Insights from the Marine Corps Organizational Culture Research: Implicit and Explicit Perceptions of Fairness

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Marine Corps Organizational Culture (MCOCR) Project
Report Front Matter

The following seven pages of front matter provide background relevant to the report that may be of interest to some readers. This material accompanies all reports from the MCOCR Project posted in the Open Anthropology Research Repository. MCOCR reports were designed for an applied audience of military and civilian officials of the U.S. Marine Corps rather than a scholarly audience. Therefore some background information, such as research team composition and the incidents of social media harassment that led to the project, is assumed rather than explicit. Included in the front matter are:

Pages	Information
1-2	Project Overview
3	Frequently Asked Questions
4	Media and Congressional Attention to the Project
4	Background on the "Marines United" Scandal
5-7	Background on the Translational Research Group

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Marine Corps Organizational Culture Research Project Overview

June 2020 *(updated Sep 2022)*

Project Overview

The Marine Corps Organizational Culture Research (MCOCR) Project was an exploratory research effort requested by the U.S. Marine Corps, Manpower and Reserve Affairs (M&RA), in July 2017 to gather information on Marine Corps culture. The project arose in part from concerns related to the Marines United social media misconduct (see page 4 of this document for more information) and also from longer-term leadership questions regarding shifts in Marine Corps culture. The research was conducted by the Translational Research Group (TRG) at Marine Corps University (MCU). [See pages 5-7 for more information on TRG.] The project was governed by Marine Corps Human Subjects Protection Protocol #USMC.2017.0005 and the provisions of academic freedom in MCU's *Academic Regulations*. The Principal Investigator for the project was Dr. Kerry Fosher.

The intent of the project was to develop a broad, robust base of data and analyses related to Marine Corps culture that could be mined over the years to provide context and insights that could be used to inform problem-framing and decision-making on a range of issues and to complement/enhance other research methods, such as surveys. Additionally, the project was intended to support scholarly analysis and publication. The project was not intended to be representative of the entire Marine Corps or to support statistical analyses. As with most exploratory research, results were intended to inform discussion rather than make claims or advance particular positions regarding any Marine Corps program or policy. For additional information see the Frequently Asked Questions on page 3.

The **first phase** of MCOCR involved research design, data gathering, initial analysis, and production of two expedited reports. The research team collected data from Aug-Oct 2017 at installations in the United States and Japan, conducting 182 interviews and focus groups that were recorded and transcribed for analysis. Initial analysis focused on issues related to leadership, cohesion, and gender bias, captured in reports to the Marine Corps' Personnel Studies and Oversight (PSO) Office, later renamed the Talent Management Oversight Directorate (TMOD).

A *Quick Look Report* on issues specifically related to the Marines United misconduct was delivered to PSO in February 2018. A broader initial *Report to PSO* was expedited and delivered on 30 March 2018. This report organized preliminary analysis into the following themes:

1. Marines United and the Prevalence of Online Misconduct
2. Challenges with and for Leadership
3. The Procedural and Social Uses of PFT/CFT Scores
4. Experiences of Female Marines
5. Hostile Environments
6. Remaining a Marine: How Enlisted and Officers Deliberate and Decide
7. Cohesion, Leadership, and Difference through the Lens of Humor

With the delivery of the initial report and associated materials to PSO, the Phase 1 of MCOCR was complete. This report is available on DTIC: [AD1079774](#). Links to other project reports from Phase 2 are provided on the next page.

Initial release of this report was scheduled for May 2018. Release was delayed due to leadership questions about the applicability of MCU's academic freedom policy. These questions were resolved in September 2019. The release resulted in **media and Congressional attention. See additional information on page 4 of this document.**

The **second phase** of MCOCR was intended to have three parts:

- Correct errors in the transcripts and removing protected information to develop them into a dataset that TRG could mine on a broad range of issues of interest to the Marine Corps.
- Conducting deeper and more structured analyses on issues of interest to the Marine Corps and topics of scholarly value.
- Continuing to advise Marine Corps organizations based on MCOCR and other datasets as requested.

The Marine Corps' decision to close CAOCL and, consequently, disband TRG in June 2020 altered the plans and timelines for the second phase. Original analysis plans for Phase 2 also were disrupted by TRG's inability to procure necessary analytic software and the delay associated with academic freedom questions. These factors significantly reduced the scope of analysis planned for Phase 2. **See additional information below.**

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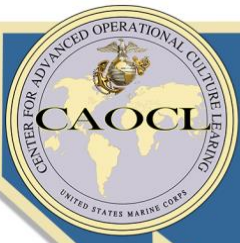
Advising

The TRG team continued to provide advice for problem framing and the development of more structured data gathering efforts to various Marine Corps organizations, including M&RA and TMOD until TRG was disbanded. Dr. Fosher continues to provide advice based on the project.

Dataset Development

Work to correct errors in the transcripts and remove protected information was completed in January 2020. This work ensured the transcripts could be analyzed accurately. It also allowed the transcripts to be placed in a repository for use by other researchers (see below).

Completed Analyses

Due to the limitations imposed by lack of software and impending closure, TRG focused on completing several "quick look" reports on different topics rather than the in-depth analyses originally planned. The following additional reports were completed and posted on DTIC:

- Insights from the MCOCR Project: Implicit and Explicit Perceptions of Fairness (DTIC AD1079415)
- Insights from the MCOCR Project: Pregnancy Loss (DTIC AD1085324)
- Insights from the MCOCR Project: Alcohol (DTIC AD1091445)
- Insights from the MCOCR Project: Rethinking Mentorship (DTIC AD1096699)
- Insights from the MCOCR Project: Trust in the Marine Corps – the Good, the Bad, and the Ugly (DTIC AD1103134)
- Insights from the MCOCR Project: Sexual Assault and Harassment (DTIC AD1103136)
- Insights from the MCOCR Project: Empathy in Leadership (DTIC AD1102322)
- Insights from the MCOCR Project: Generational Differences in the Marine Corps – Exploring Issues and Frictions Between Older and Younger Marines (DTIC AD1102357)
- Insights from the MCOCR Project: Elements and Antidotes for Disillusionment (DTIC AD1102323)

All reports from the project were submitted to the Defense Technical Information Center for posting on the public portal. See also the section on data management below for additional locations and materials.
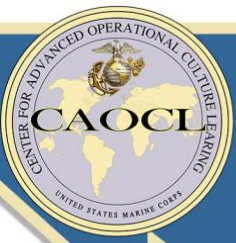
Scholarly Works

TRG team members presented on aspects of the MCOCR project at numerous academic conferences and in Marine Corps meetings. One scholarly article was published and another is in development as of this date:

- Translational Research in a Military Organization: The Marine Corps Organizational Culture Research Project. Feb 2020 in *Annals of Anthropological Practice*. https://doi.org/10.1111/napa.12130
- Post-Heroic Leadership in a Heroic Organization: The Secret and Gendered Life of Empathy in the United States Marine Corps. (article in development by team member).

Long-Term Data Management/ Data Availability for Future Research

Protection of the Marines who volunteered for the project and the data they provided was a priority for TRG. However, TRG also felt a responsibility to ensure that the data provided by Marines was used to the maximum extent possible. The principal investigator worked with the Marine Corps' Human Research Protection Program to identify a data repository that balanced internal and external discoverability with necessary security. After reviewing several options, the **Qualitative Data Repository** (QDR) was selected. Versions of transcripts that have been scrubbed of protected information, along with project documentation and reports, were deposited in the QDR when CAOCL closed. They can be accessed at https://doi.org/10.5064/F6K4IVEP. Reports and other documentation are available to the public. Access to the transcripts requires an approved human subjects protection protocol that meets criteria specified in the project documentation. Reports also are being posted to the **Open Anthropology Research Repository** during September of 2022.

Some materials from the project, but not the data, also were included in the CAOCL collection provided to the Archives Branch of the Marine Corps History Division at MCU and reports were posted on DTIC. The original audio recordings, raw transcripts, and any materials that could link participants with the data were destroyed when TRG was closed.

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What was MCOCR?
The MCOCR Project was a small, exploratory, qualitative research effort intended to gather U.S. Marine perspectives on a range of issues related to Marine Corps culture. The project resulted in 150 semi-structured interviews and 32 semi-structured focus groups with 267 unique participants (nine Marines participated in both an interview and a focus group). All participants were volunteers, and the project was conducted under a protocol approved by the Marine Corps Human Research Protection Program. The project was conducted by the Translational Research Group (TRG) at the Center for Advanced Operational Culture Learning (CAOCL) under Marine Corps University's (MCU) academic freedom policy.

How should the information in MCOCR reports be used?
Because of the non-representative sample, data and analysis from MCOCR were intended to inform discussions in conjunction with other information sources. They should not be used to make broad, statistical claims about Marines or Marine Corps programs and policies.

Were Marine statements fact-checked?
No. The intent of the project was to gather Marine perspectives without regard to whether the perspectives were based on full knowledge of current Marine Corps policies and programs. In some cases, it was important to capture misperceptions, as they had implications for internal Marine Corps messaging.

