilson's battalion commander, LtCol Robert E. Cushman, recommended him for the Medal of Honor (Cushman would later earn the Navy Cross on Guam). Wilson was promoted to major shortly before receiving this award from President Harry S. Truman in 1945 while serving at Marine Barracks, Washington, DC.



President Truman awards Maj Wilson the Medal of Honor

As a major, Wilson served as the assistant dean at the Marine Corps Institute; as an aide to the Commanding General of Fleet Marine Force Pacific; and then as the Officer in Charge of the 1<sup>st</sup> Marine Corps District's Recruiting Station in New York City. He was promoted to lieutenant colonel in 1951 and returned to Quantico, serving as Commander of the Training Battalion at The Basic School (currently the Officer Candidates School) and Camp Barrett, and then as Executive Officer of The Basic School. He returned to the fleet in 1954 and served with the 1<sup>st</sup> Marine Division in Korea before taking command of 2<sup>d</sup> Battalion, 5<sup>th</sup> Marines. Following his promotion to colonel, Wilson returned to HQMC and subsequently took command of The Basic School from 1963-1965. After a 1-year tour in Vietnam from 1965-1966, Wilson took command of the 6<sup>th</sup> Marine Corps District in Atlanta, GA, where he served until being promoted to brigadier general in January 1967. As a general officer, Wilson served as the Commandant's Legislative Assistant, where he worked closely with members of the U.S. Congress; as commander of the III Marine Amphibious Force on Okinawa, Japan; as the Deputy Director of the Marine Corps Education and Training Command at Quantico, and then as the Commanding General of Fleet Marine Force, Pacific.

At the time President Gerald R. Ford nominated Wilson to become the 26<sup>th</sup> Commandant of the Marine Corps in 1975, Wilson had commanded at every level from platoon to Fleet Marine Force, and had excelled at every assignment in both war and peace. He had also shown resilience by remaining in uniform after losing one of his lungs to cancer. And yet while his combat credentials were absolutely unassailable, evident to all by the small light blue ribbon with five white stars that he wore upon his Service "Charlies," Wilson's commands as a major, lieutenant colonel, and colonel had given him hands-on experience in virtually every level of the entry-level pipeline for Marines and Marine officers. In fact, upon closer examination of his career, the only significant command position in the entry-level pipeline that Wilson had not held was that of the Recruit Training Regimental Commander or Commander of one of the two MCRDs. When he became Commandant in July 1975 and was faced with the need for serious reforms to the Marine Corps' manpower system, Wilson knew just where to turn for help: to his old and dear friend, Bob Barrow.

**LtGen Robert H. Barrow, Manpower Chief, 1975-1976.** Like Wilson, Barrow was a tall, lean, courtly southerner who came from Baton Rouge, LA. He was born in 1922 and grew up poor; his family's home had no electricity so the young Barrow would satisfy his passion for learning by reading with a kerosene lamp. He attended LSU (which offered in-state residents attendance at no charge) from 1939 to 1942, working as a waiter and school janitor part-time while serving in the school's Corps of Cadets. The 19-year-old Barrow saw a Marine officer recruiter on campus one day during his junior year and, eager to help out in the war effort, joined the Platoon Leader's Class Program. The next semester, however, Barrow's itch for action in the war caused him to forego his chance at earning a commission and to enlist in the Corps (how would you like to have been the OSO to actually *lose* Candidate Robert Barrow?). Barrow shipped off to MCRD San Diego and graduated from boot camp in 1942. Barrow didn't seem to mind missing out on the chance to become an officer: years later when he was Commandant, Barrow would reflect back that, "The happiest experience of my life was getting on the train to go to San Diego for boot training....I'll tell you, I place enormous stress on the value of it [recruit training] today."<sup>7</sup>

Barrow's performance as a recruit gained him positive attention and he was subsequently asked to stay on as a drill instructor to help train other recruits, eventually earning his shot at Officer Candidates School in February 1943. He earned his commission in May 1943 and was deployed to China, where he fought with Americans who were then aiding Chinese guerrillas behind Japanese lines. He was awarded a Bronze Star with a Combat "V" for valor for his stellar performance in this tough assignment. After the war, Barrow served on shore patrol duty in Shanghai, China, and in 1946 was assigned to the II Marine Amphibious Force where he became an aide to MajGen Keller Rockey. After attending Amphibious Warfare School in 1949, Barrow transferred to Camp Pendleton, where he assumed command of Able Company in 1<sup>st</sup> Battalion, 1<sup>st</sup> Marine Regiment under the legendary Col Lewis "Chesty" Puller. Barrow led his Marines over the wall in the Marines' attack on Inchon, into the streets of Seoul for the recapture of the South Korean Capitol, and into the freezing mountain passes of North Korea for the Chosin Reservoir Campaign.

It was during the 1<sup>st</sup> Marine Division's withdrawal from the Chosin Reservoir that Capt Barrow would become known throughout the Marine Corps for his combat leadership. In early December 1950, the Division had concentrated at Hagaru-ri and the Division Commander, MajGen O.P. Smith, was determined to bring all of his equipment and vehicles out with his people. Smith thought this was of incalculable value in his Marines' believing that they could actually win a triumph from this withdrawal. Smith gave his Marines 2 days of rest and began the breakout from Hagaru-ri to Koto-ri on 6 December. The fight south took the Division 39 hours to complete, and by the evening of 8 December there were 14,000 Marines and soldiers (about 2,300 soldiers accompanied the 1<sup>st</sup> Marine Division, and fought very bravely throughout) safely within the perimeter at Koto-ri. The Division had another 11 miles to cover to get to Chinhung-ni and safety, to include repairing a blown bridge at Funchilin Pass that could prevent the entire division from bringing its vehicles and equipment out, and Funchilin Pass was dominated by the central terrain feature of Hill 1081, which was held by the Chinese.

The former LSU student-waiter-janitor who had grown up without electricity in his home received the mission for his Able Company to attack and seize Hill 1081 and then *hold it at all costs* so the Division's engineers could repair and emplace the bridge enabling the Marines to successfully cross with all of their equipment. For 2 perilous days on 9-10 December 1950 in the freezing mountain passes, *it all depended on Barrow's Marines seizing and holding Hill 1081 to protect Funchilin Pass*. In the most difficult conditions imaginable, with temperatures dropping to -25 degrees and the Chinese throwing everything they had against his Marines, Barrow's leadership by example inspired his Marines to seize Hill 1081 and then to hold it for 2 days against withering enemy attacks. Against incredible odds, Barrow's Marines held; the Division's engineers repaired the bridge; and the 1<sup>st</sup> Marine Division successfully completed its withdrawal and achieved what would become an everlasting triumph in the annals of Marine Corps history. Barrow was awarded the Navy Cross.



Capt Robert Barrow, commander of Able Company, 1/1, in Korea 1950.

Following his tour in the Korean War, Barrow served at HQMC, from where he was detailed to perform a “Top Secret” mission in 1952 to Taiwan. Barrow would later propose to his future wife on a long distance telephone call from Taipei. Following a tour at Camp Lejeune with 2<sup>d</sup> Battalion, 6<sup>th</sup> Marine Regiment and promotion to major, Barrow became the Marine Officer Instructor at Tulane University from 1957-1960. He was promoted to lieutenant colonel in 1960 and after stateside and overseas tours, attended the National War College in 1968. After graduating in 1969, he assumed command of the 9<sup>th</sup> Marine Regiment (Wilson’s old regiment) and deployed to Vietnam upon the request of the 3d Marine Division Commander, MajGen Ray Davis – another hero from the Chosin campaign. As the Regimental Commander during Operation Dewey Canyon under Davis, Barrow’s command excelled, ultimately earning him praise from "General William Westmoreland's former Chief of Staff and the Deputy Commanding General for III MAF, Army General Richard G. Stilwell, as the Vietnam War's "finest regimental commander."<sup>8</sup>

Barrow was promoted to brigadier general in 1969. As a general officer, Barrow served for 3 years as the Commander of Marine Corps Base Camp Butler on Okinawa, Japan, and, upon promotion to major general, became the Commander of the Marine Corps Recruit Depot at Parris Island, SC. Barrow and his family loved Parris Island, and it was said that this was where his heart really lay. The Barrows were very happy there, but in the summer of 1975 Barrow’s old friend and the new Marine Corps Commandant, Gen Lou Wilson, called and asked for help.

Wilson needed Barrow to become the Deputy Chief of Staff for Manpower to help reform the Corps' processes for making Marines. Wilson and Barrow had been through a lot over their long and distinguished careers, yet the challenges they would face to shape the future of the Marine Corps in the new all-volunteer era would test their leadership in deep and profound ways.

### **The Context: 5 November 1968 – 27 January 1973**

President Nixon, advised by Anderson, had seen the political advantages that would accrue to him for ending the draft, and upon his election on 5 November 1968 intended to make good on his campaign promise. Therefore, while Nixon's new Secretary of Defense, Melvin Laird, wanted to slow Nixon down so that he could concentrate on waging the Vietnam War – not an insignificant task – Nixon told him to “continue, at full speed, with the efforts [to transition to an all-volunteer force] you currently have underway.”<sup>9</sup> Nixon desired to appoint an independent commission that would develop a comprehensive plan to move the Armed Forces quickly toward an all-volunteer force, and on 27 March 1969 announced that former Secretary of Defense, Thomas Gates, Jr., would chair it. Gates was not a fan of the all-volunteer force, telling Nixon that he was “opposed to the whole idea of a volunteer force,” whereby Nixon responded, “that's exactly why I want you as the Chairman... If you change your mind and think we should end the draft, then I'll know it is a good idea.”<sup>10</sup>

Gates' Commission had 15 members and met for the first time on 15 May 1969. These members included two retired generals who served as NATO Supreme Allied Commanders; several educators and industry leaders, to include an African-American woman professor and former member of the Defense Advisory Committee on Women in the Services (DACOWITS); a 26-year-old law student from Georgetown University (to speak for young people); and three prominent economists: Milton Friedman, Alan Greenspan, and W. Allen Walls.<sup>11</sup> As the Commission's deliberations got underway, the arguments of the economists – led by Milton Friedman – seemed to gain the most traction with the other members. The economists' arguments, refined and honed through years of academic research and written papers, basically amounted to opportunity costs and an unfair “hidden tax” framework that was being placed on those who served:

The commission accepted the estimate of the lost wages that draftees could have earned in their best civilian alternatives – estimated to \$2 billion – as their measure of the conscription tax. They added to that the income foregone by volunteers who did not get the benefit of the wage rate that would be required to attract the marginal volunteer. This was estimated at an additional \$1.5 billion.<sup>12</sup>

The Commissioners thus wrote:

This concept of the tax does not include the income loss suffered by true volunteers whose military compensation is held below the level which would be required to maintain an all-volunteer force, nor does it include the amount by which all-volunteer pay rates would exceed the pay levels at which some current draftees and draft-induced enlistees would enter on a voluntary basis.<sup>13</sup>

In sum, the three economists intellectually drove the Commission to adopt the philosophy that individual liberty was “the most essential American value, and the free market is the best means to preserve it.”<sup>14</sup>

As the Gates Commission gradually moved to the conclusion that transition to an all-volunteer force was in the best interests of the country, their attention started to turn to the “how,” which inevitably focused on recruiting. On 21 February 1970, the Gates Commission out-briefed President Nixon in the White House Cabinet Room and unanimously recommended that the country transition to an all-volunteer force. Nixon adopted the Gates Commission’s recommendation and decided to press ahead, knowing full well that he would have to secure Congressional support to fund the transition as part of the budgetary process. On 28 January 1971, President Nixon informed Congress that he intended to “move toward an all-volunteer force” and asked for \$1.5 billion in the fiscal year 1972 budget to make “military service more attractive to present and potential members” and another \$1.5 billion to “expanding our efforts in the areas of recruiting, medical scholarships, ROTC [Reserve Officer Training Corps], improvement of housing, and other programs to enhance the quality of military life.”<sup>15</sup>

As President Nixon prepared the country for transition to an all-volunteer force by bringing members of the U.S. Congress and in the Department of Defense aboard, the uniformed leaders of the Services thought that the time could not have been worse for such a transition. After all, the war in Vietnam was going badly; a large number of Americans had lost faith in public institutions; respect for the military was at an all-time low and the Service with the largest number of new recruits to bring in each year – the U.S. Army – had the worst reputation of all; the Services were infected with drug and racial problems that showed no signs of abating; and then there were the lingering effects of former Secretary of Defense Robert M. McNamara’s “Project 100,000.”



The Gates Commission recommends to President Nixon transition to an all-volunteer force in the White House Cabinet Room, 21 February 1970.

Project 100,000 was implemented within the context of President Lyndon Johnson's Great Society programs and was intended to make life better for disadvantaged youth by enabling them to prepare for productive civilian lives within the armed forces. Accordingly, it lowered the entrance requirement for test scores and education levels to allow 100,000 individuals per year to enter the Armed Forces who would not have otherwise been qualified. Proponents of the program argued that these relaxed standards were still higher than they had been during the Korean War. Opponents thought it was an unmitigated disaster. Under this program beginning in 1966, each Service had to accept a quota of "Category IV" applicants (those below the 31 percent mental group): the Army 25 percent; the Navy 15 percent; the Air Force 15 percent; and the Marine Corps 18 percent.<sup>16</sup> These Category IV applicants were called "New Standards Men" and populated all of the Services. Project 100,000 was never popular among the Services and with the coming transition to an all-volunteer force, Congress essentially killed the program in 1971. But many of the approximately 500,000 New Standards Men who had been admitted to the Armed Services from 1966-1971 remained in uniform, and brought no shortage of problems to their leaders.

Secretary Laird desired to delay the transition for 2 years to prepare the force and better shape the context, and asked for and received an increase in pay for enlisted service-members and an increase in funding for advertising to pave the path ahead. There were still some unanswered questions however. First, the Chairman of the House Armed Services Committee, Edward Hebert (D-LA), objected to the use of tax payer's funds for advertising, thinking it would be wrong to pay for something that the government already owned (the radio and television airwaves). Second, one of the most glaring omissions of the Gates Commission's report was the failure to adequately address the future role of women in the all-volunteer military. In 1972, Congress had authorized women to attend the service academies, and the services subsequently decided to set goals for their accession of women when the AVF began. The Army and Navy decided to double the number they would enlist; the Air Force decided to triple its number; and the Marine Corps – citing a larger ratio of front line combat jobs -- decided upon a milder 20 percent increase. On 27 January 1973, Secretary Laird sent his FY 74 budget to Congress and declared, "*Use of the draft has ended.*"<sup>17</sup>

### **AVF Implementation: the Marine Corps Stumbles, January 1973 - June 1975**

While the Services were cautiously optimistic as they prepared for implementing the AVF in early 1973, it soon became apparent to all that they had badly under-estimated the challenges before them. The Army ran into the most serious trouble almost immediately, missing their April 1973 mission of 9,000 recruits by 51 percent, and then again missing badly in May. The Army's manning of only 80 percent of their recruiter force prior to implementation of the AVF and an internal Army audit conducted in the spring revealing rampant recruiter malpractice caused some of the senior OSD civilian leadership to question whether the Army's leadership was really committed to making the AVF force work. Roger Kelley, the Under-Secretary of Defense for Manpower and Reserve Affairs at the time, later accused the Army of outright "sabotage."<sup>18</sup> Milton Friedman would go even further, charging the Army's leadership in a *Newsweek* op-ed of "either gross incompetence or deliberate sabotage," noting that out of 129 officers assigned to the Army's recruiting command, who were either eligible for promotion

or school selection, not one was either promoted to senior levels or assigned to a Service school.<sup>19</sup> What had been a priority for the President and Secretary of Defense -- making the AVF work by fielding a first rate recruiting force -- appeared to have become a dumping ground for the Army. On 6 July 1973, the Army was forced to lower its enlistment standards from a 70 percent:30 percent desired ratio of high school graduates to non-high school graduates to an easier to achieve 50 percent:50 percent mix.

The Marine Corps, too, had its own share of problems in this transition. Gen Robert E. Cushman had ascended to become Commandant on 1 January 1972 and took the steps he thought necessary to prepare the Marine Corps for the “no-draft environment.” Upon taking command, Cushman published a message to all Marines stating:

We will continue  
To take care of our own  
To be squared away  
To perform outstandingly as our country’s number-one combat ready fighting force.<sup>20</sup>

Some Marines were concerned at the lack of detailed guidance in this message and were looking for more substantive direction from their Commandant for the challenges ahead. As noted above, although Cushman had excelled in key combat command and staff assignments, his time with Nixon and at the CIA had not afforded him an opportunity to serve in the Marine Corps’ entry-level pipeline.

When asked at his first Pentagon press conference what he saw as his biggest challenge, Cushman responded, “I think it will be maintaining the quality of the personnel who are enlisted in a no-draft environment. *We’ll get the numbers, but getting the quality is going to mean very rigorous recruiting* [emphasis added].” Cushman’s statement thus seemed to imply that “the numbers” took precedence over “the quality,” and events would bear out that this was, in fact, Cushman’s emphasis. Cushman did approve the assignment of 12 hand-picked colonels to the six recruiting districts – six directors and six deputy directors – three of whom would ultimately make general. One of these would become the Director of Personnel Procurement, which was the first time a general had held this post.<sup>21</sup> Cushman also hired J. Walter Thompson (JWT), which had developed advertising for the Marine Corps since WW II as a “prestige” account, as the Marine Corps’ official advertising agency.<sup>22</sup> But while the JWT advertisers started to provide some alarming data to officials at Headquarters Marine Corps, such as only 50 percent of draft-age males wanted anything to do with military Service in *any* branch and that a sparse 7 percent responded favorably to the Marine Corps’ “We don’t promise you a rose garden” marketing pitch, Cushman asserted that “92% of our enlistees are true volunteers, whose visits to their Marine recruiters were not prompted by unfortunate Selective Service lottery numbers.”<sup>23</sup>

Cushman’s assertion that fewer than 10 percent of his Marines were motivated to join the Corps because of an “unlucky” draft card would quickly evaporate in the summer of 1973 as the pool of recruits dried up. Within 6 months of implementation of the AVF, the Marine Corps was facing a full blown recruiting crisis. The Marine Corps just barely made its mission in fiscal year 73 by enlisting less than 50 percent high school graduates with 14 percent Category IV applicants. Like the Army, there was evidence that the Marine Corps’ commitment to making



the AVF succeed was not what it could have been. In an article in the *Marine Corps Gazette* in October 1973 (the start of fiscal year 74), Maj Harold Owens penned an article questioning “the concept or policy of an all-volunteer armed force” and called “on readers to do the same,” even writing that “some senior officers have voiced private, off the record conversations to journalists” expressing this.<sup>24</sup> To make matters worse, for fiscal year 74 the U.S. Congress had passed in its Defense Appropriations Bill a requirement – Section 718 – stipulating that the Armed Forces had to enlist at least 55 percent high school graduates in the future.<sup>25</sup> With this standard in place, during the spring of 1974 the Marine Corps was barely making 45 percent of its assigned mission, and with low quality at that.

