MASTER OF MILITARY STUDIES

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TITLE: THE EFFECTS OF MULTIPLE CONSTRAINTS ON THE ARMY'S
NEW OFFICER EVALUATION REPORT

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

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REPORT DOCUMENTATION PAGE

Form Approved OMB No. 0704-0188

Public reporting burder for this collection of information is estibated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing this collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burder to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. PLEASE DO NOT RETURN YOUR FORM TO THE ABOVE ADDRESS.

1. REPORT DATE (DD-MM-YYYY) 01-07-2002	2. REPORT TYPE Student research paper	3. DATES COVERED (FROM - TO) xx-xx-2001 to xx-xx-2002

4. TITLE AND SUBTITLE
The Effects of Multiple Constraints on the Army's New Officer Evaluation Report
Unclassified

5a. CONTRACT NUMBER
5b. GRANT NUMBER
5c. PROGRAM ELEMENT NUMBER

6. AUTHOR(S)
Hamilton, Charles R. ;

5d. PROJECT NUMBER
5e. TASK NUMBER
5f. WORK UNIT NUMBER

7. PERFORMING ORGANIZATION NAME AND ADDRESS
USMC Command and Staff College
Marine Corps University, MCCDC
2076 South Street
Quantico, VA22134-5068

8. PERFORMING ORGANIZATION REPORT NUMBER

9. SPONSORING/MONITORING AGENCY NAME AND ADDRESS
USMC Command and Staff College
Marine Corps University
2076 South Street, MCCDC
Quantico, VA22134-5068

10. SPONSOR/MONITOR'S ACRONYM(S)
11. SPONSOR/MONITOR'S REPORT NUMBER(S)

12. DISTRIBUTION/AVAILABILITY STATEMENT
APUBLIC RELEASE
,

13. SUPPLEMENTARY NOTES

14. ABSTRACT
See report.

15. SUBJECT TERMS

16. SECURITY CLASSIFICATION OF:	17. LIMITATION OF ABSTRACT Public Release	18. NUMBER OF PAGES 49	19. NAME OF RESPONSIBLE PERSON EM114, (blank) lfenster@dtic.mil
a. REPORT Unclassified b. ABSTRACT Unclassified c. THIS PAGE Unclassified			19b. TELEPHONE NUMBER International Area Code Area Code Telephone Number 703767-9007 DSN 427-9007

Standard Form 298 (Rev. 8-98)
Prescribed by ANSI Std Z39.18

REPORT DOCUMENTATION PAGE		FORM APPROVED - - - OMB NO. 0704-0188

public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Washington headquarters services, directorate for information operations and reports, 1215 Jeffersondavis highway, suite 1204, Arlington, VA 22202-4302, and to the office of management and budget, paperwork reduction project (0704-0188) Washington, dc 20503

1. AGENCY USE ONLY (*LEAVE BLANK*)	2. REPORT DATE	3. REPORT TYPE AND DATES COVERED ***STUDENT RESEARCH PAPER***
4. TITLE AND SUBTITLE THE EFFECTS OF MULTIPLE CONSTRAINTS ON THE ARMY'S NEW OFFICER EVALUATION REPORT		5. FUNDING NUMBERS ***N/A***
6. AUTHOR(S) MAJ CHARLES R. HAMILTON, USA		
7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES) ***USMC COMMAND AND STAFF COLLEGE*** ***2076 SOUTH STREET, MCCDC, QUANTICO, VA 22134-5068***		8. PERFORMING ORGANIZATION REPORT NUMBER ***NONE***
9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES) ***SAME AS #7.***		10. SPONSORING/MONITORING AGENCY REPORT NUMBER: ***NONE***
11. SUPPLEMENTARY NOTES ***NONE***		
12A. DISTRIBUTION/AVAILABILITY STATEMENT ***NO RESTRICTIONS***		12B. DISTRIBUTION CODE ***N/A***

abstract *(maximum 200 words)* The current OER system used by the Army addresses senior rater accountability. The main reason the Army went to the new OER is "rating inflation". Some senior leaders feared that unless a change had been made to the OER system, future decisions would have more difficult to select officers for promotion and command. The new OER reduces inflation by forcing the senior rater to rate his population to a bell shaped curve. For each senior rater, the number of Above Center of Mass (ACOM) reports is limited to less than 50 percent of all OERs in a senior rater's profile for each grade. There has been considerable controversy about the new OER process. There is a perception that the new OER is too restrictive and does not give the senior rater a consistent platform to judge from. Also it has caused many senior raters to attempt to wargame when an officer should receive an ACOM as opposed to the most deserving officer receiving the ACOM report.

14. SUBJECT TERMS (KEY WORDS ON WHICH TO PERFORM SEARCH) OER, OFFICER EVALUATION REPORT, RATER, SENIOR RATER	15. NUMBER OF PAGES:46
	16. PRICE CODE: N/A

17. SECURITY CLASSIFICATION OF REPORT	18. SECURITY CLASSIFICATION OF THIS PAGE:	19. SECURITY CLASSIFICATION OF ABSTRACT	20. LIMITATION OF ABSTRACT
UNCLASSIFIED	*UNCLASSIFIED*	*UNCLASSIFIED*	

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EXECUTIVE SUMMARY

Title: The Effects of Multiple Constraints on the Army's New Officer Evaluation Report

Author: Major Charles R. Hamilton, USA

Thesis: Does the latest Officer Evaluation Report (OER) reflect its stated purpose to reemphasize the Army core values, provide a consistent platform to rank officers and does the report put too many constraints on the senior rater?

Discussion: The current OER system used by the Army addresses senior rater accountability. The main reason the Army went to the new OER is "rating inflation". Some senior leaders feared that unless a change had been made to the OER system, future decisions would have more difficult to select officers for promotion and command.

The new OER reduces inflation by forcing the senior rater to rate his population to a bell shaped curve. For each senior rater, the number of Above Center of Mass (ACOM) reports is limited to less than 50 percent of all OERs in a senior rater's profile for each grade.

There has been considerable controversy about the new OER process. There is a perception that the new OER is too restrictive and does not give the senior rater a consistent platform to judge from. Also it has caused many senior raters to attempt to wargame when an officer should receive an ACOM as opposed to the most deserving officer receiving the ACOM report.

Conclusion: The current OER system does not meet its intended purpose of creating more flexibility and encouraging core values. The new OER undermines the core values by causing officers to attempt to manipulate the OER system. Also the new OER is too constrictive in allowing senior raters the opportunity to award ACOM reports to officers that were deserving.

Section 1

INTRODUCTION

For years the Army has recruited candidates with the slogan, "Be all that you can be." However, organizational effectiveness is dependent on placing people in billets where they can be effective and support the Army core values. The Army must be able to identify strengths and weaknesses of its personnel in order to prepare and develop them for higher levels. The tool that is used for the officer corps is the Officer Evaluation Report (OER). Unfortunately, there are inherent problems in the process that limit the effective use of the new OER. Does the latest Officer Evaluation Report (OER) reflect its stated purpose to reemphasize the Army core values, provide a consistent platform to rank officers and does the report put too may constraints on the senior rater?

The system presently used by the Army addresses senior rater accountability. The main reason the Army went to the new OER is "rating inflation". Under the old OER, an unusually large number of active-duty Army officers received a top block rating, which is the best OER rating. Supposedly selection boards and personnel officials had more than enough information to make selection and assignment decisions. However, some feared that unless a change had been made to the OER system, future decisions would have been more difficult. During this time, many officers' raters may have believed that providing average or even above average OER ratings would lead to removal of good, but not

outstanding officers from the Army. Therefore, ratings for good officers were boosted, or

inflated to excellent to provide a drawdown cushion.[1]

The Army has asked senior raters to stop the ratings inflation spiral. The system logic

has to be such that the senior rater looks at and judges it is in the Army's and his or her

best interest to evaluate (fairly and safely) without unduly hurting his or her population.

Under the new OER, the Army wants to provide the senior rater with:

- The opportunity to give the best officers the ratings they deserve
- The confidence that other senior raters can not inflate ratings
- The knowledge that the majority of all ratings will be center of mass. The new OER was reviewed at sensing sessions at several CONUS installations in Europe, with selection boards, and at the Pre-Command Course at Ft Leavenworth, KS. A total of 725 senior raters, LTC – General Officer, were provided with various alternative models for a new OER and asked to state their preferences and rank order them. Eighty-five percent picked the current OER system that is in place.[2]

Having had the opportunity to work at PERSCOM as a Selection Board Recorder and

an Assignment Officer, I have reviewed thousands of OERs in both assignments.

Working as a recorder and privileged to board member conversations and deliberations

about the old OER system, board members were more than satisfied with the information

that the report provided to make a selection. Under the new system the senior rater can

only give his population 50% Above Center of Mass reports. The intent of the new

system is to enforce the Center of Mass Concept which establishes consistency between

the way senior raters evaluate and the way DA selection boards interpret the evaluation.