What are the project's limitations?
1. The MCOCR sample was not designed to be representative of the Marine Corps population in terms of sex, race/ethnicity, MOS, or other characteristics. Therefore, the data cannot be used in statistical analysis designed to make claims about all Marines. Sample demographics are included in the March 2018 report from the project, available on DTIC (AD1079774).
2. The project did not include Marines in the reserves or recently retired/separated Marines due to Marine Corps interpretation of DoD policy on information collections at the time the research was designed.
3. The project's designers did not actively seek volunteers above E-8 and O-5; therefore, senior voices are not strong in the sample.

Who funded and sponsored the project?
The project fell within the normal scope of work of TRG and the majority of the project was funded out of CAOCL's existing budget. Manpower and Reserve Affairs (M&RA) requested that the research be done, but the research design, conduct, and analysis were controlled by TRG. M&RA assisted with logistics, travel for research team members who were not part of TRG, and funding to accelerate transcription of audio recordings.

When and where were data gathered?
Between August and October 2017, the research team gathered data at the following locations: Pentagon, Marine Corps Base (MCB) Quantico, VA, MCB Camp Lejeune, NC, Marine Corps Air Station (MCAS) Cherry Point, NC, MCB Camp Pendleton, CA, Marine Corps Air Ground Combat Center 29 Palms, CA, MCAS Yuma, AZ, and MCB Camp Butler, Okinawa, Japan.

Can Marines who participated be identified?
Identification is unlikely. Marines who volunteered for the research went through an informed consent process that warned them of the risks and the steps the research team would take to mitigate them. (A copy of the informed consent information is available in the project documentation through the Archives Branch of the Marine Corps History Division at MCU or the Qualitative Data Repository at Syracuse University.) Names were removed from the dataset and other measures were taken to mask identities, but Marines were cautioned prior to agreeing to participate in an interview or focus group, during the informed consent process, that it might still be possible for some readers to identify them through their habits of speech and/or combinations of characteristics, such as MOS and location.

What were the qualifications and characteristics of the research team?
The principal investigator was a cultural anthropologist with more than 20 years of experience working with and doing research on national security organizations, including 10 years leading research teams on projects focused on the Marine Corps. The composition of the MCOCR research team changed between 2017 and 2020, but team members possessed PhDs or MAs in the following disciplines: cultural anthropology, sociology, cultural geography, international relations, education, communication, and evaluation science. Additionally, the project's design was peer reviewed by a DoD scientist with a PhD in psychology. Data gathering teams included male and female researchers. To the maximum extent possible, participants were allowed to choose the sex of the researcher with whom they interacted. All team members were caucasian. The data gathering team included two members with Marine backgrounds. One was a recently retired field-grade Marine officer, and the other was an active duty, company-grade Marine officer. The research team also consulted with other social and behavioral scientists and Marines during design and analysis.
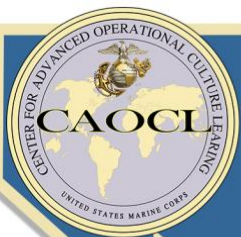
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Timeline and Background:

The initial MCOCR report was delivered to the Marine Corps on 30 Mar 2018. The Translational Research Group's (TRG) original agreement to conduct the project included public release of all outcomes under Marine Corps University's (MCU) academic freedom policy. However, release of project outcomes was delayed for 17 months due to Marine Corps leadership questions about the applicability of academic freedom policy to the project. After materials were released in September 2019, they received light attention in the media and Congress, examples of which are provided below.

Briefs to Congressional Staff

A team including the MCOCR Project's Principal Investigator, Dr. Kerry Fosher, BGen Daniel Shipley, then Director of Manpower Plans and Policies, and Dr Michael Strobl, then Deputy Director of Manpower Plans and Policies, briefed Military Legislative Assistants from the Senate on 07 February 2020 and from the House on 04 March 2020. BGen Robert Fulford, Legislative Assistant to the Commandant, and staff from the Office of Legislative Affairs also participated in the brief to Senate Military Legislative Assistants. (The brief to House staffers was truncated due to growing concerns over the COVID19 pandemic, which was emerging at that time.)

Media Coverage

To our knowledge, no major news outlets covered the MCOCR project. It received some attention on social media sites such as LinkedIn, Twitter, and Facebook in both military- and social science-related channels. It also was covered by some military-focused media outlets. Two examples of coverage are:

- Szoldra, Paul. 2019. An internal investigation spurred by a nude photo scandal shows just how deep sexism runs in the Marine Corps. Task and Purpose. 04 Dec.
- Pawlyk Oriana. 2019. Commandant Responds to Troubling Study on Marine Corps Culture. Military.com. 07 Dec.

Congressional Hearing

To our knowledge, the MCOCR Project was discussed in only one public hearing. In the 10 Dec 2019 hearing, LtGen Michael Rocco, Deputy Commandant for Manpower and Reserve Affairs, the sub-committee chair, Rep Jackie Speier, and Rep Susan Davis, briefly discussed the Marine Corps' handling of the report, challenges with Marine Corps culture, concepts of equity and parity, and the importance of empathy in the professional development of Marines.

- U.S. House Armed Services Committee Subcommittee on Military Personnel Hearing, "Diversity in Recruiting and Retention: Increasing Diversity in the Military – What the Military Services are Doing." Dec 10, 2019. The project is discussed or mentioned at:
    - 1:16:40 (LtGen Rocco briefly mentions the MCOCR initial report in his testimony)
    - 1:18:21 (Rep Speier and LtGen Rocco discuss the delayed release of the initial report and some aspects of its contents)
    - 1:31:08 (LtGen Rocco, responding to Rep Susan Davis, raises the report in his remarks on teaching empathy).

Marines United Background

In early March of 2017, The War Horse and Reveal from the Center for Investigative Reporting published a piece on a Facebook group called Marines United (See Thomas James Brennan, 4 Mar 2017). Members of the group had created linked Google Drive folders and posted photographs of women—some naked, some clothed—as well as personally identifying information and hostile comments about women. Some of the women targeted were Marines. At the time of the reporters' investigation, the Facebook group had over 30,000 members, some of whom were later determined to be active duty Marines. The investigations in the year following the initial news coverage identified 97 Marines as possible culprits. There were a range of punishments according to reporting in The Marine Corps Times (See Shawn Snow 21 Mar 2018). A brief overview of the legal actions taken was provided in a 2018 article in Military.com (See Hope Hodge Seck 13 Sep 2018). Although there were other signs of hostile behavior and social media-based misconduct that concerned the Marine Corps, the media attention and congressional scrutiny surrounding Marines United meant that it served as the primary frame for much of the subsequent discussion and action by the Marine Corps. Those actions included the formation of a task force and launching a number of initiatives. These efforts are not well documented in public Marine Corps reports, but news coverage and congressional testimony can be found via internet and library searches.
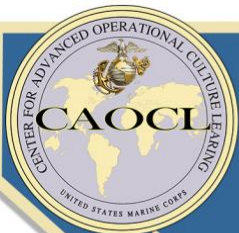
Timeline and Background:

General Background: The Translational Research Group (TRG) was a multi-disciplinary group of social scientists that operated from 2010 to 2020. The group was located within the Center for Advanced Operational Culture Learning (CAOCL), which was responsible for providing culture-related, regional, and language education and training to the U.S. Marine Corps. Originally part of the Training and Education Command headquarters, CAOCL was reorganized and became part of Marine Corps University in 2012.

The idea for the group grew out of discussions between the anthropologist who became its director and Marine Corps leaders, one of whom was the Director of CAOCL. They had seen many problems in the Marine Corps' ability to leverage research results and scientific expertise. Many problems seemed to arise from the lack of persistent presence of scientific researchers in the Marine Corps' supporting establishment. Sometimes, researchers lacked sufficient understanding of the military and its context to design effective and useful research. Sometimes military leaders did not have enough experience with scientists to know how to interact with them and how to frame questions to ensure results were usable. Often, the long lag time between completion of a research project and implementation of results meant that researchers were no longer available when the Marine Corps had questions about how to use the knowledge developed through a research effort. Having researchers on site and employed full time, rather than on a project-by-project basis, was intended to help mitigate some of these problems.

In addition to attempting to work on the challenges above, TRG also was an experiment in the interaction of the social sciences with the military. It was formed at a time when tensions were very high between social science professional associations and military organizations. The tension was a renewal of mutual mistrust that emerged during and after past periods of engagement, most notably in World War II and the 1960s and 70s. As a result of these tensions, the resulting lack of familiarity on both sides, and unrelated changes in the civilian personnel system, most military organizations became undesirable employment options for social scientists who wanted to maintain their professional identities. Even setting aside the problems working with the military could cause in academic professional circles, the working conditions were not appropriate for retaining expertise. Job duties as civil servants or contractors did not include time for maintaining and advancing professional knowledge and networks, there was little support for publication, attending conferences, and other normal scientific work, and there were very few career tracks that allowed a scientist to advance while maintaining a scientific identity rather than becoming a rank-and-file manager. These conditions were mitigated to some degree for those working in military colleges and universities, but even in those settings, support for professional development was limited and research involving fieldwork was not easily accommodated. Taking a civil service or contract job supporting a military organization was, too often, a professional death sentence. TRG attempted, with a mix of success and failure, to address these problems by creating an environment that provided military officials with access to social science expertise, but also established more viable working conditions.

