THE STAFF RIDE

FUNDAMENTALS
EXPERIENCES
TECHNIQUES

PETER G. KNIGHT

WILLIAM G. ROBERTSON

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FUNDAMENTALS, EXPERIENCES, AND TECHNIQUES

by Peter G. Knight and William G. Robertson

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FOREWORD

Staff rides are a unique and powerful way for today's leaders to gain insight and wisdom from the past for present-day application. In the process of absorbing those gains, staff ride participants exercise and improve their critical thinking skills, essential creativity, and decision-making capabilities. Properly conducted, staff rides re-animate historical battles at the actual locations where each contest took place. Every staff ride experience provides examples of leadership, tactics, operations, strategy, communications, use of the physical terrain, and perhaps most importantly, the psychology of people in combat and other crises. The examination of these factors and choices, as well as their outcome, is just as applicable today as it was in the past. This reference guide, combined with personal research and reconnaissance, offers an invaluable opportunity for the professional development of leaders by enhancing their understanding of the effective use of military force in multidomain operations.

Famous battles like Gettysburg—in which officers like Col. Joshua Lawrence Chamberlain of the 20th Regiment Infantry, Maine Volunteers, exemplified initiative, resolve, and courage in the unforgiving crucible of combat—offer valuable principles for today's leaders to study, venerate, and emulate. These leadership principles transcend time, space, and technological evolution. By the same token, learning from battlefield failures such as Lt. Col. George Armstrong Custer's at the Battle of the Little Big Horn can be equally instructive.

Staff rides have become an integral part of leadership development and team building, both at professional military education institutions and within military units themselves. We welcome this update, entitled *The Staff Ride: Fundamentals, Experiences, and Techniques*, as a timely and essential revision of the guide that has served us so well for the past thirty years. The wisdom contained within these pages provides appropriate guidance for those seeking to use a staff ride to enhance the professionalism of soldiers and civilians as well as the national security establishment

as a whole. This revision combines new experiences and innovative techniques with well-established fundamentals to emphasize the most important elements bearing on the outcome of a battle or event, the actions of leadership involved, and the psychology of human beings in general. Participants in properly conceived and executed staff rides will reap the rewards of enhanced understanding of those key elements and of the essential fact that battles are not systematic, logical undertakings but rather chaotic contests of human beings, with all their frailties and strengths.

Washington, D.C.
October 2020

RYAN D. McCARTHY
Secretary of the Army

JAMES C. McCONVILLE
General, U.S. Army
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PREFACE

On 3 October 1889, Joshua Lawrence Chamberlain, renowned soldier-scholar and former commander of the 20th Regiment Infantry, Maine Volunteers, dedicated a monument to his former unit upon Little Round Top on the Gettysburg battlefield. The Medal of Honor recipient eloquently explained the importance of military history and articulated why people seem to care about it in perpetuity:

> In great deeds something abides, on great fields something stays. Forms change and pass. Bodies disappear. But spirits linger to consecrate ground for the vision-place of souls. And reverent men and women from afar and generations that know us not and that we know not of, heart-drawn to see where and by whom great things were suffered and done for them shall come to a deathless field to ponder and to dream. And lo! The shadow of a mighty presence shall wrap them in its bosom, and the power of the vision shall pass into their souls.[1]

For the modern national security professional, the intellectual and physical journey to a famous, well-preserved battlefield like Gettysburg is a truly formative endeavor. Vicariously experiencing the conflict through preliminary study; exploring the site; and analyzing, contextualizing, and reflecting upon the events that took place there enhances one's understanding and appreciation of the realities of war and improves one's professional knowledge, skills, and abilities.

As Dr. William G. Robertson wrote in the original 1987 version of this publication, "the combination of systematic historical study of a campaign with a visit to the site of operations for the purpose of professional military education is [known as] a staff ride."[2] In today's parlance, the staff ride is an experiential learning

1. Joshua L. Chamberlain, *Bayonet Forward: My Civil War Reminiscences*, 2d ed. (Gettysburg, Pa.: Stan Clark Military Books, 1994), p. 202.
2. William G. Robertson, *The Staff Ride* (Washington, D.C.: U.S. Army Center of Military History, 1987; Reprint, 2014), p. 4.

event, where the visualization, pondering, and dreaming, to which Joshua Chamberlain referred, translate into comprehensive observation, analysis, and evaluation of battles, campaigns, or events, all of which exercise students' creativity, critical thinking, and decision-making skills. Through the development of these essential, professional skills and through the pure and visceral connections to the actual area of operations, the staff ride equips and inspires military professionals to higher levels of performance in the nation's service. From the U.S. Army's standpoint, General Carl E. Vuono, who was serving as the Army's chief of staff at the time, wrote in a 1988 article for *The Army Historian*:

> The staff ride is more than a mere historical tour that only relates what happened. The staff ride is primarily an analytical experience, one that allows the student to understand how and why events occurred as they did and to gain insights into what these observations mean in today's military environment. At its best, therefore, the staff ride assists participants not only to understand the realities of war, but also to improve their professional expertise and the readiness of their units.[3]

The traditional staff ride concept has its roots in late nineteenth-century Europe. The renowned Field Marshal Count Helmuth von Moltke the Elder, chief of the German Great General Staff and architect of three campaigns against France that led to the unification of Germany in 1871, fervently believed that war, to be understood, must be dissected and the parts examined. To that end, in the second half of the nineteenth century, Moltke directed a section of the General Staff to devote its energies exclusively to the study of military history and ordered that all General Staff officers, drawn from the cream of the Prussian officer corps, travel to battlefields, study the plans of the commanders involved, and relive the battles on the actual ground where the fighting took place. In this manner, Moltke believed, his officers could understand the interdependence of commanders' plans, logistical considerations, morale factors, and other elements of war.

Maj. Eben Swift developed the first staff ride program in the U.S. military, which was similar to Moltke's example, while he was serving as the assistant commandant of the U.S. Army General Service and Staff School (now the Command and General Staff College) at Fort Leavenworth, Kansas. In July 1906, Swift led a group of twelve officers to Chattanooga, Tennessee, to begin a two-week study of the Atlanta campaign of 1864. This and other early Fort Leavenworth

3. Carl E. Vuono, "The Staff Ride: Training for Warfighting," *The Army Historian* 12 (Oct 1988), p. 1.

staff rides were conducted on horseback, allowing participants to learn and analyze the terrain of the battles they studied.

Since the start of the twentieth century, the U.S. Army War College, the U.S. Army Command and General Staff College, and other Army educational institutions have employed staff riding as a technique to further the military education of professional Army officers. Distinct from a tactical exercise without troops (TEWT) and a guided battlefield tour, a staff ride combines rigorous historical preparation with the exploration of the actual physical environment in which a battle occurred. This revised publication presents time-tested fundamentals, new experiences, and innovative techniques for effective staff rides that can be used by military and civilian leaders across both the Army and the broader national security establishment. With enough effort, unit commanders and organizational leaders at any echelon can leverage this powerful experiential learning tool to develop their subordinates, and, along the way, encourage and strengthen the esprit de corps of their unit or organization—something all commanders and leaders must consistently strive to do.

After a long hiatus that started in World War II, staff riding gradually revived within the U.S. Army in the late 1960s and early 1970s, as Army War College professor Jay Luvaas developed and refined staff ride technique. Additionally, the 1974 publication of Michael Shaara's *The Killer Angels*, a historical novel about the Battle of Gettysburg, coincided with Luvaas's efforts. The book became required reading, at various times, at the U.S. Army Officer Candidate School (OCS), the Military College of South Carolina, the U.S. Army Command and General Staff College, the U.S. Army War College, the U.S. Military Academy (USMA) at West Point, and the U.S. Army Special Forces Detachment Officer Qualification Course. Concurrent with the book's rising popularity, the Army revived the practice of the staff ride, replacing horses with buses and automobiles, expanding the range of battles and operations studied well beyond those of the American Civil War, and extending the opportunity for participation to soldiers and service civilians of all ranks and specialties.

As staff ride popularity continued to climb throughout the Army in the 1980s, the U.S. Army Center of Military History (CMH), having been designated as the coordinator of the Army's staff ride program, asked Dr. William G. Robertson, an associate professor of military history at the Command and General Staff College, to create a doctrinal guide for conducting staff rides. Robertson, a lifelong student of the American Civil War and a veteran of many battlefield studies, was uniquely qualified to author the guide. First published in 1987, Robertson's *The Staff Ride* has been the Army's doctrinal guide for staff rides for more than three decades. While practicing and following this original doctrine throughout these thirty years,

the Army has continued to refine the techniques and applications of the staff ride. These refinements have been driven in part by the expanding scope of war, which now encompasses not only preexisting regular and irregular warfare but also new kinds of war such as those waged against global terror networks and those waged in multiple domains at once, including cyberspace. Now, more than ever before, as we adapt to the ever-evolving information age, we must continuously train our national security professionals of all ranks and grades to think critically and effectively at all levels of war (tactical, operational, and strategic), not just those deemed appropriate to their stations. Additionally, improved technology has allowed us to enhance the staff ride experience itself in ways that we could not have envisioned.

Thus, as we progress steadily into the twenty-first century, the time has come to revise and expand this important publication. Dr. Peter G. Knight, Chief of the Field and International History Programs Division at CMH, a former assistant professor of military history at USMA, and the former Army Reserve Officer Training Corps (ROTC) professor of military science at Princeton University, with twenty-three years of commissioned service in Army intelligence and ten years of experience in planning and executing staff rides, is ideally suited to this task.

The staff ride methodology affords numerous opportunities to study all three levels of war both within and beyond the traditional context of field campaigns and battles. Indeed, the use of the staff ride methodology has proven fruitful in addressing interdisciplinary matters of law, political policy, current ideology, and the corresponding historical impact each of these has on war and society. In this spirit, Knight built upon Robertson's excellent, time-tested methodology by incorporating a variety of new contexts in which to apply the staff ride framework. Additionally, Knight canvased the Army History Program and the military history field to gather new pedagogical techniques to apply to the traditional battlefield case study and beyond. The fruits of his tremendous efforts are distilled in the pages that follow to the great benefit of all students of military history and the American profession of arms.

Washington, D.C.
October 2020

CHARLES R. BOWERY JR.
Chief of Military History

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Many of the most experienced staff ride practitioners from across the Army History Program and the Department of Defense contributed to this pamphlet revision. Mr. Kevin Kennedy, Mr. Charles Collins, Mr. Gary Linhart, and Dr. Curtis S. King of the Army University Press (AUP) Staff Ride Team contributed content from "Train the Trainer Walkbook Additions," which they crafted in September 2008 as a guide for future staff ride practitioners. That work, while largely derived from Dr. William G. Robertson's original 1987 version of this publication, goes into greater detail on the steps and principles Robertson outlined. Additionally, this team has produced the pioneering work "The Exportable Virtual Staff Ride (VSR)," which has proven invaluable to practitioners constructing and executing virtual staff rides. This body of work and several subsequent efforts have helped to adapt and modernize the staff ride concept. Col. Jason Musteen, Ph.D., and Col. Raymond Kimball, Ph.D., both professors at USMA, contributed their knowledge and expertise in traditional and, especially, nontraditional applications of the staff ride methodology. They also provided insight into the potential utility of the "reacting to the past" pedagogical technique. Dr. Christopher S. Stowe, Dr. Bradford A. Wineman, and Dr. Paul D. Gelpi of the Marine Corps General Staff College contributed their knowledge and experience in the revival and modern application of decision-gaming technique in staff rides. Dr. J. Britt McCarley, U.S. Army Training and Doctrine Command (TRADOC) Chief Historian, offered sage advice based on many years of experience in training and educating the Army. I am most grateful to all of these esteemed colleagues for their time and significant contributions to this revised publication.

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October 2020

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CONTENTS

FOREWORD v
PREFACE vii
ACKNOWLEDGMENTS xi

1. INTRODUCTION 1

2. STAFF RIDES VS. OTHER EXERCISES: WHAT IS THE DIFFERENCE? 5

Tactical Exercise Without Troops 5
Battlefield Tour 5
Staff Ride. 5

3. PURPOSE AND OBJECTIVES 7

4. PLANNING A STAFF RIDE 9

Staff Ride Leader and Instructor Team Selection 9
Staff Ride Selection 10
Stand Selection and Design 12
Reconnaissance 13
Logistics 14
Research Sources 16
Constructing a Staff Ride Walkbook 19
Visual Aids. 23

5. THE PRELIMINARY STUDY PHASE 25

Methods 25
Objectives 27
Training Aids 27

6. THE FIELD STUDY PHASE 29

The Orientation, Description, and Analysis (ODA) Process . . 29
Methodology 34

7. THE INTEGRATION PHASE 37
Purpose 37
Conducting the Integration Phase 37
Discussion Methods 38

8. TYPES OF STAFF RIDE EXPERIENCES 41
Traditional Staff Ride 41
Nontraditional Staff Ride 41

9. STAFF RIDE PEDAGOGY 43
Traditional Techniques 43
Innovative Techniques 45
The Virtual Staff Ride 51

10. CONCLUSION 57

APPENDIX A. EXAMPLES OF STAFF RIDE STANDS 59
Traditional Staff Ride Stand 59
Nontraditional Staff Ride Stand 65
Virtual Staff Ride Stand 72

APPENDIX B. POINTS OF CONTACT FOR ADDITIONAL ASSISTANCE 77
In the Continental United States 77
In Europe 78
In the Republic of Korea 78

ABBREVIATIONS 79

MAP

D-Day, Omaha Beach, Normandy, France, 6 June 1944 61

ILLUSTRATIONS

Orienting participants at the Chancellorsville battlefield 3
Setting the scene of the Aisne-Marne Campaign 6
Discussing early combat actions in the Ourcq River Valley . . 8
Describing the cliff assault on Point du Hoc 21
Reviewing the opening phase of the Meuse-Argonne Campaign 31
On location atop Hill 204 38
Assembling outside Ford's Theatre for the Lincoln Assassination Staff Ride 42
A view of Antietam enhanced with augmented reality 51
Modern view from Widerstandsnest-73 60
Pvt. Harold Baumgarten 63

The Main Navy and Munitions Buildings, ca. 1925 66
Constitution Gardens 66
The Main Navy and Munitions Buildings, ca. 1945 69
The former Liberty Loan Building 70
Digital terrain screenshot of the Shahi Kot Valley 72
Digital terrain screenshot of Landing Zone 13A 73
Students participate in a virtual staff ride 75

Front cover: (*top*) Joseph A. Seymour leads a World War I Centennial staff ride in Montfaucon, France; (*middle*) David E. Hilkert conducts a staff ride at the Battle of First Bull Run; (*bottom left*) Maj. Gen. Jeff Holmes leads a staff ride to the Stones River National Battlefield (*Tennessee Air National Guard*); (*bottom right*) Jeff McGovern describes the details of the battle for Aachen on a staff ride near the Huertgen Forest, Germany (*30th Medical Brigade*).