Section 718 led to the unfortunate circumstance of Gen Cushman trudging up to the Hill to seek relief from Congress from the requirement of enlisting 55 percent high school graduates; Cushman told the members that he did not believe in the value of a high school diploma as a sole indicator of success as a Marine. The spectacle of a Marine Corps Commandant asking Congress to *lower* enlistment standards was not a happy start to Marine Corps recruiting. The results were predictably disastrous. Congress denied the request and the Marine Corps continued to miss. The Marine Corps ultimately missed its fiscal year 74 mission by more than 9,000 recruits, despite trolling the bottom of the barrel for quality.<sup>26</sup> While Congress would eventually grant Cushman’s request for some relief from Section 718, allowing Marine recruiters to enlist more non-high school graduates, the forebodings of scores of low-quality, non-high school graduate Marines filling the Corps’ ranks were ominous.

This is probably a good place to discuss the “quality” issues that afflicted the Marine Corps of the early 1970s and during the transition to the AVF. While the Marine Corps was pretty much out of Vietnam by the time of the transition to the AVF, the legacy of that conflict still hung like a pall over the institution, with many Project 100,000 Marines still in the ranks. On top of that, Cushman’s emphasis on getting “the numbers” had recruiters bringing in thousands of non-high school graduates each month. First, by Gen Cushman’s own statement at the 1973 General Officer Symposium, the Marine Corps had the highest absentee/deserter rate of all the Services.<sup>27</sup> This was a source of embarrassment for the Corps in that “tough, smart, elite” warriors did not fail to show up for duty or desert their units. But Marines were doing so in droves. Second, racial tensions had exploded and made several Marine Corps bases downright dangerous places to live. Gen Anthony Zinni recalled that when he was based on Okinawa there were whole districts in town dominated by black gangs such as the “Bushmasters” and the “Mau Maus,” where white Marines dared not enter. According to Zinni, a Ku Klux Klan cell sprang up as a backlash and racial incidents occurred regularly, with the Marine Corps’ ranks containing gangsters and in some instances outright murderers.<sup>28</sup> Third, the growing drug culture of the civilian community had infected the Marine Corps. “By 1975, the Marine Corps had the worst rates of imprisonment, unauthorized absence, and courts-martial in the armed forces.”<sup>29</sup>

Marines were getting frustrated and this started to spill out into the pages of the *Marine Corps Gazette*. In January 1975, Cushman’s Manpower Chief, LtGen Samuel Jaskilka, published an article in the *Gazette* addressing the Marines’ concerns. It opened with:

Some recent articles and letters to the editor written by Marines have been critical of our Corps. This is not surprising since we are our own most severe critics, as we should

be!....What does surprise me, however, is the misconception on the part of some that the top leadership of the Corps is either unaware of our problems or is not doing anything to solve them. Nothing could be further from the truth.<sup>30</sup>

Jaskilka elaborated that many senior Marines still felt that the Corps' entry standards were too high, even though up to 10 percent of recruits were Category IV applicants. He wrote that "we do not believe, however, that a high school diploma should be the sole determinant of success....since our recruiters cannot produce 100 percent high school graduates to meet our needs."<sup>31</sup> Jaskilka went on to address the perceived failings of the SNCO and NCO corps, explaining that their ranks had been depleted by the Vietnam War; the racial make-up of the Corps, specifically the increase of African-American Marines from 10 percent to 18 percent of the Corps from fiscal year 70 to fiscal year 74 and the need to address this through better human relations training; and the Corps' collective need to thrive on challenges and respond well to constructive criticism.

In the spring of 1975, Cushman announced that he intended to retire that summer and speculation began about his successor. Either Cushman's office or that of the Assistant Commandant, Gen Earl E. Anderson, had sent out a questionnaire to the Marine Corps' general officers querying them on who the next Commandant should be. This unusual step was reported to the Secretary of the Navy amidst allegations that the letters were somehow "coded" as Cushman had recommended Anderson as his successor. At any rate, the allegations were never proved and a number of retired Marine generals quietly began suggesting to the civilian leadership that the current commander of Fleet Marine Force Pacific, LtGen Lou Wilson, would be an ideal choice. Secretary of the Navy William Middendorf and Secretary of Defense James Schlesinger received approval from President Ford to nominate Wilson to be the 26<sup>th</sup> Commandant of the Marine Corps, and the Senate Armed Services Committee, chaired by Wilson's fellow Mississippian John Stennis, quickly and unanimously approved his selection. On 30 June 1975, Wilson was promoted to full general and became Commandant of the Marine Corps.

### **The First Revolution in Marine Corps Recruiting, 1 July 1975 – 1981**

At his assumption of command, Wilson laid out his intent in one very short sentence: "I call upon all Marines to get in step, and to do it smartly."<sup>32</sup> Wilson knew that he faced enormous challenges both internally and externally: recruiting, recruit training, the worst disciplinary rates in the armed services, rampant drug use, racial tension, a barrage of external criticism on the viability of the Corps' amphibious mission, a lack of training opportunities and decreasing readiness, and conflict with the Navy on the future of Marine aviation, to name but a few of the issues. Besieged on all fronts, Wilson knew that he would need help – a lot of help -- for the monumental challenges ahead, but he also knew just who to call.



Gen Wilson: “*I am they!*” His initial guidance to all Marines was, “I call upon all Marines to get in step, and to do it smartly.”

MajGen Robert H. Barrow was happily serving as the Commanding General of Marine Corps Recruit Depot Parris Island, when Wilson called him up to become the Marine Corps’ new Manpower Chief. *Barrow truly loved making Marines.* It is difficult to imagine a more powerful and qualified team of top generals to reform the Corps’ manpower crisis. Between the two of them, Wilson and Barrow had held almost every significant billet within the entry-level pipeline: Drill Instructor (Barrow), Recruiting Station OIC (later to be RS CO) (Wilson), NROTC Instructor (Barrow), Training Battalion Commander (later OCS) (Wilson), TBS Executive Officer and Commander (Wilson), District Commander (Wilson), and MCRD Commander (Barrow). Barrow was also one of those unique officers whose combat credentials were completely bulletproof -- all Marines knew what his Marines had accomplished at the Funchilin Pass -- but whose life experiences, personal discipline, and deep humility enabled him to take a holistic view of what was best for the Corps. For example, in a 1971 letter to the Commanding General of Fleet Marine Forces Pacific, LtGen William Jones, the “Hero of Funchilin Pass” laid out his thoughts on improving “job satisfaction and motivation”:

We need to stress the importance and challenge of duty in the supporting establishments. While we all know that the FMF is not the only critical part of the Marine Corps, orders to a supporting establishment are sometimes regarded as exile. Assignments in the supporting establishment are not only challenging, but also contribute greatly to the readiness of the FMF units. We also need to stress the importance and challenge of certain specific assignments within the supporting establishment and FMF. For example, we have all heard the clever comments about so-and-so maybe ending up as the special services officer or clubs officer. Personally, I regard those two billets at Marine Corps Base, Camp Butler as two of the most important in all of WestPac, and while they can be filled with unrestricted/nonspecialist officers, there are eager officers clamoring for FMF duty who probably couldn't handle either one. (The special services officer directs a consolidated, all-commands-on-Okinawa activity that involves the largest recreation fund budget in the Marine Corps and an enormous effort in recreation, athletics, facilities managements, hobby shop resale activity, etc. The clubs officer sits on top of a system that is over twice as large as any other in the Marine Corps, involving 27 clubs, annual gross sales of over \$7 million and employing 849 Marines and civilians. Both of these officers contribute immeasurably to the well-being of almost 20,000 Marines and, as a result, indirectly to the readiness of the FMF units on Okinawa.<sup>33</sup>

Unsurprisingly, Barrow's Marines revered their commander, with many regarding their tour at Marine Corps Base Camp Butler as among their most rewarding and fulfilling in the Corps.

The Wilson-Barrow team would attack in the "quality war" with the same fierceness and determination they had shown earlier in their careers at Guam and the Chosin Reservoir. With Barrow in place, the Wilson-Barrow team wasted no time in announcing their first series of reforms in the quality war:

- First, the recruiting districts and recruit training regiments would now report directly to the Commanding Generals at the Parris Island and San Diego recruit depots to "provide positive command attention to the recruiting effort by the same commander who is responsible for recruit training."
- Second, the Marine Corps' "goal is to have a Corps where three out of four Marines have high school diplomas when they come in, and the remainder have completed tenth grade or higher."
- Third, aggressive action would be taken to "remove from our ranks those Marines who have demonstrated their inability or unwillingness to get with the program."<sup>34</sup>



Gen Wilson inspects recruits at Parris Island, circa 1976.

Wilson also announced his plans to increase the number of female Marines from 350 to 480 women officers and 3,000 to 3,700 enlisted women Marines.<sup>35</sup> To ensure that all Marines understood he meant business with how these additional Marines were to be trained and employed, Wilson published “White Letter 5-76, Women Marines” that directed “commanders who are responsible for the conduct of professional schools should review curricula to ensure that the training offered prepares Marines to lead, irrespective of sex.”<sup>36</sup> These broad actions were intended to set the tone for the more-detailed reforms within the recruiting and recruit training environments that Wilson and Barrow had planned.

Then on 6 December 1975, disaster struck. Lynn McClure from a small Texas town had tried to enlist in the Army and Air Force but was rejected by both for scoring a 7 percent on the ASVAB test. He was a high school dropout and had been arrested several times. Somehow, McClure was permitted to enlist in the Marine Corps and shipped to MCRD San Diego, where he got into trouble right away. He soon found himself in the Motivation Platoon where he was forced to fight several other larger recruits with padded pugil sticks. After begging for the fighting to stop, McClure was in the process of running away when he was knocked unconscious by another recruit. McClure never regained consciousness and died in a Veteran’s Hospital in Houston, TX, on 13 March 1976. In a newspaper article on the tragedy found in Wilson’s



archives, Wilson's hand-writing appears in the top left corner: "IF THEY NEED MOTIVATION – KICK THEM OUT."<sup>37</sup>

Wilson and Barrow were called to testify before Congress from May to August 1976 to describe the reforms they put in place at the recruit depots:

1. To reduce the level of stress on both recruits and drill instructors by eliminating the "motivational platoons," shortening the training syllabus, and permitting recruits a limited amount of free time daily and on weekend.
2. To strengthen and improve supervision of recruit training at all levels by doubling the number of officers assigned to recruit companies and platoon series and by assigning a brigadier general to each depot to reinforce the supervisory program.
3. To review and improve the processes of screening, selection, and training of drill instructors, including psychiatric evaluation and counseling instruction.
4. To provide the recruits with a protected, confidential channel through which to report abuses (personal interviews with officers).<sup>38</sup>



*This cartoon appeared in the Los Angeles Times on 2 May 1976 and was found in General Wilson's personal papers, no doubt as a reminder of the importance of maintaining quality and ethics in recruiting and recruit training.*

An anecdote (perhaps apocryphal) from this time illustrates Wilson's determination to make these boot camp reforms stick. During a recess of Congressional testimony in which Wilson had said that he had directed the motivational platoons at both depots to be disbanded, an aide told Wilson that Parris Island had not yet disbanded its motivational platoon, to which Wilson replied, "By the time I go back in there to resume testimony, *that platoon will be gone.*" Bulldozers were brought over that afternoon from the Beaufort Marine Corps Air Station to fill in the Motivation Ditch, and the Motivation Platoon was indeed gone -- *forever.*<sup>39</sup>

The recruiting district directors reporting directly to the MCRD Commanding Generals brought "an unbroken chain of accountability for recruit quality from the individual recruiter to the depot commander."<sup>40</sup> And while the quality of the force was certainly getting better under this arrangement, in the spring of 1977 the projected shortfall for fiscal year 77 was between 8,000 and 10,000 recruits. Wilson took action once again, picking one of the hand-picked district directors from the Cushman era who had made general, BGen Alexander MacMillan, to be his director of personnel procurement. MacMillan had previously served as the deputy director and then director of the 1<sup>st</sup> Marine Corps District, where he had developed the concepts for employment of "systematic recruiting." Wilson wanted this system spread Marine Corps wide, and here is how their team did it:

- First, MacMillan wrote the *Volume I: Guidebook for Recruiters* during April-May 1977.
- Second, that summer he sent a team of 2 officers and 10 recruiters to visit every recruiting district, station, and sub-station in the Nation in order to physically install the components of systematic recruiting. Recruiting was now standardized across the Marine Corps.
- Third, manpower screening teams would now visit every major command and screen and select those SNCOs and NCOs best fit for recruiting duty.
- Fourth, long-term successful recruiters were incentivized to stay on the duty by creation of the career recruiter MOS, with these outstanding Marines having pathways for promotion and filling key billets within the recruiting regions, districts and stations.
- Fifth, a national training team was established to travel around the country to assist recruiting districts and stations in the maintenance of the components of systematic recruiting and exercising leadership in a sales environment.
- Sixth, Wilson removed the administration of Reserve units from the district headquarters and placed them under the 4<sup>th</sup> MarDiv or 4<sup>th</sup> MAW. The Reserve referral program was added in conjunction with this to keep the Reserves interested in recruiting.
- Finally, a Recruiting Management Course was created to teach every officer, sergeant major, and career recruiter how to manage and effectively lead a recruiting station.<sup>41</sup>

By 1979, as Wilson neared the end of his term, the Marine Corps had made great progress on many fronts in addition to recruiting. Some of these, but certainly not all, included the following:

1. Creation of the Marine Corps Air Ground Combat Center at Twentynine Palms, CA, where units could conduct live fire, combined arms training.
2. Creation of Marine Aviation Weapons and Tactics Squadron 1 (MAWTS-1) at Yuma, Arizona to train pilots on providing the six functions of Marine aviation.
3. Adoption of the F/A-18 fixed-wing aircraft and the AV-8B Harrier to ensure land-based, close-in, fixed-wing air support for amphibious operations.
4. Making the Commandant of the Marine Corps a standing member of the Joint Chiefs of Staff.

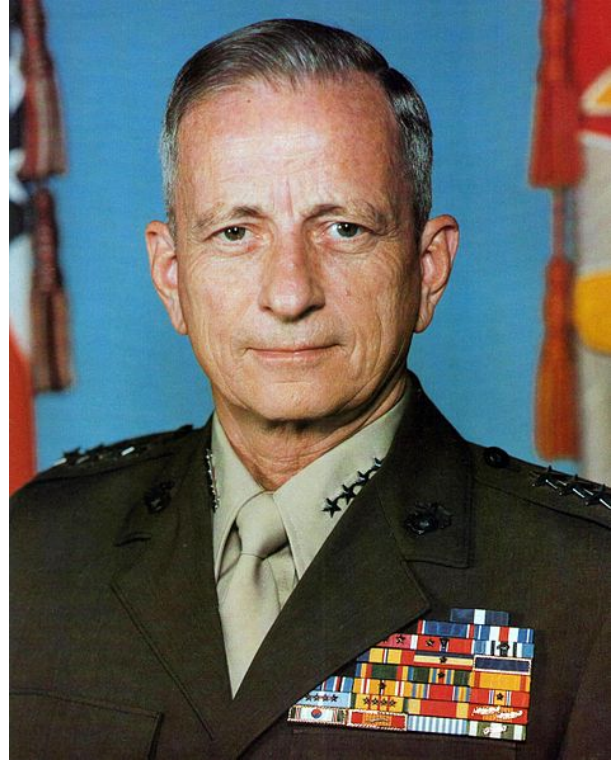
Wilson's chosen successor was his trusted protégé and partner in manpower reform, Gen Robert Barrow, then serving as the Assistant Commandant. The Marine Corps still faced challenges, to be sure, but the recruiting and recruit training reforms were by then producing very solid results.

While the "Wilson-Barrow" reforms were gaining traction, the other Services suffered poor recruiting performance in the late 1970s. This poor performance was exacerbated by the "mis-norming of the ASVAB test," which allowed several Category IV applicants into the ranks. In 1980, the Armed Forces' struggle to make the AVF work prompted former President Nixon to write the following:

I considered the end of the draft in 1973 to be one of the major achievements of my administration. Now seven years later, I have reluctantly concluded that we should reintroduce the draft....The volunteer army has failed to provide enough personnel of the caliber we need.<sup>42</sup>

But if Nixon was admitting the failure of the AVF, no one bothered to tell the Marines or their new Commandant. Barrow took command of the Corps on 29 June 1979 and had one order for his Marines: "Keep in step." Barrow thought "we could go all the way close to, if not, 100 percent" high school graduates in recruiting; he "let people know that...maybe in peacetime the most important thing the Marine Corps could do [was to] recruit well"; and he set a goal for more than tripling the number of female Marines in the Corps from at the start of Wilson's tenure to get all the way up to 10,000.<sup>43</sup> And while Barrow was opposed to women Marines serving in the ground combat arms specialties, he was absolutely adamant that women Marines have an expanded role in the Marine Corps and that they have a way up.