TRG drew its name and general orientation from the concept of translational research in medicine and other sciences, which emphasizes the ability to move knowledge from research to application quickly through increased communication between researchers and practitioners and by other means. The translational research concept in TRG differed somewhat from applied research in the military context because it included basic or foundational research. It emphasized continued scientific rigor and researcher control over design and execution with increased attention to the questions, ideas, and needs of potential end users and greater awareness of the implementation context.

People: The director of TRG, Dr. Kerry Fosher, was a civil servant at the GS-14 level whose PhD was in cultural anthropology. Although the original intent was to create government positions for the researchers, it was never possible to accomplish that goal and the group was staffed with full time contractors. Another aspect of the original intent was to focus recruitment on people from the fieldwork-focused social sciences, such as anthropology, geography, sociology, and similar fields at the PhD level. Hiring into civil service or contract positions is never a simple process and at no time was TRG completely staffed as intended. At various points, TRG had researchers with MAs or PhDs in disciplines including cultural anthropology, cultural geography, education, educational psychology, international relations, international studies, biological anthropology, and cognitive psychology. It also developed close collaborative relationships with several other researchers with backgrounds in sociology, social psychology, inter-cultural communication, and other disciplines, as well as collaborative relationships with military personnel from a wide range of backgrounds. Although the range of disciplines was not what was intended, researchers with different degree backgrounds brought other capabilities that turned out to be highly valuable. The number of researchers in the group varied over the years based on CAOCL's funding and the details of contracts, but averaged six researchers, not including the director.

Resources: TRG was funded out of CAOCL's budget rather than on a project-by-project basis, although it did occasionally take supplemental funding to enhance staffing or support requirements for particular projects. This approach to funding ensured that researchers would persist in the context, enabling them to advise on implementation of research results and other aspects of the selection and use of science. Funding the group in this way also had downsides. CAOCL had to focus on its core mission to provide education and training, which sometimes led to
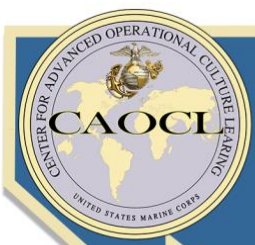
Functions: Although TRG's areas of emphasis changed somewhat over the course of the 10 years it existed, most of its work fell into three categories:

- research, advising, and outreach
- support to CAOCL
- assessment.

Research, Advising, and Outreach

TRG did not accept tasks in the way many research entities working with or within the military did during this time period. Project ideas might come from researchers, Marines, or other Marine Corps organizations. However, selection of projects was at the discretion of TRG's director, with approval by CAOCL's director. The intent was to ensure that the group conducted projects within its available range of expertise and resources and only on questions that the team found valid rather than having to respond to requests that might not have been a good fit with the group's capabilities or that would have challenged its integrity. This level of autonomy was highly unusual in DoD and frequently challenged, but necessary for the group to function as designed. Most research efforts focused on issues related to Marines and Marine Corps organizations such as stress and resilience, gender bias, humanitarian assistance missions, and cultural patterns in the Marine Corps. Projects leveraged the strengths of the team at any given time, but emphasized field research, including observation, semi-structured interviews, and semi-structured focus groups. A core strength of TRG was to bring Marine voices into discussions largely dominated by survey research and other quantified data.

The group provided a great deal of scientific advising to the Marine Corps and other DoD organizations. Originally envisioned as work that would focus on implementation of results, this line of activity expanded and became one of the most valuable aspects of TRG's work. Rather than focusing exclusively on implementation of its own results, TRG researchers also came to be valued for the advice they could provide based on their existing expertise, helping Marine Corps leaders scope problems, design research approaches, and evaluate research claims from other projects. Advisory conversations did not usually result in artifacts like reports or publications but rather in improved decision-making. However, it was one of the most valuable services TRG researchers provided.

Researchers also engaged in outreach through presenting work to scholarly and practitioner audiences, teaching guest classes and electives within Marine Corps University and elsewhere, publishing, and becoming involved in the professional associations of their disciplines. This outreach helped inform academic audiences about military personnel and served to improve relations between the military, academic social scientists, and scientific professional associations.

Support to CAOCL

TRG supported CAOCL's education, training, and policy sections in a variety of ways. Researchers reviewed and wrote inputs on doctrine and policy, advised on approaches to assessment, and occasionally supported training sessions with instruction. However, the most significant support it provided was in the area of culture general curricula, which provided Marines with the concepts and skills needed to operate effectively when they do not have sufficient/current culture-specific information. Although CAOCL had adopted the 5 dimensions model in 2009 (see *Operational Culture for the Warfighter* by Salmoni and Holmes Eber, 2008 and 2011), it was primarily used as a means of organizing regional or culture-specific material. The generalizable concepts and skills were not an integral part of curricula. For the first 5 years of its existence, TRG led the effort to integrate culture general material, first in CAOCL's distance education program and later in its training program. This work sometimes involved developing curricula or reference materials and at other times focused on advising CAOCL's sections about what should be included. Once the Professor of Military Cross-Cultural Competence (PM3C) was hired to be part of CAOCL and a member of the university's faculty, TRG was able to transition leadership of these efforts to her with TRG researchers supporting her efforts.

Assessment

TRG's director led CAOCL's assessment platform and TRG researchers worked with CAOCL's sections to help them design assessment approaches that would support required reporting and answer the more complex questions asked by CAOCL's director. One TRG researcher was responsible for collating annual information from the sections and using it to support various reporting requirements. TRG researchers also conducted assessment research, several examples of which are available on the Defense Technical Information Center's public portal.

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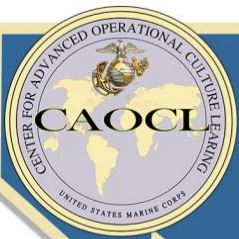
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Balance of Functions: This arrangement of tasks could be seen as a distraction from the core work of conducting research and advising or as simply "paying rent" to TRG's host organization, CAOCL. At times it was, but it also served a purpose. There was a reciprocal relationship between the work on training and education programs and the group's research. The support to CAOCL's sections and assessment work brought researchers into contact with the active duty and retired Marines in CAOCL and into discussions about Marines and the Marine Corps. In some cases, this work was a researcher's first introduction to the Marine Corps and a useful orientation before engaging in research-related activities. It also kept the researchers tied to the sometimes-frustrating realities of trying to get science integrated in the supporting establishment, something that was an important background for science advising. In turn, the group's research projects not only served their intended purposes, but also helped researchers develop greater knowledge of Marines and their missions, which informed their work on training and education.

Additionally, the arrangement ensured that the Marine Corps got full value from a relatively scarce commodity, fieldwork-focused social scientists. For the reasons noted above, during this time period, it was not easy to get qualified social scientists to work with the military and those employed purely in education and training sometimes struggled to maintain their professional standing or do research. TRG provided a mechanism that allowed social scientists to support education and training without losing their ability to conduct research, publish, and stay connected to their fields.

Closure: In 2019, the Marine Corps began substantial reorganizations and program cuts (referred to as divestment) in an effort to align its funding and personnel with the capabilities it believed would be necessary in future conflicts. These changes were difficult and controversial. For example, the service divested tanks, something that would have been unthinkable previously. Culture and language programs also were divested. CAOCL closed its doors on 30 Jun 2020 and, consequently, TRG was disbanded. Marine Corps University retained TRG's director as the university-level director of research and CAOCL's culture-focused faculty member who continued to teach across the university. Initially, a few of CAOCL's education and training capabilities were retained in the newly formed Center for Regional and Security Studies (CRSS). However, in the two years following CAOCL's closure, the CRSS lost staffing and funding. As of September 2022, CRSS has no dedicated funding and is staffed by one Marine officer who will not be replaced when his assignment changes, making it unlikely that the center will continue unless Marine Corps priorities change.

Of note, the other U.S. services underwent similar reductions or shifts in their culture and language capabilities during the same time period. (See *The Rise and Decline of U.S. Military Culture Programs 2004-20* Fosher and Mackenzie, eds and *The Best-Laid Schemes: A Tale of Social Research and Bureaucracy* Deitchman. Both are available to the public via Marine Corps University Press.) These shifts corresponded with a number of fieldwork-focused social scientists from across the services, including TRG, leaving through retirement or transitioning to work in academia or the private sector.

Archives and Repositories: TRG has archived its materials in a number of places. The specific contents of each collection were tailored to the archive or repository.

Marine Corps History Division Archives Branch: The CAOCL Collection deposited in this archive includes materials from TRG. Materials include reports and publications, project overviews and summaries, assessment reports, and similar artifacts.

Defense Technical Information Center: TRG posted many of its research and assessment reports on DTIC. Most can be located by searching on Fosher or CAOCL.

Qualitative Data Repository: TRG deposited materials and data from four projects in the QDR. Reports, project overviews, IRB-related materials, and some data from the projects are available to the public by searching for Fosher. Access to data from two of the projects requires an IRB-approved protocol.

Marine Corps University Human Subjects Research Archive: All IRB records from TRG's projects are retained in the university's centralized storage. These records are accessible only to IRB-approved personnel.

Open Anthropology Research Repository: Starting in September 2022, a selection of reports from TRG is being deposited in the OARR.