Unless otherwise noted, all images are from the Center of Military History.

1 INTRODUCTION

As a human endeavor, war is emotionally charged and therefore especially difficult to replicate through theoretical formulations. The human variables within any war are impossible to isolate or quantify precisely. Yet soldiers who are charged with the conduct of war must continually strive to prepare themselves to wage it successfully. Multiple methods of preparation exist. Direct personal experience may be the best guide, but knowledge gained from experience is usually limited in scope and often in short supply. Theory can be a substitute for experience, but it is far from satisfactory because its application is not always practical or realistic. Military history, by contrast, is not nearly as clear-cut as theory but can be far more illustrative of the complexities engendered by human factors in war.

Carefully integrated into training, the study of military history can provide, vicariously, the experience of war that is needed to further the professional education of both soldiers and civilians. One of the most effective ways to enlist military history in the cause of professional military education is to study the operations of opposing forces in actual campaigns. Campaigns of all historical periods contain valuable learning opportunities. Changes in technology and doctrine may render some insights obsolete, yet those same changes may also reveal new or timeless insights. Indeed, some lessons from history may seem particularly timeless because they spring either from universal operational principles or from universal human characteristics.

Military professionals who aspire to higher leadership positions and a true mastery of the art of war must absorb and internalize these lessons. They must understand the principles of war so often illustrated at the tactical and operational levels of war, and they must develop the capacity to think and comprehend in multidimensional, multifaceted, and strategic contexts, appreciating both principles and circumstances. Their ability to critically analyze complex situations and make timely, well-reasoned decisions must become second nature in times of crisis.

Just as the study of military history provides valuable and applicable lessons, so too can it provide the means to best solidify these lessons in the minds of students. Historical case studies of specific campaigns,

battles, or significant events are particularly effective at driving these lessons home. These case studies should not be superficial, but should delve into as much detail as possible so as to enable both scholarly discovery and depth of understanding. Whenever possible, such events should be studied through primary sources, which provide both the required degree of detail and the serious intellectual challenge to fully involve the mind of the student.

Students must engage with what German military theorist Karl von Clausewitz called "critical analysis," meaning that they must determine the facts, establish cause and effect, and analyze the results. In simpler terms, the soldier or civilian must find out what happened, establish why and how events occurred as they did, and decide what these cause and effect relationships mean to them as Army professionals today. It is the immediacy of this last element—the answer to the question, "So what?"—that makes this approach to analysis so germane. Such analysis is not simply about gleaning lessons; it is about gaining true insight and a deeper understanding of how and why war happens the way it does.

A significant component of a detailed case study is an evaluation of the environment in which the action took place and an analysis of how that operational environment shaped the contest or event. Good maps are essential for such analysis, but even the best maps are poor substitutes for firsthand knowledge of the area of operations. Thus, a visit to the actual sites associated with the campaign, battle, or event—if they are not too changed—provides the ideal impetus for analyzing the effects of the operational environment on the action studied. If a detailed historical case study encourages the identification of universal military insights, then a visit to the actual site is the ultimate means of reinforcing these insights in the minds of students. When systematic historical study is combined with visiting the relevant sites of action, for the purpose of professional military education, it is known as a staff ride.

Staff rides are experiential learning exercises that facilitate the study of war and associated historic events. Through staff rides, students come to understand that war is the highly complex and chaotic interaction of human beings and their machines, clashing in a dynamic environment. In this complicated arena, humans wage war for the attainment of military and political ends, making decisions and acting upon them according to their training, experience, intellect, and idiosyncratic personalities. These facets of war remain timeless.

Yet war as a whole, as an inherently human phenomenon, continues to evolve. In the twenty-first century, wars are not fought solely on a terrestrial battlefield; they are fought in multidimensional, multifaceted operational environments. War is no longer characterized strictly in terms of discrete, joint, or combined campaigns taking place

on land, sea, or in the air. Battles also take place in the virtual realm of cyberspace. The military term "key terrain" is no longer used solely in the geographical sense. Public opinion becomes key terrain in the execution of counterinsurgency and information operations. Spy satellites orbiting the earth and routers and servers in information networks are key terrain in battles for information dominance across the electro-magnetic spectrum and in cyberspace. Just as humans continue to evolve, the technology we use to fight wars evolves, and thus war itself changes. So, too, must the methods enabling the historical study of warfare evolve and change.

In the spirit of that necessary evolution, we have revised this publication to introduce civilians, soldiers, historians, and all those pursuing a professional military education to a wider physical and historical context for the staff ride framework. We provide innovative pedagogical techniques for creating and executing exceptional staff rides, and we offer guidance for using the insights students gain from studying military history to spark a deeper evaluation and greater understanding of contemporary warfare.

Peter G. Knight orients soldiers of Program Executive Office Soldier to their precise location on the Chancellorsville battlefield relative to the battle positions of the U.S. and Confederate forces that fought there 30 April–6 May 1863. (*Courtesy of PEO Soldier PAO*)

2 STAFF RIDES VS. OTHER EXERCISES: WHAT IS THE DIFFERENCE?

Staff rides are often confused with other types of exercises or venues that explore campaign areas through the lens of military history.

TACTICAL EXERCISE WITHOUT TROOPS

A tactical exercise without troops (TEWT) involves a hypothetical scenario played out on actual terrain, usually employing current doctrinal concepts. Although the exercise may take place on a battle site, any relationship to historical events is usually coincidental. A TEWT uses terrain, but not history, as a teaching vehicle.

BATTLEFIELD TOUR

A historical battlefield tour is a visit to the site of an actual campaign, albeit with little or no preliminary systematic study before the visit. These tours are relatively brief (three to four hours) and are often arranged with short notice. Participants have not been given the time or means for a full-fledged study phase before the event. Nevertheless, some instructors may provide brief, selected readings in advance, and the instructor or facilitator can still apply the general staff ride methodology. The instructor or facilitator may, at certain points, assume a greater role in the field study portion of the tour to compensate for the audience's lack of depth in required preparation. Through the use of carefully prepared questions, posed to the audience during or after the tour, the instructor or facilitator can still make the battlefield tour an exercise of critical thought and analysis, drawing on the preliminary readings (if any) and the perspective acquired during the field study. In this way, the battlefield tour uses both the terrain and the historical situation as teaching vehicles, even without a preliminary study phase.

STAFF RIDE

A staff ride consists of three essential and distinct phases: (1) the systematic preliminary study of a selected campaign, battle, or event; (2) an extensive visit (known more formally as a field study) of the

actual sites associated with that campaign, battle, or event; and (3) an opportunity to integrate the lessons derived from each. Staff rides rely on maximum student involvement before arrival at the site to guarantee thought, analysis, and discussion. In this way, staff rides link a historical event both to the systematic study of it and to its actual physical environment, a combination which produces analysis in all dimensions. A staff ride differs from a guided battlefield tour in that it can be used to study leadership and decision making and to analyze potential alternate outcomes. Finally, the staff ride requires active participation, which promotes active learning. To ensure an active learning experience, staff ride leaders should not simply be instructors lecturing to students. Rather, the staff ride leader should be more of a facilitator, who draws out student discussion by asking open-ended and Socratic-style questions in ways that make students engage with the subject matter, analyze and evaluate it on location and in context, and discuss their thoughts with their peers. This publication will present many techniques for achieving active learning on staff rides.

During a World War I Centennial Commemoration Staff Ride, Peter Knight orients soldiers of the 28th Infantry Division to the fighting location of the 28th Division atop Hill 204 and describes the early actions of division elements during the opening stages of the Aisne-Marne Campaign.

3 PURPOSE AND OBJECTIVES

The staff ride is a versatile educational tool designed to deepen the participants' intellectual foundations in the military profession. This purpose is achieved through the development of critical thinking, creative problem-solving, and decision-making skills. Staff rides may be designed to achieve one or many objectives, depending on the needs of the students and the circumstances under which the staff ride is conducted.

Although professional military education is sufficient reason for devoting time and resources to staff rides, they also can help meet other important objectives. Because a visit to a historic site or battlefield may be an emotional experience, it can reinforce soldiers' positive feelings for their profession, their units, and one another. If participants belong to the same unit or office, their shared experiences during the exercise may strengthen the camaraderie and esprit de corps that are necessary for workplace cohesion. If promotions or individual achievement awards are due to be conferred at the time of the staff ride, there can be no better setting for the ceremony than a site hallowed by earlier deeds of sacrifice and valor. Significant in themselves, such experiences become even more meaningful in the context of a staff ride to the site of a significant campaign, battle, or historic event.[4]

Other specific objectives for conducting a staff ride may be:

1. To provide case studies in leadership at strategic, operational, and tactical levels.
2. To provide case studies in the application of strategic, operational, and tactical doctrinal concepts.
3. To expose participants to the dynamics of battle, especially those factors which interact to produce victory and defeat.

4. An example of an exercise designed principally to achieve these secondary ends is described by Lt. Col. Richard M. Swain in "Terrain Walk," *Field Artillery Journal* 52 (Jul-Aug 1984), pp. 46–47.

4. To expose participants to the "face of battle," the timeless human dimensions of warfare.
5. To provide case studies in the application of the principles of war.
6. To provide case studies in operational art to explore in depth and breadth.
7. To provide case studies in decision making under conditions of uncertainty.
8. To provide case studies in combined arms operations, joint operations, or the operations of a single arm or branch.
9. To help participants understand the dynamic relationships between technology, doctrine, tactics, operations, and strategy.
10. To provide case studies in how logistical considerations affect operations.
11. To show the effects of the environment (terrain, weather, technology, doctrine, and the human element) upon plans and their implementation.
12. To provide case studies in organizational dynamics, cohesion, team building, and teamwork.
13. To encourage the study of leadership through the use of military history.
14. To initiate or reinforce an interest in the history and heritage of the U.S. Army.
15. To teach historical-mindedness and critical thinking.
16. To teach military leaders that the lessons and insights of history are applicable to current operations.

Peter Knight orients 28th and 42d Infantry Division soldiers to their respective units' fighting locations during offensive operations in the Ourcq River Valley, Aisne-Marne Campaign, July 1918.

4 PLANNING A STAFF RIDE

The planning phase for a staff ride, as in any military operation, is extremely important in laying the foundation for a successful and rewarding experience. This phase begins with the decision by the commander or group leader to conduct a staff ride. After determining how much time will be devoted to the execution of the staff ride, the commander usually assigns a staff ride leader and/or planner to assume responsibility for planning the staff ride.[5] The Army's eight-step training model, presented here, is integral to the planning process:

1. Plan the training
2. Train the leader(s)
3. Recon the site(s)
4. Issue the order or guidance
5. Rehearse
6. Execute the training
7. Conduct an after action review (AAR) to evaluate the training
8. Retrain if necessary

Implementing this model, combined with the guidance provided throughout this chapter, will result in a highly successful staff ride.

STAFF RIDE LEADER AND INSTRUCTOR TEAM SELECTION

Select the staff ride leader carefully, as this person will both lead the group through the event and facilitate discussion during the exercise. Although the staff ride leader is not always expected to be an instructor during the staff ride, he or she is expected to be familiar enough

5. For simplicity's sake, we use the term "staff ride leader" throughout the rest of this manual to mean "the staff ride leader and/or the staff ride planner." Some organizations may have both a leader and a planner; in others, the leader *is* the planner.

with the material to be the primary facilitator of discussion. The staff ride leader can be virtually anyone in the command or unit, preferably with a relatively sufficient amount of Army schooling, experience, and leadership ability. An advanced degree in history is not required, but it is extremely helpful in being an effective staff ride leader. The staff ride leader should recruit and appoint additional instructors, as necessary, to form the instructor team.

To the degree that circumstances permit, the instructor team generally should:

1. Be thoroughly conversant with the sources, both primary and secondary, relevant to the campaign selected.
2. Understand current U.S. Army doctrine and terminology and be able to interpret significant events using this construct.
3. Be thoroughly familiar with the orders of battle and all major units involved, the operational environment where the fighting occurred, and the movements and operations of all significant units. Also, have a working knowledge of all major figures involved and their personalities.
4. Be able to assess and carefully monitor participants' knowledge and interest levels to generate and retain their involvement throughout the exercise and keep them from becoming passive spectators.
5. Be familiar with the eight-step training model and use that model to prepare the staff ride as an Army training event.

STAFF RIDE SELECTION

The selection of an event and location for the staff ride is one of the most important decisions that the staff ride leader makes. Although staff rides can be conducted wherever a historical event has occurred, some events make better teaching vehicles than others.