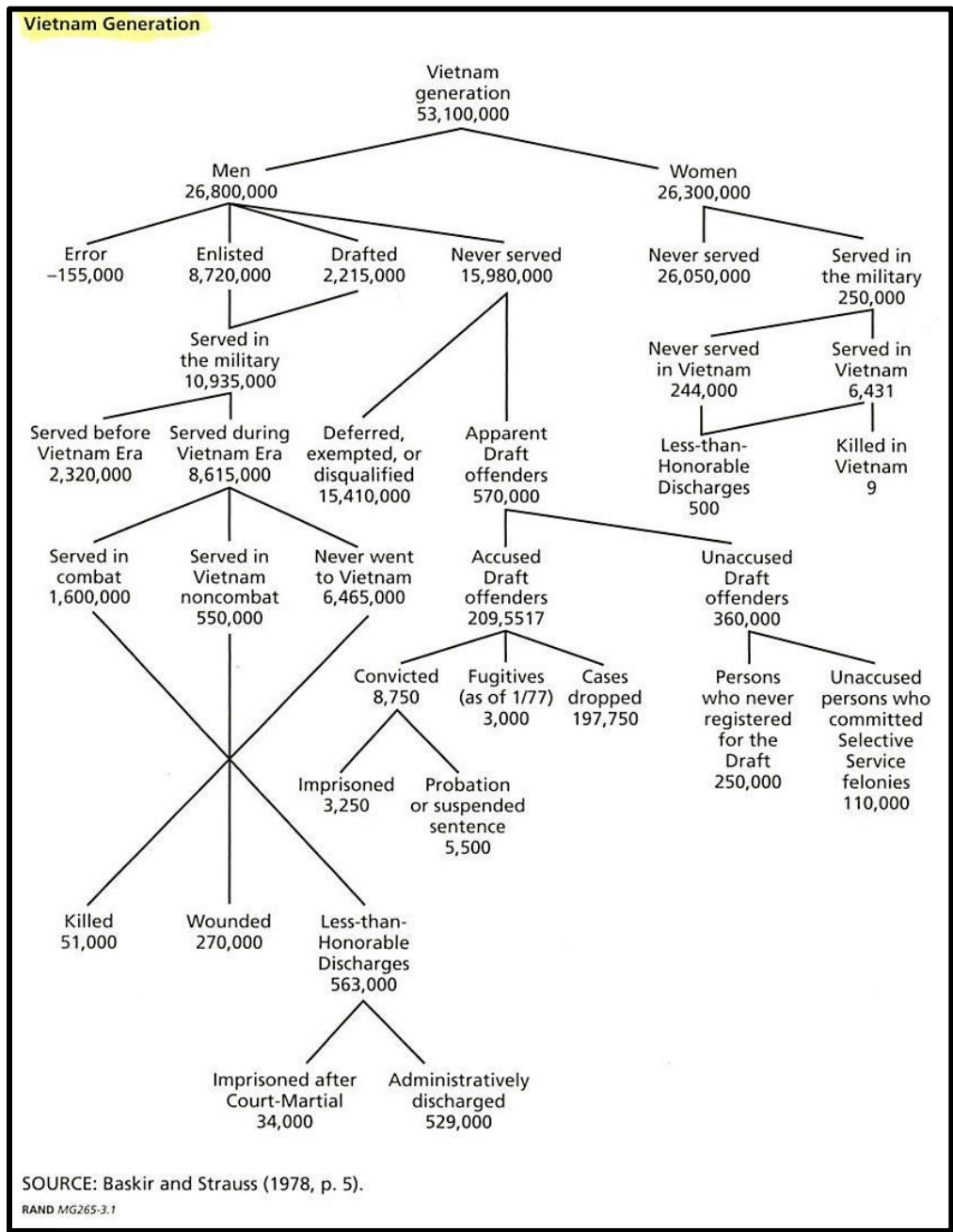




With his Marines in lock-step behind him, Barrow would proceed to march the Marine Corps into a new Golden Age: one that saw implementation of the maritime pre-positioning force program, establishment of forward deployed, crisis response MAGTFs, and an ever-increasing quality and elitism on the recruiting and recruit training fronts. The culmination of this “revolution” in Marine Corps recruiting was Barrow’s creation of the Commandant’s “Superior Achiever Award” in 1981 to recognize every recruiting station in the country that had met or exceeded the Marine Corps’ quality and quantity goals in every measurable category for both officer and enlisted recruiting. Achievement of the Superior Achiever Award remains a significant milestone in an RS Commander’s tour, and to this day the Commandant of the Marine Corps personally presents these awards annually at the National Recruiting Commander’s Conference.

Years later, on 4 May 2012, then-Commandant of the Marine Corps, Gen James F. Amos, was dedicating Wilson Hall at the Officer Candidates School at Quantico, VA. His reflection back upon the dedicatee of the new OCS Headquarters Building was the exact same as that of another former Marine Corps Commandant, Gen Charles C. Krulak, from his office as the current President of Birmingham Southern University, as it likely would be for any other Marine who lived through and served in our Corps during that transitional period:

*“Lou Wilson saved the Marine Corps.”*



This graph shows the inequitable enforcement of the draft. (Rostker, 45)

## Resolution by the Gates Commission of Arguments Against an All-Volunteer Force

### Arguments Against an All-Volunteer Force

### Findings by the Gates Commission

An all-volunteer force would be very costly—so costly the nation cannot afford it.

Although the budget for a volunteer armed force will be higher than that for a mixed force (volunteers and conscripts), the actual cost will be lower. This is not really a paradox because many of the costs of manning our armed forces are not reflected in the budget. Men who are forced to serve at artificially low pay are actually paying a form of tax, which subsidizes those who do not serve. Furthermore, the output of the civilian economy is lower because more men serve in the military than necessary for an all-volunteer force of the same strength.

An all-volunteer force would not be flexible enough to expand rapidly for a sudden crisis.

A standby draft could be put into effect promptly if circumstances required mobilization of large numbers of men.

An all-volunteer force would undermine patriotism by weakening the tradition that each citizen has a moral responsibility to serve his country.

Compelling service through a draft undermines respect for government by forcing an individual to serve when and how the government decides, regardless of his own values and talents.

Draftees guard against the growth of a separate military ethos.

The existing loyalties and political influence of the force cannot be materially changed by eliminating conscription in the lowest ranks.

The higher pay for a voluntary force will appeal especially to blacks, who have fewer civilian opportunities.

Ending conscription will not fundamentally change the composition of the armed force; further, denying such opportunities would be seen as either bias or a paternalism, as though blacks are not capable of making the "right" decisions about their lives.

An all-volunteer force would consist of mercenaries.

Mercenaries are men who enlist for pay and nothing else, usually in the service of a foreign power. Those who volunteer for the armed forces do so many reasons, including a sense of duty. Moreover, we do not consider career commissioned and noncommissioned officers to be mercenaries.

It will stimulate foreign military adventures.

The President can always increase enlistments, through a standby draft and calling up reserves under an all-volunteer force, or by increasing draft calls under conscription.

The all-volunteer force will be less effective because highly qualified youths will be unlikely to enlist or to make the military a career.

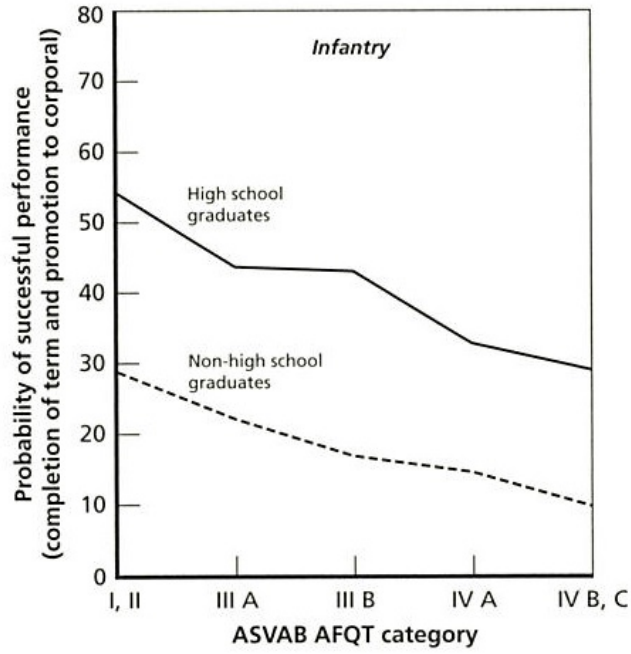
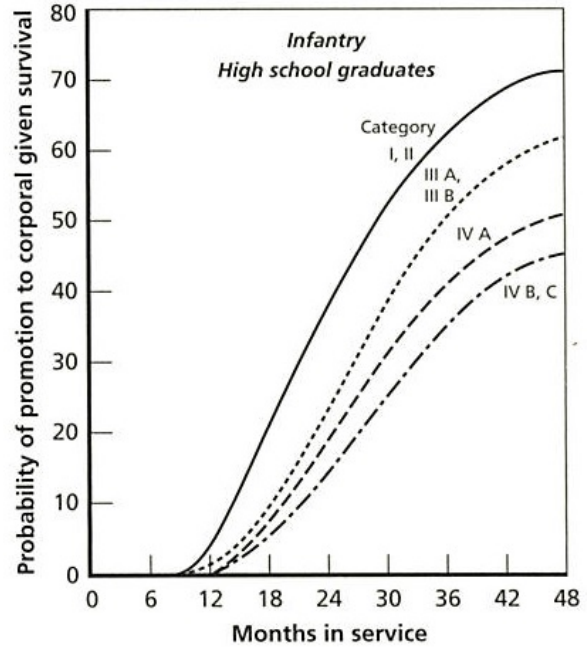
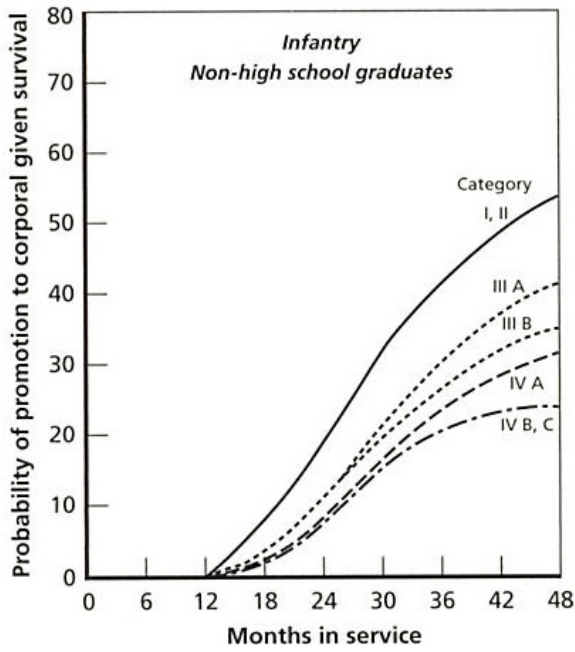
A force of men who have freely chosen to serve should enhance the dignity and prestige of the military. Every man in uniform would be serving as a matter of choice rather than coercion.

NOTE: The table paraphrases points made in the commission report.

This table paraphrases findings by the Gates Commission (Rostker, 79)



Assessment of ASVAB AFQT Categories and "Job Performance"



SOURCE: Hiatt and Sims (1980).

RAND MG265-13.6

This series of graphs depicts quality recruits with job performance (Rostker, 493)

### **Questions For Discussion (30 min)**

1. Describe the context in which our country made its transition to an all-volunteer force. Do you agree with the Gates Commission's focus on economics as the driving factor for transitioning to an AVF? Did they place economics above the duties of citizenship? What were the internal and external factors influencing the Marine Corps Commandant's decisions during the early years of the transition? What would have happened if General Cushman had not allowed such a high percentage of non-high school graduates to enlist in the Corps?
2. In all fairness to Gen Cushman, who had won a Navy Cross as a battalion commander on Guam, commanded a battalion on Iwo Jima, and commanded the largest tactical formation ever by a Marine up to that time in the Vietnam War, why do think he had a different view on what made a successful Marine than did Gens Wilson and Barrow? Whose views were more in line with the political elitism of the Marine Corps? Look at the "Brute's" answer to Gen Pate's question, and then consider Congress's passage of Section 718 and initial rejection of Gen Cushman's request to lower the Corps' standards. What does this tell us about the American peoples' expectations of their Marines?
3. Discuss Gen Wilson's actions upon becoming the Commandant. What were his priorities? How effective was he at implementing them? How did the reforms of the Wilson-Barrow team impact other areas of the Marine Corps? What did Wilson do to ensure these reforms were institutionalized beyond his tenure as CMC?
4. Re-read Barrow's letter to the CG, FMF Pacific. Do periods of sustained combat operations tilt the delicate balance of quality people in the Marine Corps more towards operational units? Is this healthy? What types of leaders does it take to "rebalance" the institution once sustained combat operations are over?
5. "Brute" Krulak's classic *First to Fight* devotes an entire section to "The Innovators." Consider the Wilson-Barrow reforms within the context of Brute Krulak's description of the development of the Corps' amphibious doctrine in *First to Fight*: would you characterize Gens Wilson and Barrow as "innovators"? Were the reforms these commandants implemented as impactful as the Corps' development of amphibious doctrine prior to and during World War II? Was the impact as significant?
6. Webster's defines "revolution" as a "complete cycle of events" or "a complete change." Was this a revolution in Marine Corps recruiting and recruit training? Why or why not?

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<sup>1</sup> LtGen Victor H. Krulak, USMC (Ret), *First to Fight*, Naval Institute Press, Annapolis: Maryland, 1984, p xv

<sup>2</sup> Ibid, 67.

<sup>3</sup> Beth Bailey, *America's Army*, Harvard University Press, Cambridge, MA 2009, p 23

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<sup>4</sup> Ibid, p 24.

<sup>5</sup> Bernard Rostker, *I Want You: The Evolution of the All Volunteer Force*, Rand Corp., Santa Monica, CA 2006, p 35.

<sup>6</sup> Col John G. Miller, USMC (Ret), “Robert Everton Cushman, Jr” *Commandants of the Marine Corps*, Allan Millet ed.

<sup>7</sup> Cyril O’Brien, “Giants of the Corps: General Robert H. Barrow,” *Leatherneck*, January 2009, pp 30-32.

<sup>8</sup> Robert Martin, “Robert Barrow, a Marine Corps Reformer Who Became Commandant, Dies at 86,” *New York Times*, 31 October 2008, [www.nytimes.com/2008/11/01/washington/01barrow.html?\\_r=0](http://www.nytimes.com/2008/11/01/washington/01barrow.html?_r=0)

<sup>9</sup> Rostker, 65.

<sup>10</sup> Ibid, 66.

<sup>11</sup> Bailey, 25.

<sup>12</sup> Rostker, 80.

<sup>13</sup> Ibid.

<sup>14</sup> Bailey, 33.

<sup>15</sup> Rostker, 94.

<sup>16</sup> Ibid, 136.

<sup>17</sup> Ibid, 184.

<sup>18</sup> Ibid, 269,

<sup>19</sup> Ibid.

<sup>20</sup> Miller, p 417.

<sup>21</sup> LtCol Joseph D. Riech and Maj Gary Kozlusky, “The New Recruiting Command and the Story of Marine Corps Recruiting,” *Marine Corps Gazette*, August 1994, p 64.

<sup>22</sup> Miller, USMC (Ret), pp 417-418.

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<sup>23</sup> Ibid, 421.

<sup>24</sup> Major Harold M. Owens, “The All Volunteer Force: Reaction or Alternative?” *Marine Corps Gazette*, October 1973, p 24.

<sup>25</sup> Ibid, 424.

<sup>26</sup> Reich and Kozlusky, 65.

<sup>27</sup> Gen Robert E. Cushman, “Corps Operations Facing Austerity,” *Marine Corps Gazette*, August 1973, p 2.

<sup>28</sup> Gen Anthony Zinni and Tom Clancy, *Battle Ready*, G.P. Putnam’s Sons: New York, 2004, p 116.

<sup>29</sup> Allan R. Millett, *Semper Fidelis: The History of the United States Marine Corps*, The Free Press: New York, 1991, p 612.

<sup>30</sup> LtGen Samuel Jaskilka, “Quality and Leadership,” *Marine Corps Gazette*, January 1975, p 14.

<sup>31</sup> Ibid, 15.

<sup>32</sup> Col David H. White, “Louis H. Wilson: 1920-2005,” *Marine Corps Gazette*, August 2005, p 9.

<sup>33</sup> BGen Robert Barrow, “Job Satisfaction and Motivation,” *Marine Corps Gazette*, March 1981, p 30.

<sup>34</sup> Gen Louis Wilson, “New Directions,” Speech to the Washington D.C. Council of the Navy League, 8 September 1975.

<sup>35</sup> Gen Lou Wilson, “Emphasis on Professionalism for a New Generation of Marines,” *Sea Power Magazine*, January 1976, p 29.

<sup>36</sup> Col Nancy P. Anderson, “Up to the Challenge: Women’s Training in Today’s Marine Corps,” *Leatherneck*, February 2002, p 32.

<sup>37</sup> Gen Wilson’s handwritten notes to “Participant: Marine Beaten Into a Coma,” *The Tampa Tribune*, 17 June 1976.

<sup>38</sup> White, 11.

<sup>39</sup> This anecdote was relayed to the author by Col Warren Parker, USMC (Ret) during a lunch at the officer’s club.

<sup>40</sup> Reich and Kozlusky, 65.

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<sup>41</sup> Ibid, 66.

<sup>42</sup> Rostker, 363.

<sup>43</sup> BGen Edwin H. Simmons, Robert Hilliard Barrow: 1922-2008, *Marine Corps Gazette*, January 2009, p 10.



## Making Marines, Part II

The second revolution in Marine Corps Recruiting, 1993 – 1999

### Biographical Information

**Gen Carl Mundy, Commandant of the Marine Corps, 1991-1995.** Carl Mundy was born in Atlanta, GA, in 1935 and grew up in North Carolina and Montgomery, AL. He attended Auburn University and enlisted in the Marine Corps Reserves while also enrolling in the Platoon Leader's Class to gain a commission. He rose to the rank of Sergeant, 38<sup>th</sup> Special Infantry Company while also pursuing his commission. Upon graduation from Auburn in 1957, he was commissioned a second lieutenant and served in the 2<sup>d</sup> MarDiv, and subsequently aboard the aircraft carrier USS *Tarawa* (CV 40) and the cruiser USS *Little Rock* (CL 92). Following this assignment, he served as an instructor at The Basic School under the command of then-Col Lou Wilson, and then as the Officer Selection Officer for Recruiting Station Raleigh, NC. Following his tour on recruiting duty, Mundy served in Vietnam from 1966-1967 as the Battalion Operations Officer and Executive Officer for 3d Battalion, 26<sup>th</sup> Marines, and then as the Intelligence Officer, III Marine Amphibious Force. Following his tour in Vietnam, Mundy served as an aide to the Commandant of the Marine Corps; as Inspector and Instructor for 4<sup>th</sup> Air Naval Gunfire Liaison Company (ANGLICO); and as Battalion Commander of 2<sup>d</sup> Battalion, 4<sup>th</sup> Marines.