This assists in ensuring that the message sent by the senior rater is the same as the one

received by DA selection boards. This should in turn provide sufficient senior rater

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[1] Jack Miller, interviewed by Gerry J. Gilmore, Army Link News, Army News Service, 23 December 1996: p.1.
[2] Jack Miller, p. 2

confidence to accept the opportunity to indicate the **very best** and those below standard

without fear of hurting all the rest. The center of mass concept is so important that every

DA selection board is briefed that it is the single best method for interpreting the senior

raters's box check.

I intend to provide a clear perception about the new officer evaluation report and the

limitations and constraints that encourages raters and senior raters to violate and attempt

to manipulate the intent of the new OER. In addition, I will also provide the results the

new OER has had on the Army selection board process.

The implications of manipulation cuts to the very essence of what we teach our

leaders **not to do**. Eventually such manipulations become the standard as opposed to the

exception to the rule. This is significant in that we should have a system that clearly

promotes the Army core values and rewards its best officers.

Section 2

BACKGROUND

The old OER allowed room for rating inflation. The new OER reduces inflation by forcing the senior rater to rate his population of officers to a bell shaped curve. In the mid 1990's the army began to take a look at the Officer Evaluation System to ensure that it was meeting the needs of the officer corps selection boards and assignment officers. In October of 1997, the new OER, Department of the Army Form 67-9 (see fig 1) went into effect replacing the old OER, DA Form 67-8 (see fig 2) that had been used for 18 years. Prior to that the Army used DA Form 67-7 (see fig 3) which lasted from 1973 to 1979; Prior to DA Form 67-7 the Army had a variety of different OER reports.   The real transformation took place in 1973 when the Army started using the term "Officer Evaluation Report" as opposed to "Efficiency Report" a term that had stood for 50 years.[3] The DA Form 67-7 was replaced because of the following problems:

- It did not support the Officer Personnel Management System (OPMS),
- Limited in scope failed to improve organizational effectiveness.
- It did not encourage the professional development of officers.
- Because of its highly inflated nature it was difficult to use as assessment tool and was of little use for discriminating among competitive officers.[4]

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[3] Department of the Army, Assessment of the Current Evaluation Reporting System, Evaluation Systems Office. February 1977, pp. 4-7
[4] Assessment of the Current Evaluation System, pp. 10-11

The DA Form 67-8 incorporated several new features that had not been included in previous officer evaluation reports:

- Participation of the rated officer
- Increased role of the reviewer
- Supported the Officer Personnel Management System
- Formulated for board and Personnel Management Use[5]

The new OER DA Form 67-9 and its predecessor have some of the same traits. In an officer rating chain, he or she is first evaluated by a rater, who evaluates the officer's overall duty performance and potential for promotion. Then, an intermediate rater may also evaluate the officer. The last official in the rating chain is the senior rater who reviews the supervisor's and/or intermediate rater's evaluations and provides important career influencing input to the evaluation. The basic structure allows the rater to give shape and direction to the rated officers' performance and also provides a chain-of-command evaluation of an officer's performance and potential.

The new Officer Evaluation Reporting system is designed to determine the quality of the officer corps, to facilitate selection of future Army leaders, and to support planning of each officer's career. It also supports many current Army personnel management programs. For example emphasis on senior/subordinate communication supports the Army's "people-oriented programs." It is intended to focus attention on constructive problem solving and the importance of sound working relationships. One of the areas of interest is the focus on junior officer leader development. There is a separate junior officer developmental support worksheet that requires developmental tasks for lieutenants based on leadership doctrine and directly tied to the unit's mission.

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[5] Department of the Army, Assessment of the Current Evaluation Reporting System Vol II, Evaluation Systems Office. February 1978, pp. A-1-A-4.

The primary intent of the junior officer developmental program is to facilitate the rapid, fair and equal assimilation of junior officers into the Army culture by providing greater opportunity for more open senior/subordinate communication. Personnel officials conducted working sessions and surveyed 331 lieutenants and captains. Ninety-two percent liked the new junior officer developmental support form worksheet.[6]

A related component is the masking of prior second lieutenant OERs after their use by the captain selection board. Later, when they (captains) go before the major's board, the board will only evaluate first lieutenant and captain records. This is done to level the playing field, as there are considerable variations in the quality of junior officers' assignments, the intensity of junior officer experience, and the rate of integration into the Army culture during the early years of the officers career. The process will ensure that slow starters are not disadvantaged and that early mistakes, made during the learning process, are forgiven.[7]

The primary function of the OER is to provide information to DA for use in making personnel management decisions. The information supplied in the OER, combined with the Army's needs and individual's qualifications, is used as a basis for personnel actions: promotion elimination, retention in grade, retention on active duty, reduction in force, command selection, school selection, assignment, specialty designation and Regular Army (RA) integration.[8]

The secondary purpose of the OER is to encourage officer professional development and enhance mission accomplishment. Consequently the OER stresses the importance of

[6] Jack Miller, p. 3.
[7] Department of the Army, Pamphlet No. 623-105, The Officer Evaluation Reporting System " In Brief". October 1997, pp. 4-7

sound senior/subordinate relationships. The key to the system's secondary function is

effective communication between senior and subordinate officer. Such communications

makes the rated officer aware of what his or her duties are and allows the officer to take

part in the organization's planning. It also stresses the importance of setting standards

and giving direction to the performance of subordinate officers. The OER provides an

opportunity for senior/subordinate communication about career development issues for

the senior to provide advice and guidance more available to the rated officer and for the

rated officer to discuss career progression. This exchange enables the rated officer to

take advantage of his or her superior's experience when making decisions that affect his

or her career. [9] The new OER is designed to:

- Set objectives for the rated officers that support the organization mission.
- Review the rated officer's objectives and update them to meet current needs.
- Promote performance-related counseling to develop subordinates and better accomplish the organization's mission.
- Evaluate the rated officer's performance.
- Assess the rated officer's potential.
- Ensure a review of the entire process.

However, the process of the revised OER strictly limits the number of "Above Center

of Mass (ACOM)" HQDA labels applied to OERs (see fig 4). For each senior rater, the

number of ACOM labels is limited to less than 50 percent of all OERs in a senior rater's

profile for each grade. For a "top box check" to generate an ACOM label, the senior rater

must have a credible profile at the time the report is completely processed. All OERs are

batch processed on the day they are received at HQDA. All reports received on the same

day, by the same senior rater, for the same grade, will have the same standard calculation

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[8] Department of the Army Pamphlet 623-105, pp. 7-11
[9] Department of the Army Pamphlet 623-105, pp. 14-15

in determining whether the profile is credible or not. That calculation is made after all reports received on a given day have been processed and includes all the OERs received on that day. Whenever a "top box" OER is received at HQDA, the report is processed and *then* a profile (i.e., DA label) determination is made. If the number of total "top blocks" in a senior rater's profile for a given grade is *less than fifty percent*, an ACOM label is applied to the report. If the number of total top boxes in a senior profile for a given grade is *fifty percent or greater*, a "Center of Mass (COM)" label is applied to the report. The one exception to the "less than fifty percent" rule is that the first single top box check received will generate an ACOM label regardless of the profile. However, this box check still increments the profile, this means that once a single top box check is rendered, three "second through fourth box checks" must be in a senior rater's profile before the possibility exists for another "top box check" to generate an ACOM label for the same grade.

Section 3
RECEPTION OF NEW OER

There has been considerable controversy about the new OER process. Telephone interviews with four Brigade Commanders were conducted, three of whom wish to remain anonymous.   In addition, one Brigade Commander did agree to put his thoughts in writing.   Their thoughts and strategies are summarized in this section.

There is a perception that the new OER is too restrictive and does not give the senior rater a consistent platform to judge from. Many senior raters are spending time making calls and trying to wargame this new report. Some officers have even figured out a methodology that they call the "heartbeat", which means that the senior rater must plan to give an officer an Above Center of Mass OER demonstrating to a selection board that this is a quality officer deserving of promotion. Unfortunately this may be at the expense of the rated officer who might actually be performing at the Above Center of Mass level. One senior rater predicts that the New OER will go away within a couple of years, because he believes that the same phenomenon will befall it as has every other OER. He thinks that inflation is not the issue, but sameness.[10] This means that it doesn't make a difference if everyone receives a top block profile or everyone has two Center of Mass reports for every Above Center of Mass report, all files will eventually start to look the same. However there is one very overriding reason why senior raters do not like the new OER: It is too restrictive in terms of allowing senior raters to award the number of top blocks they judge their subordinates deserve. It is one thing for a colonel to feel this

frustration, but it must be hell for a corps commander who rates very few majors – maybe only one, his aide-de-camp – and cannot reward him or her annually. Some Colonels are nostalgic for the old OER system where some officers profiles carried in the old Himalayas system as the (peak, peak, peak, maybe a valley, peak, peak…). Those days are over. The reality is that the new profile for officers will look more like what one senior rater called "the heart monitor": "valley, valley, peak, valley, valley, peak….". When the Army Personnel Command (PERSCOM) tells you there is a difference between a COM report and a COM file, what they are trying to communicate is: YOU HAVE TO HAVE A HEARTBEAT! If promotion boards don't find a heartbeat, they may think the "patient" is dead – and may pull the "plug". You don't want that. And promotion boards don't want to pull the plug unless the patient really is dead.[11] Further most colonels believe that the current OER requires more interaction between the rated officer and the senior rater than any other OER. Their interaction is needed to ensure that a heartbeat is developed. One would think this interaction is for mentorship or career counseling, however it it to ensure that your senior rater is aware when your board convenes. For example, an officer who reports in to a new unit after a break (for schooling, specialty training, etc.) may have two OERs before his next promotion board. The rated officer cannot assume that his or her busy senior rater will know when the officers next selection board occurs. The rated officer feels compelled to alert the senior rater that he or she needs a "heartbeat" sometime in his or her next two OERs. Obviously, this conversation isn't easy to have. One Brigade Commander recommends