Some of the important considerations for selecting an appropriate event and site include:

1. *Home station proximity*. Although every effort should be made to use a site that teaches the appropriate lessons, fiscal and time constraints can, unfortunately, interfere with this objective. Therefore, those who coordinate the staff ride should strike an appropriate balance between nearness to the home station and the insights that a particular site affords. Furthermore, the staff ride has to be supported logistically. Transportation, dining, and billeting facilities must be provided, when applicable. (For additional information, see *Logistics*, pp. 14–16.)
2. *Historical site integrity*. Some sites remain relatively unchanged from their original historical settings; others have been either

altered in some way or virtually obliterated, leaving little or nothing of the historical scene intact. Although an effective staff ride can be conducted at any of these sites, the task of the staff ride leader becomes more difficult as the degree of historical integrity declines. When the historical setting has changed significantly, more visual or virtual aids are required to better animate the action under study. The ideal site is one that remains relatively intact and historically accurate, such as Antietam National Battlefield or Gettysburg National Military Park.

3. *Availability of historical sources for the preliminary study phase.* Staff rides require preliminary research into as many sources of information as can reasonably be obtained. These sources should consist of both primary and secondary accounts to ensure students gain the perspectives of the actual battle participants as well as the perspectives of those who have benefited from the passage of time and the ability to consult multiple sources to help determine the facts of what transpired.

4. *Logistical support and funding.* No staff ride can be successful without proper logistical support. Food, transportation, lodging, and preparation of personnel and equipment for all types of weather are essential. The students should be free to focus on the learning objectives of the staff ride and not distracted by inadequate logistical support.

5. *Audience considerations*. Each staff ride should be shaped to needs of the participating group. Therefore, the staff ride leader should carefully consider the relationship of the historical site to the group's learning objectives. Some considerations are:

    a. *Echelon of command and type of unit*. Many campaigns (Napoleonic, American Civil War, the world wars, and the Korean War) are complex enough to serve as excellent teaching vehicles at any echelon of command. Furthermore, most campaigns provide opportunities for studying the particular operations of infantry, artillery, and cavalry units, and the like.

    b. *Experience of opposing forces*. No matter how well trained in peace time, units behave differently in first engagements than in subsequent contests. If "first battle" lessons are important, engagements such as First Bull Run or Kasserine Pass might be good choices. Operations involving veteran units may provide a different variety

of lessons, including demonstrations of growth and adaptability.

c. *Terrain*. Staff ride leaders may wish to consider the type of terrain of a given battle, campaign, or event to ensure it provides good examples for illustrating its effects on the battle, campaign, or event and encourages participants to draw comparisons to current operating environments. Staff ride leaders must also pragmatically evaluate the terrain to ensure it can be safely traversed and explored and that students and leaders are appropriately dressed and equipped for that exploration.

STAND SELECTION AND DESIGN

Once the historical site meets as many of the above criteria as possible and the staff ride itself has been selected, the next step is to select and organize the individual stops that will make up the staff ride. The staff ride should be designed to visit all significant locations associated with the selected battle or event. These sites, referred to as "stands," should be selected based on the following considerations:[6]

1. *Proper chronological order.* The staff ride route should feature stands in chronological order to avoid confusion and unnecessary complexity. To maintain engagement, the route should avoid backtracking as well as long, barren segments between stops. Two examples that challenge these goals are Shiloh, which is a two-day battle that traverses the same ground twice, and Gettysburg National Military Park, which has many one-way park roads, requiring creative planning to stay on the proper timeline.
2. *Historical significance or importance*. Stops or stands along the route should be selected for their historical significance, visual impact, and logical necessity. Exact placement of the stand matters. Sometimes, moving ten meters to the left or right can make an incredible difference in perspective and visual impact, especially when considering how to give the entire student group the best view of the terrain.
3. *Accessibility*. As much of the route as possible should be traversed on foot. Many terrain features that would seem

6. The term "stand" has its origin in the Army's first staff rides, which were accomplished on horseback in the 1900s. When participants reached an important location on the battlefield, they would dismount their horses and "stand" at that location to observe the terrain and have discussions. Staff rides are no longer conducted on horseback very often, but the word "stand" continues to be used to identify key locations or stops. Staff ride terminology contains other holdovers from the days of mounted excursions, such as referring to the walking or field phase of a staff ride as the "dismounted" portion. Indeed, the word "ride" itself is a legacy of horse riding days, which explains why this is a staff *ride* manual and not, for instance, a staff *fieldtrip* manual.

insignificant from a motor vehicle suddenly become prominent when viewed from a foot soldier's perspective. In some cases, the site of an important event may not be accessible (perhaps it is on privately owned property), but staff ride facilitators must still cover the material. If arrangements cannot be made to visit the actual site, facilitators should choose a location as close by as seems reasonable or comfortable so that the material can still be covered at the right time, perhaps using a map. One example of this dilemma is Nicodemus Heights at Antietam, which rests on private property, yet students may access it with prior coordination and the permission of the landowner. Alternatively, it can be pointed out from a nearby location within Antietam National Battlefield and referenced with a proper map. When feasible, try to obtain easements for access to sites not normally open to the public. Be sure to find appropriate parking for the type of vehicle being used for the staff ride.

Once the stands have been selected, the staff ride leader should create a timetable that includes the time allotted for each stand and the time it takes to move between stands, so that there is a reasonable outline of how the day will progress. However, the timeline (and leader!) should allow for a certain amount of flexibility to make adjustments for unplanned stops (in Army parlance, "targets of opportunity"). For example, reenactors might be conducting an artillery fire display and drill that fits in with the learning objectives of the staff ride.

Whenever possible, the staff ride leader should link assigned readings to specific sites by intentionally referring to the readings at the stands. Tying primary sources to the sites that compelled their writing reinforces the value of studying them and helps students internalize the concepts being discussed.

RECONNAISSANCE

As with any planned military operation, reconnaissance of the staff ride site is absolutely necessary. Usually, a staff ride leader will need to reconnoiter the staff ride sites twice.

The first reconnaissance is necessary early in the planning process to identify stops, parking, dismount points, lunch sites, route modifications, and more. If possible, the leader should conduct this reconnaissance with someone who has been on the staff ride (or a similar one) before or is familiar with the area or the specific sites being visited. The reconnaissance team should visit each of the planned stops and should coordinate face-to-face with onsite officials regarding any special rules for large groups or buses. The team should observe the terrain, foliage, and other variations, noting that they and

the corresponding fields of fire and observation may have changed considerably since the time of the battle or event and differ based on the season of the visit as compared to the season in which the battle or event took place. If possible, the staff ride leader should use this first reconnaissance to rehearse the planned presentation at each stand to get a feel for the necessities of each stop and to identify areas of the presentation that need further refinement. The team should evaluate lunch sites in the area, identify the best options, and, whenever possible, discuss the planned lunch stop with the manager of the establishment(s).

The second reconnaissance should be done a day or two before the ride itself. The staff ride leader and instructors treat this as a "test run," rehearsing the entire ride and executing it as seamlessly as possible. Of course, the team also uses this visit to identify and adapt to any changes in the plan, such as road closures (because of construction, flooding, or downed trees, for example) and site-specific details (including hours of operation and admission costs). The team prepares alternate routes and adjusts the staff ride plan and timetable as necessary.

Reconnaissance is essential to the success of the staff ride. It builds the staff leader's confidence, reduces the frustration that can come from adapting to unforeseen changes, and supports an efficient timetable on the day of the staff ride.

LOGISTICS

Properly planned logistics are critical to the success of any staff ride. Excellent logistical support allows participants to focus on the intellectual aspects of the exercise. Poorly designed travel schedules, inadequate dining arrangements, and uncomfortable billeting may distract participants from their primary purpose. This does not mean that the staff ride leader or instructor team must cater to every desire of the participants. Rather, the logistics of the field study phase should be designed and handled thoughtfully, such that they do not interfere with the educational aspects of the exercise.

Because of the detail and coordination involved, responsibility for the logistics of the field study phase should be formally assigned to a logistical coordinator at the earliest possible moment. The logistical coordinator can be a member of the instructor team or a person from the unit, such as the G–4 or a logistics or supply officer or noncommissioned officer (NCO). The logistical coordinator should consult regularly with the primary instructor or staff ride leader to integrate education and logistics. When the number of participants is especially large, additional members of the instructor team will need to assist the logistical coordinator. Anyone assigned to logistical duties

must be made aware of the importance of this work and its relevance to the success of the exercise.

Some of the most important logistical considerations include:

1. *Transportation*. Normally, transportation considerations fall into two categories: travel to and from the battle site, and travel between the stands once at the site. Though modes of transportation are largely dependent upon group size, planes, buses, and vans (fifteen-passenger or smaller) are usually the most cost-effective modes for traveling to and from the site. In selecting transportation, the logistical coordinator should also consider which modes allow for maximum time on site. Once on site, travel between stands that cannot be done on foot because of time constraints and distances involved should be by vans or buses adequate to group size. Ideally, the van or bus should have an intercom speaker so that the staff ride leader can communicate to participants between stands. DVD/CD players in the bus may be another consideration. If the group is small, privately owned vehicles or rental vehicles can be used. Such vehicles are convenient and at times necessary (as when using an SUV to traverse rough terrain). However, too many vehicles may congest the battlefield roads, so carpooling should be maximized.
2. *Timing*. Each stop on the staff ride should be allotted the proper time in order to complete the exercise. Additionally, extra time should be built into the schedule to accommodate unforeseeable delays and to take advantage of teachable moments. Timing should be coordinated with the staff ride leader. (See *Stand Selection and Design*, pp. 12–13.)
3. *Lodging*. Accommodations should be arranged as needed for multiday staff rides. Some groups may wish to camp near the battlefield. Other options include local motels or hotels and lodging on nearby military posts or National Guard armories. The logistics coordinator should make arrangements or reservations for any of these accommodations and confirm that the cost fits within the authorized per diem.[7] Note that a close lodging site can save time in movement to your first stand.
4. *Meals*. Breakfast and dinner are not usually a concern for the staff ride leader or logistics coordinator. However, lunch should always be planned. Unless prior arrangements can be made, regular restaurants should be avoided because of the

7. Curtis S. King and the Army University Press Staff Ride Team, "Train the Trainer Walkbook Additions" (Unpublished paper, Army University Press, Combat Studies Institute, Sep 2008), p. 24, Historians Files, U.S. Army Center of Military History (CMH).

unpredictability of the service. Fast food places are usually able to accommodate large groups quickly, but it is best to find a cluster of options so the group does not overwhelm any one establishment. Alternatively, arrangements could be made to have food preset or delivered to a place on the battlefield. Prepacked lunches can be supplied and then eaten at picnic tables or on the bus. Note that dining sites may be limited to certain locations by regulation or availability, which may require adjustment of the proposed route. Finally, always be sure to have ample, potable water available, no matter the temperature or weather conditions.

5. *Appropriate clothing.* The uniform or dress code for the staff ride should be communicated clearly to the group. Civilian clothing is usually recommended. The staff ride leader should emphasize good walking footwear and long pants, especially if the participants will be walking over rough terrain or through tick- and chigger-infested fields or forests. Attention to headgear and footwear is particularly important when the sun is strong and proper protection is warranted.
6. *Weather.* Be prepared for all types of weather and plan accordingly. Staff rides are normally conducted rain or shine (unless lightning, high winds, or other hazardous conditions exist). All training aids should be weather-proof.
7. *Fees and permissions*. To keep the staff ride running smoothly, arrange for fee waivers (i.e., at National Park Service sites), coordinate land permissions, and negotiate group rates, especially at museums.[8]
8. *Medical needs*. Heat-related incidents, foot injuries, and other minor wounds occasionally occur. Standard precautions should include first aid kits, evacuation plans, keeping plenty of potable water on hand, and the identification of nearby sources of medical assistance.
9. *Visual aids*. The logistics coordinator works with the staff ride leader to create a plan for carrying, moving, and displaying visual aids. Tubular map cases and large art portfolios can be helpful.[9]

RESEARCH SOURCES

The careful selection of research sources from the following categories can facilitate the smooth planning of a staff ride and, in turn, can imbue the preliminary study phase of the staff ride with meaningful reading.

8. Ibid., p. 25.
9. Ibid.

Primary Sources

Primary sources are documents that were produced by participants in or eyewitnesses to the event being studied, either contemporaneously with the occurrence of the event or at some point thereafter. Examples of primary sources to be used for a staff ride include:

1. Photographs, paintings, drawings, diagrams, and schematics
2. Orders
3. After action reports (The *Official Records of the War of the Rebellion* is an excellent resource for Civil War battles.)
4. Correspondence, notebooks, datebooks, diaries, or other written materials
5. Audio recordings, including news reports and interviews
6. Period maps
7. Artifacts such as uniforms, personal effects, weapons, or inert ammunition

The value of primary sources is threefold:

1. Primary sources provide raw material for student analysis. The original details of these materials give students the opportunity to understand exactly how opposing forces conducted operational and administrative affairs. Students are empowered to draw their own conclusions about commanders' and staffs' mindsets at particular times.
2. By propelling students to an earlier time, primary sources allow students to relate more closely to a past situation, and because primary sources require students to study, they also provide students with an intellectual challenge. Students analyze and reach conclusions about primary sources without any added influence from secondary interpretations.
3. Primary sources encourage students to use critical thinking in evaluating the veracity of historical accounts. In spite of their value as immediate connections to the past, primary sources are not without problems. Peoples' memories fade over time, even among those who were directly involved in a given battle, campaign, or event. Personal accounts can be subject to biases and can sometimes be self-serving. Primary source materials, including physical ones such as documents or artifacts, may also be incomplete or missing vital information. Because staff ride students

are professional soldiers and civilians and not necessarily academic scholars, they often need assistance in threading their way through the primary materials provided for their use. Such assistance is important and necessary, but it should in no way relieve students of their responsibility to involve themselves deeply in the analytical process and draw their own conclusions.