Following a tour at HQMC, Mundy returned to Camp Lejeune, and served on the staff of the 2<sup>d</sup> MarDiv before taking command of the 2<sup>d</sup> Marine Regiment. He was promoted to brigadier general in 1982 and returned to HQMC to become the Director of Personnel Procurement for then-Commandant, Gen Bob Barrow. Following this assignment, he commanded the 4<sup>th</sup> Marine Amphibious Brigade before returning to HQMC to become the Chief Operations Officer for the Marine Corps. He was promoted to lieutenant general in 1988 and served as the Deputy Chief of Staff for Plans, Policies, and Operations at HQMC, and then as the Operations Deputy to the Joint Chiefs of Staff. From there, he went on to command Fleet Marine Force, Atlantic, and II MEF before being promoted to general on 1 July 1991 and assuming the post as the 30<sup>th</sup> Commandant of the Marine Corps. Mundy brought a wide range of experience to the office of the Commandant: he had served on ships; he had served as a recruiter; he had served in combat; he had commanded at every level; he had filled several staff jobs at HQMC; and, perhaps most significantly, he had served under Gens Wilson and Barrow and knew their philosophy on reforming the Corps' manpower systems.

Years later, on 29 July 2005, when Mundy delivered the eulogy for Gen Wilson, he described his first, unforgettable experience with that legendary Marine:

Three years after I graduated from The Basic School at Quantico, I was ordered back to become an instructor. I reported to the adjutant, who informed me that the commanding officer was absent for a few days, but would return the following week. He advised, further, that it was the colonel's policy to address all newly forming companies of lieutenants on the first day of training, which would occur, coincidentally, on the day of his return, and that I should be there.

At 0700 on the prescribed day, I mustered with a half-dozen instructors and couple of hundred new lieutenants in the outdoor classroom just in front of the headquarters building. Precisely at 0715, the front door opened and a tall, rangy, all-business-looking colonel walked out. We were called to attention, then put at ease and given our seats. The colonel spoke for probably no more than 8 to 10 minutes, citing what was to be accomplished and what was expected of the lieutenants in the next 6 months. He concluded by saying: 'While you're here, you'll find many things that are wrong... that are not to your liking... not the way you would do them -- and you'll find yourselves talking about how 'they' ought to change this or that... and how 'they' just don't understand the problem. When you have those thoughts or discussions he went on, 'I want you to remember: I ..... am they!'

He stood looking at us for probably no more than 5 seconds, which seemed like minutes. Not a head turned; not an eye blinked, and I'm sure 200 second-lieutenant minds were working in unison to figure out how they could go through 26 weeks of training without ever once uttering the word, 'they'!<sup>1</sup>

**Gen Charles C. Krulak, Commandant of the Marine Corps, 1995-1999.** Charles Krulak was born as the youngest of three sons to LtGen Victor H. "Brute" and Amy Krulak in Quantico in 1942. He attended high school at Phillips Exeter Academy in New Hampshire and entered the United States Naval Academy in the fall of 1960, graduating in 1964. Following his commissioning, Krulak commanded a platoon and two companies in Vietnam before transferring to MCRD San Diego, where he commanded a series of recruits and the Special Training Branch from 1966-1968. He commanded the Counter-Guerrilla School on Okinawa, Japan, in 1970 and then served as a Company Officer at the Naval Academy. He commanded the Marine Barracks at North Island, CA, from 1973-1976 and then served as the Battalion Operations Officer for 2<sup>d</sup> Battalion, 9<sup>th</sup> Marines. In 1978, Krulak transferred to the Manpower Department of Headquarters Marine Corps where he served first, as the Assignments Monitor for ground combat arms Marines and then as the Executive Assistant for the Director of Personnel Procurement from 1979-1981. During this tour, like Gen Mundy, Krulak had a front-row seat to the impact of the "Wilson-Barrow" manpower reforms.

Following his tour at Headquarters, Krulak attended the National War College and graduated in 1982. He was then transferred to Hawaii where he served from 1982-1985 as a Plans Officer, Regimental Executive Officer, Assistant Chief of Staff for Operations of the 1<sup>st</sup> MEB, and as the Battalion Commander, 3d Battalion, 3d Marines from 1983-1985. He returned to Washington, DC, and became the Deputy Director of the White House Military Office in 1987 where he served until he was promoted to brigadier general in 1989. As a general officer, Krulak served concurrently as the Commanding General of the 10<sup>th</sup> MEB and Assistant Division Commander of the 2<sup>d</sup> Marine Division, and in the summer of 1990 became the Commanding General, 2d Force Service Support Group, which he commanded during Operation Desert Storm. After redeploying his forces from the Gulf War in 1991, Krulak became the Deputy Chief of Staff for Manpower and Reserve Affairs for the new Commandant, Gen Carl Mundy. In 1992 Krulak was elevated to lieutenant general and became the Commander, Marine Corps Combat Development Command at Quantico, and in 1994 he became the Commander, Fleet Marine

Force, Pacific – a post once held by his father. Krulak became the 31<sup>st</sup> Commandant of the Marine Corps on 30 June 1995.

### **The Context: 1983 – 1993**

Gen Barrow's tenure as Commandant (1979-1983) continued to improve upon the quality and quantity of Marines entering the Operating Forces through recruiting and recruit training. Barrow began mandatory drug testing in 1981, dramatically reducing the incidents of Marines' illegal drug use, and by the end of his tenure had restored the Marines' sense of *elitism*. By 1983, the Corps was on firm manpower ground when Gen P. X. Kelley became the 28<sup>th</sup> Commandant of the Marine Corps. Like Wilson and Barrow, Kelley was committed to maintaining the quality and quantity of the Marine Corps' people. Unfortunately, the suicide truck bombing of the Marine Barracks of the 24<sup>th</sup> Marine Amphibious Unit (MAU) in Beirut, Lebanon, on 23 October 1983 which killed 241 Marines and Sailors, placed General Kelley in an impossible political situation. On the one hand, Kelley felt he had to defend the lax security procedures of the MAU's command element to stick by his Marines, while on the other hand, he was reluctant to criticize the Reagan Administration's "policy" that had placed those Marines in an increasingly volatile situation in the first place, whereby accomplishing their mission had required them establishing a neutral "presence" between warring factions.<sup>2</sup> But despite this tragedy, Kelley still found a very generous budget environment in the Reagan Administration's military build-up, and used it to modernize, equip, and train the Corps with the best weapons, systems, and training then available.

On 1 July 1987, Gen Alfred M. Gray became the 29<sup>th</sup> Commandant of the Marine Corps, inheriting "a Marine Corps that had nearly completed the reconstruction of its human and material foundation."<sup>3</sup> Gen Gray initiated what would become known as the Marine Corps' intellectual and operational "renaissance." He changed the terminology of MABs to "expeditionary" to emphasize that Marines could operate anywhere. He ordered the standing-up of Surveillance, Intelligence, and Reconnaissance Groups in each MEF. All of the officers' and SNCOs' formal education schools were brought under the umbrella of a new Marine Corps University, which soon published a Commandant's Reading List with books that the Commandant had personally selected and expected all Marines to *read*. Gray personally put the weight of his office behind two new little booklets – *Warfighting* and *Campaigning* – which changed the official doctrine of the Marine Corps to "maneuver warfare," a warfighting philosophy based upon mission-type orders; decentralization; empowerment of young officers, SNCOs, and NCOs; and thinking leaders at *every* level. Contingency operations in Grenada and Panama seemed to validate Gray's intellectual and operational "renaissance" as Marines performed superbly in both operations.<sup>4</sup> *And yet this point cannot be over-stated: Gen Gray was able to achieve the Marine Corps' intellectual and operational renaissance in the late 1980's because the Marine Corps' ranks were then filled with tough, smart, elite, physically fit, ethical warriors who had graduated from high school, scored well on their enlistment tests, were completely drug free, and were capable of understanding the more sophisticated operational and tactical concepts called for by "maneuver warfare."*

The real test for the Wilson-Barrow manpower reforms, Kelley's modernization reforms, and Gray's renaissance came in the deserts of Southwest Asia in 1990-1991 after Saddam

Hussein's Iraq had invaded and occupied Kuwait. In August 1990, the Commander of U.S. Central Command, GEN H. Norman Schwarzkopf, called for three MEBs to deploy immediately to the Persian Gulf region to help defend Saudi Arabia from further Iraqi aggression. This became known as Operation Desert Shield. The I MEF under the command of LtGen Walter Boomer became the senior Marine headquarters in theater. As President George H.W. Bush built up an international coalition and shored up domestic and international support, forces continued to flow into theater, ultimately bringing the number of American military forces in theater up to 500,000, which included 94,000 Marines. This force was prepared for offensive operations to eject Iraqi forces from Kuwait, which would become known as Operation Desert Storm. The 4<sup>th</sup> MEB and 13<sup>th</sup> MEU remained afloat in the Persian Gulf as part of the Central Command Commander's deception plan, which caused Iraqi forces to construct beach defenses all along the coastline of Kuwait.<sup>5</sup>

On the morning of 23 February 1991, I MEF's two Marine divisions breached six lanes through the Iraqi minefields and cut through the Iraqi ground forces like a hot knife through butter. The MEF then repulsed an Iraqi counterattack and took more than 5,000 Iraqi prisoners as it took back Kuwait City. GEN Schwarzkopf's description of I MEF's attack validated all of the reforms of the previous 15 years:

I can't say enough about the two Marine divisions. If I use words like brilliant, it would really be an underdescription [sic] of the absolutely superb job that they did in breaching the so-called impenetrable barrier. It was a classic, absolutely classic military breaching of a very, very tough minefield, barbed wire, fire trenches type barrier. They went through the first barrier like it was water. They went across into the second barrier line, even though they were under artillery fire at the time. They continued to open up the breach. And then they brought both divisions through that breach. Absolutely superb operation, a textbook, and I think it'll be studied for many, many years to come as the way to do it.<sup>6</sup>

I MEF's success in Operation Desert Storm underscored the Marine Corps' utility as a multi-domain, power projection, combined arms force: not only did I MEF's two-division attack cut through the Iraqis' defenses easily and enable more decisive operations further west, but the threat of an amphibious landing – planned and executed by the 1<sup>st</sup> MarDiv's Assistant Division Commander, BGen Thomas Draude -- “forced the Iraqis into inefficient deployments and made his [Schwarzkopf's] deception plan especially credible.”<sup>7</sup> As America's Armed Forces redeployed from Southwest Asia in the spring and summer of 1991, the looming post-Cold War drawdown of the defense budget began in earnest. Having seen his doctrine of maneuver warfare validated with the incredible performance of young Marine Corps officers, Staff NCOs, and NCOs in Grenada, Panama, and most recently in Southwest Asia, on 1 July 1991 Gen Gray turned over the duties as the Commandant of the Marine Corps to Gen Carl Mundy, who would face a series of much different challenges.

When Mundy became Commandant, the fiscal year 1991 budget had provided for a Marine Corps of 193,735 Marines, but the future year defense plan (FYDP) took the Marine Corps down to an end-strength of 159,100.<sup>8</sup> Everyone knew that the 193,735 number would not hold, but the question before all was how low would the Corps be forced to go? Two prior

attempts to build an alternate reduced Marine Corps force structure had failed. The Armed Forces as a whole were expected to shrink by at least 22 percent over a 4 year period, with the Army's end strength eventually coming down 30 percent.<sup>9</sup> In this budget environment, Mundy called all of the Corps' generals together for a three-day "retreat" in August 1991 to "set the course for the Marine Corps as it refined its capabilities in light of the new security environment and declining resources."<sup>10</sup> Mundy needed a plan and a defense against draconian cuts, and *fast*. He then tasked Gen Krulak, his new Manpower Management Director, to lead a 17-person Force Structure Planning Group (FSPG) to restructure the Marine Corps for a force that could be programmed to an end-strength of 159,100 Marines, *and an alternate force structure if the 159,100 force was deemed inadequate for the emerging security environment* (which it was). Mundy also foresaw that the Marine Corps could not be viewed as a second land Army in this environment and immediately began to work closely with the U.S. Navy on development of a new power projection strategy that emphasized maritime operations conducted "from the sea."

### **The Second Revolution in Marine Corps Recruiting: 1993-1999**

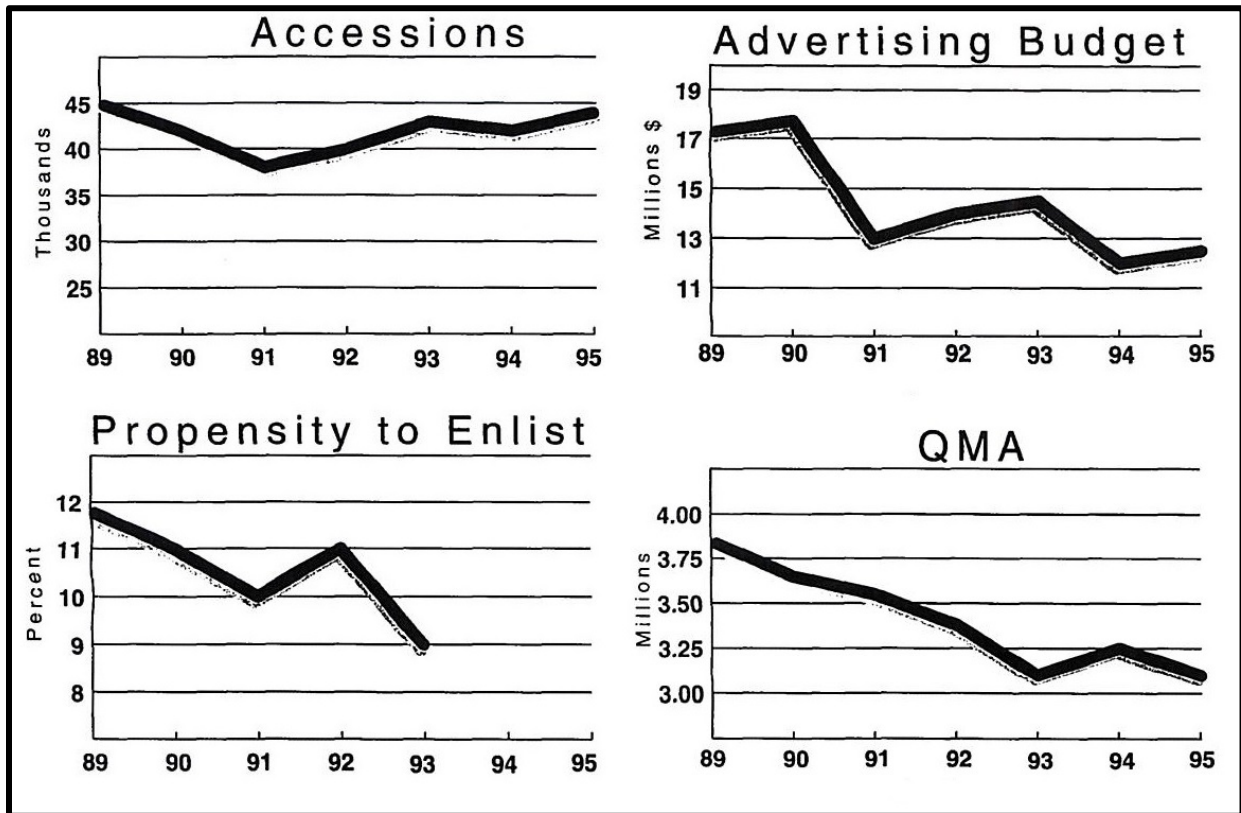
Through his brilliant diplomatic, political, and educational skills and efforts, Mundy was able to hold the Marine Corps' end-strength at 177,000 Marines and to publish *From the Sea...* as an equal partner with the U.S. Navy. But if Mundy dedicated the first 2 years of his tenure to preserving the Corps' traditional roles and missions, restoring the Corps' partnership with the U.S. Navy, and holding the Corps' end strength at 177,000 (which allowed him to put more Marines back on ships, reinforce some embassies, and shore up some critical low-density occupational specialties), the next 2 years would be devoted to ensuring that those end-strength numbers could be met with the quality of Marines leaders throughout the Corps had come to expect. From his own firsthand experience as an OSO and then Personnel Procurement Director, General Mundy understood the importance of recruiting and knew it would not be easy.