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Executive Summary

This quick-look report[1] is derived from insights gained through a preliminary examination of the data gathered for the Marine Corps Organizational Culture Research Project. The report addresses data and analysis that can inform messaging and narrative transformation for issues involving gender; takeaways can be applied to other forms of diversity. The report focuses on implicit and explicit perceptions of fairness embedded in Marines' views on standards, especially as they pertain to physical fitness tests, and leadership. Detailing how fairness is a subjective, malleable, and relational concept, this report discusses the following:

- Depending on the context, Marines speak about fairness in different ways. Sometimes fairness means "the same, for everyone" (*parity*), while at other times it means treating people differently depending on their strengths and weaknesses and the situation (*equity*). Judgments of fairness are made relationally, comparing one's own experience with an ideal, a perception of another person's experience, or institutional messaging.
- Explicitly invoking a parity-based approach to fairness, many Marines see gender-specific standards as unfair. Many of these same Marines, however, believe that men and women are inherently different and that women cannot achieve male fitness standards. Conversely, other Marines believe that the physiological differences between men and women mean that fairness in standards *necessarily entails* having different standards.
- Discussing how standards are determined – and how they are never actually neutral – might address some of the anger over having gender-specific physical fitness standards or over the biases inherent in "gender-neutral" standards (such as with uniforms).
- In the case of leadership, treating people differently based on their characteristics and the context is often viewed as an ideal of leadership. Implicit in this view is an equity-based approach to fairness that sees a thoughtfully tailored approach to leadership as ideal.

The differences in meaning surrounding the idea of fairness that already exist provide and opportunity for the Marine Corps to more finely tune its messaging to achieve the desired effect. Some Marines are already talking about standards using language that invokes an equity-based approach to fairness and many use such language while talking about good leadership. Messaging surrounding divisive issues like gender-specific standards might benefit from a conscious and targeted framing of fairness when the Corps is trying to convey the idea of equity rather that absolute sameness.

Likewise, Marine Corps leaders should be mindful of the messages they may inadvertently convey in talking about standards. For example, the word "accommodation" evokes the idea of a less-able group needing to be given special treatment to fit into the dominant group. This language might possibly trigger people resistant to things like promoting diversity in the Marine Corps because it might be viewed as a weakening of the force. The Marines who participated in this project were able to speak about accommodation in terms of avoiding formulaic leadership and the benefits

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[1] This Quick-Look Report was produced as part of the Translational Research Group's ongoing series of "quick look" publications, which provide overviews of scientific issues, books, and articles. Other publications in the series include the Book Digests and other Quick-Look Reports. The intent of this series of publications is to provide knowledge that can inform a range of discussions and leadership deliberations on programs or policy.

of "getting to know your Marines," both of which are approaches to talking about accommodating and leveraging diversity that might provoke less reactivity.

Introduction

After a preliminary analysis of interviews and focus group transcripts from the Marine Corps Organizational Culture Research (MCOCR) Project,[2] it is evident that Marines hold varying perspectives on the concept of fairness. Some of these perspectives were stated explicitly, while others were implied in the stories and insights Marines shared with researchers.[3] Because the researchers used in-depth, semi-structured interviews and focus groups,[4] they were able capture the various ways that Marines talked about fairness within the complex narratives they presented. In this report, I draw out two of the most common conceptions of fairness that arose in the data – parity and equity – and highlight how they are leveraged by Marines to express ideas about standards and leadership.[5]

In drawing out Marines' perceptions of fairness, I aim to demonstrate the subjectivity and malleability of the concept as it exists among Marines and within an individual's own narrative. Further, I explore the importance of examining fairness as relational. That is, judgment calls about fairness always need a referent – be it another person, an ideal, or organizational credo – against which a person measures their own experience. Difficulties can arise when someone's idea of fairness does not match up with what they perceive to be happening within the organization or when they perceive someone else as receiving better treatment than him or herself. I focus on the subjectivity, malleability, and relational nature of fairness to suggest that messaging and language surrounding fitness standards and the integration of women might benefit from consciously handling portrayals of fairness.

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[2] The MCOCR Project was an exploratory project designed to gather Marines' experiences and perspectives about leadership, cohesion, and gender bias. Fieldwork for the project was conducted between August and October of 2017 under Marine Corps Human Research Protocol #USMC.2017.0005. Researchers traveled to bases on both coasts of the US and in Japan and conducted interviews and/or focus groups with 267 Marines in total. While transcripts from the interviews and focus groups are still being cleaned and scrubbed, researchers have been able to gain preliminary insights through field notes and initial transcript reviews. NOTE: Transcript excerpts in this report are cited using the sex and rank of the participant and the location of the interview or focus group. While including MOS might provide readers additional context for the statements, the project's Principal Investigator determined that doing so would create undue risk of identification for participants.

[3] There were eight researchers for the project, including one active duty Marine captain and one retired Marine major. This report was prepared and written by me alone, although I did obtain the help and feedback from other team members.

[4] Interviews lasted for an average of one hour, while focus groups tended to last for about one and a half hours. The in-depth, semi-structured format of these methods allowed for participants to spend time on the topics they felt most relevant. Researchers used prepared questions as prompts as opposed to strict scripts, allowing for unforeseen themes and discussions to emerge.

[5] This report was written in the context of discussions with Marine Corps leaders seeking ways to change messaging and behavior related to gender, inclusion, and diversity. Its emphasis on ways to shift thinking and discourse toward more open and inclusive models is in response to those discussions. This emphasis should not be construed as the only way the perspectives Marines provided can be interpreted.

The Many Faces of Fairness

Fairness is neither universal nor objective, nor is it set in stone.[6] It is a contextually specific concept that exists both as an ideal and as a lived reality. Often, a disconnect between the ideal and the lived reality causes personal strife and social discord, while alignment creates contentedness and a sense of justness. We saw both cases in the Marines with whom we spoke.

The field of organizational justice talks about how employees perceive fairness in the workplace and explores how individuals often measure their situation against *their perception* of a colleague's situation using an input-to-output ratio.[7] So, for example, if a worker believes that she is putting in more time and effort but getting less reward than her colleague, she may make a negative judgment about the organization for which she works. Organizational justice literature also provides insight into the unique nature of assessing fairness in an institution where a person willingly enters into an agreement where other people (management) have authority over them, thereby contractually ceding some of their personal liberty. In yielding power to another person, an individual runs the risk of being exploited, causing employees to be vigilant about fairness and injustice.[8] Social science, in general, has also taught us that culture, though immeasurable and immaterial in many ways, plays an important role as an arbiter of what people perceive to be fair or not.[9, 10] For Marines, the primacy of the combat arms and the persistence of the "every Marine a rifleman"[11] credo work to organize values and shape ideas of what is necessary and thus fair.

I use these insights to guide an examination of Marines' perceptions of fairness. I frame the discussion around two broad theoretical and experiential foundations of fairness – parity and equity. **Parity** is used to describe measurable sameness. **Equity** can be described as providing people what they need to succeed, with the underlying notion that not everyone has the same strengths or weaknesses. While these conceptions of fairness are not diametrically opposed, they often stand in contrast to each other. As illustrated below, fairness is a powerful concept to use as a foundation on which to support a viewpoint, but the integrity of that foundation often goes unquestioned. When individuals and groups leverage fairness without explicitly defining it, they run up against complications when others implicitly define it in a contrasting way. This is not unique to the Marine Corps and can be seen in broader political discourses as well. For example, both sides of the

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[6] A full review of philosophical scholarship on the concept of fairness, more commonly referred to as justice in the literature, is beyond the scope of this report. An overview of western philosophies of justice can be found in the Internet Encyclopedia of Philosophy at https://www.iep.utm.edu/justwest/. Of particular note for this report, some scholars, such as John Rawls and Robert Nozick, have debated the tension between liberty and justice in the landscape of fairness, asking, when does one's liberty cause injustice for others? Any culture – be it on the scale of a nation or an organization – will run into this tension, as interacting with others as a member of a group entails necessary give and take.

[7] Jerald Greenberg, "A Taxonomy of Organizational Justice Theories," *Academy of Management Review* 12, no. 1(1987): 9-22.

[8] Russell Cropanzano, Zinta S. Byrne, D. Ramona Bobocel, and Deborah E. Rupp, "Moral Virtues, Fairness Heuristics, Social Entities, and other Denizens of Organizational Justice," *Journal of Vocational Behavior* 58(2001): 164-209.

[9] See, for example: Jennifer Jensen, Suzanne de Castell, and Mary Bryson, "'Girl Talk': Gender, Equity, and Identity Discourses in a School-Based Computer Culture," *Women's Studies International Forum* 26, no. 6(2003): 561-573.

[10] For example, someone living in a society with a greater emphasis on personal liberty might have a lower tolerance for social redistribution programs and a greater propensity to see them as unfair.

[11] I use "every Marine a rifleman" here and throughout the paper as a shorthand for the cultural identity that is perpetuated by the Corps' focus on readiness and lethality. That is, beyond marksmanship and the pragmatics of being able to hit a target, I see "every Marine a rifleman" as an aphorism that is part and parcel of the cultural identity of the Marine Corps as a lethal fighting force. Standards like the PFT are one (large) stream that feeds into this cultural identity.

affirmative action debate cite (un)fairness as a reason for their platforms and actions, but each side defines the concept differently. While some take a contextually broad approach and see affirmative action as leveling the playing field by making up for the historical and structural disadvantages faced by minorities, others see it as unfair because they believe the playing field starts off as level and that achievements are earned through individual merit alone. Awareness of these two ways of perceiving fairness might help the Marine Corps tailor its narratives in a manner that avoids ambiguity.