Secondary Sources

Secondary sources are accounts of events that have been produced by nonparticipants, that is, people who received their information about the event secondhand, either from primary sources or other secondary accounts. Secondary sources are most often narrative in form; many are analytical in nature. Authors of secondary sources range from enthusiastic amateurs to professional historians. Examples of secondary sources that will be useful for conducting a staff ride include:

1. *Historical monographs.* These are the most common secondary source used in staff ride preparation.
2. *Publications from the U.S. Army Center of Military History (CMH) and Army University Press (AUP).* CMH and AUP publish a variety of useful publications, all of which are available for download in PDF format, free of charge, from the CMH and AUP websites (see Appendix B). These publications include:
    a. *Campaign booklets and short monographs*. These are excellent, preliminary readings on various battles and campaigns.
    b. *Staff ride guides and handbooks*. These publications highlight the key points of an event, list orders of battle, discuss leaders and tactics, and recommend stand locations and discussion questions for a particular battle, campaign, or historical event.
    c. *Official histories*. Through CMH, the U.S. Army has published an extensive set of volumes, now known as the "green book" series, chronicling its involvement in World War II. There are also comparable volumes about the Korean War (the "black book" series), the Vietnam War, the Persian Gulf War, and Operations IRAQI FREEDOM and ENDURING FREEDOM (the "tan book" series).
    d. *Documentaries*. AUP has excellent documentary videos that can be used in prebriefs or on the bus to and from the staff ride.

e. *Exportable virtual staff rides*. AUP has an ever-increasing library of virtual staff ride options for both older and more recent battles, such as Stalingrad, Fallujah, and Wanat.

3. *Battlefield guides*. A variety of book-length guides are available to the general public for assistance in visits to American battlefields. Although many of these are designed to facilitate a battlefield tour, rather than a staff ride, they do provide excellent information on important events that occurred during a particular battle. Some of the best currently in publication are the *U.S. Army War College Guide to Civil War Battles*, as well as a similar series of guides published by the University of Nebraska Press. Many of these are available for purchase at National Park Service Visitor Center bookstores or online.
4. *Films and documentaries*. Films can be shown and used as learning tools in staff ride prebriefs or on the bus en route to the staff ride location. Instructors who opt to use a film or documentary must be ready to delineate between history and Hollywood.

Internet Sources

The internet provides abundant information on historical events for anyone looking for it, though the reliability and quality of online sources can vary tremendously. Information taken from websites other than those listed here should always be verified. Wikipedia, for example, is not necessarily a reliable source, but it often provides links to fairly reliable source material. User discretion is always advised.

Reliable websites that may be helpful in facilitating a staff ride include:

1. National Park Service (www.nps.gov)
2. Library of Congress, especially for photographs (loc.gov)
3. The National Archives and Records Administration (www.archives.gov)
4. Websites for specific battlefields that are managed under the auspices of individual states

CONSTRUCTING A STAFF RIDE WALKBOOK

The purpose of a walkbook (also sometimes known as a battle book) is to provide the instructor with a guide to facilitate the field study phase of the staff ride. It is an unpublished work, created by an individual instructor or staff ride leader, and tailored for a particular ride and its audience. The content of a walkbook is divided into sections, usually based upon the series of stands, in the order in which they will

be conducted. Each stand's section should be built on "orientation, description, and analysis" (ODA) guidelines, which will be discussed in greater detail later.[10]

Instructors should alter or add to their walkbooks based on their own style and the things they wish to emphasize. At a minimum, however, a walkbook should include the following items:

1. *Directions*. Whether driving or walking, it is good to have written or printed directions, GPS (global positioning system) coordinates, and maps to locate and navigate to the stand site.[11]
2. *Orientation*. Upon arrival at a site, the leader or instructor covers the key points to orient the participants to the site's terrain, using maps and photos as needed, and referring to environmental surroundings.[12]
3. *Description*. Next, the leader covers the key events that transpired at the stand site. This is usually done chronologically, noting dates and times, though on occasion key events are summarized thematically. Additionally, leaders must be cognizant of the following:
    a. Keep descriptions to a manageable size and avoid long narratives so that the information can be found quickly within the pages of the walkbook.
    b. Remember that the goal is to keep participants involved. Prompt them to provide information. This works well when using role-playing technique. For example, while at the stand at Chancellorsville, Virginia, where Confederate Lt. Gen. Thomas J. "Stonewall" Jackson attacks Maj. Gen. Oliver O. Howard's flank, the leader could ask: "General Jackson, what was your plan for the attack? How did you array your troops (or forces)?"
    c. Because a walkbook is unpublished and intended for instructional purposes only, sources are often copied and pasted into it and then formatted as needed. However, copyrighted content should always be cited within the walkbook so that the instructor can give proper credit to its author or creator, as appropriate, in the course of a discussion. Instructors must take special care to ensure that walkbooks containing copyrighted materials do not end up on the internet or passed around as published works.

10. Ibid., p. 17.
11. Ibid.
12. Ibid.

On location in Normandy, France, for a D-Day 75th Anniversary Commemoration Staff Ride, Secretary of the Army Mark T. Esper listens as Peter Knight describes important aspects of the 2d Ranger Infantry Battalion's 6 June 1944 cliff assault on Point du Hoc. (*Department of the Army PAO*)

d. Extracts from orders, memoirs, and other primary sources can be included.[13]

4. *Vignettes*. These are human interest stories that are meant to engage the interest of students and elicit their reactions. Vignettes can be interspersed at various locations throughout a stand site or used at the end for a more powerful, lasting effect. Vignettes are not needed at every stand; they will lose their effect if overused. However, some stands may center on a particular vignette, such as the story of a Confederate sniper who wrote a letter to Col. Joshua L. Chamberlain after the war, explaining how he had taken aim at Chamberlain during the fighting on Little Round Top, but, holding Chamberlain's life in his hands, had decided not to fire. Vignettes usually come from primary accounts (letters, diaries, memoirs, and so forth) and can be read verbatim directly from the source or paraphrased as needed. Not every quote constitutes a vignette. For example, you may quote orders, memos, or directives as part of the description of an event or stand, without presenting this as a vignette.[14] (For more information on vignettes, see *Methodology*, pp. 34–36.)

13. Ibid., pp. 17–18.
14. Ibid., p. 20.

The following are examples of different types of vignettes:

a. *The face of battle.* Any of the first-hand accounts of troops landing at OMAHA Beach on D-Day; Lt. Col. John Howard's account at Cowpens of how the Americans refused their flank and delivered a devastating volley against the 71st Regiment of Foot (Highlanders).[15]

b. *Humor.* Henry Knox and Alexander Hamilton at Yorktown trying to avoid British shells; the parson at Chickamauga who is scared of battle.[16]

c. *Sorrow or hardship*. The father who brought his son to the battlefield at Chickamauga in a wagon and had to take him home dead that same night; identifying Capt. Thomas W. Custer at Last Stand Hill at the Battle of the Little Big Horn.[17]

d. *Leadership*. Accounts of Daniel Morgan walking among the troops the night before Cowpens; Brig. Gen. Norman Cota leading troop movement off of OMAHA Beach under fire on D-Day in Normandy; Colonel Chamberlain leading the bayonet charge down Little Round Top at Gettysburg.[18]

e. *Heroism*. The 13th Infantry's attack on Stockade Redan at Vicksburg; the French and American attacks on Redoubts 9 and 10 at Yorktown.[19]

f. *Fear.* The account of a Confederate private before Pickett's Charge.[20]

g. *Other.* The stories of injured, immobilized soldiers in the 1864 Battle of the Wilderness perishing in the forest fires. The story of the soldiers at the 1864 Battle of Cold Harbor pinning their names to their uniforms, knowing that they would die.[21]

5. *Analysis*. This part of the walkbook includes the prompts and discussion questions that the instructor or staff ride leader will use to facilitate an open discussion among the participants. The goal is to allow learning points and insights to be shared among the participants. Although these questions are often open-ended and can have more than one answer, the walkbook should include

15. Ibid.
16. Ibid.
17. Ibid.
18. Ibid.
19. Ibid.
20. Ibid.
21. Ibid.

a list of possible answers for all sides of a debate, allowing the leader to play devil's advocate and elicit discussion as needed.[22]

VISUAL AIDS

Visual aids enhance the learning experience by adding other media and/or tangible objects to the field study phase. The following examples describe different types of visual aids:

1. *Maps*. These are the most common and most useful of visual aids. It is not necessary to have a map at every stand, but any map that is used must be connected to the surrounding terrain.[23] Maps should be printed on weatherproof canvas or mounted on ruggedized poster board. The source of the original map should be listed in the walkbook.
2. *Photographs, paintings, and drawings*. These are most effective when the image can be used for a "then and now" comparison by matching it to the exact spot and with the same view of the site. Pictures of equipment, vehicles, ships, aircraft, key leaders, and more may also be quite helpful in bringing history back to life. The source for any image that is not in the public domain should be listed in the walkbook.[24]
3. *Diagrams and schematics*. These can help illustrate complicated tactical moments or decision points. Examples include the schematics of Civil War units and their formations, and diagrams of various siege fortifications, such as those made by then Brig. Gen. Ulysses S. Grant at Vicksburg.[25]
4. *Films and documentaries (on DVD or streaming*). These are usually not practical on the ground, but they can be useful in transit to the field site if using a vehicle equipped with a DVD player.[26]
5. *Audio recordings.* Music of the era and newsreel clips can be used to help set the mood or give a flavor of the times. The sounds of various weapons being fired can also be quite powerful.[27]
6. *Artifacts*. It often saves time in the field study phase to show artifacts such as weapons, ammunition, uniforms, and personal effects in the preliminary study phase, but it still

22. Ibid., p. 18.
23. Ibid., p. 21.
24. Ibid.
25. Ibid.
26. Ibid.
27. Ibid.

might be beneficial to share certain artifacts in the field study phase, if time allows.[28]

7. *Smartphone and tablet applications.* Various innovative visual aids can be at your fingertips with the use of these devices. For example, the American Civil War Battlefield Trust has designed several GPS-enabled mobile applications that allow users to scan QR codes at key locations on various battlefields. Doing so pulls up pertinent information such as orders of battle, maps, soldier biographies and data, campaign narratives, and iconic photographic images.
8. *Monuments, plaques, and signs.* These can be useful—or distracting—during the field study phase of a staff ride. If instructors do not wish to integrate these items into the staff ride, they must instruct participants to avoid them, as people have a tendency to wander off and read signs. Alternatively, instructors can inform participants up front that they will be given time to explore these items after the stand is complete. During the staff ride reconnaissance, leaders should read and review the information presented on monuments, signs, and plaques to ensure that it is accurate. Staff ride leaders have periodically identified factual errors, misorientation of maps on signs, and monuments that have been erected in the wrong location. Instructors should feel free to incorporate a sign or plaque into the staff ride if it helps to orient and visualize unit locations and troop dispositions accurately.[29]

Using Visual Aids

Some instructors prefer to place visuals on the ground, oriented to the correct direction, while others prefer to have the visuals held up vertically. When using a map, instructors should always begin by pointing out the current location. Before creating a new map, staff ride leaders and logistics coordinators should consider where it will be positioned and how it will be oriented when using it. This will ensure that word placement on the map is consistent with how it will be oriented.[30]

28. Ibid.
29. Ibid., p. 23.
30. Ibid., p. 22.

5 THE PRELIMINARY STUDY PHASE

This first step in staff ride execution lays the foundation for the success of the entire event. Experience shows that the more knowledgeable a group is about the battle or campaign, the more they benefit from the staff ride. That knowledge begins with the staff ride leader, who must gain a significant degree of historical understanding of the staff ride topic through intensive reading and study. The leader performs a preliminary search for the historical literature, including use of the internet, and then narrows the focus of study to specific primary source material and secondary literature that he or she will study in preparation for leading the staff ride.

At this stage, the leader should check with the command historian or staff ride historians at CMH or AUP for their recommendations. These historians are expert staff ride leaders and have already identified the best published literature and primary source material for many different staff rides. Published battlefield staff ride guides can also be quite useful.

Unless they are trained historians, even the best prepared staff ride leaders likely will feel overwhelmed by the depth of materials available, and they may never feel truly comfortable with their mastery of the details of the particular battle or campaign. This is a natural and normal reaction, but it will not necessarily detract from a successful staff ride. By diligently following the steps in this guide, staff ride leaders or instructors will be well prepared to facilitate and inspire meaningful discussion and thought among the staff ride participants.

METHODS

After the staff ride leader has completed his or her own preliminary research, he or she then selects (usually in conjunction with the unit commander) the method that will be used for the group's preliminary study phase. Circumstances will dictate which form must be adopted, but some forms constitute far more effective teaching techniques than others. Several options are dependent on the amount of time available

to the group before the execution of the field study phase of the staff ride. Leaders should plan and select a method accordingly.

Regardless of the method adopted for the preliminary study phase, the instructor team is responsible for ensuring that the objectives of that phase are met. The more limited the time available for group discussion, the more the instructor team must compensate by carefully choosing sources, providing individual study packets, and being available to facilitate discussion, answer questions, and stimulate critical thought and analysis. (For more information on assembling study packets, see *Additional Training Aids*, below.)

Overview Briefing

The staff ride leader or a subject matter expert presents the overview of the campaign, battle, or event to the group of participants. Training objectives for the staff ride should also be reviewed. Unfortunately, briefings provide little or no opportunity for group involvement, allowing students to become passive participants. Therefore, this method should be used only when time constraints preclude the use of other methods. Selecting this method relegates the vast majority of student-instructor and student-student interaction to the field study phase; ideally, those interactions should permeate every phase of the staff ride. If this method is selected, the briefing should be conducted no more than one week before the staff ride to ensure individual retention of the material.

Individual Study

The staff ride leader recommends and assigns overarching reading(s) to the group so that all participants may gain a situational understanding of the event they are studying. These assignments can be in the form of downloaded handouts, maps, articles, and even books, all of which are provided to the participants along with clear deadlines for completion. Note that readings and other media selected by the staff ride leader for student consumption must be tailored to the unit's stated learning objectives.

In conjunction with this group study, the leader gives each participant an individual assignment to study in greater depth. Carefully selected reading packets, adapted for individual study, can illuminate critical aspects of the campaign in more detail. Packets should be designed to offer divergent viewpoints and generate discussion. Students should be prepared to present and discuss their individual topics during the field study phase of the staff ride. These discussions can take place on the battlefield or in the area of operations. Topics for individual study could include specific leaders of the battle or campaign, specific unit roles, missions, and performance, and critical correspondence between leaders.