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[10] Interview of Bde Cdr number 1 (Anonymous). Interview by the author, phone interview, Fairfax Station, VA, 2001
[11] Interview of Bde Cdr number 2 (Anonymous). Interview by the author, phone interview, Fairfax Station, VA, 2001

that rated officers discuss this issue first with their raters and ask the rater how best to inform the senior rater. The rater may choose to take the message to the senior rater, or may be willing to broach the rated officer's concerns with the senior rater prior to the rated officer's counseling session. This is not a conversation the rated officer wants to have with a senior rater after being passed over. The current process forces the senior rater to juggle ratings in or to meet expected forced distribution of his profile. If the senior rater has carefully planned his or her ACOM distribution and hasn't sacrificed the new guy's rating, he (senior rater) may permanently harm the officer's career. One of the colonels actually encouraged officers to seek out and work for senior raters who have large profiles to ensure there is opportunity to get an ACOM report.[12] This is a new phenomenon to have officers actually seeking out senior raters who have profiles that can support them in receiving an ACOM report. Officers are actually making phone calls to senior rater's adjutants to get an assessment on their profile. This is a clear manipulation of the intended purpose of the new OER. Traditionally officers have taken their assignment without must question. Now officers after gathering information on their senior raters profiles are making assignment decisions.

THE TYRANNY OF THE NUMBERS. It is not easy to be a senior rater – especially with this new OER. If the senior rater gives there one and only rated officer an ACOM, he or she must then give at least two COMs before they can give his or her next ACOM, another clear limitation to the new system. If the senior rater showers all of his ACOMs

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[12] Interview of Bde Cdr number 3 (Anonymous). Interview by the author, phone interview, Fairfax Station, VA, 2001

on his best officers they could have all but pulled the plug on many of the other officers he or she senior rates. Remember: no heartbeat, no joy.[13]

Many senior raters have voiced concern about this new OER because it doesn't permit them to use it as a classic leadership development tool as previous OERs. In one brigade commander's view, the award of an ACOM provides one silver bullet – to be fired to each <u>deserving</u> officer prior to his or her next board.[14] This senior rater clearly decided to not give an ACOM to his best offficer but instead to an the officer with a selection board coming up. This is another clear violation of the new OER, only the best officers are to get ACOM reports. Another senior rater uses this analogy to explain his dilemma. It is like giving a senior rater a revolver loaded with six silver bullets. In front of him are standing 12 officers. The senior rater is told he or she can shoot the silver bullets as he or she sees fit. He or she lifts the gun, aims – and is interrupted by a voice that says: "Oh, by the way, you can really only fire five of the bullets."   (Six would be right at 50% and would eliminate all flexibility in the near term for the senior rater). Practically speaking, he or she would have to give two COMs before contemplating another ACOM.) The forced ranking demeans the other officers by inferring that their performance is not up to par with the ACOM officers.[15]

Another senior rater uses what he called an counter-intuitive example – or perhaps, what is emerging as an unintended "perversion" - of a system which should allow a senior rater to reward excellence all the time but does not. The counter-intuitive scenario goes like this: In a population of all senior captains, all colonels agreed that the goals are

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[13] Interview of COL James Cox, Training Bde, Interview by the author, telephone interview, Fairfax Station, VA, 2002.
14 Interview Col Cox
[15] Interview Bde Cdr 2

to help these fine officers get to major and onto the Command and Staff College list. Consider the example of a hot-shot captain (MAJ "A") who gets promoted BZ (and is automatically on the CSC list) or the captain who gets selected for 04 in the PZ and CSC on her first look (MAJ "B"). Should the senior rater really do anything more for those officers? According to some senior raters, the answer is "no", not in the near term. In fact, one commander tells his officers that no LTC promotion board members will ever look back in their files earlier than the completion of CSC. Why would one? CSC selection is harder to come by than promotion to LTC, looking strictly at percentages. It is not that promotion boards are lazy. Promotion boards work very hard to select the most qualified officers being considered. Instead, simple logic takes over. If an earlier board has selected MAJs "A and B" for CSC (a tighter selection than for LTC), why would a subsequent board spend time redoing the earlier board's work? Instead, the LTC board will spend its time on the files of those officers who were not selected for resident CSC, so that it can pick the most deserving of them for selection/promotion. In other words, CSC selection can be considered a "silver bullet" fired by the Army at the officer. The fact that an officer already has received a silver bullet from the Army is something the senior rater should factor into his rating plan. In fact, CSC selection provides the only flexibility in the "tyranny" of the numbers associated with this new OER. [16]

Let's return to the senior rater's dilemma of OERs in front of him or her for officers (MAJs A and B), who have been selected both for MAJ and CSC. Granted, they are fine officers. However, will an ACOM to these officers be as significant as one for MAJ "C" who has one more "look" for CSC and, is just as deserving of CSC selection as the officers who got it on their first look? Given how few ACOMs you can be awarded, the

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[16] Interview Col Cox

senior rater might conclude that there is no option but to fire the "silver bullet" at MAJ "C", However, explaining "this to MAJs "A and B" will be difficult. Because of the constraints of the new OER, this senior rater has to be put into a situation where his best officers are not getting the ratings that they have earned. Instead, an officer less deserving will receive the ACOM report to help facilitate their selection for promotion or schooling.

One senior rater states officers aren't going to get two ACOMs from him even if they are the finest officer who has ever put on a uniform. The ACOM would be redundant, and, given its scarcity, is best applied to the population of outstanding officers who have already undergone a process of selection and self-selection but need additional recognition. The Brigade commander said he would try to help as many career officers as possible by spreading the wealth. Majors A and B need two ACOMs. In fact knowing what I do about the tyranny of the numbers for senior raters, the promotion board upon seeing two or more ACOM reports on an officer from the same senior rater, might be very suspicious of the senior rater. (How many good officers did he or she hurt by so favoring one?)[17] In other words, the tyranny of the numbers can force senior raters to award their precious silver bullets to officers who are not the most successful, but rather to those in need of (and fully deserving of) a "push" over the next career hurdle.

Some senior raters believe it all goes back to the words that a senior rater writes. All brigade commanders agreed that most board members will focus on the words. If their conclusions are accurate (that the tyranny of the numbers will force senior raters to adopt a "silver bullet" approach to the award of ACOMs), then what about the officers, say MAJ A or B, who got selected for promotion to major and for CSC on his or her first

look, but for whom the senior rater believes he or she can't afford or needs to expend a silver bullet? The answer is in the words the senior rater writes. The senior rater needs to make clear (but without specific reference to the fact) that the rated officer is an ACOM-quality officer. The senior rater needs to provide enthusiastic and clear comments that highlight specific skills and accomplishments as well as future potential. When the senior rater cannot expend the extra ACOM rating such as with Majors A and B the comments need to reflect an ACOM-quality write up. Bottom line: Recognizing the forced nature of the distribution limits, boards will not rely solely on the box check. They will have to read what the senior rater writes. It is clear that the senior rater task may well require more time and effort in the future than it has in the past.

Another issue is one of time-in-job. In the past, many contemporaries tended to hop from job to job as quickly as their professional legs and ratings could carry them. With limited number of top ratings to provide it is logical to expect that this will slow down progression. Officers may have to stay in a job longer to obtain an ACOM from their senior rater. Traditionally some of the Army's best officers have moved from one assignment to the next. Most of these officers are quick learners and are usually thrust into key positions above their grade and experience. Under the new OER system officers are least likely to seek out or accept these once coveted positions for fear of receiving a COM report. Traditionally these positions come with small profiles to compete.

I recognize that the colonels that I interviewed have a wealth of experience and they are currently dealing with the new OER system in the field. In the following pages, I have identified several examples to further illustrate the constraints of the new OER. I agree that officers who are used to being straight top block officers have to get used to

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[17] Interview Bde Cdr 2

the idea that they will have some center of mass OERs in their file in the future. Their

"heartbeat" analogy is a good illustration of this reality. However, the effort to ensure that

as many officers as possible get a "heartbeat" can result in perversions of the system.

They recognized one of them. I can think of a few more. Consider the following four:

- The system only works with large populations.
- The heartbeat theory leads to brigade command senior raters artificially growing their populations to give CPTs heartbeats in company command.
- The judgment of when you need a heartbeat is extremely subjective.
- Everyone has to play the same way to make the system fair.