Parity and Standards

In interviews and focus groups, parity appeared most strongly in discussions of measurable standards, namely the physical fitness test (PFT) and the combat fitness test (CFT). Despite the 2013 changes in female PFT standards to include pull-ups, thereby making the *events* of the tests gender-neutral,[12] many of the male Marines who participated in this research took issue with the fact that women need to do fewer pull-ups and do not have to run as fast as the men to receive the same scores. They cite the numbers as proof positive of inequality. A gunnery sergeant's[13] thoughts on the matter captured this viewpoint:

> Just like the PFT standards. I don't know if that question will come up, but are they equal? Are they required to meet equal physical standards? No, it doesn't take a scientist to study that. They need to do this many pull-ups, and I need to do this many. Is that equal? No. Four and four is equal. 20 and 20 is equal. That's equal. So either we're equal, or we're not. I just, I hate that we try to act like they are, and we're trying to push for equal standards, but we don't.

Aside from the perceived unfairness of having different standards for men and women, a clear theme that comes through in the above quote is irritation that the organization of the Marine Corps is espousing one thing but doing another. The gunnery sergeant expressed this through a general understanding that the Marine Corps promotes equality as a value, though he does not go into detail about how he believes the Marines Corps defines equality. This perspective of physical fitness standards and fairness was common.

During another interview, a captain[14] took a slightly different approach when he read to me the definition of discrimination in Marine Corps Equal Opportunity Manual (EOM). Afterwards, he cited the example of having different uniforms and haircut standards for women as meeting the definition of institutional discrimination[15] that the EOM provides. His point was not to suggest that women wear the same uniforms and have the same haircut as men, but instead to provide an example of a clear contradiction of policy and action:

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[12] A look at the history of PFT changes in the Marine Corps shows wide variation in the ways Marines have been tested for physical fitness, with two large periods of time during which there is no evidence of fitness standards at all (from 1775 to 1908 and 1918 to 1955). Women have had physical fitness standards only since 1969. For women, pull-ups can now be done in place of the flexed arm hang, which was the gender-specific event used to measure women's upper body strength up until pull-ups became an option in 2013. [source: McGuire, Brian (USMCR Col, ret., Deputy Director, Force Fitness Division). USMC Physical Standards: Development, Implementation, and Assessment. Presentation at the 2019 NATO Symposium on the Integration of Women into Ground Combat, 6 February 2019.]

[13] Participant #054, Male, Gunnery Sergeant, MCB Camp Lejeune, 23 August 2017.

[14] Participant #209, Male, Captain, Pentagon, 7 September 2017.

[15] "Policies, procedures, or practices that, intentionally or unintentionally, lead to differential treatment of selected identifiable groups and which, through usage and custom, have attained official or semiofficial acceptance in the routine functioning of the organization/institution." (Marine Corps Equal Opportunity Manual, 14 April 2003, p. F-3).

> [H]ow is having a different standard for men and women not institutional discrimination? [referring to definition of discrimination in Marine Corps orders] … I just think it's a double standard. … Then you ask them like all the while, "Why do we have female uniforms?" Yeah, well, you know, "Don't ask those questions."

He gave the example of a female colleague of his who would prefer to wear her hair in a shorter, more masculine style, but the rules prohibit her from doing so.

> [S]he has like a fade, but their hair at any point can't be shorter than like half an inch or so. And like that actually like bothers her 'cause like she wants to be kind of more masculine and the Marine Corps literally doesn't allow her. Like she would be like breaking the rules if she got a haircut. I get- I mean, from a casual observer's perspective, it'd looked like kind of the same haircut, but like she can't like per the rules get like get this close [*points to his own hair*]. It has to be like, more like this length [*demonstrates length*].

He informed me that he had written a letter to Marine Corps leaders at the Equal Opportunity Office addressing his concern and that he felt that their response was to brush his concerns aside and imply that he "quit asking questions." This is a clear case where organizational credo, as encapsulated in actual policy, departs from what this Marine perceives as fair on a day-to-day basis, hence the captain's perspective that the Marine Corps has a "double standard."

Many of the men who were upset about women having lower fitness standards also talked about how women's physiological differences (as they understood them[16, 17]) prevented women from performing like men. For example, the gunnery sergeant[18] from above said:

> [W]e're created differently, male and female, and men know that, and females know it too. But it doesn't matter if we're Marines. It doesn't matter if we're told everyone is green, but all the same. Doesn't matter what you tell me. I still live with the human condition, the human condition is this: females are different. I'm married to a woman. She's my wife. I treat a female differently than I do a male.

A sergeant[19] had a similar view of irreconcilable physical differences between men and women:

> [W]e [the Marine Corps] want to make, you know, we're saying that women are equal to men and everything is equal, and then people may look at PFT and CFT. Well, why do I have to run in 26 minutes and she is asked to run in 28 or 29? But then you also

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[16] There is not enough room in this paper to discuss the complicated and largely erroneous understandings Marines have about physiology and sex differences. Physical strength and ability are greatly influenced by environment, including culture, and are thus not purely genetically determined and can be altered with conditioning. For example, in the U.S., men and women are expected or encouraged to do different things with their bodies from a very young age and thereby develop different muscle sets and different bone densities. Therefore, the observable different capabilities in segments of a population at a particular point in time do not necessarily point to an underlying, unalterable genetic difference.

[17] "Misunderstandings about the relationship between genetic potential and observable physical or mental capabilities create challenges at individual and organizational levels. At individual and unit levels, Marines need to know and operate with the actual, developed capabilities of their peers, not their, perhaps undeveloped, genetic potentials. Yet when they confuse the current capabilities of individuals with the genetic potential of entire segments of the population, it can lead to unwarranted bias toward and against those parts of the population. At the service level, the Marine Corps must also work with the population it inherits from society. Unfortunately, if long-term policies are set on the basis of how the population is developed at this particular moment in time, it could cause the service to blind itself to the future potential of some segments of the population. Additionally, when inaccurate folk theories of biology rather than science drive decision-making, it can blind the service even to current potentials." (Kerry Fosher. "Research Notes: Folk Theories of Biology in the Marine Corps." Personal Research Materials Collection, 2017.)

[18] Participant #54, Male, Gunnery Sergeant, MCB Camp Lejeune, 23 August 2017.

[19] Participant #115, Male, Sergeant, MCB Camp Pendleton, 13 September 2017.

have to look at physiologically men and women are built differently. Men have more muscle mass. Why is the NFL all male? Why do the Olympics, you know, have men compete against men and women compete against women? There's a physiological difference that we have to consider as well.

Yet other Marines tied their argument for a single standard to the need to be able to perform alongside men in combat. This sergeant[20] expressed that viewpoint:

If we had one standard, I'd be more comfortable with it. But if I think you might have to drag my bleeding body to a helicopter and I know you are legitimately and objectively not as strong as your male peers, I have to wonder about my own health and safety. And I don't want to disparage female Marines. They are what they are. Some of them are awesome at their jobs. Some of them are beasts at PT. But, again, those are outliers. I'm not gonna say they're not competent. I'm not gonna say they can't fight. I'm not gonna say they can't be proficient with a weapon or anything else. But I think it's disingenuous to just disregard biological differences. But it's not politically expedient to do so.

This Marine's view of fairness is embedded in a culture where combat readiness reigns supreme and is upheld by the "every Marine a rifleman" cultural identity and attendant value construct. The primacy of the infantry in Marine Corps culture sets ideals that can affect even military occupational specialties (MOSs) in which combat skillsets are less necessary. Women (and men) in these other MOSs get viewed through this same combat lens despite their need for other characteristics, skills, and abilities to meet Marine Corps requirements.[21] This discord, unresolved, was something heard in multiple interviews and focus groups.

Problematizing Parity and Demystifying Standards

In holding up organizational credo – whether it be definitions from policy or a general sense of Marine Corps values – next to the disparity in male/female standards, some Marines make a relational judgment call of unfairness built on the concept of parity. However, we also get the sense that, because numbers are the easiest thing to compare – much easier to compare than intangible qualities that go into being a good and capable Marine, the double standard of physical fitness, especially the marked difference in pull-ups, is often an easy target and could possibly be a proxy for other grievances that Marines have with the Marine Corps. Presented as objective evidence of unfairness, fitness standards might be a valve through which anger over more complex issues – be it a change in policy or the presence of women in general – is released. One major[22] called this a "red herring," noting, "There are plenty of [male] grunts that aren't meeting the mark. So I think the

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[20] Participant #049, Male, Sergeant, MCB Camp Lejeune, 23 August 2017.
[21] Anger over PFT standards must be considered in light of the way that scores are used in the Marine Corps. Beyond being measures of physical fitness, these scores "travel" and create meaning in other realms. Certain institutional practices add extra weight to the PFT and make it more high stakes than a mere measure of physical fitness. For instance, PFT scores are formally used in promotion boards. Additionally, PFT scores – within an organization that has long valorized physical strength – can be *informally* used to make up for a Marine's non-measurable strengths or weaknesses. A former Marine who gave feedback on this paper noted that some leaders might use a high PFT score to inflate a Marine's proficiency and conduct score. Moreover, Marines judge themselves and each other using PFT scores as indicators of who is a "good" Marine and who is not. Of course, like all indicators, PFT scores are simplistic proxies for a more complex reality.
[22] Participant #053, Male, Major, Interview, MCB Camp Lejeune, 23 August 2017.

physical piece, that's a red herring."[23] A sergeant[24] suggested that it was something that was more pervasive among junior enlisted:

> I haven't heard any sort of negative talk about the different standards at the corporal, sergeant ranks. That's more like the lance corporal speak, you know, they are talking to each other and angry that they have to take the PFT in the first place, so to channel that anger they are gonna complain about how the standards are different.