In September 1992, LtGen Walter Boomer, the I MEF Commander in Desert Storm, became Gen Mundy's Assistant Commandant of the Marine Corps. Boomer had served as the Deputy Director (Executive Officer) and Director (Commander) of the 4<sup>th</sup> Marine Corps District from 1981-1985, and in May 1990 before he went out to assume command of I MEF had published a very insightful article in *Proceedings* accurately describing the recruiting challenges ahead:

Recruiting is where it all begins – in the schools and on the streets of our nation. As we face the next decade, we cannot forget this axiom. We have proved time and again that our recruit training, good as it is, cannot turn unintelligent, poorly motivated, physical wrecks into Marines. Recruiting high-quality applicants for the Corps is terribly expensive, but the price of not doing it is disaster. Fine young men and women can be recruited only by good Marines. We must be able to bear the pain of having to do without our best and brightest while they serve a tour on recruiting duty. Otherwise, we mortgage our future, with bankruptcy an eventual certainty. Unfavorable demographic trends will make recruiting even more difficult during the early 1990s. We can face this challenge in two ways: lower our quality, or maintain the same standards we have insisted upon for the last decade – and work harder. Only the latter is acceptable. The short-term price may be that even more recruiters must hit the pavement to acquire the

good people we need. Or we can opt for a lower-cost solution of maintaining our present recruiting force levels at the expense of other force structure. We cannot cut our recruiting program and still obtain the high-quality recruits we must have through the decade.<sup>11</sup>

The demographic challenges of which Boomer spoke were very real. In 1980, there were 25.2 million Americans between the ages of 18-22; by 1999, that number would drop to 21 million. An enormous number of these applicants were either unqualified as they did not graduate from high school, or were in the bottom two mental percentiles, which were no longer eligible to enlist. Moreover, the propensity of young people to enlist was dropping off dramatically as the Administration of newly elected President William J. Clinton believed in making college more affordable and available for qualified young people, and implemented several policies to do so. And on top of all of this, the post-Cold War drawdown created the perception among young people that the military did not offer them long-term career potential.<sup>12</sup>



*This series of graphs shows the unfavorable demographic, propensity, accession, and advertising trends of the early 1990s. Reich & Kozlusk, 66-67*

In late 1993, Gen Mundy saw the need to improve upon the Corps' organizational approach to recruiting: each of the MCRD Commanders, the Personnel Procurement Director, and the Deputy Chief of Staff for Manpower and Reserve Affairs were reporting directly to him in one fashion or another on recruiting matters. In a tough recruiting environment, accountability was diluted. Gen Mundy thus directed formation of a Marine Corps Recruiting Command to provide unity of effort, facilitate a "standardized, 'one Corps' approach to recruiting," and to

“bring about steady improvement to the overall recruiting process.”<sup>13</sup> Gen Mundy described the new recruiting command, which was activated in the summer of 1994, this way:

The only regiment in the Corps that is in constant contact with its objective 30 days a month, without let up, is the recruiting service. It’s the toughest job, at any grade, in the Marine Corps.<sup>14</sup>

As all of the Services struggled to make their recruiting missions in the early 1990s due to “continued economic growth, coupled with falling propensity and slightly more ambitious accession goals,” the Marine Corps was the only Service with a plan in place to have more recruiters in the field in fiscal year 1995 than they did in fiscal year 1993 (as Gen Boomer had suggested).<sup>15</sup> As the Marine Corps Recruiting Command closed out its fiscal year 1994 mission having just missed its accession goal, it looked forward to improving its performance in fiscal year 1995. On 7 June 1995, recruiting got another boost as Gen Mundy was able to witness the Secretary of the Navy’s approval of the Marine Corps recruiting ribbon, something he had pushed for to further signify the importance of this vital mission.



*The Marine Corps recruiting ribbon was approved during General Mundy’s last month as Commandant of the Marine Corps in June 1995. His reforms started the second revolution in Marine Corps recruiting. This ribbon remains prestigious to this day: Gen James N. Mattis – who completed two tours on recruiting duty -- often praises those who wear it, and Gen James F. Amos has called it the “CONUS combat action ribbon.”*

When Gen Krulak became Commandant on 1 July 1995, he brought with him a lifetime of experience, wisdom, and kinetic energy to the office that imbued all Marines with a restless energy and sense of urgency to *get things done*. Most importantly, Krulak understood better than any person alive “The Brute’s Insight” in his father’s answer to then-Commandant Gen Pate’s question on why America needs a Marine Corps (contained in Part I). And the “Brute’s Insight” basically amounted to this: *that the political strength of the Marine Corps – which exists in the hearts, minds, and souls of the American people, and is expressed by their mystical faith in the character and capabilities of the individual Marine – will always trump the strategic and operational attributes of the Marine Corps, however powerfully displayed they may be in war and peace or articulately described within the Pentagon or academic journals*. And Krulak -- whose father had devoted an entire chapter to this called “This Precious Few” in his classic *First to Fight* -- understood that this all started with recruiting and recruit training. Gen Krulak thus issued comprehensive planning guidance to all Marines making clear he would continue to prioritize Gen Mundy’s emphasis on recruiting:

Because Marines are the centerpiece of the Corps, how we recruit them, train them, instill in them our core values and a sense of integrity and accountability, equip them to do their jobs, and treat them with dignity, care, and concern must be our primary emphasis. . . . The most important thing we do in the Marine Corps is make Marines. The individual Marine IS the Corps.<sup>16</sup>

Then, Gen Krulak went on to incentivize recruiting duty:

If we are going to recruit the right people – the lifeblood of our Corps – we must provide those who recruit them with all the resources they need. Our recruiters are truly at the forefront of making Marines, and they are there every day, 365 days a year. I recognize how important their mission is to the future of the Corps and they deserve rewards commensurate with their sacrifice and success. Aside from ensuring they have adequate professional resources to accomplish their mission, we must provide our enlisted recruiters with an increased opportunity for meritorious promotion. Recruiting Station Commanding Officers, Executive Officers, Operations Officers, and Officer Selection Officers will have their choice of school or duty station upon completion of a successful tour in recruiting. The DC/S Manpower and Reserve Affairs will implement this policy immediately and will develop a set of proposals which recognize and reward the critical contributions and sacrifices the recruiters and their families make to their Corps.<sup>17</sup>

Gen Krulak saw that even with more recruiters in the field in fiscal year 1995, MCRC was behind on its annual accession goals and further reforms were needed. He did three things. First, while all of the Services were struggling to meet their accession goals and conventional wisdom held that some enlistment standards might have to be relaxed, General Krulak *raised* the Corps' enlistment standards: while DoD required 90 percent high school graduates, General Krulak demanded 95%; while DoD asked for 60 percent Mental Group I-III Alpha applicants, Krulak insisted upon 63 percent; and while DoD would allow up to 10 percent Category IV applicants, Krulak would allow no more than 1 percent.<sup>18</sup> Krulak also started to require female Marines to run the full three miles on their physical fitness tests, making them even more a part of the "elite." By raising the Corps' enlistment standards at a time of very difficult recruiting for all the services, Krulak was flying in the face of conventional wisdom. Second, Gen Krulak created the Recruiting Warrant Officer MOS of 4810 modeled on the Battalion Gunner Program to incentivize MCRC's best enlisted *leaders* to apply for the career recruiter MOS. Gen Krulak fully embraced the need to build more career recruiters (the MOS created by Gen Wilson) and saw this as a way to do it.

Third, and perhaps most significantly, Gen Krulak directed his Manpower Management Department to implement a more formal command screening process to select the majors who would serve as recruiting station commanding officers. This command screening process would instantly transform recruiting duty for many of the most competitive majors – most of whom were in the combat arms MOSs, but not all -- from *something that was very important, but for someone else to do while they accrued more operational time at the elbow of observant senior leaders* to a very realistic possibility for them, and one that would challenge their leadership in new and unexpected ways.<sup>19</sup> Over time, Gen Krulak and his Manpower Chief, LtGen Jack



Klimp, intended for this to transform RS CO duty from a “career ender” to a “sought after” duty that would be an ideal proving ground for future senior leaders of the Corps. In March 1996, Gen Krulak released an “All Marines” message formally announcing the 17 primary selectees and three alternates as the first officially screened RS commanders, forever changing the game for how this difficult duty would come to be viewed by officers.<sup>20</sup>

Gen Krulak had good reason for raising the Corps’ enlistment standards and increasing the importance of recruiting the right people: he saw these actions as strategically imperative to the future national security interests of the United States. As he traveled around the Marine Corps in the summer and fall of 1995 to explain his *Commandant’s Planning Guidance*, he introduced two profoundly visionary, interdependent concepts: that of the *Strategic Corporal*” in “*The Three Block War*. These are best described, in his words, below:

Modern crisis responses are exceedingly complex endeavors. In Bosnia, Haiti, and Somalia the unique challenges of military operations other-than-war (MOOTW) were combined with the disparate challenges of mid-intensity conflict. The Corps has described such amorphous conflicts as -- the three block war -- contingencies in which Marines may be confronted by the entire spectrum of tactical challenges in the span of a few hours and within the space of three contiguous city blocks.<sup>21</sup>

In order to succeed under such demanding conditions they [young Marines] will require unwavering maturity, judgment, and strength of character. Most importantly, these missions will require them to confidently make well-reasoned and independent decisions under extreme stress -- decisions that will likely be subject to the harsh scrutiny of both the media and the court of public opinion. In many cases, the individual Marine will be the most conspicuous symbol of American foreign policy and will potentially influence not only the immediate tactical situation, but the operational and strategic levels as well. His [and her] actions, therefore, will directly impact the outcome of the larger operation; and he will become, as the title of this article suggests -- the *Strategic Corporal*.

Gen Krulak’s description of the strategic corporal projecting the elements of national power in the three block war had a congruence of vision, ethos, and values that enabled him to “sell” the Corps’ higher enlistment standards to ourselves, the civilian leadership, and, most importantly, to the American people through their elected representatives on the Hill. And yet as Gen Krulak was traveling across the Marine Corps delivering his intent, an incident on Okinawa, Japan, would underscore the seriousness of his emphasis on the character of the strategic corporal.

On 4 September 1995, two junior Marines and a Navy Corpsman stationed at Camp Hansen, Okinawa, were alleged to have kidnapped and raped a 12-year old Okinawan girl. The incident sparked wide public outrage on Okinawa and called into question the entire U.S.-Japan Status of Forces Agreement. The Pacific Command Commander, ADM Richard Macke, was then dealing with an escalating crisis in the Taiwan Strait as the People’s Republic of China had conducted missile tests in August and was planning to conduct highly publicized amphibious assault exercises in November. Just two months into his Commandancy, on 3 October 1995 Krulak defied the advice of several Defense Department officials (who thought the situation too

volatile for a high-profile visit) and got on an airplane, flew to Okinawa, and delivered twenty-one 35-minute talks to every Marine, sailor, and civilian Marine on the island on the importance of upholding and daily projecting our values and standards.<sup>22</sup> But the crisis would still get worse.

At a press conference in November 1995, ADM Macke said of the rape:

I think it was absolutely stupid. I have said several times: for the price they paid to rent the car [used in the crime], they could have had a girl [prostitute].<sup>23</sup>

President Clinton relieved ADM Macke immediately and, upon revelation of an adulterous affair the admiral had been engaged in, forced him to retire as a two-star. President Clinton then had an emergency meeting with the Japanese Prime Minister, Ryutaro Hashimoto, to negotiate a new bilateral agreement that would “reduce the amount of land on Okinawa covered by U.S. bases by 21 percent.”<sup>24</sup> As Krulak had foreseen, the “Okinawa Rape Crisis” and the “Taiwan Strait Crisis” illustrated the tendency of 21st Century crises to converge, coalesce, and cascade into what became, in effect, an “American Presence in the Pacific” crisis.

Gen Krulak, who was already moving at breakneck speed on several fronts, sprang into action and demanded immediate improvements to recruit training. Krulak wanted greater emphasis on how the core values of our *youngest Marines* were now an integral part of our war-fighting philosophy. And in keeping with his philosophy on recruiting, Krulak did not want recruit training to be made “easier” or more “sensitive,” but rather *tougher* and *more challenging*. The result was an extension of Marine boot camp – already the longest and toughest of all the services – by 1 week and the addition of a grueling 54-hour evolution called “The Crucible.” Gen Krulak described its rationale as follows:

We developed the Crucible for two major reasons. The first reason is that we saw a change in the operating environment in which our Marines will be employed. Decentralized operations, high technology, increasing weapons lethality, asymmetric threats, the mixing of combatants and noncombatants, and urban combat will be the order of the day vice the exception in the 21<sup>st</sup> century. Our Marines must be good decision-makers. They must be trained to the highest standard. They must be self-confident. They must have absolute faith in the members of their unit. This is why we have instituted the Values Program for all Marines. This is why we have enhanced the way we transform America’s sons and daughters into U.S. Marines. This is why we have included the Crucible as part of the Transformation process. We must ensure that our newest Marines fully understand and appreciate what the Marine Corps represents, and that, as members of the world’s fighting elite, they must uphold the sacred trust we have with our great Nation—and the sacred trust that we have with each other. The Crucible is designed specifically to contribute to the making of this kind of Marine. Preparing our young Marines for battle is the genesis for the Crucible.

The second reason for the Crucible was derived from subtle changes in the societal norms and expectations of America’s youth. We have all heard the term “generation X,” a term often associated with a negative connotation. Yet, it is from this

generation that we recruit the Marines who will be our future. It is, therefore, important for us to understand just how the young people of today view the world, to understand what motivates them. Almost 2 years ago, we brought in a team of psychologists to tell us about generation X. From them, we learned that young people today are looking for standards, and they want to be held accountable. They, for the most part, don't mind following, but they can lead and want to lead. Most want to be part of something bigger than themselves. They want to be something special. Most believe in God. Many don't fully recognize it as such, but they want to have faith. These traits manifest themselves in a tendency to join—join gangs, join fraternities and clubs, join causes. These are exactly the same attributes and attitudes that offer the Marine Corps a tremendous opportunity. Generation X does not want to be “babied.” These young Americans are looking for a real challenge. They desperately want to be part of a winning team; they crave the stature associated with being one of the best.<sup>25</sup>

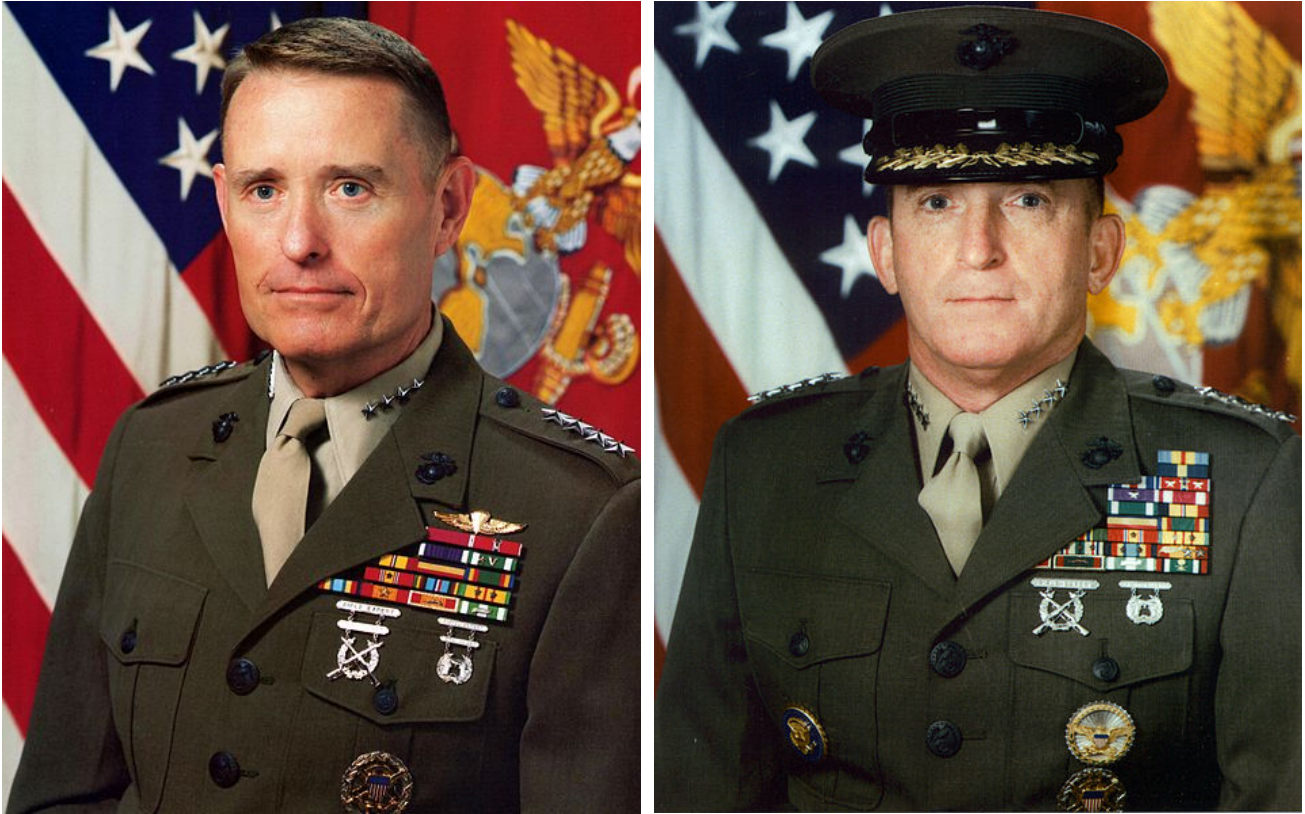
Yet again, Krulak was flying in the face of conventional wisdom and the practices of the other services by *extending* the time Marine recruits would spend in the entry-level pipeline when the budget reality of the time seemed to call for *reducing* the perceived inefficiencies of more time in the entry-level pipeline. By the summer of 1997, Crucible-trained Marines were arriving in the Operating Forces and the results were extremely positive. The Crucible remains the defining moment for newly minted Marines to this day.

*The Marine Corps Drill Instructor ribbon was authorized for wear by the Secretary of the Navy in July 1997 for Marines who have trained and qualified as Drill Instructors and officers in recruit training.*



On 1 July 1999, Gen Krulak relinquished his post as Commandant to Gen James L. Jones. As he did so, the recruiting situation was grim for the Armed Forces: the Army's goal for fiscal year 1999 was to access 74,500 recruits and it would miss by 7,000; the Navy had missed so badly in fiscal year 1998 that their situation was called “disastrous;” and the Air Force was struggling too, which one expert called “against the laws of God and Nature.”<sup>26</sup> The Marine Corps Recruiting Command -- alone of the Armed Services recruiting organizations -- had made its recruiting goals for 48 months straight, during every month of Gen Krulak's tenure, and with higher enlistment standards, tougher recruit training, and with every Recruiting Station Commanding Officer screened and selected by his formal process. Gen Jones would continue this unbroken string of success during his tenure as Commandant until January 2003, after which he became the Supreme Allied Commander for Europe and NATO – the first Marine ever to hold this post. His words continue to greet every visitor to the MCRC Headquarters in Quantico:

*"I know of no command that is more operational."*



**Questions For Discussion (30 min)**

1. Describe the recruiting reforms put in place by Gens Mundy and Krulak. What was the context in which they led the Marine Corps? Would you characterize their reforms as a “second revolution” in Marine Corps recruiting? Why, or why not?
2. What was the response of Gens Mundy and Krulak when the Marine Corps came under institutional strain? How was this similar, or different, to the responses we saw by Gens Wilson and Barrow? Which way does the “arc of Marine Corps recruiting bend,” more or less selective? Which standards matter most to the American people?
3. Compare and contrast the response of the U.S. Congress to Gen Krulak’s request to raise enlistment standards and toughen recruit training with its earlier rejection of Gen Cushman’s request to ease the restrictions of Section 718. What does this tell us about the American peoples’ expectations of their Marine Corps?
4. Consider the the following quote by Sun Tzu within the context of the Okinawa Rape Crisis:

“...the best military policy is to attack strategies; the next to attack alliances; the next to attack soldiers; and the worst to assault walled cities.”