The system only works with large populations. From our recent experience, consider the

battalion commander with three out of four CPTs needing OERs. That LTC more than

likely has not rated CPTs in the past and has an immature profile. Unless the battalion

commander is leaving, all three will more than likely receive COM reports, maybe one

will get an ACOM. Which principle should have primacy? Statistical distribution or

performance? Again, we are dealing with a constraint of the system – timing. The

battalion commanders will have more depth in their CPT profile and probably have more

flexibility to manipulate superior ratings.

A battalion commander whose senior rates his S1, S2, S4 and assistant S3. Once again,

only four CPTs are in the profile. The battalion commander has the advantage of rotating

more people through the system and building more depth in the profile, but once again

three is a small population with little flexibility. One Brigade commander considered the

system inflexible with 40 or 50 people in his profile. When there's one tenth of that,

there's one tenth of the flexibility.[18] His heartbeat theory is more applicable when you

can realistically manipulate the system to spread the wealth among MAJs that are

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[18] Interview Bde Cdr 1

entering the zone for CGSC and selection to LTC. Maybe CPTs, especially young ones

are better served with best performance when they are in small populations. The

heartbeat theory leads to senior raters artificially growing their populations to give CPTs

heartbeats in company command.

The brigade commanders interviewed said that they made the conscious decision to

senior rate EVERY CPT in their brigade to ensure that their company commanders had

the maximum opportunity to get a ACOM report in command. The advantage to a large

population is more flexibility.. The disadvantage is that there are probably at least one or

two staff officers to hold up the company commanders. In other words, you get ACOMs

until you get an opportunity to command and compete, until then they are set aside as

COM. As one brigade commander stated, while the CPT still has to earn it, the senior

rater has effectively created a stovepipe system, whereby officers are not rewarded for

being their best, but being their best in certain positions.[19] This is a huge constraint on

the rated officer and the senior rater. The system is forcing officers to be rated by

position not performance. Not all company commanders will get ACOM OERs in

command. The tyranny of the numbers may not allow it even with all the staff CPTs

holding them up. Imagine the company commander who didn't get an ACOM in

command and all of previous OERs in that brigade were deflated as a result of trying to

give other company commanders heartbeats in command. Company command has then

become an all or nothing (zero defects) proposition or at least it may be perceived that

way. In the old system, it was an absolute must to get a one block in command because

of inflation. Setting aside heartbeats for company commanders in a brigade seems to be

pulling us back in that same direction.   Now most CPTs would have taken the opposite

view. In that case, most CPTs would have liked it if the battalion commander would have senior rated all the CPTs in the brigade. They all did essentially the same job and would be competing on a fairly level playing field. There were no set asides, but combining them into a larger population fairly increased their possibility of doing well. What happened in one brigade was that the CPTs in the four battalions were senior rated by their battalion commanders and the result was unfairly subjecting them to the tyranny of the numbers.

The judgment of when you need a heartbeat is extremely subjective. Just how often do you need a heartbeat? It's in the eye of the senior rater and no two senior raters may see it the same way. Another constraint to the system is no clear consistency across the Army among the senior raters. An officer career is at the whims of what philosophy their senior rater adopts. If you go strictly by the heartbeat theory, you better hope they assess correctly. This way of trying to do business creates inconsistency in the system. I will use several examples to illustrate my analysis and the multiple constraints that are imposed on the senior rater. Consider MAJ A who is senior rated by COL X. COL X also senior rates MAJs B, C, D and E. If COL X rank ordered the MAJs based on best qualified or best performance, here's how he would do it:

1 - MAJ B

2 - MAJ A

3 - MAJ C

4 - MAJ D

5 - MAJ E

[19] Interview Bde Cdr number 3

COL X's profile allows for two ACOM OERs. However, in COL X's judgment, based on a thorough evaluation of exactly where each of these officers is in their careers, MAJ C needs a heartbeat more than MAJ A. He makes the tough call and MAJs B and C get ACOM OERs. MAJ A gets a COM OER on his way to a new assignment.

When MAJ A gets to his new assignment he meets his new senior rater, COL Y, who has a similar philosophy to COL X. In addition to MAJ A, COL Y also senior rates MAJs F and G. However, this time MAJ A is now the best one. Here's how COL Y would rate them:

1 - MAJ A

2 - MAJ F

3 - MAJ G

There's just one problem. COL Y only has one ACOM to give the next three officers. After a thorough evaluation of all of their files, MAJ F clearly needs a heartbeat more than MAJ A. MAJ F is a solid officer that deserves to be promoted, selected for school, etc., etc,. etc. Once again, the senior rater makes the tough call, gives MAJ F the ACOM and tells MAJ A the "facts of life" as one senior rater put it. MAJ A has now spent the last two years of his career performing better than some of his peers, but not being adequately rewarded for it. The old adage of work hard and things will work themselves out would not apply. Maybe MAJ A will get his heartbeat the following year, but will his file be indicative of the type of officer that he really is? An outstanding officer with an Above Center of Mass File with bad timing could very easily become a COM officer under the new OER.

Everyone has to play the same way to make the system fair. Another scenario is instead of having two senior raters with similar philosophies, MAJ A runs into the second senior rater with a much different philosophy than the first. This time he doesn't PCS, the first senior rater leaves and is replaced by the second. MAJ A is senior rated by COL X. COL X also senior rates MAJs B, C, D and E. If COL X rank ordered the MAJs based on best qualified or best performance, here's how he would do it:

1 - MAJ B

2 - MAJ A

3 - MAJ C

4 - MAJ D

5 - MAJ E

COL X's profile allows for two ACOM OERs. However, in COL X's judgment, based on a thorough evaluation of exactly where each of these officers are in their careers, MAJ C needs a heartbeat more than MAJ A. COL X makes the tough call and MAJs B and C get ACOM OERs. MAJ A is explained the "facts of life" and gets a COM OER with MAJs D and E. COL X departs the unit and COL Y replaces him. COL X leaves a detailed continuity file explaining why he rated various officers, but COL Y disregards it. COL Y is in direct opposition to the COL X philosophy. He views it as a perversion of the system. COL Y is equally concerned about the officers he senior rates.His explains his rating philosophy. He personally interviews them and reviews their ORBs. He spends time to ensure their professional development and finds out what they need to advance in their careers. However, his philosophy is that the best performing officers with the greatest potential should be best rewarded. His best officers will get ACOM OERs

within the limit of his profile. He strictly manages his profile, like COL X, to ensure that

he can reward deserving officers. After the rating period, MAJ A is again second best,

but MAJs D and E left with COL X and were replaced by two senior MAJs. Here's how

COL Y would rate them:

1 - MAJ B

2 - MAJ A

3 - MAJ C

There's just one problem. COL Y only has one ACOM to give the next three officers.

After a thorough evaluation of all of their files, MAJ A clearly needs a heartbeat more

than MAJs B or C. MAJ A is a solid officer that deserves to be promoted, selected for

school, etc., etc,. etc. MAJ A would have had an ACOM last year had it not been for

MAJ X's philosophy. Once again, the senior rater makes the tough call and COL Y gives

MAJ B an ACOM and gives MAJs A and C COM OERs. At the end of two years in the

same place with different senior raters here's how they stack up.

MAJ B, 2 x ACOM.

MAJ C, 1 x ACOM, 1 x COM

MAJ A, 2 x COM

In reality, MAJ A is better than MAJ C in the eyes of two senior raters, but his file

does not reflect that reality. Once again MAJ A's file really wouldn't reflect the type of

officer he is. In the past two years he should have had a heartbeat, but because of the

divergent interpretations of his senior raters he didn't get one. He has now spent the last

two years of his career performing better than some of his peers, but not being adequately

rewarded for it. Again the system is too limiting to to reward the Army's best officers.

The new system relies too much on timing and not who performs the best.

The point of these scenarios is not to dream up situations where people could get hurt.

Strange circumstances have always existed. Senior raters will have to make the tough

calls based on their knowledge, experience and understanding of the system. That's why

the Army empowers them and the officer corps has to trust them. However, the question

must be asked, what situation would sit better with you, COL X telling you that you're

not getting an ACOM because MAJ C needs it more or COL Y telling you you're not

getting an ACOM because MAJ B was better?

Consider three concepts.

Concept one. "Growing" an officer.

Concept two. "Spiking" a file prior to a board.

Concept three. Downturn in performance.

Lets look at how one senior raters theory could affect these common notions.

We used to have a concept called "growing" an officer. In practical terms, lieutenants

would show up in a unit and unless they saved the Commanding General's life, they

would start with a 2 block. If they were outstanding during the next rating period, the

battalion commander would consider giving them a 1 block. This allowed the

commander to maintain a decent profile. He could also do the same for his staff captains.

This was a common practice and well understood by both most senior raters and

promotion boards. You could look at an officer's file and tell whether or not he had been

"grown". This practice diminished during the end of the old system due to inflation.