Whatever the case may be, in creating an "unfair impasse" by combining parity, fitness standards, and perceived physiological differences, some Marines – intentionally or not – stifle any further conversation.

However, the dissonance encapsulated in the "women are different, but it's unfair to have different standards" perspective points to a prime challenge with a parity approach to standards: standards are never neutral.[25] The genesis of any standard is often mystified. That is, the way in which it was extrapolated and from what data do not travel with the standard itself, creating a free-floating standard that appears as though it is universal and free from bias. The lack of transparency about inherent bias in standards clashes with the parity ideal that suggests "the same, for everyone" as the way to facilitate equality. While appealing in its black-and-white simplicity, the concept of parity as it applies to standards is fundamentally flawed. The Marine Corps is not alone in having this challenge. In many occupations in the U.S., the standards for what capabilities are needed for success are based on how one part of the population, often men, achieve that success. Such standards, whether intentionally or not, can end up leading to the assumption that success can *only* be achieved in that way.[26] There are similar assumptions in standards of appropriate appearance and attire, as can be seen in women's business attire, which often mimics a man's suit, although neither piece of clothing has any practical effect on one's ability to do the work.

A captain[27] illustrated the problem with parity while talking about uniforms: "The uniform change that we experienced and are continuing to experience, basically it was pitched as this gender neutral uniform. It's not gender neutral. Making females buy male uniform items never was gender neutral." A gunnery sergeant[28] descriptively emphasized this point:

> God forbid I say, "You know what? I got boobs, so can the flak jacket have a little bit of a curve to it so I can breathe when I'm hiking for 12 miles [*chuckles*] instead of pressing on my chest and I can get in the prone position without it hitting my Kevlar and blocking my eyes to see what the hell I'm shooting at? That is set up for failure.
> … I cannot reach my potential as the other person that has everything designed. Let

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[23] This participant (ibid) also articulated an MOS-specific schema for standards, distinguishing those MOSs that "require a physical standard" from those that do not: "I do think there absolutely should be one physical standard for MOSs that require a physical standard. You need to be able to do this many pull-ups, this many crunches, run this far this fast to be an 0311, period. If you can do that, you can be an 0311. If you can't, you can't." Several of the Marines who participated in this study had a similar view, acknowledging that not every MOS is physically demanding. The fact that physical standards are upheld even in non-physically demanding MOSs is, of course, indicative of the organizational culture of the Marine Corps, where the ethos of "every Marine a rifleman" and combat readiness shape expectations and values.

[24] Participant #106, Male, Sergeant, Interview, Pentagon, 7 September 2017.

[25] Todd Rose, *The End of Average: How We Succeed in a World that Values Sameness* (New York: HarperCollins, 2015).

[26] This is not to suggest that the Marine Corps does not or should not make choices about different models of how to achieve success. An organization of the size and complexity of the Marine Corps cannot flex to incorporate all possible combinations of capabilities that might be successful in accomplishing its missions.

[27] Participant #058, Female, Captain, Focus Group, MCAS Cherry Point, 24 August 2017.

[28] Participant #136, Female, Gunnery Sergeant, MCAS Yuma, 25 September 2017.

me wear a size 12 shoes when I'm seven and a half and go run for three miles. See how that works. [*interviewer chuckles*] That's exactly what happening.

The gunnery sergeant notes how turning a blind eye to difference in the name of a parity-based view of fairness is "set up for failure." An equity-based approach, however, would take into account differences *expressly* to set up all parties for success.

The "set up for failure" mindset extends beyond uniforms. This major[29] captured the need for the Marine Corps to move away from a "one-size-fits-all" approach to the ideal Marine:

> The Marine Corps, in my experience, it's kind of a one-size-fits-all, that we've had a one-size-fit-all institution. And I believe as a culture, as a society, we are starting to learn and realize that you can't pigeonhole humans like that. That when you-when you make a requirement so stringent that it's a one-size-fits-all, that everybody must meet these certain metrics or these certain requirements, that you lose out on a lot of things, whether it's ideas, ideals, thoughts, it goes on and on and on. And I would say we're now, as an institution, beginning to realize that one size fits all, the six-foot blond-haired, blue-eyed, barrel-chested, can do 100 push-ups and 20 pull-ups and can run an 18 minute three mile, that that's not the only Marine that we need. And I think we're starting to realize that. But I think as it relates to society and as it relates to maybe the other services to a small scale, that we are behind.

Noting how a strict adherence to certain metrics and measurements generates a narrow pool of "ideas, ideals, [and] thoughts," the major suggests that a fixation on measurable and largely physical traits actually puts the Marine Corps at a loss relative to broader society, which is "starting to learn and realize that you can't pigeonhole humans like that." He therefore implies that society writ large recognizes the advantages of diversity in a way the Marine Corps as of yet does not.

An Equity-Based Approach to Standards

Many of the Marines who participated in this research had no issue with different male and female standards. Some of these Marines situated their view of fairness in a way that was more in line with equity than parity. For instance, this warrant officer[30] articulated an equity-based approach to physical fitness standards:

> It's [different male and female standards] almost [like] grading on a curve. So what can females do for the female group? What can a man do for the male group? And it's all based off of the scoring system for PFTs and CFTs, and for everything else you're graded the same, like your pros and cons, your proficiency and your conduct markings or your performance evaluations that's graded by the book … The only thing that is really different is that performance standards of the PFT and the CFT.

In equating different male and female standards to "grading on a curve," he is demonstrating a perception of fairness that is not as rigid as "equal or not equal." This approach takes into account the differing capabilities of men and women, which those with a parity-approach portray as an insurmountable obstacle to fairness. However, as "grading on a curve" has negative connotations for some, this language, like "accommodation," might not be ideal for narrative transformation.

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[29] Participant #418, Male, Major, Focus Group, MCB Camp Butler, 18 October 2017.
[30] Participant #023, Male, Warrant Officer, Interview, MCB Camp Lejeune, 22 August 2017.

Another Marine used language that is less triggering to describe an equitable approach to standards. After noting that she does not know where fitness standards came from, the same captain[31] who called out the "gender neutral" uniforms above talked about how having equal standards might mitigate men's complaints that women have it easier. However, the way she described "equal standards" diverges from parity to take on a more equitable approach:

> PT standards, I don't know how they came up with those numbers. I don't know how that happened. I have no idea. … Because [if standards are equal,] then there's no complaints about how, "Well, the only reason she's doing better is because she doesn't have to do as many pull-ups as me or she doesn't have to run as fast as I do." So, biological differences aside, there must be some way that you can come up with an equal standard that is challenging but that still evaluates everyone equally, the way that it should be.

By linking the concepts "equal standard" with "evaluate everyone equally," the captain implies an approach to fairness in standards that is not based on parity. While she recognizes the need to have equal standards, the equality in her vision is based on outcome evaluation and not the raw numbers at the outset. This is an example of how slight changes in language can shift focus and perspective, and it challenges the perspectives of Marines who use a parity-based approach to fairness to argue that having different standards is unequivocally unfair.

Equitable Leadership: Knowing Your Marines

In descriptions of leadership, it was very common for Marines to use an equity-based approach. Many suggested that "getting to know your Marines" was important because you could better lead your Marines if you had a sense of their strengths and weaknesses, what was going on in their lives, and what motivated them. I describe this as equitable leadership.[32] In first-person narratives of good leadership, cutting a Marine some slack because they were experiencing a serious personal issue, for example, was viewed as a sign of a fair and understanding leader.[33] The underlying conception of fairness inherent in this mindset is based on equity, where treating people differently according to their position and needs is seen as virtuous. A 1st lieutenant[34] explained:

> [I]t's the job of leadership to understand the differences, to know their Marines. And I know that's said all the time, but I don't think it ever sinks in. You need to know your Marines well enough to know what their strengths and weaknesses are and how to utilize those strengths and weaknesses to make them a better person.

Naturally, not everyone has the same strengths and weaknesses. Therefore, this approach to leadership would entail treating everyone a bit differently. The 1st lieutenant does not equate this with special treatment or unfairness but instead with the process of producing a better Marine.

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[31] Participant #058, Female, Captain, Focus Group, MCAS Cherry Point, 24 August 2017.

[32] This style of leadership has been described using other names, such as post-heroic leadership (cf. Joyce K. Fletcher, "The Paradox of Post Heroic Leadership: Gender Matters," *The Leadership Quarterly*. 15 (2004): 647-661). I use the term equitable leadership here solely to highlight this paper's focus on fairness and the concepts of equity and parity, not to suggest an alternative branding of the concept.