Why is this significant as the Marines rebalance to the Asia-Pacific region?

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<sup>1</sup> General Carl E. Mundy, “Eulogy for General Louis H. Wilson,” Congressional Record, 109<sup>th</sup> Congress, 29 July 2005, <http://thomas.loc.gov/cgi-bin/query/z?r109:S29JY5-0031>.

<sup>2</sup> Millet, 627-630.

<sup>3</sup> Ibid, 632.

<sup>4</sup> Ibid, pp 632-634.

<sup>5</sup> Millet, 638-639.

<sup>6</sup> As quoted in Millet, 639.

<sup>7</sup> Millet, 640.

<sup>8</sup> Ibid, 641.

<sup>9</sup> Roster, 640.

<sup>10</sup> MajGen Charles C. Krulak, “A Corps of Marines for the Future: Relevant, Ready, Capable,” *Marine Corps Gazette*, June 1992, p 14.

<sup>11</sup> General Walter E. Boomer, “Smaller and Better In the 1990s,” *Marine Corps Gazette*, October 1992, p 19. (originally published in *Proceedings*, May 1990)

<sup>12</sup> Bailey, 233-234.

<sup>13</sup> Reich and Kozlusky, 67.

<sup>14</sup> Joseph A. Bushner, *Winning the Recruiting War*, Marine Corps Recruiting Command, p 4.

<sup>15</sup> Rostker, 662-663.

<sup>16</sup> General Charles C. Krulak, “Commandant’s Planning Guidance,” *Marine Corps Gazette*, August 1995, p A-17.

<sup>17</sup> Ibid, A-18.

<sup>18</sup> These reforms were described by SgtMaj Lee (USMC Ret) at the “Lucky 13” Conference, 12 February, 2014.

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<sup>19</sup> Captain Manuel F. Munoz, “Analysis of the Screening and Selection for U.S. Marine Corps Recruiting Station Commanding Officers,” Naval Postgraduate School Thesis, March 2005, p 3.

<sup>20</sup> Ibid, 4.

<sup>21</sup> General Charles C. Krulak, “The Strategic Corporal,” *Leatherneck*, January 1999, p 16.

<sup>22</sup> Edgar F. Puryear, Jr., *Marine Corps Generalship*, National University Press, Washington D.C. 2009, 253-254.

<sup>23</sup> 1995 Okinawa Rape Incident, [http://en.wikipedia.org/wiki/1995\\_Okinawa\\_rape\\_incident](http://en.wikipedia.org/wiki/1995_Okinawa_rape_incident).

<sup>24</sup> Ibid.

<sup>25</sup> General Charles C. Krulak, “Crucible: Building Warriors for the 21<sup>st</sup> Century,” *Marine Corps Gazette*, December 2013, pp 22-23.

<sup>26</sup> Bailey, 233.

## Making Marines, Part III

The third revolution in Marine Corps recruiting, January 2012 --

### **The Context: January 2012**

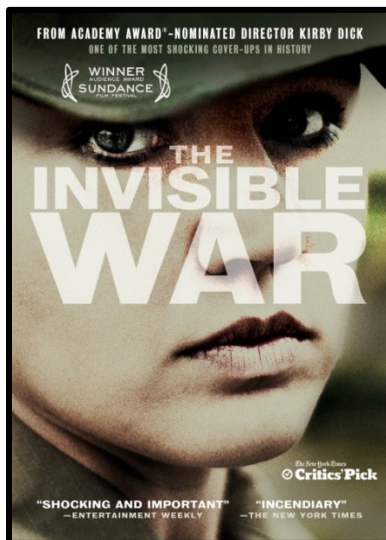
Years hence, Marines are likely to look back upon January 2012 as the beginning of the third revolution in Marine Corps recruiting. Three different yet inter-related events happened then that would change the future direction of the Marine Corps. First, on 5 January, President Barack Obama, Secretary of Defense Leon Panetta, and Chairman of the Joint Chiefs of Staff, GEN Martin Dempsey, USA, held a press conference at the Pentagon to announce their publication of a new defense strategy. The Service Chiefs, Combatant Commanders, and Department of Defense (DoD) civilian leadership had all worked for 6 months on this strategy as part of President Obama's call for a "comprehensive defense review" that would reduce the defense budget by \$500 billion over the next decade. The month before, in December 2011, President Obama had officially ended the U.S. military's mission in Iraq and said that the new strategy was "turning the page on a decade of war."<sup>1</sup> He also announced that "we will [now] be strengthening our presence in the Asia Pacific."<sup>2</sup> Secretary Panetta and GEN Dempsey echoed President Obama's strong support for the new defense strategy, calling for new ways of projecting power into anti-access/area denial (A2/AD) environments and in developing "innovative, low-cost, and small-footprint approaches" to achieving our national security objectives through "exercises, rotational presence, and advisory capabilities."<sup>3</sup> In a difficult budget environment, the new strategy clearly sought to leverage the Marine Corps' unique capabilities for our Nation. This was good for the Corps.

Second, on 11 January, the Marine Corps suffered a serious setback. Someone anonymously posted a video on "Youtube" showing Marines urinating on the corpses of dead Afghans, with one of the Marines heard to be saying, "Have a great day, buddy." The Marines were quickly identified as coming from the 3d Battalion, 2<sup>d</sup> Marines, which had recently redeployed from Now Zad, Afghanistan. The video strained the potential peace talks with the Taliban that had been planned and led to reprisal attacks against French soldiers, which placed an even greater strain on NATO's international coalition. Secretary of State Hillary Clinton strongly condemned the "deplorable behavior" of the Marines shown in the video, and Headquarters Marine Corps released a statement: "The actions portrayed are not consistent with our core values and are not indicative of the character of the Marines in our Corps. This matter will be fully investigated." Some Marines did not immediately grasp the gravity of the situation or its implications, potentially indicating an even greater problem. On the heels of the new defense strategy, significant damage had been done to the Corps.





Third, on 20 January at the Sundance Film Festival in Park City, UT, a documentary film called *The Invisible War* was released to wide critical acclaim. The film purported to show a culture of rampant sexual harassment, sexual assault, and in some cases even reprisal against victims of sexual assault in all branches of the military. *The Invisible War* contained several moving and gut wrenching interviews with several female (and male) servicemembers who had been the victims of sexual assault, often at the hands of their uniformed colleagues. The film delved deeply into the Navy's 1991 Tailhook scandal, the Army's 1996 Aberdeen Proving Ground scandal, the 2003 Air Force Academy scandal, and culminated with an uncovering of an alleged culture of sexual harassment and sexual assault at the prestigious Marine Barracks, Washington, DC. As if that were not enough, in February 2012 another photo of a Marine Scout/Sniper Platoon appeared in the media -- this one from the 1<sup>st</sup> Reconnaissance Battalion -- showing very unkempt and disheveled Marines with a flag emblazoned with an "SS" logo resembling that used by the Waffen SS in Nazi Germany. Taken together, these incidents grabbed the instant attention of the Commandant and Sergeant Major of the Marine Corps -- Gen James F. Amos and Sergeant Micheal Barrett -- and galvanized them into immediate, focused, and decisive action.





In the mid-1990s, Gen Krulak had seen and articulated two main reasons for implementing the Crucible: changes to the operating environment and new generational dynamics. The events of January 2012 showed that these changes were upon us again. First, the operating environment had changed in substantial ways. Military operations would now be conducted in information-saturated environments in which every action could be captured and recorded. These images could then be transmitted globally, and "go viral" near-instantaneously. Moreover, counterinsurgency, stability, and "presence" operations would be competitions for influence. The U.S. strategic position would rest on perceptions of American intentions and values as shown by the most junior Service members on the ground.

In ways that Gen Krulak had foreseen, the networking and information sharing technologies that enabled the tremendous capabilities of our small units also now had the potential to elevate tactical action to create profound strategic effects -- for good or ill. As improved sustainment and command and control capabilities would now permit more widely distributed formations, increased dispersal of these same forces would be necessary to protect against high-density, long-range weapons. These factors place an ever greater emphasis on the operational wisdom, judgment, tactical and technical expertise, and character of our small units and their leaders. The tyranny of distance across the vast blue highways of the Asia-Pacific would only accentuate these trends. More than ever, Marines would now have to be recruited, trained, educated, and led in a manner that reflected the strategic consequences of their every action. *The strategic corporal – or lance corporal, staff sergeant, lieutenant, or lieutenant colonel – would be our most important national asset, but – as the events of January 2012 illustrated – was also a liability if they were not properly armed with superior character and sound judgment.*<sup>4</sup>

Second, a new generation known as “Millennials” had arrived upon the scene. Our Nation currently has 80 million “Millennials” (those people born between 1981 and 2002); our Corps currently contains 144,000 of them at the ranks of sergeant and below; and our Corps will access between 200,000 and 250,000 of them over the next 8 years. In 2006, LtCol Wayne Sinclair published an insightful article on “Millennials” in the *Marine Corps Gazette* describing their characteristics:

By design and with the best intentions, Millennials became the most protected generation in history....Higher academic standards, ‘zero tolerance’ policies, school uniforms, and formalized teacher accountability were widely instituted....In contrast to Generation Xers, parental relationships and opinion are considered crucial to young people’s well-being and decisionmaking calculus. Accustomed to center stage, they are more than willing to work hard to meet the high expectations of the audience....They expect light speed and interactive communications tools and are comfortable conveying and receiving information in sound bytes and key strokes. When one considers that Millennials have never known life without cell phones, instant messaging, and fingertip access to ideas and information from around the world through the Internet, their conceptions of time, communications, and space are easier to understand....Their generational propensity to impose order, seek the greater good, take the role of protector vice conqueror, build structure, and seek clarity of direction or consensus in their actions are not necessarily liabilities in the irregular three block wars and nation-building predicaments in which

Marines will find themselves for decades to come. Still, one must understand their capacity for creativity and self-regulation. *In contrast to their more independently minded Generation X predecessors, the Millennial small unit leaders need and expect tailored solutions (e.g. tactics, techniques, and procedures), structure, oversight, teamwork, methodology, and a cause that gives them the opportunity to make a difference for something greater than themselves [emphasis added].*<sup>5</sup>

In addition, Millennials are more at ease with diversity; more tolerant of converging gender roles; more confident in their futures despite economic hard times; more likely to live in an inter-generational household; and less idealistic about America's role in the world.<sup>6</sup> While the lone warrior navigating the maze to emerge and slay the fire monster to the cheers of the crowd might have had great appeal to the Generation Xer, the Millennial will be much more likely to respond favorably to a multi-ethnic, multi-gender *team working together* to achieve a great deed, and with the eyes of the world upon them. And the winter of 2012 shows what can happen when their propensity to collaborate goes awry.

The result of these interdependent dynamics has been causing a gradual shift in the daily habits of Marine recruiters. For example, today's Marine recruiters are likely to spend at least as much time teaching, coaching, leading, and mentoring their "future Marines" to prepare them for life in the Corps as they are "prospecting and selling" new applicants. And while some recruiting "old hands" warn that the force will not be able to do this when the missions return to their historically higher levels, the cost of not investing this considerable personal time and energy into every future Marine could be disastrous. For example, if another "Okinawa Rape Crisis" were to happen within the framework of our strategic "rebalancing" to the Asia-Pacific, perhaps with a video of the crime uploaded to the Internet, the impact could be equal to that of a weapon of mass destruction. The new operating environment and the characteristics of Millennials are changing the game yet again for recruiting.

Seeing all of this, Gen Amos and SgtMaj Barrett spoke to the colonels and lieutenant colonels attending the "Commander's Course" in March 2012 and gave them an early version of what would come to be known as the "Heritage Brief." They made it clear to all the officers present that if they were not 100 percent "all in" on leading Marines through our core values and reinforcing "Who We Are" 24/7/365, then they should not take command. At least one slated colonel waved off after this. The Commandant then published a White Letter on 23 March (the last day of the Commander's Course) titled "Leadership and Conduct," and instructed the President of Marine Corps University, MajGen Thomas Murray, to hand deliver it to all attendees of the course. That month, Gen Amos also announced the standing up of an operational planning team to be led by a general officer and comprised of hand-picked colonels and enlisted leaders that he would task with developing a Service-wide Sexual Assault Prevention and Response (SAPR) Campaign Plan.

The former Commandant and Sergeant Major of the Marine Corps began to deliver their "Heritage Brief" across the Marine Corps that spring. On 3 May, Gen Amos published a White Letter titled "Sexual Assault" calling immediate attention to this urgent problem and describing a way ahead on how to fix it:

Accordingly, the awakening within the Marine Corps on this issue starts immediately...with receipt of this letter. I intend to shine a bright light on the crime of sexual assault. It is no longer acceptable to say ‘We will do better.’ I want Marines of all ranks thinking and talking about this issue. We must reinforce the message that it’s every Marine’s inherent duty to step up and step in to prevent sexual assault...**As a Marine Corps, we will take the same approach we have taken to combat the threat of improvised explosive devices over the last eight years and ‘get to the left of the event.’.....This letter represents a shot across the bow for all Marines on the issue of sexual assault** – it is my intent to publish our Corps-wide Campaign Plan within the next 30 days.<sup>7</sup>

In July 2012, after the Marine Corps’ Campaign Plan was published, every Marine general officer was called back to Washington, DC and educated on sexual assault and their leadership responsibilities for preventing it; they, in turn, educated all of their subordinate commanders, who in turn educated all of their Marines. By the fall of 2012, every single Marine, sailor, and civilian Marine in the Marine Corps had been fully trained on sexual assault prevention and response and had received the former Commandant’s “Heritage Brief.” During these briefs, Gen Amos made clear to all Marines that he was declaring “war” on sexual assault; that stopping it would test Marines’ courage like never before; and that he viewed this scourge as an *existential threat* to the trust and respect of the American people in their Marines, and thus to the Corps’ survival.

Commanding generals and commanding officers took their Commandant’s intent and started to turn ideas into action in the fall of 2012. And as with the “Wilson-Barrow” and “Mundy-Krulak” reforms from earlier, the most *strategic* reforms were arguably taking shape where it all began: in recruiting and recruit training. The former Commanding General, Eastern Recruiting Region/MCRD Parris Island, BGen Loretta E. Reynolds – occupying the post once held by the “Hero of Funchilin Pass” and herself a decorated combat commander from the wars in Iraq and Afghanistan and one of the first RS Commanders screened by Gen Krulak’s new RS CO command selection system back in 1996 – implemented an initial series of reforms that were later adopted by MCRC:

- First, there would now be “Two-Person Integrity” for all recruiting activities with applicants and entry-level Marines of the opposite sex.

- Second, all female recruits would now receive enhanced screening and an educational video once aboard MCRD Parris Island to ensure that our recruiting force has been professional and adherent to our core values in all areas and, if a recruit has had something bad happen to them prior to entering our Corps, they would get the help, counseling, and leadership they need to be *successful* in our Corps.

- Third, Marines on recruiting duty were directed to widen their aperture through which they compete for the best female talent out there, to include engaging women's sports teams, honor societies, and women’s coaches groups, thus opening pathways to previously untapped reservoirs of talent for our Corps.

- Fourth, Marines would now truly begin the “Transformation” and enculturation into our Corps in the recruiting office by teaching, counseling, coaching, mentoring, and leading our

"future Marines" with values-based training, whole-of-character training, and entry-level training classes.

With these reforms in place in recruiting and recruit training, in January 2013 two more significant events happened that would dramatically affect the Corps' future. First, the U.S. Congress failed to reach a compromise before midnight on 31 December 2012 that would have allowed them to pass a budget, triggering a mechanism called "Sequestration" that imposed draconian, across the board budget cuts to the Federal Government. The Marine Corps' share of this budget cut would be \$1.4 billion in fiscal year 2013 and \$2 billion per year every year for the next 10 years. The recruiting and advertising budget would have to be trimmed substantially. Second, on 14 January, the Department of Defense announced an end to the formal "Direct Combat Exclusion Rule" which had prevented women from serving in units whose primary mission was to engage in close in ground combat. While the language rescinding this policy did not specifically refer to the military's problems with sexual assault, former Secretary of Defense Leon Panetta said afterward that he hoped military leaders were beginning to "get the message" on reducing sexual assault, adding that he hoped his decision to allow female servicemembers onto the battlefield would speed a larger culture change within the military:

Having them be able to get into combat and having them get into key positions would, in fact, make people a hell of a lot more sensitive to these kinds of issues....This is not something that's going to be fixed overnight. It's going to take a dedicated effort to make sure we have a clear message out there that we have zero tolerance for sexual assault.<sup>8</sup>

Panetta's comment seemed to suggest that allowing women into combat roles was as motivated by eradicating the scourge of sexual assault from the military's ranks as it was about expanding opportunities for women and expanding the operational effectiveness of our forces.