This approach essentially creates mini-experts on particular subtopics, which virtually guarantees lively discussion and debate, resulting in critical thought and analysis, among the participants. This method of study ensures a common level of understanding while also encouraging maximum participation by the students in both the preliminary study phase and the field study phase.

Hybrid Method

The optimum preliminary study phase combines the methods described above: individual study, overview briefing, and group discussion facilitated and moderated by the staff ride leader.

To actively engage participants, the staff ride leader should assign specific subjects for participants to investigate more deeply, as described in the individual study method above. Students can then brief the entire group, either in a formal classroom setting or later in the field study phase.

The hybrid method can be structured in several ways, as schedules allow, and depending on the time available for the preliminary study phase. For example, the staff ride facilitator could assign group readings to be accomplished before the overview briefing, then hand out individual assignments at the overview briefing to be presented during the field study. Or, both group and individual study topics could be disseminated before the overview briefing, group discussion and debate can happen in conjunction with the briefing, and role-playing could carry over into the field study phase.

By using the hybrid method, the high level of student involvement and interaction that is generated in the preliminary study phase carries over into the field study phase with positive results.

OBJECTIVES

The preliminary study phase in any form must accomplish certain tasks:

1. Participants must fully understand the purpose of the exercise.
2. Participants must be active learners and not passive spectators.
3. Participants must acquire a general understanding of the selected campaign or event, based on the materials given to them during the preliminary study phase. (See *Methods*, above, and *Training Aids*, below.)

TRAINING AIDS

During the preliminary study phase, participants must be given access to the best sources possible, both online and in print. In the field study phase, training aids can orient students, clarify complex

maneuvers, and create immediacy. (See also *Visual Aids* and *Using Visual Aids*, pp. 23–24.)

Study Packets

Study packets should contain materials that support general understanding of the selected event, including the following:

1. Organization, operating strength, technology, and doctrine of the opposing forces
2. Biographical data, personality insights, and idiosyncrasies of significant leaders
3. Relevant weapons characteristics
4. Relevant terrain and climatic considerations
5. General outline and chronology of significant events
6. Materials pertaining to the individual's assigned topic

Additional Training Aids

As a minimum, all participants should receive or have access to the following:

1. A well-written, recently researched account (analytical, if possible)
2. A modern topographical map of the selected campaign or event
3. Relevant primary sources (such as after-action reports, official messages, personal accounts, contemporary maps)
4. PowerPoint presentations formatted with short, succinct bullets and attractive visuals, such as maps and charts. (Never let such presentations become the center of the staff ride experience. They are meant to augment, not replace, human thought and interaction.)
5. Terrain tables or boards, if available (useful in helping participants visualize the event and the terrain they will explore during the field study phase)

6 THE FIELD STUDY PHASE

The field study phase distinguishes the staff ride from other forms of systematic historical study. It combines all previous efforts by instructors and participants to understand selected historical events, to analyze the significance of those events, and to derive relevant lessons for professional development.

Because field study builds so heavily upon preliminary study, each phase must be designed to produce a coherent, integrated learning experience. If the preliminary study phase has been systematic and thorough, the field phase reinforces ideas already generated. This is not to say that a systematic and thorough preliminary study phase permits a useless or hurried field study phase. Instead, the visual images and spatial relationships created by carefully designed field study reinforce any analytical conclusions acquired earlier. If, however, preliminary study has been hurried or incomplete, field study may raise entirely new issues or lines of analysis. In either case, the field study phase is the most effective way to stimulate the participant's intellectual involvement and to ensure that he or she retains any analytical conclusions reached at any point in the staff ride process.

THE ORIENTATION, DESCRIPTION, AND ANALYSIS (ODA) PROCESS

The instructor team, with its knowledge of both the historical events and the environment, is responsible for ensuring that participants are correctly oriented, both chronologically and spatially, throughout the entire exercise.

No matter how thorough the preliminary study phase has been, most participants will become disoriented at some point along the field study route, particularly in close terrain and highly complex historical situations. A partial solution is to have all participants carry compasses, maps, and notes on relevant documentary material such as orders of battle.

While orientation is formalized at the beginning of each stand, the overall task of orientation is a continuous process that should not be confined to the ODA process.

Orientation

In this step, the staff ride leader or another facilitator points out the group's current location on a map, orients the participants to the cardinal directions and where they stand on the ground, and identifies key aspects of the environment that are relevant to the battle or event. Orientation ensures that the students understand where they are and what the area looked like at the time of the battle or other historical event. The orientation does not have to follow a particular format.[31]

Recommended items to include in the orientation:

1. The group's last location and, when the current stand is complete, the group's next location (if either is visible from the current location)
2. The current location, pinpointed on the map
3. The primary directions (north, south, east, west)
4. The key environmental features in the area (natural or manmade), for example, hills, streams, forests and other vegetation, buildings, roads, and railroads. (Point out the feature, then identify where it is on the map, as appropriate.)
5. A description of the area of operations, including differences between the physical environment as it was at the time of the event and the current environment.

   Tips for bringing the historic environment to life:

   a. Use primary accounts, diaries, period maps, and the like to research what the environment was like at the time of the battle or event.

   b. Hills or ridges are the least likely aspect of topography to have changed over time (although mining, erosion, or seismic activity could alter them considerably).

   c. Water courses will often change over time. Look for dams, locks, and canals or other manmade controls that can change the water courses.

   d. Forests can change considerably. Look at the size of the woods, as well as the type of foliage and density of the trees. Understand generally that at the time of the eighteenth and nineteenth centuries, woods were often less dense and had less underbrush because society was more agrarian and wood-burning.
6. Buildings in the area that date from the time of the battle or historic event. These will draw interest, so give a concise

31. Ibid., p. 9.

history of the building and the people who owned, worked, or lived in it whenever possible.

7. Environmental conditions (weather, season) at the time of the battle or event.[32]

To transition to the next step (the description), get the students involved in the discussion by pointing out the locations of units within the area of operations. If they are prompted to do so, students assigned role-play or unit briefings will be motivated to talk about the events on the ground. For example: "Maj. Gen. George E. Pickett's division staged its charge from the woods on the left and behind the ridge, and the federal defensive line was behind a stone fence over there."[33]

Charles R. Bowery Jr. facilitates discussion with 28th and 42d Division soldiers regarding unit movements in the opening phase of the Meuse-Argonne Campaign in the small French town of Cheppy.

Description

In this step, the staff ride leader and participants describe the historic events that occurred at (or are related to) the stand location. If the preliminary study has been conducted properly, the participants should be able to describe the events (such as combat actions, unit movements,

32. The list of recommended orientation items was adapted from ibid.
33. Ibid., p. 10.

leaders' decisions and actions, and individual soldier actions) with only selective prompting from the leader, thus avoiding the need for long lectures from the staff ride leader.[34]

Key considerations for the description:

1. *Content*. The most common content in the description is a chronological narrative of the main events, which could include unit movements (overland marches, river crossings, etc.); combat actions (attack, defend, withdrawal, etc.); leader movements, actions, and decisions; and individual soldier actions (acts of heroism or cowardice). Additionally, the description could include key meetings or events between leaders, such as councils of war, correspondence, and the issuing and receiving of orders in any form (verbal, written, and signal).
2. *Noncombat stands*. Some stands may not focus on combat operations, but they still lend themselves to a chronological narrative of events. For example, a stand focusing on logistics at a rail junction may talk about when the rail line was established, how the line was utilized, what types of troops or supplies arrived, and when they arrived.
3. *Thematic stands*. Some stands are best described and executed thematically. For example, a stand that discusses the ability of Viet Cong guerrillas to blend into the population may not cover specific events in chronological order, but instead may cover aspects of the local population (culture, religion), the guerrillas (how they were summoned, their equipment, their logistical support), and the use of local terrain (jungles, tunnels, or village safe houses) for hiding.[35]

Analysis

The purpose of this step is to develop critical thinking skills. This is done by prompting participants to analyze how and why things occurred and to evaluate their significance. Students can perform this analysis from one of two perspectives: *historical context* and *continued relevance*.

The following examples demonstrate various methods of inquiry that evaluate the significance of particular events, leaders, units, and systems within their own *historical context*.

1. *Leaders and units*. Did the leader demonstrate characteristics of good leadership? How so or in what ways? Did the leader make reasonable decisions? Avoid the "blame game." Instead of focusing solely on whether a decision was good (or bad or right

34. Ibid., p. 11.
35. The list of key considerations for the description step was adapted from ibid.

or wrong), focus on analyzing the factors behind a decision. Why did the leader make that choice? How did he or she arrive at a particular decision? What conditions, people, circumstances, beliefs, and assumptions informed the leader's choice? This same process can be used to evaluate unit performance.

2. *Systems and warfighting functions*. Explore why a certain system or warfighting function worked or did not work within the parameters of the historical setting. This might include looking into the practices and standards for recruiting, arming, logistics, intelligence, and command and control that were in place at the time of the event.

3. *Historic implications*. What were the (immediate or short term) effects of a particular moment or event on the overall battle, campaign, event, or war? Can the analysis of this moment lead to an understanding of subsequent (relatively immediate) events in history? What were the effects on society, culture, or the local populace? What were the effects on the development or evolution of the military profession?[36]

The following examples focus on methods of inquiry that examine the *ongoing relevance* of a historical event. These analyses can be of value to military and national security professionals because they demonstrate how the lessons and insights gained at the time of the event still apply to today's organizations and operations.

1. *Answer the question head on*. The instructor or leader asks the participants: "What insights can you derive from this action that still apply today?" This simple and open-ended question is the most direct method of analyzing history through the lens of ongoing relevance. It is an excellent question, and it gets directly to the heart of one of the main objectives of conducting a staff ride, but do not overuse it. Other methods of inquiry often end up here, so see if you can tease out a more focused conversation.

2. *Compare and contrast*. Ask the participants to narrow in on a particular aspect of the event to evaluate what has changed and what has not. For example: "What aspects (or necessities or peculiarities) of joint operations are revealed at Vicksburg that still must be considered today? What aspects or considerations have changed dramatically or no longer apply? Why?"

36. The list of methods of inquiry concerning historical context was adapted from ibid., p. 13.

3. *Current doctrine*. The instructor can highlight aspects of current doctrine to glean insights from the past. For example: "What does the Army leadership manual tell us about where a commander should locate himself or herself during an engagement? What factors inform and influence this decision? Are any of these factors applicable to the decisions made by Stonewall Jackson at Chancellorsville?" Another example: "Which is truer today? Technological development drives doctrinal development or doctrinal development drives technological development? Was this the case during the Cold War? Why or why not?"

4. *Personal experience*. History gains immediate relevance when it taps into participants' own experiences. Facilitators can ask, for example: "Have any of you witnessed a disruptive personality clash among leaders in your unit or organization? What was the root of the disagreement? What factors created or exacerbated the intensity of the confrontation? Which, if any, aspects of this clash feel similar to what happened between General Robert E. Lee and Lt. Gen. James Longstreet at Gettysburg? What can we learn from this?" Another example: "Have any of you seen units in combat or at a CTC (combat training center) that displayed exceptional cohesion? What traits did those units possess? Are any of those traits shared with Easy Company (Company E, 506th Parachute Infantry) in World War II?"[37]

METHODOLOGY

Throughout the field study phase, the instructor team should make every effort to maintain intense participant involvement by removing distractions and keeping attention focused on the exercise.

The Use of Personal Devices

Participants should be required to keep cell phones turned off or in silent mode, unless such devices are being employed for a specific instructional purpose.

Vignettes

A simple technique to enhance both participant involvement and orientation is the use of first-person accounts or vignettes at specific stops along the field study route. These personal accounts are essential to any battle or event analysis, because they provide important information on the attitudes, perspectives, and mental state of the people involved and thus illustrate the vital human dimension.

37. The list of methods of inquiry concerning ongoing relevance was adapted from ibid.

Carefully devised and correctly executed, vignettes can contribute significantly to the sense of time, place, and mood which every staff ride must achieve to be truly successful. (For more guidance on designing and using vignettes, see *Constructing a Staff Ride Walkbook*, pp. 19–23.)

Vignettes may be read aloud from primary sources. Ideally, such vignettes are brief and colorful. The instructor team should select vignettes in advance and include them in the staff ride walkbook for easy access in the field.

For relatively recent campaigns, veterans of the operation being studied can offer personal vignettes. These stories are often unmatched when it comes to encouraging and retaining the interest and involvement of staff ride participants. Profound discussion often follows. However, veteran vignettes must be used carefully for best effect. If possible, they should be chosen because of a particular role the veteran played in the selected campaign. The instructor team should screen veterans for articulateness and accurate recollection. In some cases, screening may expose personal biases or personality traits that would make the vignette ineffective. If such hurdles can be overcome, it will be worth the effort. Staff rides that involve veterans of the campaign being studied are powerful, effective, and extremely rewarding.

Discussion

At every opportunity during the field study phase, the instructor team should stimulate discussion among the participants, relating these discussions to similar ones held during preliminary study. Discussions may be supplemented by briefings from various participants. See the sections on *Individual Study*, *Hybrid Method*, and *Study Packets* in the "Preliminary Study Phase" chapter for more information on student presentations.

Group Size

The number of participants and the instructor-to-participant ratio will help determine the quality of the field study phase. In general, as the instructor-to-participant ratio declines, so does student involvement and discussion. In most cases, twenty-five to thirty participants is the maximum a single instructor can lead while still incorporating a degree of personal interchange. A much more effective ratio is one instructor for every fifteen to twenty participants. Members of the instructor team should be spaced throughout a large party to answer questions, encourage focus, retain interest, and stimulate discussion.

Group Management

When walking from stand to stand, the instructor team should maintain a steady pace, neither rushing nor dawdling but progressing

purposefully from point to point. The group should be kept in as compact a formation as possible to prevent straggling. Left to their own devices, relatively large groups tend to disperse and have to be gathered at each stop. It may be necessary to assign team members to positions throughout the group to help keep people together.