[33] In conversation with a former Marine [LtCol Michael Purcell (ret., tank officer)] about this report, he suggested that this mindset is shaped by the type of leadership required in operational environments, where the changing contexts and ever-shifting variables demand that a leader be less by-the-book and use more personal discretion. This type of leadership entails an empowerment of Marines to make their own decisions based on the "spirit of the law" versus the "word of the law."

[34] Participant #047, Male, 1st Lieutenant, Interview, MCB Camp Lejeune, 23 August 2017.

Similarly, during a focus group, a chief warrant officer 2[35] described the connection between "knowing your Marines" and "foster[ing] the traits that we want to keep":

> I often use the analogy of, you have a Marine that shows up UA[36] three, four days in a row. Well, instead of hammering him, "Hey, what's going on, devil?" "Oh, well, my wife, she was just diagnosed with cancer, so I'm trying to help her with this stuff." "Well, why didn't you come talk with us?" "Well, I just…you're an officer or you're a staff NCO. I didn't want to come talk to you." That's knowing your Marines. And I think that's how we foster the traits that we want to keep.

Not all Marines use the language of "knowing your Marines." A PFC,[37] when asked by the interviewer what he would recommend to ask subsequent interviewees about leadership, described this tailored leadership style as "accommodation":

> I would definitely just ask about … how they would deal with a situation. Like how they would deal with a Marine, and ask if there's a specific formula of doing it or if they accommodate depending on who the Marine is. Like if they knew that person and how they would react to things, like I would ask them if they would accommodate for that Marine.

This same PFC talked about how, although he has little experience leading Marines, he has been a leader in other areas of his life. In his experience, accommodating for the uniqueness of individuals achieves "better results" than treating them according to a "certain written down formula":

> I personally, I've always accommodated for people. I feel like you get better results that way. You get better performance, you develop relationships, and I feel like it's more respectful, because if you're treating everyone the same way or … putting someone to a certain written down formula, like try to punish them based off of that or being in a situation where you're upset with someone, like I don't know. It [accommodation] just works better. You're going to get a lot better performance out of your Marines, your workers, whoever.

In this scenario, the PFC clearly does not see policy clashing with action like the captain who wrote a letter to EO leaders and instead sees the formulaic treatment of individuals as counterproductive. This is a great example of how language matters. His use of the word "accommodation" can cloud people's understanding of his intent. The word "accommodation" prefigures a less-able group needing accommodation into the dominant group. Use of this particular word to describe equitable leadership might possibly trigger people resistant to things like promoting diversity in the Marine Corps because it might be viewed as a weakening of the force. His imagery of "formulaic leadership" to describe rigid leadership practices as well as the more common refrain of "getting to know your Marines" to describe more flexible ones, however, might provoke less reactivity.

The Role of Empathy in Equitable Leadership

Many Marines who participated in this research talked about the importance of empathy in good leadership. For instance, during at least one focus group[38] and one interview,[39] Marines suggested

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[35] Participant #057, Male, Chief Warrant Officer 2, Focus Group, MCAS Cherry Point, 24 August 2017.
[36] Unauthorized absence.
[37] Participant #039, Male, Private First Class, Interview, MCB Camp Lejeune, 23 August 2017.
[38] Participant #203, Female, Major, Focus Group, MCB Quantico, 6 September 2017.
[39] Participant #126, Male, Major, Interview, MCAGCC Twentypalms Palms, 19 September 2017.

that one of the Es from JJDIDTIEBUCKLE[40] be replaced with "empathy." Some Marines used the word "compassion," while others described situations in which they were able to put themselves in someone else's shoes. Whatever the language, this suggests that empathy is something that Marines value but that they perceive to be discouraged or undervalued by the Marine Corps. Empathy is also a key element of equitable leadership, as it facilitates "knowing your Marines" by moving away from the "one-size-fits-all" approach of "formulaic leadership." Speaking to this distinction, a captain[41] talked about how the mentality of "look[ing] at everyone like they're equal, then they'll just be equal" does not adequately address the differences in people. She used the word "empathy" to talk about what this method is lacking:

> I know that I've been through things that are very specific to being female. And then I know that my friends have gone through things that are very similar, and that we have struggled differently, solely based on gender. And I think that, as a culture, or as a Marine Corps, there is this perception that, if we look at everyone like they're equal, then they'll just be equal, which is just false. It's not true. It's a terrible way to look at the problem. And I think it lacks the empathy … we were talking about earlier to address the issues and solve them.

Echoing this sentiment, a lieutenant colonel[42] reflected on how she used to treat everyone the same because she "completely accepted the Marine Corps' cultural norm on face value." She lamented that this made her "part of the problem," especially when it came to pregnant women:[43]

> [U]p until the time that I became a mother as a lieutenant colonel with sixteen years of service, I had no idea what the challenges were for pregnant service women and also for new mothers. And I'm ashamed to admit that I was part of the problem because I completely accepted the Marine Corps' cultural norm on face value and did what I thought was appropriate as a supervisor, which was to hold my females accountable the same way I'd hold men accountable. And so, no, I was not inclined to give any sort of accommodation. I wanted the doctor's note for everything. I was awful. I was absolutely awful. And after I became a mother where I could find them, I sent emails to the women who I had been a supervisor of and I apologized to them because it was- I was perpetuating a system that is not very accommodating.

She went on to tell a personal story that she's "horrified" by after her shift in perspective:

> When I was a major at Headquarters Marine Corps, did I have to give the captain with a new baby a hard time because she was having problems being able to support the Marine Corps Marathon on a Saturday? Did I have to do that? No. But did I do it? Yes, because I felt that was expected. And I told this line of, "Well, everybody has got to," you know, "show up at Butler Stadium at 3 o'clock in the morning to be counted until 5 o'clock to get on the bus to stir the Gatorade." And now I look back and I'm horrified that I put that female Marine through that level of crap over it. But I did

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[40] An acronym for Marine Corps leadership traits: Justice, Judgement, Dependability, Initiative, Decisiveness, Tact, Integrity, Enthusiasm, Bearing, Unselfishness, Courage, Knowledge, Loyalty, Endurance
[41] Participant #058, Female, Captain, Officer Focus Group, MCAS Cherry Point, 24 August 2017.
[42] Participant #603, Female, Lieutenant Colonel, Interview, Pentagon, 6 September 2017.
[43] Marital status and parenthood were both issues in which ideas of fairness crystalized. Though not a primary consideration of this paper, these two topics would be fruitful areas to mine for ideas relating not only to fairness but also to work/life balance, single-parenthood, dual military families, motherhood vs. fatherhood in the Marine Corps, and changes in perspective among individual Marines. This lieutenant colonel's story is one of several that involve this shift.

> because that's what was expected. And in fact, you know, my bosses, men expected
> me to do that and I didn't see anything wrong with it.

Like the captain who discussed empathy, the lieutenant colonel noted that she was only able to treat pregnant women differently when she empathized with them through shared experience.

A gunnery sergeant[44] described his shift in perspective on LGBTQ[45] community members in the Service. It was only after, during the repeal of Don't Ask, Don't Tell, listening to then-President Obama talk about how "once upon a time, African Americans couldn't serve in the military" that he began to empathize with LGBTQ service members:

> In the company of all men, it's "I just don't want 'em [LGBTQ community members] around [in the military]. I just don't like them." They'll be blatantly honest, "I just don't want 'em around." Jesus, really? Like once upon a time somebody said that about black people, you know. I used to think the same way about gay, lesbian. Transgenders [sic] wasn't even a thing back then. When at the time President Obama repeal[ed] Don't Ask, Don't Tell, I had a problem with it because I was like, "What the fuck is going on?" And then he made a statement where he was like, "Once upon a time, African-Americans couldn't serve in the military." I think with enough time we look back on how foolish we were being when we did not allow the LGBTQ community … to serve. And I was like, light bulb. Okay, I've seen the light. You know what? That makes perfect sense. And that opened my eyes to pretty much all walks of life. I was like, "absolutely right." Once upon a time I couldn't be a Marine, and I think I'm a pretty damn good Marine, if I do say so myself.

This Marine's "light bulb" moment came when a respected superior (then-President Obama) drew a parallel between the plight of African American service members, of which the gunnery sergeant identified, and LGBTQ service members, thus eliciting empathy through shared experience. In finding this commonality of experience, the gunnery sergeant's mental and emotional "distance" from the LGBTQ community was significantly ameliorated.

Equitable Leadership and the Problem – and Solution – of Perspective

An equitable leadership decision may not be perceived as fair by someone who has a limited perspective on the situation. In some cases, it might be perceived as special treatment, a subject that came up often in Marines' list of grievances with leadership. While it certainly is the case that favoritism and nepotism do play into leadership decisions, there must always be leeway to interpret third-person stories as partial perspectives that are shaped by preconceived notions. That is, what might look like special treatment from the outside might actually be a leader rewarding an adept Marine. A master sergeant[46] described this in the case of the preconceived notions about women that many male Marines have:

> My Marines tried to tell me that females get different treatment. But that's their perception, that they get different treatment. And so you ask, how do you deal with it? You got to deal with it on your level and just like I said, when I explained to them like, "Man, this chick is out here doing everything you do. She's better than you. Don't try to say she's getting preferential treatment 'cause she's better than you. No, she gave birth and then came back and was still better than you."