Closely related to the growing concept was the "spiking" concept. When senior raters

had true profiles they would sometimes intentionally give an officer a 1 block prior to a board. This was called spiking (sounds a lot like heartbeats). Based on my experience as a Board Recorder, it often had the exact opposite effect than was intended. Boards would see what clearly was a center of mass file with a spike prior to a board and conclude that despite the spike he really was a COM officer. Board members would clearly see though this attempt to get this officer selected by giving him a spike performance as a last resort

The opposite of growing an officer was a downturn in performance. A downturn in performance was defined as being in the same job with the same senior rater and receiving a lower rating on the second rating. For example, COL Cox gives a ACOM on the officers first OER and a COM on his second. His file could also be viewed as showing a downturn in performance if you were getting consistent ACOM ratings and then start getting consistent COM ratings. MAJ A below could illustrate an example of that. One senior rater calls it like it is and he gets 1 blocks. The other senior rater goes by "needs of the heartbeat" and MAJ A gets 2 blocks. Lets hope that...

- If senior raters begin growing officers again, they keep the trend going upwards. True, growing is one way of manipulating their profile as is heartbeats. However, there's something intuitively positive about an upward trend unless you accept COL Cox's notion that (outside of key jobs) it doesn't matter when you get your heartbeat.
- Boards don't interpret a strategically timed and placed heartbeat as a "spike".
- Boards accept the notion that the reason that an officer received a 2 block on the second rating after receiving a 1 block the year prior is because they

needed their heartbeat up front. The 2 block they received on year two doesn't really reflect a downturn in performance.

Having worked on selection boards ranging from CPT through MG my experience has been that an ACOM report always carried more weight than a COM report with equal or greater words. In other words, an officer who received an COM block didn't get as much credit as an officer that received an ACOM. Too much deliberate manipulation of a rating profile can put senior raters in an organizationally inconsistent position. The truth changes too often. One senior rater uses the heartbeat principle because he thinks he's doing the right thing for his officers. Another uses best performance/potential and thinks he's doing the right thing. All board members may not be as intellectually adroit as others. Wouldn't it be better to?

- Communicate with the officers you senior rate

- Carefully manage your profile (keep track of where you stand, what you can give, timing of OER submissions)

- Rate people honestly according to their performance and potential

- Manipulate your profile with heartbeats or whatever system you choose as the rare exception as opposed to the rule

This leads me to my last point. One of the good things about the old system was that, in the end, everyone played the inflation game the same way. Everyone was a 1 block and you differentiated with the words. This was the very reason that the old system had to go. In a way, the brigade commanders seemed like they were trying to return to the old system. Parcel out an occasional heartbeat at the right time and maximize the senior rater's flexibility. The outcome would be a flattening of officer's files. We would

achieve a certain sameness and boards would be forced to read the words to differentiate files.

That sounds a lot like the old system, but it would help senior raters get around the tyranny of the numbers. What if the brigade commanders theory isn't the predominant theory? I've talked to other senior raters and they agree with some of this theory but their best guy will be an ACOM. So you have two theories. Brigade Commanders: ACOM = great performance and most needing a heartbeat Other COLs: ACOM = best performance.[20] Until these theories are normalized with a consistent platform from which to judge there will not be the parity that defeats the "tyranny of the numbers. This new OER system was designed to give the best officers ACOM reports so that selection boards could easily pick these officers for early promotion and command. How well you do may have as much to do with your senior rater's philosophy as with your own performance. Is this a natural outcome of the new system or a creation of senior raters trying to beat the system?

To read my analysis one might get the impression that I don't agree with most of what the brigade commanders say. In fact, the opposite is true. As a LT, CPT and MAJ I know that personal contact with a senior rater is needed. Too many senior raters don't take the time to get to know the people they senior rate. The Army principle of training two levels down does not seem to apply to counseling and leader development. The senior rater can determine whether or not an officer makes it to the next grade or not. These decisions should not be made lightly or with limited information. Anything that facilitates communication between officers and their senior rater is a good thing and I

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[20] Interview with Bde Cdr 3

think that's one of the best messages to take from the interviews with the brigade commanders.

A final caution: Recognize that some brigade commanders command in a training / institution environment. How many of his officers are in branch qualifying jobs? I don't know, but unless they are at an AIT post, normally officers on training post are not in branch qualifying jobs. Once again, I don't know. However, that in itself might give a senior rater more flexibility because the officers might be "biding their time" or "paying a bill" until they get to their next branch qualifying position or CSC. It would definitely change the dynamic of a senior rater rating profile.

As of 1 December 1999 only 32 percent of all OERs processing at PERSCOM were above-center-mass. The vast majority of OERs arriving at PERSCOM are center-of-mass. Nine misfires have occurred with more than 1,778 misfire prevention contacts to date. (Senior rater checked ACOM and did not have the profile to support the rating, therefore the report receives a COM label.)[21]

All boards selected officers for promotion with at least one 67-9 COM report in their file. Conversely, all boards non-selected officers with at least one 67-9 ACOM report in their file.

Latest Selection Board Feedback

Selection boards are reporting that the new OER is well on its way to providing them with the information necessary to make their selections with confidence. This, along with the fact that all boards are selecting officers with center of mass reports in their files. Senior Raters say they are faced with making tough choices in a high quality officer

corps, but that say they cannot afford to do less if we are to have a say as to who replaces them. Board results have shown that officers can be selected with one or more COM reports in the their file. As demonstrating from the board results below, officers are getting promoted with COM reports. However, the statistics do not tell the entire story. The statistics do not show how may officers that were previously below the zone selects fell victim to the force distribution of the new system. Also the statistics don't show how officers fared on the command track nor does it give demographics results. Additionally as demonstrated by the statistics below, more officers are being selected with Center of Mass Reports.

Major Board 17 April 01

Projected 85% select rate 1st Time Considered
- 89% Of the Population have at least ONE 67-9 COM.
- 69% Of the Population have two or more 67-9 COM.
- 28% have all COM 67-9 reports
- 11% have all ACOM 67-9 reports
  - **Result - Large numbers of officers with COM reports in their file will be selected. (Avg 3.7 67-9 reports per file)**

LTC Board 28 Mar 01

- (Avg. 3.4 per file)
- (Selected 1210 w/ 67-9)
- 71% Selects had at least one COM
- Branch Qualifying Position - 47% Selects had at least one COM
- 472 Selects had two or more COM
  - **28 Selects had 4 COM**
  - **4 Selects had 5 COM**
  - **First time considered select rate was 75.7%**

COL Board 28 AUG 01 Operations
- (Avg. 4.1 per file)
- (Selected 340 w/ 67-9)

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[21] LTC William Swisher, Officer Evaluation Report Information, 28 August 2001, p. 3

- 72% Selects had at least one COM
- 37% Selects had two or more COM
- **30 Selects had 3 COM**
- **10 Selects had 4 COM**
  - **2 Selects had 5 COM**

Institutional Support

- (Avg. 3.9 per file)
- (Selected 41 w/ 67-9)
- 72% Selects had at least one COM
- 17% Selects had two or more COM
  - **1 Select had 3 COM**

Operational Support

- (Avg. 3.9 per file)
- (Selected 66 w/ 67-9)
- 71% Selects had at least one COM
- 28% Selects had two or more COM
  - **3 Selects had 3 COM**
  - **2 Selects had 4 COM**

Information Operations

- (Avg. 4 per file)
- (Selected 24 w/ 67-9)
- 75% Selects had at least one COM
- 38% Selects had two or more COM
  - **1 Select had 3 COM**
  - **1 Select had 4 COM**

CPT Board 17 Mar 00
- (Avg. 2.3 per file)
- (Selected 3043 w/ 67-9)
- 87.7% had at least one COM
- 1% No New OER
  - **1784 Selects had two or more COM**

MAJ Board 15 May 00
- (Avg. 2.4 per file)
- (Selected 1650 w/ 67-9)
- 66% Selects had at least one COM
- BQ Position - 41% Selects had at least one COM
- 3.9 % No New OER

- **466 Selects had two or more COM**
- **9 Selects had 4 COM**
- **1 Select had 5 COM**

COL Board 16 Aug 00
- (Avg. 2.6 per file)
- (Selected 410 w/ 67-9)
- 65% Selects had at least one COM
- .2 % No New OER
- 138 Selects had two or more COM
  - **6 Selects had 4 COM**
  - **2 Select had 5 COM**

23 May 2000
CW3 Tech Selects
- (Avg. 2.8 per file)
- (Selected 376 w/ 67-9)
- PZ Selects 78.2%
- 86% had at least one COM
- 184 Selects had two or more COM
  - **51 Selects had 3 COM**
  - **7 Selects had 4 COM**
  - **2 Selects had 5 COM**

CW3 Avn Selects
- (Avg. 2.5 per file)
- (Selected 421w/ 67-9)
- PZ Selects 83.5%
- 87 had at least one COM
- 222 Selects had two or more COM
  - **53 Selects had 3 COM**
  - **6 Selects had 4 COM**