Weather

Given the inflexibility of travel dates for most staff rides, both instructors and participants should be prepared for bad weather. All members of the group should have seasonal protective clothing, and the instructor team should have route modifications and other contingency plans. Normally, these simple precautions will allow a successful field study even if weather is less than ideal.

7 THE INTEGRATION PHASE

No matter how detailed the preliminary study or how carefully crafted the field study, a truly successful staff ride requires a third and final phase. This integration phase is a formal or informal opportunity for participants and instructors to reflect jointly upon their experience. Most importantly, this phase is designed to connect the preliminary study and field study phases of the exercise, and, in so doing, find insights that benefit the modern national security professional.

PURPOSE

Several positive effects stem from the integration phase. First, it requires participants to analyze the previous phases and combine what they learned in each into a coherent overall view. Second, it provides a mechanism through which participants may organize and articulate their impressions of both the selected campaign and the lessons derived from its study. Third, participants may gain additional insights from sharing these impressions with their peers both during the staff ride and well beyond its conclusion. This phase highlights the utility of the staff ride experience and helps answer the "so what?" (or the purpose) of the entire study.

Note that this phase is not intended to be an after action review (AAR). An AAR can be conducted at another time or accomplished in written format. Nor is the integration session the right time to introduce another critique of the commanders or leaders on either side of a given battle or event. The idea is to focus on lasting insights rather than simply reiterating praise or blame for the people involved.

CONDUCTING THE INTEGRATION PHASE

The integration phase may be conducted on the battlefield immediately following the field study phase, at a nearby location following the field study phase, or upon returning to the participants' home station. In general, however, the integration phase is most successful when it follows the field study phase as closely as circumstances permit.

3d Infantry Division soldiers on location atop Hill 204 overlooking the division's assigned sector near Chateau-Thierry, France, discuss the division's role in the Aisne-Marne Campaign of World War I with facilitator Charles Bowery.

An instructor should moderate discussion during the integration phase and focus on the exercise just completed. He or she should allot enough time for all who wish to speak and for a complete discussion of any issues raised. The instructor should encourage candor among all participants.

The instructor should organize the integration phase based on the unit participants, time available, and the stated training objectives. Whatever method the instructor chooses to employ to frame the discussion (seminar-style dialogue, doctrine based, role specific, etc.), the most important consideration is ensuring that the participants do the majority of the talking.[38] This fosters critical thinking and helps ensure active learning by the participants.

Unit commanders or organizational leaders often like to speak during the integration phase. This is highly encouraged because it allows the commander to connect his or her personal experience of the staff ride, as well as any professional perspectives he or she has gleaned from it, to the unit's current mission and personnel.

DISCUSSION METHODS

Various integration methods can work, but one proven method is to conduct the session in three parts, based upon three broad questions. Sometimes, with well-engaged groups, the leader need only present the general question and the group will carry the conversation. In

38. Ibid., pp. 26–27.

other situations, the leader may need to prod the discussion along by asking additional follow-up questions.[39]

Three proven questions for integration are discussed below.

1. *What perceptions of the battle (campaign or event) had you developed in the preliminary study phase that changed because of your study of the actual site?*[40]

    a. This is a crucial question because seeing the environment or site is central to the purpose of a staff ride. Otherwise, the campaign could simply be studied in the classroom. Of course, students may develop a wide range of answers based on their personal study and what they observed in the field study phase.

    b. The instructor can follow up with several related questions (e.g., *Did seeing the environment or site alter your evaluation of any of the leaders?*).[41]

2. *What aspects of warfare have changed and what aspects have remained the same since the battle (campaign or event) we have studied in this staff ride?*[42]

    a. The aspects that have changed will probably seem more obvious to the modern military professional and often will be related to technology.

    b. The aspects that have remained the same may not seem as obvious or as numerous at first, but the students will often build on some initial answers and find a lot of good items.

    c. Depending on the group, the instructor may want to ask a few more focused questions (e.g., *What aspects of intelligence have changed and what aspects have remained the same?*).[43]

3. *What insights can the modern military professional gain from this campaign or event that are relevant today?*[44]

    a. Clearly, the students can take this discussion in a vast number of directions. Once again, to guide the discussion, it might help to focus on insights that are relevant to the type of unit participating in the staff ride. For example, a military intelligence unit might focus on the commander's situational awareness, intelligence collection, and the importance of reconnaissance.[45]

39. Ibid., p. 27.
40. Ibid.
41. Ibid.
42. Ibid.
43. Ibid.
44. Ibid.
45. Ibid.

The three integration questions mentioned above are meant to aid in initiating discussion, not to dictate rules for conducting the integration. It is recommended that the instructor take some time before the staff ride to write down some of his or her own answers to these questions in order to have some potential starting points for student discussion. The idea is to generate discussion among the participants and to let the discussion roam down many different paths, so long as the paths are germane and logically and intellectually sound.[46]

Lastly, integration is something that need not be confined solely to the end of the staff ride. There may be numerous logical points throughout the field study phase where it may make sense to do "integrated integration." Seizing these moments of discussion as they arise will emphasize and integrate particular points about the battle or a leader by tying them to doctrinal or leadership discussions and showing their contemporary relevance.[47] Such points can be revisited in the final integration phase of the staff ride as a check on learning and to confirm student retention.

46. Ibid., pp. 27–28.
47. Email, J. Britt McCarley, U.S. Training and Doctrine Command (TRADOC) Chief Historian, to author, 24 Apr 2020, sub: Working Draft of Staff Ride Guide Revision, Historians Files, CMH.

8 TYPES OF STAFF RIDE EXPERIENCES

Understanding that staff rides are experiential learning exercises that use the aforementioned three-phase methodology of preliminary study, field study, and integration, staff rides can effectively be grouped into two categories.

TRADITIONAL STAFF RIDE

The traditional staff ride focuses on a battle, campaign, or operation within a war.

The most common version of the traditional staff ride includes a physical visit to the geographic locations of the event being studied. This is the exercise that has been defined and discussed in detail throughout this guide, based on William Robertson's definition from the 1980s. It has been practiced by the U.S. Army, taught in the Army's schoolhouses, and used by units at all echelons of command since the early 1900s.

The virtual staff ride (VSR) is a newer variation of the traditional staff ride in which, instead of exploring the actual geographic location of an engagement, the exploration of the area of operations is done in the virtual realm with digital terrain or cyberspace network navigation. The VSR is a particularly effective option for studying more recent events. For example, the site of Operation ANACONDA, which occurred in the Shahi Kot Valley in Afghanistan from 2 to 19 March 2002, is located in an active theater of operations. Security and fiscal considerations preclude executing staff rides on location. Instead, digital terrain data, navigated by a computer operator in a secure and cost-effective classroom environment, re-creates and animates the area of operations for the benefit of staff ride participants. This fulfills the field study phase of the staff ride. The preliminary study phase and the integration phase of a VSR are identical to those of an in-person staff ride. (For detailed information about VSRs, see *Virtual Staff Rides*, pp. 51–56.)

NONTRADITIONAL STAFF RIDE

In nontraditional staff rides, the staff ride methodology is employed to study events that took place in atypical settings. That is to say, not

all events related to military history and national security occurred on a terrestrial battlefield. For example, a staff ride studying the assassination of President Lincoln takes place at key locations throughout the national capital region: Ford's Theatre, the Samuel Mudd House, and the conspirators' trial room on Fort McNair. A Cold War staff ride might take place at locations like the former site of the Berlin Wall or at the Reichstag in the German capital city. Such staff rides might have a more strategic focus as opposed to focusing on operations or tactics. These staff rides may examine politics, economics, society, religion, culture, and language. They could also be interdisciplinary in approach, bringing in aspects of political science, international relations, law, literature, medicine, and philosophy.[48] Numerous Army posts, camps, and stations like West Point, Fort Monroe, and Fort Leavenworth are ideal nontraditional staff ride venues, rife with opportunities to study the U.S. Army's training, educational, doctrinal, structural, and institutional evolution.[49]

David Hilkert (*facing camera at center*) addresses questions from officers and civilians from the Army Judge Advocate General's office as they assemble outside the entrance to Ford's Theatre as part of the Lincoln Assassination Staff Ride.

48. Jason Musteen, "Nontraditional Staff Rides at West Point," *Army History* 110 (Winter 2019), p. 29.
49. Email, McCarley to author, 24 Apr 2020.

STAFF RIDE PEDAGOGY 9

Numerous effective techniques can be used to instruct and facilitate staff ride experiences. Below is a list of traditional, time-tested techniques as well as more recent and innovative techniques. All are designed to aid staff ride instructors and facilitators in optimizing the staff ride methodology to achieve the desired active learning objectives of their respective audiences.

TRADITIONAL TECHNIQUES

Role-Playing (Character-Driven Method)

The staff ride leader assigns key leader roles to students who will research primary and secondary sources in preparation for playing their character role over the course of the staff ride. This method, when properly performed, often generates meaningful lessons and insights for its participants. Students will come to better appreciate the timeless, inherent complexities of leadership, command and control, and operations. However, while students become limited subject matter experts for their character, that singular emphasis can detract from discussions of larger themes and notable military variables like the principles of war, the military decision-making process, and the use of military ways and means to achieve political objectives. Staff ride leaders should be cognizant of this and encourage role-players to use their knowledge to broaden, not limit, discussion. (See *Individual Study*, *Hybrid Method*, and *Study Packets* in the "Preliminary Study Phase" chapter for related guidance.)

Socratic Dialogue

This technique employs the use of open-ended questions designed to make students engage in critical thought and analysis. Usually a "how" or "why" type question is used to ensure that students answer with more than a mere "yes" or "no" to a given question. These questions force students to analyze, evaluate, and interpret information, make an argument, and support that argument with facts. Another advantage of this technique is that it solicits engagement from all members

of the group rather than targeting single participants to summarize the actions of assigned characters. If students and facilitators use this flexible methodology skillfully, it enables seminar-style learning to occur throughout the exercise. Additionally, this technique opens up multiple discussion threads such as warfighting functions, maneuver warfare, elements of national power, and civil-military relations. Threads like these may not be fully explored in a character-driven staff ride.[50] That said, Socratic dialogue runs the risk, much like its character-driven counterpart does, of devolving into discussions of decision making and engaging in fault-finding instead of fostering genuine creative thinking among the participants. Moreover, this technique becomes significantly less productive if students intellectually detach or lack adequate preliminary study. Well prepared students, instructors, and facilitators are essential to executing a broad, Socratic dialogue within the parameters of the staff ride construct.[51]

Devil's Advocate

This corollary technique builds upon Socratic dialogue such that students make an argument and the instructor or, better yet, another student can encourage more extensive critical thought by making a counter argument. If participants are engaging as they should this technique often happens on its own without instructor prodding. However, the instructor should be fully prepared to play devil's advocate when necessary to enhance the group discussion. For example, if 100 percent of students participating in a staff ride of the Battle of the Little Big Horn begin to find fault with some of Lt. Col. George Armstrong Custer's decisions, then the instructor should step in and make an argument for Custer. Doing so forces the students to think through the full range of factors influencing a leader's decisions and actions and prevents them from defaulting to a popular opinion.

Principles of War

This corollary technique uses the timeless principles of war (objective, offensive, mass, economy of force, maneuver, unity of command, security, surprise, and simplicity) as a framework by which to analyze and evaluate leader actions or inactions and the associated decisions of a battle, campaign, or event. A person assigned a particular role would be responsible for explaining how their character did (or did not) adhere to the principles. The rest of the group can then engage in Socratic dialogue regarding how and why.

50. Christopher S. Stowe, Bradford A. Wineman, and Paul D. Gelpi, "Staff Riding in the Twenty-First Century: A Need for Pedagogical Change?," *Army History* 110 (Winter 2019), p. 23.
51. Ibid.

Warfighting Functions

This corollary technique uses the six warfighting functions (movement and maneuver, intelligence, fires, sustainment, command and control, and protection) employed by leaders as a framework to analyze and evaluate leader actions or inactions and the associated decisions of a battle, campaign, or event. Again, a person assigned a particular role would be responsible for explaining how their character did (or did not) optimally employ the warfighting functions. The rest of the group can then engage in Socratic dialogue regarding how and why.

Instructor Lecture

This technique entails straightforward lecturing by the instructor. At certain times this technique is highly effective, for example in conveying the strategic setting or operational overview of a given campaign to set the stage for the staff ride. However, this method should be used sparingly and with proper punctuation and timing. Overuse of this technique makes the staff ride devolve into a guided tour during which the students perform no critical analysis or evaluation of the information the instructor conveys. Staff rides are designed to make students engage in active learning by performing critical analysis, evaluation, and decision making. Passive absorption of information is the antithesis of experiential learning.

INNOVATIVE TECHNIQUES

Additional staff ride techniques have been revived or newly developed over the past several years. They provide excellent, innovative ways to enable students to exercise critical thinking, creativity, and decision-making skills through active, experiential learning.

Decision Gaming

In decision gaming, facilitators present students with detailed planning scenarios, drawn from past events, at the tactical, operational, or strategic levels of war. Students then plan their own courses of action, which they brief at the various staff ride stands. These plans are then assessed during the integration phase.

Decision gaming as a staff ride technique has its antecedents in the map exercises and war games of the Prussian Grand General Staff and, later, the U.S. Army War College. The Prussian version of the war games required students to present their courses of action in historically based scenarios to faculty who graded the submitted product in both form and content against an approved solution. In contrast, the U.S. Army War College war games did not measure against a single approved solution. To its credit, the U.S. Army War College wanted to prevent an overreliance on history as a guide while also avoiding ex post facto decision making, so it omitted the names

of the historical commanders involved. Today, students at the War College are presented with scenarios largely based on the historical narrative but often with some deviations. The commanders' names are still omitted, thus encouraging maximum student creativity and critical thinking in formulating courses of action.[52]

Practitioners of decision gaming have observed that, in the planning phase, students like to employ geospatial representations of the area of operations in addition to reading published primary and secondary source manuscripts. They use both original maps from the time period under study, preferably those that were available to the real commanders, and modern Google Earth maps representing the current lay of the land. Most students tend to rely more heavily on the historic maps in an effort to remain period-focused.[53]

The following is an example of an operational-level decision-gaming scenario that would be presented to students during the preliminary study phase. This scenario and the courses of action the students generate from it then form the basis of the field study phase.