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[44] Participant #510, Male, Gunnery Sergeant, Interview, MCAGCC Twentynine Palms, 18 September 2017.
[45] Lesbian, Gay, Bisexual, Transgender, Queer
[46] Participant #236, Male, Master Sergeant, Focus Group, MCAS Yuma, 26 September 2017.

He went on to say that when male Marines try to claim that women receive special treatment, he tells them, "'Hey, dude, you're on the outside looking in.'" This hits the problem of perspective on the head. Other Marines expressed how they treated Marines differently when they experienced a shift in perspective. For instance, in dealing with pregnant Marines and mothers before she became a mother herself, the lieutenant colonel from above lacked the perspective to know how to treat some of her female Marines. In her "treat everyone the same" mentality, she might have viewed allowing the new mother to come in later than others for marathon preparation as "special treatment."

Of course, in viewing an outside situation, it is impossible for a person to have an unlimited perspective. However, in the case of the Marine Corps, contextual issues exacerbate the already circumscribed perspective that men have on women in general. Because women only make up about 8% of the Corps, many male Marines are not around or close to many female Marines. Moreover, there seems to be hesitation from both sides for men and women to be friends, especially among the junior ranks. This sets up a barrier for Marines to fully know each other and their respective perspectives. Although familiarity is not a prerequisite for empathy, knowing someone and their situation does help to facilitate a more accurate understanding of their situation, thereby possibly challenging preconceived notions. This was the case with a 2nd lieutenant's[47] male peers, who only revealed their feelings to the lieutenant after she and the other females in her platoon had "proved" herself at TBS and became a squad leader, thereby shifting their perspective on female Marines from wariness to appreciation:

> I remember on our mess night, and of course at mess night, it's tradition that we have a few drinks. … And when that happened, a lot of the people came out of the woodworks and were like, "You know, just want to tell you," and usually talking to me and my fellow counterparts in the platoon, they're like, "We just want to tell you that, we were really, like, really hesitant, and weren't sure how females were, and you guys all proved us wrong and I have … a greater appreciation for women now in the military." And it's like, we're like, "Thank you." … [One of my closest buddies] was in my fire team and the very first three weeks there, I was elected to be our squad leader for the whole squad because I had prior experience. … And I was rated top squad leader, and later on down the road we were out in the field one time, and we were just talking because you feel that's about all you can get to do. And he's like, "I gotta be honest with you, *[Name removed in accordance with human subjects protection protocol.]*, I wasn't a fan of having a female as a squad leader in the beginning." He's like, "I didn't even care if you were a squad leader or not, just really hesitant to doing what you were telling me". But he's like, "As we've come along, and now it's, you know, we've kind of proven that you're not, you know, what I perceived as a female in the military." … And we're great buddies now and we talk about this issue quite a bit. But, again, at the end of all those months, a lot of people came around and were really appreciative.

After telling this story, the 2nd lieutenant expresses that she doesn't "know where they [male Marines] get this perception from," but that "it's kind of a relief" when they let a female know that she goes against their initial perception. However, the 2nd lieutenant also notes that that it should really be no surprise that women can make it in the Corps, saying, "Of course there's a like, 'you

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[47] Participant #125, Female, 2nd Lieutenant, Interview, MCAGCC Twentynine Palms, 18 September 2017.

should have had a V8' moment,[48] but [*laughter*] unfortunately, that's just kind of … that's where we're at right now in the world."

Equitable Leadership, Trust, and Organizational Change

Although many Marines who participated in the research seemed to feel jilted by the organizational hypocrisy that they perceive in matters of standards, they were far less likely to describe a disconnect between value and action when it comes to the positive and *trusting* relationships of which they are a part in the workplace. This harkens back to an insight about fairness from the subfield of organizational justice: an employee must necessarily cede some of their power over to the management upon entering into a contract with an organization, which can be a risky and fraught reality if they do not have trust in the organization and those in charge.[49] A major[50] discussed how "engendering that loyalty to you and that openness" makes Marines more receptive to actions that go against their "initial thoughts," stating:

> It's engage[d] leadership, but I keep going back over the years and different jobs and different leadership positions, I've constantly come back to that. … [I]f you are talking to your Marines, you are creating and engendering that loyalty to you and that openness and stuff like that. They are also more likely to be receptive when you tell them something that perhaps goes against what their initial thoughts are on the subject. They're more open and receptive to that. So, when you're engaged at that level, you have a greater ability to impact Marines. You're never gonna eliminate it all, right, but perhaps more of those marginal people you can bring on board.

This major demonstrates how "when you're engaged at that level," things run more smoothly because leaders will already have the trust of their Marines. In this sense, the engagement necessary for equitable leadership (i.e., "getting to know your Marines") is advantageous in that it also fosters trust in the organization. This points to another initial insight from the MCOCR Project, which is that trust in leadership is essential in instituting any organizational change. For instance, for male Marines, changing "their initial thoughts on the subject" of gender likely cannot be instituted by a top-down, brief-heavy approach and might be better approached through an equitable leadership style in which the trusted leader introduces new ideas at the interpersonal level and models respectful behavior.

Suffice it to say that the benefits of an engaged leadership style are well-tread territory. However, for reasons that are beyond the scope of this paper, engaged leadership is difficult to actually implement. The Marines who participated in this research talked about the extra work that engaged leadership entails, describing how getting to know their Marines, though useful, was time-intensive. Some struggled juggling engaged leadership with the operational demands of their job, not to mention those of their personal and family lives. The Marines who were successful at doing so noted that it was like having second job. While some lamented this, others saw it as part of their duty. A master sergeant[51] who belongs in the latter category said, "If you don't have the spirit of sacrifice, you just

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[48] "You should have had a V8" is a reference to a famous 1977 commercial for the V8 vegetable drink. In the commercial, a series of hapless dolts are mindlessly snacking on junk food and suddenly realize that they "could have had a V8!"

[49] Russell Cropanzano, Zinta S. Byrne, D. Ramona Bobocel, and Deborah E. Rupp, "Moral Virtues, Fairness Heuristics, Social Entities, and other Denizens of Organizational Justice," *Journal of Vocational Behavior* 58 (2001): 164-209.

[50] Participant #068, Male, Major, Interview, MCAS Cherry Point, 24 August 2017.

[51] Participant #200, Male, Master Sergeant, Interview, MCB Quantico, 6 September 2017.

won't make it." Thus while ideal, an engaged leadership style is often stymied by structural difficulties and the reality of having a life outside of the Marine Corps.

Takeaways

- To say that standards are never neutral and always biased is not to say that they are *inherently* unfair or not useful. Instead, it is to suggest that they are difficult to reconcile with ideas of fairness that invoke parity (sameness). In this conception of fairness, the dissonance between women's apparent physiological differences and their inability to achieve male fitness standards tends to get translated as a general insufficiency amongst female Marines.

- Fitness standards are convenient evidence of perceived unfairness because they are tangible and measurable and have an air of no-nonsense objectivity. However, it is evident that to be a good Marine, personality characteristics such as empathy matter a great deal as well. Because empathy is not a codified core value and because it is intangible and thus difficult to measure, empathy and characteristics like it are not leveraged in the same way as physical measures to judge a Marine as good.

- Numerical measurements lend themselves to parity-based judgement calls of fairness, as comparing numbers is an easy way to gauge sameness. This perhaps exacerbates the focus on fitness standards as a measure of a good Marine and the associated devaluing of women by those who use these same numbers to argue that women do not measure up. Equity, however, is a more multi-dimensional approach to fairness. For instance, there is temporal depth to equity: it assesses where people are coming from in order to promote a more equitable future. Parity, on the other hand, provides a snapshot of a single point in time and is relatively sparse in context. An equity-based articulation of fairness would thus leave room for more complex and non-numerical measures of being a good Marine. This might mitigate the perception that women are inadequate Marines, as it allows for a more holistic and multi-dimensional approach to assessing the quality of a Marine.

- The Marine Corps revisits standards occasionally and chooses indicators it assesses to be adequately linked to the kinds of activities for which Marines need to be prepared. Critique of the selected indicators and measures is beyond the scope of this paper. However, the perspectives provided by Marines for this project suggest that the meanings and validity of physical standards is not always accepted or understood. Likewise, there is variable understanding of the purpose of different standards for male and female Marines. The Marine Corps may want to refine messaging related communicating the purpose of fitness standards with conscious attention to how fairness is articulated.[52]

- An examination of the differing and sometimes contradicting ways that Marines and the Marine Corps talk about fairness might inform improved messaging surrounding divisive topics like gender-specific physical standards. More specifically, examining the ways that

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[52] Thanks to Maj Brian McLaughlin (ret., infantry officer) for this suggestion and for his feedback on this paper.

people describe fair versus unfair situations might reveal language for how to reframe fairness in the case of standards. For instance, "evaluating everyone equally" is equity-invoking language that challenges portrayals of having different standards as inarguably unfair. This is important because language impacts perception and perceptions impact action. Marines will treat each other better if they do not see their fellow Marine as someone who has it easier than they do.