CW4 Tech Selects
- (Avg. 2.8 per file)
- (Selected 155 w/ 67-9)
- PZ Selects 80.3%
- 88% had at least one COM
- 76 Selects had two or more COM
  - **15 Selects had 3 COM**
  - **3 Selects had 4 COM**
  -
CW4 Avn Selects
- (Avg. 2.7 per file)

- (Selected 89 w/ 67-9)
- PZ Selects 83.9%
- 78% had at least one COM
  - **31 Selects had two or more COM**
  - **3 Selects had 3 COM**

CW5 Tech Selects
- (Avg. 3 per file)
- (Selected 30 w/ 67-9)
- PZ Selects 53.4%
- 90% had at least one COM
  - **13 Selects had two or more COM**
  - **4 Selects had 3 COM**

CW5 Avn Selects
- (Avg. 2.6 per file)
- (Selected 35w/ 67-9)
- PZ Selects 59%
  - **89% had at least one COM**
  - **12 Selects had two or more COM**
  - **2 Selects had 3 COM[22]**

Section 4

SUMMARY

In March of 1995 the Chief of Staff of the Army directed adjustments be made to the Officer Evaluation Report (OER) to reflect the challenges of a smaller, high quality post drawdown Officer Corps. The vision was to take an "evolutionary step" to improve, rathar then radically change or remake the existing system. Accordingly, the new Officer Evaluation Report resembles the previous system in many respects. There are several changes in the new OER which enhance the way we as an Army mentor, develop, evaluate, and ensure a level playing field for our officer corps.

The primary function of the OER is to provide information to DA for use in making personnel management decisions. The information supplied in the OER, combined with the Army's needs and individual's qualifications, is used as a basis for personnel actions: promotion elimination, retention in grade, retention on active duty, reduction in force, command selection, school selection, assignment, specialty designation and Regular Army (RA) integration. [23]

The secondary purpose of the OER is to encourage officer professional development and enhance mission accomplishment. Consequently the OER stresses the importance of sound senior/subordinate relationships. The key to the system's secondary function is effective communication between senior and subordinate officer.

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[22] LTC William Swisher, Officer Evaluation Report Information, 28 August 2001, pp. 7-10
[23] Department of the Army Pamphlet 623-105, pp. 7-11

During my analysis of the new OER, I found multiple constraints and the effects they are having on the senior rater:

(1) Limits the number of Above Center of Mass Reports to 50% of population

(2) Wargaming system – giving officers a "heartbeat" report when they may not be deserving

(3) Officers seeking out senior raters with large profiles

(4) Doesn't permit senior raters to use as a classic leadership tool

(5) Senior Raters establishing criteria of how they will senior rater officers within a time span as opposed to their performance

(6) No clear rating platform from which to judge

As demonstrated by the board statistics, officers with several COM reports are still being selected by promotion and command boards. However, as stated by several brigade commanders, there is still a great deal of work to do with this new report.

Section 5

Conclusion

The current OER system does not meet the initial intent stated in the purpose of the Officer Evaluation Report Regulation which talks about core values and creating more flexibility for the senior rater to take care of his population of officers. Also, the new OER does not provide a consistent platform for senior raters to judge. Officers are subject to several rating philosophies that could ultimately result in a top performer being a non-select. In fact the new OER does just the opposite of its intended purpose. The new OER undermines the core values by causing officers to attempt to manipulate the OER system. Also, the new OER limits the number of officers who can be rated as the best. The hands of the senior rater are tied to trying to take care and manipulate the promotion boards by occasionally rewarding a COM officer with an ACOM report, when perhaps there are more deserving officers within this rating profile. The overriding reason that senior raters did not like the new report is that it is too constrictive in allowing senior raters the opportunity to award ACOM to officers that were deserving.

Instead of changing to a new OER that has so many constraints, perhaps re-educating the Army Senior Officer Corps on how to manage their profile better would have been more suitable. A system that would allow for more flexibility would be appropriate. If a senior rater did not mange their profile correctly, his superiors would deal with that senior rater. And perhaps the senior rater could explain to his chain of command the reason he exceeded his profile limits. However, the officers with bad timing or have senior raters with different rating philosophies will not suffer

because their senior rater is limited to the number of ACOMs they can give. As the

OER currently stands with several constraints, officers are not allowed to "Be all that

you can be". As demonstrated throughout the paper, the new OER has many

challenges as it ties the hands of the senior raters, restricting them from rewarding our

best officers, which is in direct contrast to the intended purpose of the new OER. The

examples provided and the analysis of this process suggest the pitfalls that an officer

can encounter.   Although an officer may be the best among his peers, depending on

the philosophy adopted by his senior rater he may not be rewarded for doing an

outstanding job.

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OFFICER EVALUATION REPORT
For use of this form, see AR 623-105; the proponent agency is ODCSPER

PART I - ADMINISTRATIVE DATA

a. NAME (Last, First, Middle Initial)	b. SSN	c.RANK	d. DATE OF RANK			e. BRANCH	f. DESIGNATED / PMOS (WO) SPECIALTIES
			Year	Month	Day		

g. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND | h. REASON FOR SUBMISSION

I. PERIOD COVERED						j. RATED MONTHS	k. NONRATED CODES	l. NO. OF ENCL	m. RATED OFFICER COPY (Check one and date)		n. PSB INITIAL	o. CMD CODE	p. PSB CODE
FROM			THRU						1. Given to Officer	Date			
Year	Month	Day	Year	Month	Day				2. Forwarded to Officer				

PART II - AUTHENTICATION (Rated officer's signature verifies officer has seen completed OER Parts I-VII and the admin data is correct)

a. NAME OF RATER (Last, First, MI)	SSN	RANK	POSITION	SIGNATURE	DATE
b. NAME OF INTERMEDIATE RATER (Last, First, MI)	SSN	RANK	POSITION	SIGNATURE	DATE
c. NAME OF SENIOR RATER (Last, First, MI)	SSN	RANK	POSITION	SIGNATURE	DATE

SENIOR RATER'S ORGANIZATION	BRANCH	SENIOR RATER TELEPHONE NUMBER	E-MAIL ADDRESS

d. This is a referred report, do you wish to make comments? ☐ ☐ Yes, comments are attached ☐ No | e. SIGNATURE OF RATED OFFICER | DATE

PART III - DUTY DESCRIPTION

a. PRINCIPAL DUTY TITLE | b. POSITION AOC/BR

c. SIGNIFICANT DUTIES AND RESPONSIBILITIES. REFER TO PART IVa, DA FORM 67-9-1

PART IV - PERFORMANCE EVALUATION - PROFESSIONALISM (Rater)

CHARACTER Disposition of the leader: combination of values, attributes, and skills affecting leader actions

a. ARMY VALUES (Comments mandatory for all "NO" entries. Use PART Vb.)   Yes   No   Yes   No

	Yes	No		Yes	No
1. HONOR: Adherence to the Army's publicly declared code of values			5. RESPECT: Promotes dignity, consideration, fairness, & EO		
2. INTEGRITY: Possesses high personal moral standards; honest in word and deed			6. SELFLESS-SERVICE: Places Army priorities before self		
3. COURAGE: Manifests physical and moral bravery			7. DUTY: Fulfills professional, legal, and moral obligations		
4. LOYALTY: Bears true faith and allegiance to the U.S. Constitution, the Army, the unit, and the soldier					

b. LEADER ATTRIBUTES / SKILLS / ACTIONS: First, mark "YES" or "NO" for each block. Second, choose a total of six that best describe the rated officer. Select one from ATTRIBUTES, two from SKILLS (Competence), and three from ACTIONS (LEADERSHIP). Place an "X" in the appropriate numbered box with optional comments in PART Vb. **Comments are mandatory in Part Vb for all "No" entries.**

b.1. ATTRIBUTES (Select 1) Fundamental qualities and characteristics	1. MENTAL Possesses desire, will, initiative, and discipline YES NO	2. PHYSICAL Maintains appropriate level of physical fitness and military bearing YES NO	3. EMOTIONAL Displays self-control; calm under pressure YES NO
b.2 SKILLS (Competence) (Select 2) Skill development is part of self-development; prerequisite to action	1. CONCEPTUAL Demonstrates sound judgment, critical/creative thinking, moral reasoning YES NO	2. INTERPERSONAL Shows skill with people: coaching, teaching, counseling, motivating and empowering YES NO	3. TECHNICAL Possesses the necessary expertise to accomplish all tasks and functions YES NO
	4. TACTICAL Demonstrates proficiency in required professional knowledge, judgment, and warfighting YES NO		

b.3. ACTIONS (LEADERSHIP) (Select 3) Major activities leaders perform: influencing, operating, and improving