Later in 2013, Gen Amos announced the standing up of a "Diversity Task Force" in response to a report produced by the Military Leadership Diversity Commission. This Commission -- which had been mandated by Congress's 2009 National Defense Authorization Act -- released a report in March 2011 concluding that:

The Armed Forces have not yet succeeded in developing a continuing stream of leaders who are as demographically diverse as the Nation they serve....The Armed Forces must also acknowledge that diversity encompasses more than demographics, and they must take action to harness the range of knowledge, skills, and backgrounds needed to prevail in the rapidly changing operational environment.<sup>9</sup>

Moreover, as the role of women has continued to expand in the workplace as the Nation transitions from an Industrial Age economy that placed a premium on physical strength (which benefited males) to an Information Age economy that values knowledge above all else (which benefits all of those people who are smart and work hard), the diversity task force's charter encompassed the recruitment and retention of female Marines as well as minorities. With 6 in 10 college students and 20 of 100 U.S. Senators currently being women, the importance of how well we recruit, train, lead, mentor, and retain female Marines will only grow.<sup>10</sup>

On 12 March 2014, Gen Amos published a White Letter describing the Marine Corps' way ahead on allowing women Marines to serve in ground combat units. Specifically, the former Commandant articulated four lines of effort to accomplish this task: 1) an expansion of the assignment of female Marines (which had been limited to just officers since 2012) to include NCOs in non-infantry, ground combat arms battalions down to the company and battery level; 2) expansion of opportunities for women Marines to volunteer for closed MOS training schools following their graduation from recruit training; 3) creation of a Ground Combat Element Experimental Task Force to train female Marines in hitherto closed MOSs and to observe and document their performance; and 4) opening 11 ground combat arms MOSs that had previously been closed to female Marines.<sup>11</sup> And while the Marine Corps continues to press ahead towards integrating female Marines into ground combat arms occupations, Secretary of Defense Chuck Hagel is calling for "wide and deep" changes within the military culture to completely eradicate sexual assault.<sup>12</sup> Speaking at the sexual assault hotline center on 21 April 2014, Secretary Hagel said he wants his presence there to send this message to all hands: "No single issue has a higher priority at the Pentagon."<sup>13</sup>

As the AVF enters its 41st year amidst this welter of change, the Marine Corps continues to enjoy unprecedented recruiting success. The looming threat of further budget cuts, however, threatens the recruiting and advertising budgets and manning levels. For example, the Marine Corps is the youngest and smallest of the services yet maintains the second highest number of recruiters at about 3,000 of 15,000 armed forces recruiters Nation wide (the Army has 7,000). The words of former Deputy Secretary of Defense Dr John White, who spoke at the 30<sup>th</sup> Anniversary Conference of the AVF on the fragility of recruiting, remain especially trenchant:

[first] it takes some time for the system to detect any important shifts in program effectiveness. Monitoring mechanisms are 'weak and imperfect, leading to an unfortunate lag between changes in conditions and changes in policy.'....Second, once the remedies are fashioned there is a further, inevitable, lag in the time it takes to make either internal, programmatic adjustments or legislative changes such as authorizing pay increases.<sup>14</sup>

Gen Amos acknowledged this fragility, and in his remarks to all of the recruiting commanders in February 2014 told them he would "not fall prey to cutting MCRC." He also told MCRC's commanders that the effort to "Reawaken the Soul of the Corps" began with the recruiting force as that was where future Marines had their first contact with our Corps and when their initial azimuth was set.

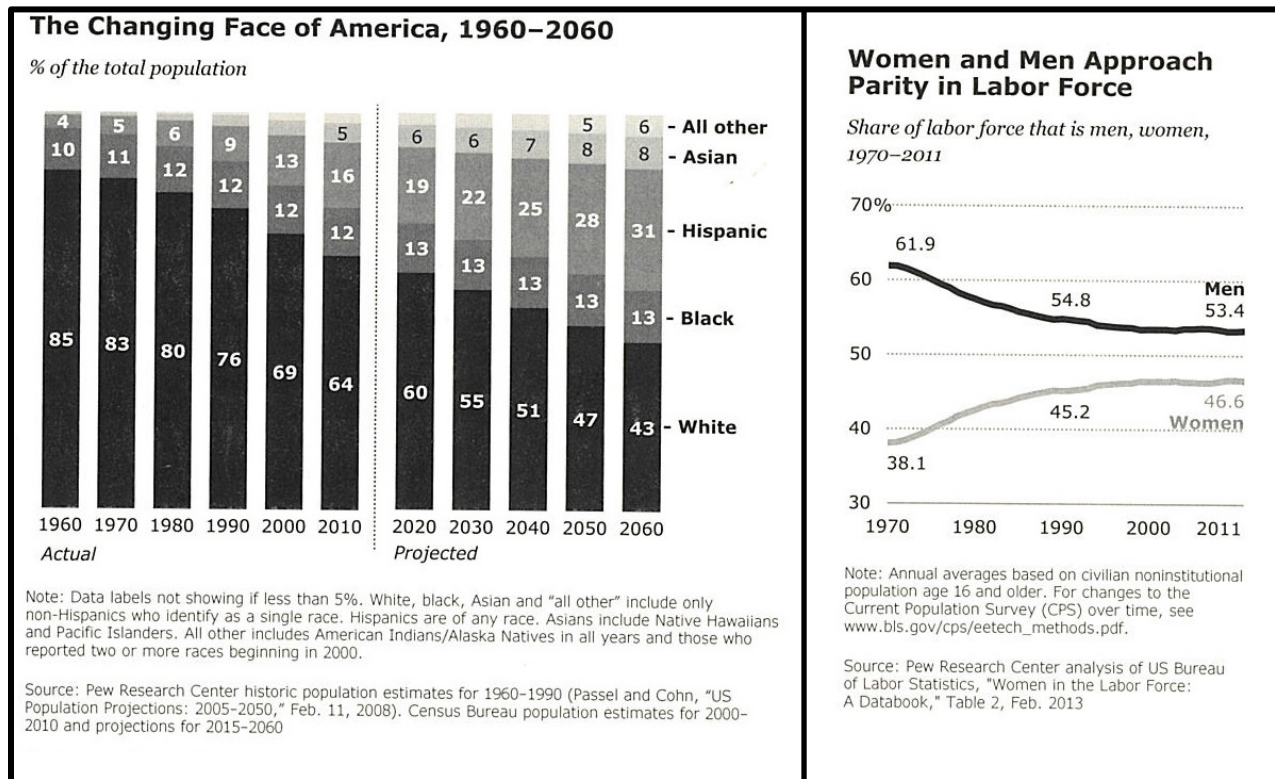
It has been two generations since the "Wilson-Barrow" reforms gave us the first revolution in Marine Corps recruiting, and nearly a generation since the "Mundy-Krulak" reforms professionalizing the force engendered the second. As we go forward, standing upon the shoulders of giants, the challenges and opportunities of our forbears lie before us: How will the Marine Corps continue to establish our Marines as "a breed apart" in the hearts, minds, and souls of the American people? How will we sustain and perpetuate our ethos and values to a new generation of Marines? This story does not have a neat and clean ending because, as you all know, it is still being written. And as noted in Part I, the Marine Corps' story is itself still a developing one: it is not the story of great leaders, new platforms, or visionary new concepts

(however important all of these may be). It's worth recalling the timeless words of Brute Krulak:

In the most profound sense, I suppose, the future of the Corps lies within itself, because, however large or small its problems are, nobody else is going to find solutions to them. It has been that way for over 200 years and it is that way today. It is a challenge that will demand the very best of a Corps that has been sharpened on challenge for all of its colorful life.<sup>15</sup>

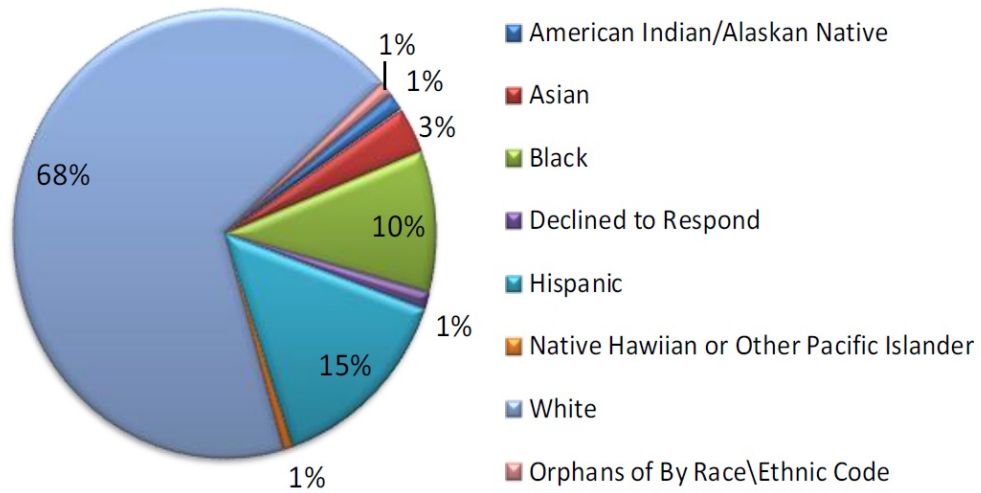
In closing, ours is the story of the young man or woman of character who voluntarily overcomes great odds to become transformed into a "U. S. Marine;" who then deploys into the great frontiers of history to help win battles for our Nation; and who then returns to society as a better citizen with a ruck sack full of stories to inspire the next generation of future Marines. Using everything you have learned thus far, the graphs and tables below, and (of course) the Brute's insight,

*What is the next revolution in Making Marines?*



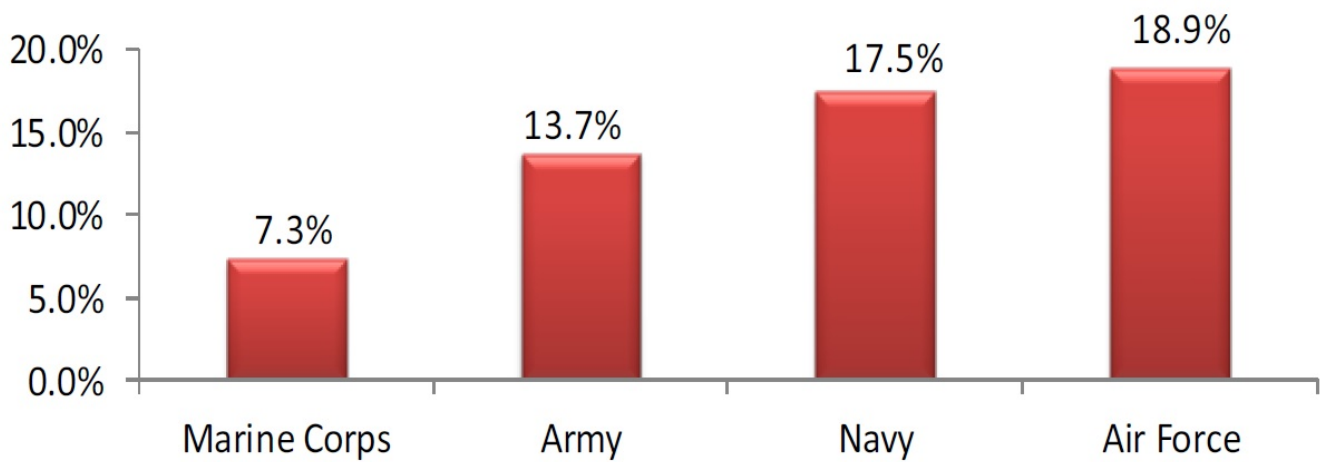
Taylor, *The Next America*, pp 3, 13.

**Ethnic Demographics of the Marine Corps**  
**Data Source: TFDW - December 2013**



Marines Almanac

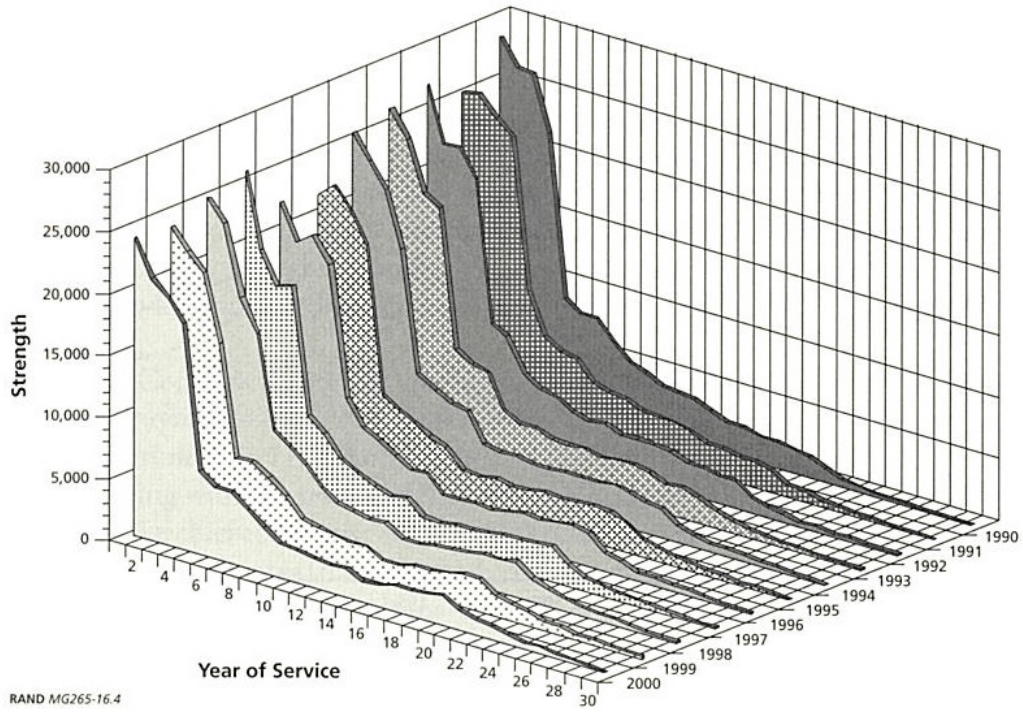
**Percentage of Female Members**  
**Data Source: DMDC - December 2013**



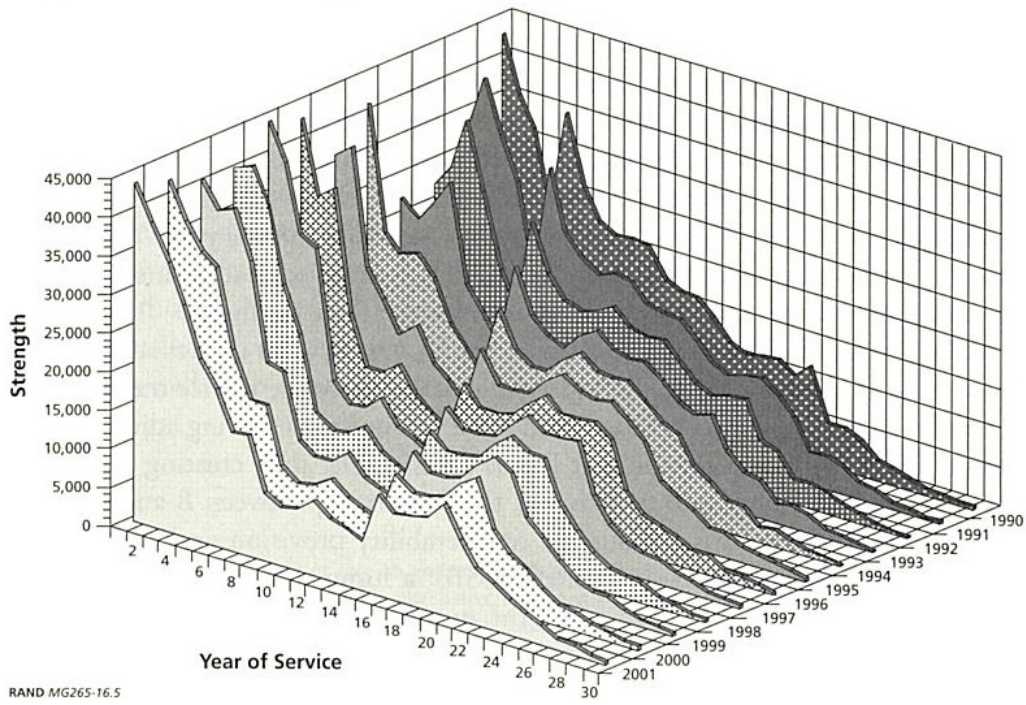
Marines Almanac



Marine Corps Enlisted Personnel Profile, 1990–2000

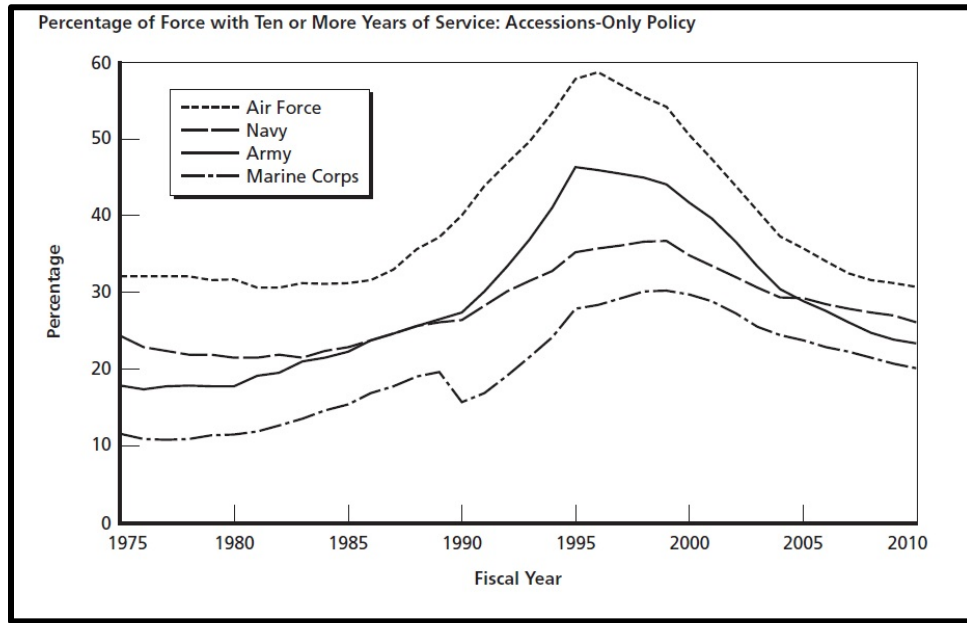


Air Force Enlisted Personnel Profile, 1990–2001



Rostker, 641.





Rostker, 642.



Legacies from the “Hero of Funchilin Pass” and Gen Krulak’s RS CO command selection board: the former Commandant and Sergeant of the Major of the Marine Corps, Gen James Amos and Sergeant Major Micheal Barrett, and the former Commanding General ERR, BGen Loretta E. Reynolds, recognize the “Superior Achievers” of the Eastern Recruiting Region in February 2014. Gen Amos presented every “Superior Achiever” award earned during his tenure as Commandant.