Taneytown, Maryland.

It is 1830 on 1 July 1863. You are Commanding General of the Army of the Potomac. The commanding general of the U.S. Army has directed you to protect both Washington and Baltimore, as well as operate against the enemy's forces arrayed in Pennsylvania. Your headquarters is in front of defensive positions you have today selected astride Big Pipe Creek, Maryland, with the intent of luring the enemy into battle. This morning, your advance infantry corps arrived on your orders at Gettysburg, Pennsylvania, some thirteen miles north of your current headquarters, after you received reports that your cavalry division had encountered the enemy there. Although the corps commander informed you of his intent to defend the town—which conformed to the amount of discretion you extended to him in your orders—he was killed almost immediately after he committed his corps. Another general of a follow-on infantry corps, with whom you are less familiar, now commands the force at Gettysburg—now two infantry corps strong—and may not be privy to your latest intent. Consequently, you dispatched one of your most trusted subordinate officers, a man fully cognizant of your intent, to take temporary command of your forces in Gettysburg and assess the situation. His initial report has just now arrived, and you learn from it that two enemy corps have pushed your two corps out of Gettysburg. Your forces now hold a prominent height south of the town. Your trusted subordinate claims that the hill is good defensive terrain and that your advance

52. Ibid., pp. 22–23.
53. Email, Christopher Stowe to author, 31 Jan 2020, sub: Decision-Gaming Preparation, Historians Files, CMH.

forces have regrouped sufficiently to hold the position if they are reinforced. Fresh information received at headquarters indicates that the disposition of one enemy corps remains unknown. The enemy's infantry appears to be converging upon Gettysburg, but you lack conclusive information to confirm their intent. Additionally, an enemy cavalry division had positioned itself three days earlier between you and the nation's capital, but you now (similarly) lack conclusive intelligence of more recent enemy cavalry dispositions or intent. Your orders from the commanding general are clear: stay between the enemy and the nation's capital. Only an hour ago, you learned that your request for a "composite corps" of reinforcements from the defenses of Washington and Baltimore has been approved. These forces number some 12,600 men according to the latest army returns. Defending at Big Pipe Creek seems the most feasible, acceptable, and suitable way to ensure you stay between the enemy and the capital while engaging enemy forces. Still, the enemy is miles away from Taneytown. Two of your corps have been hotly engaged at Gettysburg and at least one more corps should arrive in its vicinity before sundown. The "composite corps" cannot be expected to be present in the area of operations for two to three days. Your subordinate commanders need guidance, as the time has come to commit to Gettysburg, Big Pipe Creek, or elsewhere.

General, what are your orders?

Adapted from Stowe, Wineman, and Gelpi, "Staff Riding in the Twenty-First Century," pp. 26–27.

Note that the given scenario may not always be fully consistent with the historical narrative.[54] In this Gettysburg-based scenario, the existence of and approval to use an additional "composite corps" is a new variable that is not part of the actual historical narrative. However, in decision gaming, deviations from the historical narrative are encouraged in order to prevent students from clinging to what actually happened without considering alternatives.

In decision gaming, students are not encouraged to assume the persona of the actual historical actor. Doing so often inhibits course of action development when the player defaults to the historical course of action or conjectures regarding what he or she thinks a historical actor might do. Instead, students should engage with the material and think critically and originally to formulate their own courses of action, which are in turn evaluated and critiqued by their peers (and facilitators as necessary). An interesting twist happens when students inject generic personality traits and biases into the commander-subordinate relationship.[55] The decision-making process

54. Stowe, Wineman, and Gelpi, "Staff Riding in the Twenty-First Century," p. 26.
55. Stubbornness, vainglory, eccentricity, or a bias toward taking the offensive instead of fighting on the defensive are just a few examples of the many different

becomes fascinating to watch as these injections shape how decisions are made and influence the buy-in of both the commander and his or her subordinates during the game. Such factors introduce a level of friction that is often forgotten about during the planning process and course of action development.[56]

The objective of a decision-gaming exercise is not for students to pass judgment on or mimic their historical predecessors but to understand and appreciate the difficulties of decision making, particularly under duress, within the context of high-tempo operations and combat. Students are guided to come up with their own unique ideas of how they would respond to a given scenario armed with similar (not necessarily matching) knowledge, capabilities, and limitations as compared to the historical actors and actions under study. The main idea is to encourage students to solve complex military problems similar to those of their professional predecessors.[57]

An important component of using the decision-gaming technique within staff rides is the use of the integration phase to compare student solutions (and their projected outcome) to the historical commander's solutions and outcome (i.e., what actually happened historically). This allows the group to fully understand the distinctions between their historically based scenario and the actual scenario as it played out in the battle or campaign. This comparison enables the students to better analyze, evaluate, and understand how the historical actors may have arrived at their decisions and creates a deeper appreciation for the factors that shaped those decisions.

In the integration phase of decision-gaming staff rides, students learn to ask the right questions of what actually happened historically when reflecting upon their own decision making under similar circumstances. Ideally, students will comprehend the importance of acknowledging both similarities and differences in situations they will face in the future compared to those that occurred in the past. This is a pragmatic application of military history that can inform future operational and strategic planning; students can use insights from the past without succumbing to the dangers of historical analogy. In other words, students learn the crucial skill of comparison in context, understanding both the similarities and differences between the real-world or training scenarios they could experience compared to the campaigns, battles, and events of the past. It reinforces the lesson that military history does not provide a blueprint to guarantee future battlefield success. Instead, it is a vehicle for critically thinking about the past to glean useful insights for application in the future.

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personality traits that can shape and influence choices for action.
56. Email, Stowe to author, 31 Jan 2020.
57. Stowe, Wineman, and Gelpi, "Staff Riding in the Twenty-First Century," p. 26.

Reacting to the Past (RTTP)

This technique was developed and defined by Mark Carnes, professor of history at Barnard College, Columbia University, in 1996.

> RTTP is an active learning pedagogy of role-playing games designed for higher education. In RTTP games, students are assigned character roles with specific goals and must communicate, collaborate, and compete effectively to advance their objectives. Reacting promotes engagement with complex ideas and improves intellectual and academic skills. Class sessions are run by students. Instructors advise students and grade their oral and written work. Reacting roles and games do not have a fixed script or outcome. While students are obliged to adhere to the philosophical and intellectual beliefs of the historical figures they are assigned to play, they must devise their own means of expressing those ideas persuasively in papers, speeches, or other public presentations. Students must also pursue a course of action to try to win the game.[58]

Applying this technique within the staff ride methodology involves students aggressively researching their assigned character roles and exercising critical thinking and creativity as they communicate and compete with their fellow students throughout the staff ride. For example, in the preliminary study phase, a student assigned the role of Maj. Gen. George G. Meade may research the series of orders and events that chronicled Meade's assumption of command and then articulate Meade's thoughts and desires in the form of some initial guidance, a message to the troops, and initial orders to his staff, upon assuming command of the Army of the Potomac. In the field study phase, the student playing Meade might recreate his nonbinding council of war on the night of 2 July 1863, soliciting the input of his fellow general officers and leading to his personal decision to stay and fight General Lee. Another example could be a student reenacting Meade's heated encounter with Maj. Gen. Dan Sickles, who created a bulge in the union defensive line in front of Cemetery Ridge against Meade's orders. The student playing the role of Sickles could respond with his rationale for taking the questionable action. The RTTP technique allows students to discuss the advantages and disadvantages of different courses of action considered by the historical character.

RTTP could also be used in the integration phase to reinforce key lessons or insights gained from the study of the campaign or event. For example, the student assigned to play General Meade might read some of his writings about the battle and then prepare a speech to be presented at the end of the staff ride to an audience

58. "What is Reacting?" Reacting to the Past, Barnard College, https://reacting.barnard.edu, Historians Files, CMH.

of his "soldiers," congratulating them on the victory and preparing them for the rest of the war. Or perhaps "Meade" could give a speech to Congress, reporting the state of the Army of the Potomac after the battle.[59]

The instructor must carefully assign different students to play their respective character roles at various phases and stands of the staff ride and carefully manage the time for student dialogue at each to ensure all students get the opportunity to engage the wider audience and to appreciate and tie their actions to the operational environment. Instructors must also be vigilant to ensure the entire audience understands the historical facts and must promptly correct any student conjecture that occurs in the articulated role-playing. Additionally, instructors must evaluate student performances throughout the staff ride and determine a winner of the student competition. Students' natural competitiveness will help make for an interesting experiential learning event. Students who are intimidated by role-playing or public speaking should view this method as an opportunity for personal and professional growth. Criteria for judging performances should be based on historical accuracy, demonstrated knowledge, and effective presentation.

RTTP is a time-intensive technique and it may not work for units with a high operational tempo or units that lack sufficient time for student research in advance of the staff ride. This technique is primarily recommended for cadets as part of their required military history curriculum at USMA, ROTC, and OCS, or for officers in professional military education schools like the U.S. Army Command and General Staff College or the U.S. Army War College.

Augmented Reality

Augmented Reality (AR) is "a technology that superimposes a computer-generated image on a user's view of the real world, thus providing a composite view."[60] AR provides an interactive experience of a real-world environment in which the objects that reside in the real world are enhanced by computer-generated perceptual information that can be both seen and heard.

The use of AR in staff rides is still quite rare, but when used it normally comes in the form of either a mobile tablet or a smartphone device. Facilitators and students can download applications that provide maps, period pictures, callout information boxes, and vignettes to juxtapose on their viewing screens while absorbing live, camera-view observation of the site under study. Eventually,

59. Email, Jason Musteen, Academy Professor, Department of History, U.S. Military Academy, to author, 24 Feb 2019, sub: Reacting to the Past integration phase insights, Historians Files, CMH.
60. "Augmented reality," Lexico Powered by Oxford, https://www.lexico.com/en/definition/augmented_reality, Historians Files, CMH.

as this technology progresses, staff ride participants will be able to use wearable devices like AR glasses as they traverse historical sites. The National Park Service and private historical organizations use such technology today at places like George Washington's Mount Vernon.[61]

When using AR techniques, staff ride leaders are cautioned to make sure that they can control and synchronize the timing of the pertinent historical content augmentation to meet the objectives of their respective audiences.

Augmented reality enhances a real-world view of a given staff ride location and adds pertinent data for the user to absorb. This example shows a Civil War monument near the split rail fences marking the "Bloody Lane" at Antietam.

THE VIRTUAL STAFF RIDE

Virtual staff rides (VSRs) are unique in that the physical area of operations is replicated digitally in a classroom environment. The 3D virtual terrain is projected and displayed at the front of the classroom, and it is the primary tool for bringing the area of operations to life.[62] Aside

61. For an example of the integration of augmented reality and experiential learning, see "Mount Vernon in AR," George Washington's Mount Vernon, https://www.mountvernon.org/plan-your-visit/augmented-reality-tour/, Historians Files, CMH.
62. "The Exportable Virtual Staff Ride (VSR)—Stalingrad," Army University Press Staff Ride Team, p. 1, https://www.armyupress.army.mil/Portals/7/educational-services/staff-rides/Introduction_Stalingrad_VSR_ver_1-0.pdf, Historians Files, CMH.

from that fundamental difference, a VSR is run just like any other traditional staff ride.[63] However, it is quite possible that VSRs could be used for other kinds of staff rides as well, such as exploring battles that occur in cyberspace, where the information network and associated terminals actually comprise the area of operations.

Background

Since 2004, the Combat Studies Institute (CSI) of AUP has fulfilled the Army's need to conduct leader training and education with computer-driven terrain analysis techniques, and has pioneered the ability to execute virtual staff rides in the classroom setting.[64] During this time, CSI used emerging 3D technology and Virtual Battlespace 3 (VBS3) software to develop multiple VSRs tailored to the needs of particular units. CSI has also taken the additional step of creating exportable VSRs. Exportable VSRs contain all of the material necessary for a unit to execute the VSR on its own, without the assistance of CSI personnel. The exportable VSR follows the same basic principles as all other staff rides.[65]

Pros and Cons of VSRs

There are several advantages to conducting a staff ride virtually. VSRs allow staff ride participants to explore a vast amount of terrain quickly and from multiple viewpoints (both tactical and operational). VSRs are also quite cost effective in that they can be done at home station with little or no temporary duty (lodging, food, and transportation) costs for participants. (Some temporary duty costs may be incurred if qualified instructors or computer operators must travel to the site of the VSR.)[66] Additionally, VSRs enable students to go back to any point on the digital terrain—instantly—during the integration phase. This capability helps students assimilate what they learned from exploring the terrain in the field study phase. It is *not* a capability that can pragmatically or feasibly be replicated in nonvirtual staff rides.[67] Of course, for cyber warriors, VSRs may end up becoming the one true staff ride option. Because the actual area of cyber operations is the real, live "terrain" of the worldwide information network, the VSR could conceivably depict past cyber operations digitally and graphically on screen, allowing participants to visit these "terrains" as they were at the time of the operation. It is also possible that VSRs could use isolated training

63. Curtis S. King, "Virtual Staff Rides: Their Benefits and Methodology," *Army History* 110 (Winter 2019), p. 37.
64. "The Exportable Virtual Staff Ride (VSR)—Stalingrad," Army University Press Staff Ride Team, p. 1.
65. King, "Virtual Staff Rides," pp. 37–38.
66. Ibid., p. 38.
67. Ibid., p. 39.

networks specifically designed to replicate the sensitive operations under study.