INFLUENCING Method of reaching goals while operating / improving	1. COMMUNICATING Displays good oral, written, and listening skills for individuals / groups YES NO	2. DECISION-MAKING Employs sound judgment, logical reasoning and uses resources wisely YES NO	3. MOTIVATING Inspires, motivates, and guides others toward mission accomplishment YES NO
OPERATING Short-term mission accomplishment	4. PLANNING Develops detailed, executable plans that are feasible, acceptable, and suitable YES NO	5. EXECUTING Shows tactical proficiency, meets mission standards, and takes care of people/resources YES NO	6. ASSESSING Uses after-action and evaluation tools to facilitate consistent improvement YES NO
IMPROVING Long-term improvement in the Army its people and organizations	7. DEVELOPING Invests adequate time and effort to develop individual subordinates as leaders YES NO	8. BUILDING Spends time and resources improving teams, groups and units; fosters ethical climate YES NO	9. LEARNING Seeks self-improvement and organizational growth; envisioning, adapting and leading change YES NO

c. APFT: DATE: HEIGHT: WEIGHT:

d. JUNIOR OFFICER DEVELOPMENT - **MANDATORY YES OR NO ENTRY FOR RATERS OF LTs AND WO1s.**
WERE DEVELOPMENTAL TASKS RECORDED ON DA FORM 67-9-1a AND QUARTERLY FOLLOW-UP COUNSELINGS CONDUCTED?   ☐ YES   ☐ NO   ☐ NA

DA FORM 67-9, OCT 97   +   REPLACES DA FORM 67-8, 1 SEP 79, WHICH IS OBSOLETE, 1 OCT 97   USAPA V2.01

Figure 1

40

NAME	SSN	PERIOD COVERED	-

PART V - PERFORMANCE AND POTENTIAL EVALUATION (Rater)

a. EVALUATE THE RATED OFFICER'S PERFORMANCE DURING THE RATING PERIOD AND HIS/HER POTENTIAL FOR PROMOTION

☐ OUTSTANDING PERFORMANCE, MUST PROMOTE ☐ SATISFACTORY PERFORMANCE, PROMOTE ☐ UNSATISFACTORY PERFORMANCE, DO NOT PROMOTE ☐ OTHER (Explain)

b. COMMENT ON SPECIFIC ASPECTS OF THE PERFORMANCE AND POTENTIAL FOR PROMOTION. REFER TO PART III, DA FORM 67-9 AND PART IVa, b, AND c DA FORM 67-9-1.

c. IDENTIFY ANY UNIQUE PROFESSIONAL SKILLS OR AREAS OF EXPERTISE OF VALUE TO THE ARMY THAT THIS OFFICER POSSESSES. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

PART VI - INTERMEDIATE RATER

PART VII - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

I currently senior rate _____ officer(s) in this grade

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review ☐ YES ☐ NO (Explain in c)

☐ BEST QUALIFIED ☐ FULLY QUALIFIED ☐ DO NOT PROMOTE ☐ OTHER (Explain below)

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

c. COMMENT ON PERFORMANCE/POTENTIAL

☐ ABOVE CENTER OF MASS
(Less than 50% in top box; Center of Mass if 50% or more in top box)

☐ CENTER OF MASS

☐ BELOW CENTER OF MASS RETAIN

☐ BELOW CENTER OF MASS DO NOT RETAIN

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

DA FORM 67-9, OCT 97 (Reverse)　　　　USAPA V2.01

Figure 1-1

For use of this form, see AR 623-105; proponent
agency is US Army Military Personnel Center.

PART 1 - ADMINISTRATIVE DATA

a. LAST NAME - FIRST NAME - MIDDLE INITIAL	b. SSN	c. GRADE	d. DATE OF RANK			e. BR	f. DESIGNATED SPECIALTIES	g. PMOS*(WO)*	h. STA CODE
			Year	Month	Day				

i. UNIT, ORGANIZATION, STATION, ZIP CODE OR APO, MAJOR COMMAND	j. REASON FOR SUBMISSION	k. COMD CODE

l. PERIOD COVERED						m. NO. OF MONTHS	n. MILPO CODE	o. RATED OFFICER COPY *(Check one and date)*	p. FORWARDING ADDRESS
FROM			THRU						
Year	Month	Day	Year	Month	Day			☐1. GIVEN TO OFFICER ☐2. FORWARDED TO OFFICER	

q. EXPLANATION OF NONRATED PERIODS

PART II - AUTHENTICATION *(Rated officer signature verifies PART I data and RATING OFFICIALS ONLY)*

a. NAME OF RATER *(Last, First, MI)*	SSN	SIGNATURE ☐

GRADE, BRANCH, ORGANIZATION, DUTY ASSIGNMENT		DATE

b. NAME OF INTERMEDIATE RATER *(Last, First, MI)*	SSN	SIGNATURE ☐

GRADE, BRANCH, ORGANIZATION, DUTY ASSIGNMENT		DATE

c. NAME OF SENIOR RATER *(Last, First, MI)*	SSN	SIGNATURE ☐

GRADE, BRANCH, ORGANIZATION, DUTY ASSIGNMENT		DATE

d. SIGNATURE OF RATED OFFICER	DATE	e. DATE ENTERED ON DA FORM 2-1	f. RATED OFFICER MPO INITIALS	g. SR MPO INITIALS	h. NO. OF INCL

PART III - DUTY DESCRIPTION *(Rater)*

a. PRINCIPAL DUTY TITLE	b. SSI/MOS

c. REFER TO PART IIIa, DA FORM 67-8-1

PART IV- PERFORMANCE EVALUATION - PROFESSIONALISM *(Rater)*

a. PROFESSIONAL COMPETENCE *(In Items 1 through 14 below, indicate the degree of agreement with the following statements as being descriptive of the rated officer. Any comments will be reflected in b below.)*

HIGH DEGREE ⟵   LOW DEGREE ⟶   1 2 3 4 5

1. Possesses capacity to acquire knowledge/grasp concepts	8. Displays sound judgment
2. Demonstrates appropriate knowledge and expertise in assigned tasks	9. Seeks self-improvement
3. Maintains appropriate level of physical fitness	10. Is adaptable to changing situations
4. Motivates, challenges and develops subordinates	11. Sets and enforces high standards
5. Performs under physical and mental stress	12. Possesses military bearing and appearance
6. Encourages candor and frankness in subordinates	13. Supports EO/EEO
7. Clear and concise in written communication	14. Clear and concise in oral communication

b. PROFESSIONAL ETHICS *(Comment on any area where the rated officer is particularly outstanding or needs improvement)*

1. DEDICATION
2. RESPONSIBILITY
3. LOYALTY
4. DISCIPLINE
5. INTEGRITY
6. MORAL COURAGE
7. SELFLESSNESS
8. MORAL STANDARDS

D FORM 1 SEP 79 **67-8**   REPLACES DA FORM 67-7-1, 1 JAN 73, WHICH IS OBSOLETE, 1 NOV 79.   **US ARMY OFFICER EVALUATION REPORT**

Figure 2

PERIOD COVERED						
**PART V - PERFORMANCE AND POTENTIAL EVALUATION** *(Rater)*

a. RATED OFFICER'S NAME   SSN
RATED OFFICER IS ASSIGNED IN ONE OF HIS/HER DESIGNATED SPECIAL TIES/MOS   YES ☐   NO ☐

b. PERFORMANCE DURING THIS RATING PERIOD. REFER TO PART III, DA FORM 67-8 AND PART III a, b, AND c, DA FORM 67-8-1

☐ ALWAYS EXCEEDED REQUIREMENTS   ☐ USUALLY EXCEEDED REQUIREMENTS   ☐ MET REQUIREMENTS   ☐ OFTEN FAILED REQUIREMENTS   ☐ USUALLY FAILED REQUIREMENTS

c. COMMENT ON SPECIFIC ASPECTS OF THE PERFORMANCE. REFER TO PART III, DA FORM 67-8 AND PART III a, b, AND c, DA FORM 67-8-1. DO NOT USE FOR COMMENTS ON POTENTIAL!

d. THIS OFFICER'S POTENTIAL FOR PROMOTION TO THE NEXT HIGHER GRADE IS

☐ PROMOTE AHEAD OF CONTEMPORARIES   ☐ PROMOTE WITH CONTEMPORARIES   ☐ DO NOT PROMOTE   ☐ OTHER *(Explain below)*

e. COMMENT ON POTENTIAL

PART VI - INTERMEDIATE RATER

a. COMMENTS

PART VII - SENIOR RATER

a. POTENTIAL EVALUATION *(See Chapter 4, AR 623-105)*

SR		DA USE ONLY
		HI
		LO

A COMPLETED DA FORM 67-8-1 WAS RECEIVED WITH THIS REPORT AND CONSIDERED IN MY EVALUATION AND REVIEW

☐ YES   ☐ NO *(Explain in b)*

b. COMMENTS

Figure 2-1

PART I – PERSONAL DATA (Read paragraph 3-2a AR 623-105)

	d. DATE OF RANK			e. BRANCH		f. SP CAREER PROG CODE
E – FIRST NAME – MIDDLE INITIAL	Year	Month	Day	Basic	Control	

g. UNIT, ORGANIZATION, STATION AND MAJOR COMMAND

PART II – REPORTING PERIOD AND DUTY DATA (Read paragraph 3-2b, AR 623-105)

Period Covered

a.	From			Thru			RATED DUTY DAYS	b. NONDUTY DAYS	b. Reason for Submitting Report	c.	Report Based On
YEAR	MONTH	DAY	YEAR	MONTH	DAY	a. NONRATED DUTY DAYS	OTHER DAYS a+b (Total)		RATER	
									INDORSER	

d. EXPLANATION OF NONRATED DUTY DAYS AND/OR OTHER DAYS (As Required)

PART III – DESCRIPTION OF DUTIES (Read paragraph 4-3d, AR 623-105)

a. Principal Duty Title _____   b. Duty MOS _____   c. Auth Grade _____

d. Special Career Program Position Designation _____   e. Description

PART IV – PROFESSIONAL ATTRIBUTES (Read paragraph 4-3e, AR 623-105)

a. RATER Complete each question, Explain *No and *Needs improvement responses in Part IVb and, if necessary, Part VII.