Marines deliver a leadership presentation to Clemson University's Women's rowing team at the ACC Championships in May 2014. Aggressively competing for the best female talent out there could very well be part of the next revolution in "Making Marines."

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<sup>1</sup> President Barack Obama, Defense Strategic Guidance Briefing from the Pentagon, 5 January 2012.

<sup>2</sup> Ibid.

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<sup>3</sup> President Barack Obama and Secretary of Defense Leon Panetta, *Sustaining U.S. Global Leadership: Priorities for 21st Century Defense*, Washington, DC, 2012, p 3.

<sup>4</sup> Colonel Todd S. Desgrosseilliers, Colonel William J. Bowers, and Lieutenant Colonel Christian F. Wortman, U.S. Marine Corps, “Projecting Power in gator Operations,” *Proceedings*, November 2012, pp 34-39.

<sup>5</sup> LtCol Wayne A. Sinclair, “Millennials Merging: Leading a New Generation in War,” *Marine Corps Gazette*, September 2006, pp 72-74.

<sup>6</sup> Paul Taylor, *The Next America*, Public Affairs: New York, 2014, p 33.

<sup>7</sup> General James F. Amos, CMC White Letter, “Sexual Assault, 3 May 2012.

<sup>8</sup> Jason Hoppin, “Panetta: Military 'ought to be transparent' on record of man who killed Santa Cruz police officers,” *San Jose Sentinel*, 13 March 2013, [http://www.mercurynews.com/central-coast/ci\\_22776194/former-defense-secretary-leon-panetta-military-ought-be?source=rss](http://www.mercurynews.com/central-coast/ci_22776194/former-defense-secretary-leon-panetta-military-ought-be?source=rss)

<sup>9</sup> Lester L. Lyles, Chairman, MLDC, *From Representation to Inclusion: Diversity Leadership for the 21<sup>st</sup> Century Military*, March 2011, p xiii.

<sup>10</sup> Taylor, 30.

<sup>11</sup> General James Amos, CMC White Letter, “Integrating Female Marines Within the Ground Combat Element,” 12 March 2014.

<sup>12</sup> “Hagel Vows to Keep Fighting Sexual Assault,” *USA Today*, 21 April, <http://www.usatoday.com/story/news/nation/2014/04/21/military-sexual-assault-defense-secretary-chuck-hagel/7970211/>

<sup>13</sup> Ibid.

<sup>14</sup> Rostker, 755.

<sup>15</sup> Krulak, *First to Fight*, 226.



# Appendix 1: Case Study User's Guide





## Case Study User's Guide

**“We need every Marine and Sailor to seek creative solutions to today’s and tomorrow’s complex problems.... to ensuring we can Innovate, Adapt, and Win!” *Marine Operating Concept***

**1. Purpose:** Provide unit leaders with information on how to lead small group case studies.

**2. Intent:**

**a. Purpose:** The purpose of case studies is to use historical scenarios as an analytical guide for: 1) professional discussion and debate in pursuit of solutions to current real-world problems and leadership challenges; and 2) developing the critical thinking and creative decision-making abilities of participants. Case studies are also an effective way to rehearse the practical application of leadership and ethical principles (reps and sets), to demonstrate the value of diversity in decision-making, to connect Marines with their legacy of character and competence in a meaningful way, and to strengthen team cohesion.

**b. Methodology:**

(1) Case studies are conducted in a Socratic, student-centered learning environment where the students take the lead in the discovery process, guided by the instructor. Rather than serving as a lecturing “sage on the stage,” the instructor functions as a facilitator, moderator, devil’s advocate, and fellow-student who guides discussion with thought provoking questions intended to draw out key themes and principles and to exploit teachable moments that emerge from the dynamic interaction. Unlike lectures, case study discussions unfold without a detailed script or pre-determined outcomes -- the aim is to teach participants how to think rather than what to think.

(2) Successful case study discussions rely heavily on both preparation and spontaneity. A precondition for a successful case study is all participants have thoroughly studied and analyzed the associated historic narrative, supporting materials, and assignment questions and are prepared to challenge the group with their unique experienced-based insights. Additionally, the instructor must be prepared to stimulate thought-provoking discussion through targeted, thematic, open-ended questions; all-hands prompting; cold-calls; follow-ups; and summations. Thorough preparation and effective moderation in an environment of mutual respect set the conditions for a rich free-exchange of ideas and unconstrained learning.

(3) Effective case study leaders guide students to discover unchanging principles applicable to current challenges, alternatives to conventional wisdom, and new approaches to problem solving across key themes and focus areas relevant to the Marine Corps. The following are examples of pertinent interest areas which should emerge naturally from case narratives and provide direction for continued discussion and debate:

**(a) Warfighting Themes**

- Nature/Character of Warfare
- Command and Leadership
- Strategic and Military Culture
- Learning and Adaptation
- Maneuver Warfare
- Geography
- Sustainment
- Unity of Effort

**(b) Advance to Contact -- Five Vital Areas**

- People
- Readiness
- Training/Simulation/Experimentation
- Integration with the Naval and Joint Force
- Modernization and Technology

**(c) Marine Operating Concept – Five Critical Tasks**

- Integrate the Naval force to fight at and from the sea
- Evolve the MAGTF
- Operate with resilience in a contested-network environment
- Enhance our ability to maneuver
- Exploit the competence of the individual Marine

**c. Desired Outcomes:** Case studies are intended to achieve the following goals:

- (1) Develop student skills in critical thinking, creative problem-solving, decision-making, communication, and leadership.
- (2) Involve more personnel in the pursuit of solutions to current operational and leadership challenges.
- (3) Provide personnel with an effective way to rehearse the practical application of leadership and ethical principles (reps and sets)
- (4) Demonstrate the value of diversity in decision-making.
- (5) Educate Marines on the nature of war and the principles of warfighting.
- (6) Encourage students to have more responsibility for their learning, and promote skills, practices, and disciplines that enable lifelong learning and independent problem-solving.
- (7) Demonstrate an effective method of teaching that can be replicated by participants with future students.
- (8) Connect Marines with their legacy of character and competence in a meaningful way.
- (9) Strengthen team cohesion.

### 3. Case Study Preparation.

**a. Student Responsibilities:** The primary responsibility of students preparing for a case study class is to thoroughly study and analyze the associated historic narrative, supporting materials, and assignment questions. The goal of preparation is not simply to be prepared to regurgitate facts and chronologies but rather to – understand the “big picture” as well as the game-changing “little details”; identify key themes and principles as well as their applicability to current challenges; identify key causal relationships in their complexity; identify the primary problems and dilemmas faced by protagonists; and identify key decision makers, factors which influenced their decision-making calculus, consequences of their decisions, and alternative approaches to their decisions and actions. Drawing from their personal knowledge and experiences, students should prepare to contribute insightfully and creatively to the group learning environment. If possible students should seek opportunities to discuss the materials with other students before the case study session.

**b. Case Study Leader Responsibilities:** In preparing for the discussion, the leader must become fully conversant with the facts of the case, and should conduct the same analysis he/she expects the group to engage in. Beyond that basic requirement, the leader must prepare both content and process, including a clear set of teaching/learning objectives, a call list, a board plan, an opening question, discussion probes, transitions, follow-up questions, and closing comments. The leader must also prepare the discussion venue – audio/visual requirements, seating arrangement/assignments, supplemental materials, etc. Thorough preparation includes learning about the backgrounds of the students (ideally a small group) in order to develop an informed call plan that maximized the richness of their diverse experiences. Case study leaders should be prepared to start and end the session on time while ensuring all-hands participation and adequate time to summarize group outcomes. Finally, case study leaders should have a plan to collect and share post-event critiques.

### 4. Case Study Execution:

**a. Student Responsibilities:** Students should be ready to start on time and to positively contribute to the learning environment, understanding that there are no passive observers in case study sessions. Effective participation balances active, analytical listening with constructive comments, critique, and debate that draws out and expand upon major learning points. Students must be ready to take intellectual risks and to challenge status quo and group think, while remaining receptive to differing viewpoints and while maintaining mutual respect among participants. Critical thinking must never devolve into cynical thinking, and animated discussions must never become aggravated discussions.

**b. Case Study Leader Responsibilities:** The case study leader (CSL) sets the stage by introducing the material, establishing the learning objectives, explaining the rules of engagement, and starting the discussion pasture. The case study leader actively manages class flow and structure, while responding flexibly to student comments. The CSL poses challenging questions, cold/warm calls, and follow-ups to promote high quality class discussion; stimulates thoughtful student-to-student discussion and encourages participation from all students; draws on student



background information in guiding the class discussion; provides closure to discussion segments with appropriate transitions; and finally, concludes the session with appropriate synthesis, takeaways, and recommendations for further study and actions.

**5. Keys to Success.** The quality of a case study session is determined by the quality of the questions asked and answers given. Harvard Business School Professor C. Roland Christensen described case method teaching as “the art of asking the right question, of the right student, at the right time—and in the right way.”

The “right” questions promote learning and discovery, pique student interest, and yield dynamic discussions. Questions themselves cannot exist in isolation, but instead form part of the basic triad of questioning, listening, and responding. Asking a question entails active listening and a thoughtful response—often in the form of another question or follow-up probe. Good questions take into account the specific audience (What are the students’ needs, interests, and abilities?), the pedagogical goals of the class (What are the key learning objectives? Why should students care?), and the content and class plan (Which case features are relevant, surprising, confusing, etc.? How is the material sequenced?). Whether it calls for analysis, encourages debate, or solicits recommendations for action, a question is most effective when it fits the needs of a specific class context and helps guide students individually and collectively towards discovery and learning.<sup>1</sup>

The below sample questions (a slightly modified list from Harvard Business School) are provided for consideration.<sup>2</sup> These sample questions are organized into four main categories, which mirror the four major ways in which a discussion leader uses questions:

**a. Starting a discussion:** Framing students’ approach to the case study. At the beginning of case discussions, questions involving assessment, diagnosis, or recommendation/action tend to be more effective for stimulating learning than purely descriptive questions such as “What is the situation?” or “What are the issues?”

**(1) Assessment:**

- “How serious is the situation?”
- “How successful is this [protagonist]?”
- “How attractive is the opportunity under consideration?”
- “What’s at stake here?”

**(2) Diagnosis:**

- “What is the most significant problem/challenge faced by the [protagonist]?”
- “Who or what is [responsible/to blame] for the crisis faced by the [protagonist]?”
- “Why has the [protagonist] performed so well/poorly?”

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<sup>1</sup> “Questions for Class Discussions”, C. Roland Christensen Center for Teaching and Learning, Harvard Business School

<sup>2</sup> Ibid. Note: The list of questions provided, along with their explanations, are only slightly modified from the above reference, though detailed quoting and footnoting has been omitted to avoid confusion to the reader.

“As [the case protagonist], what keeps you up at night? What are you most worried about?”

**(3) Recommendation/Action:**

“Which of the [three] options presented in the case would you pursue?”

“What would you recommend to the [protagonist]?”

“What would be your plan of action?”

**b. Following up:** Responding to student comments by probing for more depth (drilling down), opening up the discussion to more participants (moving laterally), or asking for generalization/reflection/synthesis (linking up). Case study leaders should consider that, while follow-ups are necessary to guide the discussion and challenge students, excessive interventions can lead to instructor-focused, hub-and-spoke exchanges. Greater depth of analysis can be achieved through general probes and questions exploring underlying assumptions and boundary conditions.

**(1) General probes:**

“Why?”

“Could you say a little more about that?”

“Could you walk us through your logic/thought process?”

“What leads you to that conclusion?”

“How did you come up with that estimate?”

“Do we have any evidence to support that?”

“How did you interpret that exhibit/quote/data/information?”

“Why is that important?”

“What are the implications?”

**(2) Underlying assumptions and boundary conditions:**

“What indicators/measures/criteria are you using to support your analysis?”

“What are you assuming with respect to [x, y, z]?”

“Do you have any concerns? How might they be addressed?”

“If we assume [x] instead of [y], does that change your conclusion/recommendation?”

“What would it take for you to change your conclusion/recommendation?”

“Was the outcome inevitable?” “Could it have been prevented?”

“To what extent was the [protagonist] just lucky?”

“Is that consistent with [another student’s earlier point]?”

“How does this compare with what we discussed/concluded previously?”

**(3) To open the discussion to other students:** Although the instructor may call on another student without responding at all to the previous comment, it is often helpful to provide some guidance for the subsequent contributor. It is particularly useful to indicate whether the next student should respond directly to the previous comment or not.

**(a) The questions may be prefaced by framing statements such as:**

“Let’s stick with this”

“[Student X] is arguing [y].”

“Any reactions?”

“What about that?” “What do you think?” “Is that right?” “Any concerns?” “Do you buy that?” “Any questions for [previous student]?”

“Who would like to build on [previous student]’s point?”

“Does everyone agree?”

“Does anyone see it differently?”

“Can someone help us [work through this analysis, resolve this confusion]?”

“Can anyone address [student x]’s concern?”

**(b) Broadening the discussion:**

“Other perspectives?”

“Are we missing anything?”

“Are there other issues we should consider?”

“Who can reconcile these different interpretations/conclusions/points of view?”

**(4) To encourage generalization, reflection, or synthesis:** Case study leaders can help students integrate new concepts and internalize takeaways by challenging them to link key learnings to broader leadership issues or experiences from their own lives:

“What do you take away from today’s discussion/case?”

“What’s the moral of this story?”

“Why should leaders care about these issues?”

“In what other situations would the lessons/principles of today’s case apply?”

“Has anyone confronted a similar challenge in their own work experience?”

**c. Transitioning:** Bridging the current situation with the next discussion block, which may include checking for student comprehension before moving on. Transitions are often preceded by two types of questions: 1) comprehension-checking questions that invite questions or final thoughts, and 2) framing questions that link the current situation to the new one.

“Have we missed anything important?”

“Any final comments before we move on?”

“Before we get into [x], are there any questions?”

“Is everyone comfortable moving on to [...]?”

“Now that we’ve established [x], what about [y]?”

“In light of our discussion of [x], what should we do about [y]?”

“What are the implications of [x]?”

“So we’re clear on [x]—shall we move on to [y]?”

“Before getting into the details, how do we think about how we should approach the analysis?”

**d. Handling special challenges:** There are a variety of student contributions that can create challenges for discussion leadership. Examples include tangential, non-sequitur, long, complex, and/or confusing comments. Instructors also may find it difficult to know how best to respond to incorrect answers or the use of offensive or inappropriate language by a student. In many of these instances, it may be difficult to redirect or refocus the comment without interrupting the student. To capture the student’s attention and reduce the likelihood of causing offense or embarrassment, it is helpful to begin the response by making eye contact, saying the

student's name, and offering a neutral-to-complimentary observation such as –

“That’s an interesting perspective,”

“You’re raising some important issues,”

“I hear you saying that [ . . . ].”

**(1) Tangential or non-sequitur comments:**

“How does that relate to what [previous student] was saying?”

“Let’s hold off on that for the moment. Can we first resolve the [issue/debate] on the table?”

“We’ll get to that a little later in the discussion. Let’s stay with [previous student]’s question.”

“Let’s park that [on the side board], and I’ll look for you when we get to [later discussion topic]”

**(2) For esoteric contributions:**

“Why don’t we take that off-line.”

**(3) Long, rambling comments:**

“You’re raising a number of issues. Let’s focus on [x].”

“It sounds like you’re concerned about [x]. Let’s explore that.”

“So you basically disagree with [the previous student] because [x, y]. [To previous student]: would you like to respond?”

“I hear you saying [x]. Does everyone agree?”

“What’s the headline?”

**(4) Complex or confusing comments:**

“Let’s slow this down for a minute.”

“Let’s take it one step at a time.”

“How would you explain that to someone unfamiliar with technical language?”

“Let’s keep it simple.”

“Before digging into the numbers/details, let’s make sure we understand the basic intuition.”

“You mention [x]. I’m not sure everyone is familiar with that concept. Could you clarify?”

“I just want to make sure I understand your argument. You’re saying [ . . . ]?”

**(5) Incorrect answers:** Incorrect answers might stem from a lack of preparation, legitimate confusion, or other causes, such as ambiguous questions or lack of clear direction. For factually incorrect comments containing minor inaccuracies not central to the discussion, it is often appropriate for the instructor to respond with a gentle correction. Faulty or incomplete analysis can serve as a learning opportunity for the student and the class. Ideally, the instructor will 1) not abandon the student, 2) not confuse other students by letting incorrect answers pass unchallenged, and 3) address the reason for the misperception, not just the misperception itself. When possible, the instructor should guide the student or his/her classmates to correct the error.

“Where in the case did you find that?”

“Could you walk us through how you came up with that?”

“Did anyone come up with a different answer?” “Let’s see if we can reconcile these different results.”

“This is a particularly complex analysis. Let’s make sure the basic assumptions are clear.”

**(6) Offensive or inappropriate language:**

“Would you like to take another shot at/rephrase that?”

“Hold on just a second. Do you want to try that again?”

“In less colorful language?”

**6. Conclusion:** Past is prologue – history sets the context for the present. Case studies are a highly effective and enjoyable way to learn lessons from the past and apply them to future current and future challenges. Case studies provide valuable reps and sets for the development of critical thinking and creative decision-making abilities, while promoting teambuilding and collaborative problem-solving. Importantly, effective case studies require rigorous preparation and pre-work by all participants. Students must come fully prepared to positively contribute to a dynamic group learning environment through thought provoking commentary, active listening, real-time analysis, and constructive discussion and debate. Case study leaders must be prepared stimulate and sustain fruitful discussion and debate through questioning, while managing the discussion through the artful balance of structure and flexibility. While adroit case study leaders know how to bring a case study session to a logical conclusion, a successful case study should leave participants with a sense that the discussion has only just begun, and everyone should walk away with heightened interest in autonomous learning and problem-solving.

**Officers are expected to have a solid foundation in military theory and a knowledge of military history and the timeless lessons to be gained from it. *MCDP 1***



Lieutenant General Thomas Holcomb poses with Major General A. A. Vandegrift, Major General Roy C. Geiger, and their commanders and staff on Guadalcanal.