	YES	*NEEDS IMPROVEMENT SOME / MUCH	*NO
1. Has this officer demonstrated moral and character strength?	1		
2. Did this officer demonstrate technical competence appropriate to his grade and branch?	2		
3. Did this officer state, as appropriate, his honest opinions and convictions? (Not a "yes man")	3		
4. Did this officer seek responsibility?	4		
5. Did this officer willingly accept full accountability for his actions and the actions of his subordinates?	5		
6. Is this officer emotionally stable under stress?	6		
7. Is this officer's judgment reliable?	7		
8. Did this officer maintain effective two-way communication with juniors, seniors, and peers?	8		
9. Did this officer demonstrate concern for the best interests of his subordinates?	9		
10. Did this officer contribute to the personal and professional development of his subordinates?	10		
11. Did this officer subordinate his personal interests and welfare to those of his organization and subordinates?	11		
12. Did this officer's personal conduct set the proper example for his subordinates?	12		
13. Was this officer innovative in his approach to his duties and responsibilities?	13		
14. Did this officer demonstrate a breadth of perspective and depth of understanding beyond the limit of his specific responsibilities?	14		
15. Did this officer keep himself physically fit?	15		
16. Did this officer fulfill his responsibilities concerning the Army's Equal Opportunity Program?	16		

b. RATER Explanation: Question(s) _____

c. INDORSER Remarks on above questions, if desired: Question(s) _____

PART V – DEMONSTRATED PERFORMANCE OF PRESENT DUTY (Read paragraph 4-3f, AR 623-105)

RATER AND INDORSER In my judgment, this officer's performance of duty was (place score in applicable box):

	Outstanding 70 - 68	Superior 67 - 57	Excellent 56 - 36	Effective 35 - 15	Marginal 14 - 4	Inadequate 3 - 0
SCORE RATER						
INDORSER						

* You are required to cite SPECIFIC examples or illustrations in Part VII to support this rating.

DA FORM 67-7 REPLACES DA FORM 67-6, 1 JAN 68, WHICH IS OBSOLETE.   **US ARMY OFFICER EVALUATION REPORT**
1 JAN 73

Figure 3

RATED OFFICER'S LAST NAME AND SSN

PART VI – POTENTIAL *(Read paragraph 4-3g, AR 623-105)*

a. RATER *(Complete each question in the space provided.)*
1. What did this officer do best?

2. In what capacity or assignment do you believe this officer would make the greatest contribution to the Army?

b. RATER AND INDORSER   If I had full responsibility and authority, I would *(place score in applicable box):*

	Promote this officer immediately	Promote this officer to the next higher grade ahead of his contemporaries	Promote this officer with his contemporaries	Promote this officer to the next higher grade behind his contemporaries	Not promote this officer
SCORE	30	29 – 24	23 – 8	7 – 2	1 – 0
RATER					
INDORSER					

* You are required to cite **SPECIFIC** examples or illustrations in Part VII to support this rating.

PART VII – COMMENTS *(Read paragraph 4-3h, AR 623-105)*

a. RATER *Narrative evaluation is mandatory.*

b. INDORSER *Narrative evaluation is mandatory unless the provisions of paragraphs 2-2h and 4-4g, AR 623-105 apply.*

PART IX – AUTHENTICATION *(Read paragraph 3-2j, AR 623-105)*

PART VIII – REPORT SCORES			*a.* SIGNATURE OF RATER		*(Last, First, MI)*	
PART	RATER	INDORSER	GRADE, BRANCH, ORGANIZATION, DUTY ASSIGNMENT			DATE
V			*b.* SIGNATURE OF INDORSER		TYPED NAME *(Last, First, MI)*	SSN
VI			GRADE, BRANCH, ORGANIZATION, DUTY ASSIGNMENT			DATE
Sum	*a*	*b*				

c. REVIEWER   MY REVIEW ☐ INDICATES NO FURTHER ACTION   ☐ RESULTS IN ACTIONS STATED ON INCLOSURES

REPORT SCORE	SIGNATURE OF REVIEWER	TYPED NAME *(Last, First, MI)*	SSN
1. With INDORSER *(a+b)* 2. Without INDORSER *(2 × a)*	GRADE, BRANCH, ORGANIZATION, DUTY ASSIGNMENT		DATE

PART X – PERSONNEL OFFICER *(Read paragraph 3-2k, AR 623-105)*

	UNIT			SUBSEQUENT
a. DATE ENTERED ON DA FORM 66 MPO INITIALS	*b.* RATED OFFICER COPY *(Check one and date)* ☐ 1. Given to officer ☐ 2. Forwarded to officer ☐ 3. Forwarded to indorser ☐ 4. Forwarded to reviewer	*c.* FORWARDING ADDRESS *(Rated Officer)*	*d.* DATE RECEIVED *e.* RATED OFFICER COPY ☐ 1. Given to officer ☐ 2. Forwarded to officer ☐ 3. Returned to MPO	

Figure 3-1

HQDA Label Process

Senior Rater Checks Top Box in VII b.

Part VII, DA FORM 67-9 completed by Senior Rater

PART VII - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

I currently senior rate ___5___ officer(s) in this grade

[X] BEST QUALIFIED [ ] FULLY QUALIFIED [ ] DO NOT PROMOTE [ ] OTHER (Explain below)

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review [X] YES [ ] NO (Explain in c)

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

[X] ABOVE CENTER OF MASS (Less than 50% in top box; Center of Mass if 50% or more in top box)

[ ] CENTER OF MASS

[ ] BELOW CENTER OF MASS RETAIN

[ ] BELOW CENTER OF MASS DO NOT RETAIN

c. BULLET COMMENTS ON PERFORMANCE / POTENTIAL

CPT Buck is the best out of 5 Captains I senior rate. His performance as battalion S-4 has exceeded my expectations in every respect. This warrior successfully combines a solid grounding in tactics with a keen understanding of the fundamentals of multi-functional logistics to produce first rate combat service support. Due to his exceptional leadership qualities, CPT Buck has been selected to command a Forward Support Supply Company. Select for below the zone to Major and early attendance at resident CGSC.

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

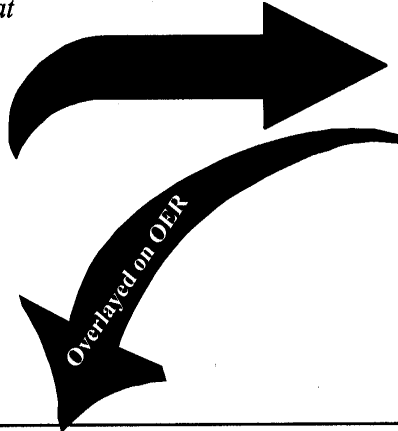Support Operations Officer, Battalion Executive Officer, DISCOM S-3

Box check is compared to the Senior Rater's Profile for CPTs at DA, since less then half in Top box .... ACOM

Process at **DA** **PROFILE IS**

* [2]
[4]
[0]
[0]

TOTAL Ratings [6]

Overlayed on OER

HQDA Label is created based on Senior Rater Profile

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

ABOVE CENTER OF MASS

RO: CPT BUCK, GEORGE 999999999

SR: LTC SMITH 666666666

DATE: 98 11 28

TOTAL RATINGS: 6

RATINGS THIS OFFICER: 1

PART VII - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

I currently senior rate ___5___ officer(s) in this grade

[X] BEST QUALIFIED [ ] FULLY QUALIFIED [ ] DO NOT PROMOTE [ ] OTHER (Explain below)

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review [X] YES [ ] NO (Explain in c)

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

ABOVE CENTER OF MASS

RO: CPT BUCK, GEORGE 999999999

SR: LTC SMITH 666666666

DATE: 98 11 28

TOTAL RATINGS: 6

RATINGS THIS OFFICER: 1

c. BULLET COMMENTS ON PERFORMANCE / POTENTIAL

CPT Buck is the best out of 5 Captains I senior rate. His performance as battalion S-4 has exceeded my expectations in every respect. This warrior successfully combines a solid grounding in tactics with a keen understanding of the fundamentals of multi-functional logistics to produce first rate combat service support. Due to his exceptional leadership qualities, CPT Buck has been selected to command a Forward Support Supply Company. Select for below the zone to Major and early attendance at resident CGSC.

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Support Operations Officer, Battalion Executive Officer, DISCOM S-3

Figure 4