VSRs, by definition, take place in a classroom setting, and this negates one of the biggest advantages of staff riding, which is traversing the hallowed ground where tremendous acts of valor and sacrifice took place, sometimes with world-altering effects. Despite impressive 3D technology, the "virtual walk" over the terrain in a VSR will always lack some of the full immersion experience that comes from exploring the real place where a fight occurred.

All staff rides take participants away from their normal locations and routines, and this change of venue enables and encourages them to immerse themselves fully in the study of a battle or event. With VSRs, especially those that occur in conjunction with professional military education, participants run the risk of treating the experience as simply another classroom session. In these settings, staff ride leaders are encouraged to highlight the advantages of the VSR, and emphasize the unique experience that it is. Moreover, with the continuing evolution of virtual and augmented reality technologies and artificial intelligence, the capabilities of the VSR will expand dramatically in the years ahead.

Preliminary Study Phase

This phase includes all forms of individual and group study that are conducted before seeing the digital environment. At a minimum, participants must gain a general understanding of the battle or event being studied before the field study phase, when they will see the actual computer-generated terrain. If time permits, preparation can be more extensive and might include classes, student presentations, and more.[68] (See pp. 25–28.)

Field Study Phase

During this phase, the participants see the computer-generated terrain and navigate to different locations within the virtual terrain to discuss actions in the battle, using the terrain to enhance discussion. During this phase, the digital terrain is juxtaposed with slides or other visual aids shown on an adjacent screen. Together, the visual aids and digital terrain provide unique perspectives. Participants can go to places on digital terrain that they either could not go to at all in real life or could not get to quickly on a terrestrial battlefield.[69] (See pp. 29–36.)

Integration Phase

The integration phase allows participants to discuss how exploring the area of operations influenced their understanding of the battle

68. "The Exportable Virtual Staff Ride (VSR)—Stalingrad," Army University Press Staff Ride Team, p. 2.
69. Ibid.

and provided them insights relevant to their modem military professional roles.[70] The integration phase of a VSR is usually conducted in the classroom soon after completion of the field study phase. It is recommended that students take a break between the field and integration phases to gather their thoughts and reflect on the entire staff ride experience. The digital terrain should be displayed during the integration phase so it can be easily referenced during the discussions.[71] (See pp. 37–40.)

Stands

Like its terrestrial counterpart, the VSR field study phase is divided into stands. The stands are usually discrete chronological or thematic breaks in the course of the experience. They allow for discussion of key analysis points at appropriate times and enable the participants to get breaks during the course of the field study phase. Bear in mind that each staff ride and its participants are unique, and while breaks should be factored into the staff ride timeline, they can also occur at any time as needed. In a VSR, the stands should be seen as guidelines, not necessarily fixed stopping and starting points.[72] (See Appendix A for an example of a virtual stand.)

Virtual Views

A virtual view is a point providing a particular perspective within the virtual environment that is used to illustrate a staff ride stand. A single stand in a VSR can have multiple virtual views. The term is used in the instructor notes to help align the movements and views in the terrain with the historical material being discussed.[73]

Walkbooks, Visual Aids, and Directions

As for all staff rides, VSR instructors and VSR leaders must prepare thoroughly for a successful staff ride. Instructors should compile instructor notes into a walkbook, which they will use as a guide to move through all the stands in the field study phase. VSR walkbooks tend to follow the ODA format and, on the whole, they will be similar to the walkbooks described on pages 19–23. VSR walkbooks should contain directions for and descriptions of the movements through the virtual terrain; an account of the important events at each stand; and analysis questions.[74] VSR walkbooks will also contain other elements found in typical staff rides such as vignettes, lists of visual aids and cues for their usage, and navigation directions within the area of operations. However,

70. Ibid.
71. King, "Virtual Staff Rides," p. 39.
72. "The Exportable Virtual Staff Ride (VSR)—Stalingrad," Army University Press Staff Ride Team, p. 2.
73. Ibid.
74. Ibid.

visual aids (which are usually maps) and navigational directions are used in a slightly different manner in VSRs.[75]

VSR visual aids are displayed in PowerPoint rather than on weatherproof canvas scrolls or ruggedized poster boards. The walkbook should list the visual aids for each stand, give cues on when to present them, and specify the PowerPoint slide number for each.[76] Visual aids are essential in the VSR, but they should not distract from the digital terrain exploration. The most powerful visual aids for a VSR are photographs or paintings that can be replicated by the digital terrain view at a given stand, providing "a powerful connection to the past."[77]

Movement and stand directions are more complicated in VSRs. The directions in a VSR do not only get the participants to a specific location in the virtual terrain, they also must describe other movements and views, which enable the computer operator controlling the movement in the virtual terrain to navigate to the desired location and viewing angle.[78]

Classroom Setup and Group Size

With the need to show participants the virtual terrain and the visual aids simultaneously, the classroom requires two viewing screens placed side by side. Thus, it is also necessary to have two computer-projector combinations, with the virtual terrain projected on the largest screen possible, and the visual aids projected to the side.[79]

The recommended group size is twelve to fifteen people. This size allows for maximum participation and a better view of the virtual terrain for all participants.[80] Larger groups (up to twenty participants) are possible but not encouraged, because those unable to view the terrain well will be less likely to fully engage, which in turn significantly decreases discussion within the broader group.[81]

Personnel

Every VSR requires at least one staff ride instructor, but two instructors may be preferable as they can share the teaching load. To effectively execute all phases of the staff ride, instructors must be experts on the campaign and know the walkbook intimately.[82] VSRs also

75. Ibid., p. 3
76. Ibid.
77. King, "Virtual Staff Rides," p. 41.
78. "The Exportable Virtual Staff Ride (VSR)—Stalingrad," Army University Press Staff Ride Team, p. 3.
79. Ibid.
80. King, "Virtual Staff Rides," pp. 39, 41.
81. "The Exportable Virtual Staff Ride (VSR)—Stalingrad," Army University Press Staff Ride Team, p. 3; King, "Virtual Staff Rides," pp. 38–39.
82. "The Exportable Virtual Staff Ride (VSR)—Stalingrad," Army University Press Staff Ride Team, p. 3.

require a computer operator. This is the person who does the "flying" to navigate from one virtual view to the next. The computer operator must be familiar with VBS3 software and must rehearse the movements with the instructor so that the two can work together smoothly in actual staff ride execution.[83] Just as terrestrial staff ride participants do not want to sit in the bus on the side of the road while a staff ride leader deals with an unexpected detour, VSR participants do not want to sit idle in a classroom while the staff ride leader fumbles through instructions to the computer operator, who is attempting to figure out the game controller moves to navigate to and position the next virtual view of a stand. In this regard, VSRs are no different from other staff rides: reconnaissance and rehearsals are essential to success.

83. Ibid.

CONCLUSION 10

The design and conduct of a staff ride is not a simple task. It should not be taken lightly or done on the cheap. By its very nature, a staff ride is both time and resource intensive. A staff ride requires subject matter expertise, intelligently applied in a systematic way, to guide professional soldiers and civilians through the most complex of intellectual exercises—the analysis of battle in all its dimensions.

If a terrain exercise is all that is required, a TEWT could be constructed on any convenient piece of ground. Such terrain exercises are useful, but they are not staff rides in and of themselves. However, a TEWT can become a staff ride if it is specifically grounded in a past campaign, performed on location on the actual terrain, and made to follow the phased methodology illustrated in the decision-gaming technique presented earlier. In contrast, if participants are to be taken to a battlefield of the past but there is little or no time for systematic preliminary study, then a historical battlefield tour is all that is required. Such tours have their place, but they are not staff rides. A staff ride yields much greater results than a stand-alone TEWT or a battlefield tour can, but it is far more difficult to devise. Those who want to create a staff ride, be it traditional or nontraditional, virtual or terrestrial, must be aware of these difficulties.

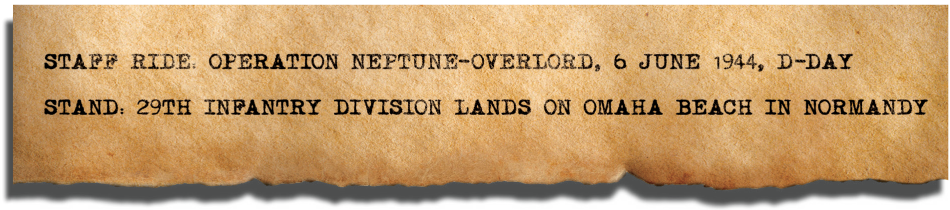
Carefully designed and intelligently executed, a staff ride is one of the most powerful instruments available for the development of national security professionals. Staff rides are among the best experiential learning events for fostering critical thinking skills through the analysis and evaluation of battles and events, appreciating the similarities and differences between past events and present challenges, and rediscovering the timeless aspects of warfare. Staff rides also foster creativity and mental agility, while addressing the complexities of leadership and decision making in the unforgiving crucible of multi-domain combat. Practitioners and participants gain useful insights that they can apply to improve and inspire their own service to the nation. May all those involved

with staff rides now and in the future put forth their maximum efforts and leverage all available resources to gain the most from every aspect of this unique experience.

EXAMPLES OF STAFF RIDE STANDS

APPENDIX A

TRADITIONAL STAFF RIDE STAND



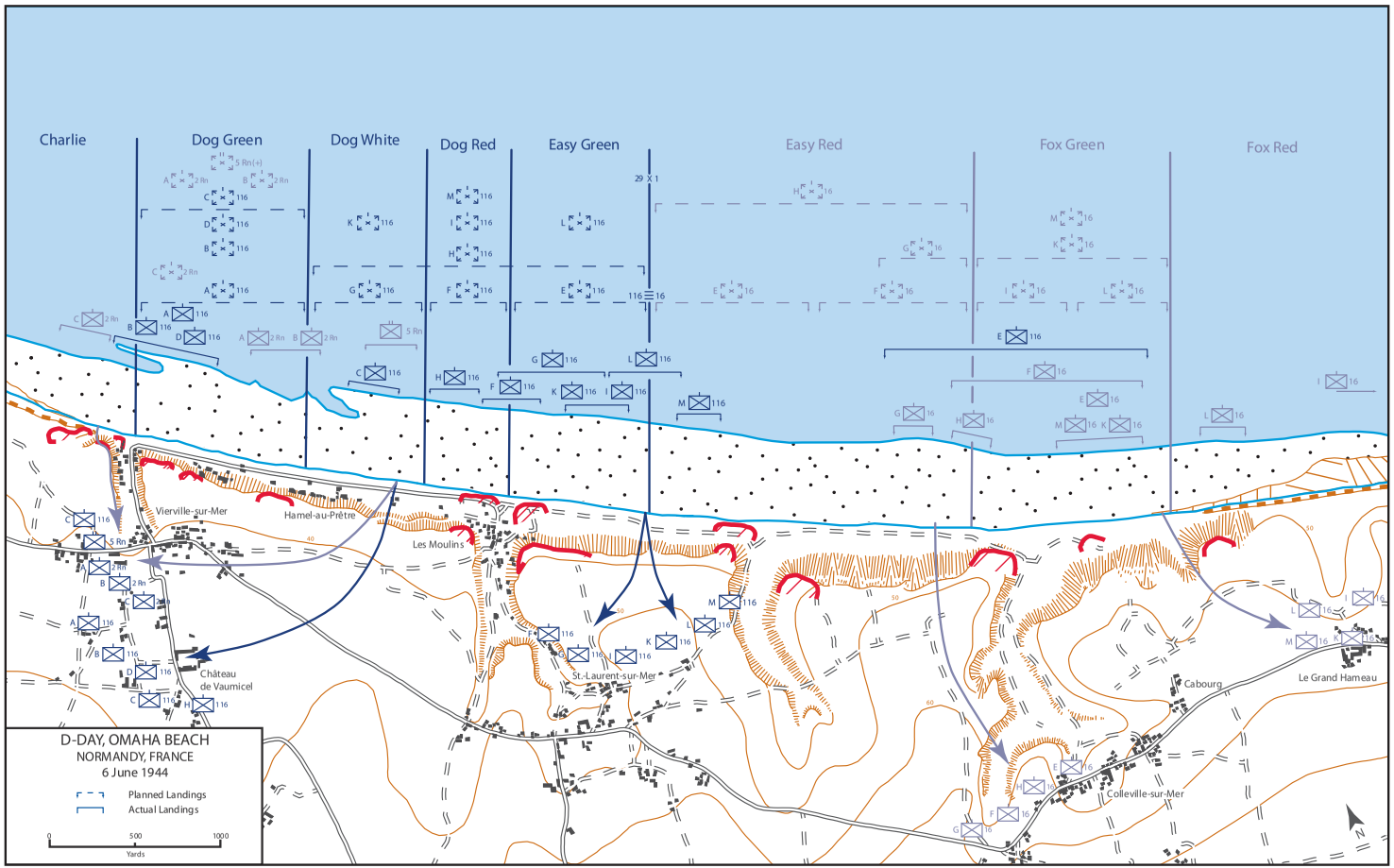
ORIENTATION

Situation

On 6 June 1944, the 116th Infantry, a regiment assigned to the 29th Infantry Division, lands on the western (left) half of Omaha Beach in the Dog Green, Dog White, Dog Red, and Easy Green sectors to begin the Allied invasion of the European continent. The soldiers of the 29th Infantry Division face the daunting challenges of numerous mine-laden beach obstacles slowing their amphibious approach. They must make a deadly and desperate advance across a large beachfront in the face of determined German *352d Division* soldiers defending from the high ground and flanking positions in concrete resistance nests (*Widerstandsnester*) armed with deadly machine guns, 75-mm. and 88-mm. field guns, and mortars to oppose the Allied landing with lethal, enfilading direct and indirect fires.

Battle maps depicting unit positions and actions are an essential visual aid to use at a stand like this to orient students to their location on the battlefield. Refer to the map (p. 61) and note the location of the 116th Infantry companies. Also note the locations in red of the formidable German defenses in 116th Infantry's landing sector.

Modern view from Widerstandsnest-73 looking east down Omaha Beach


Charlie
Dog Green
Dog White
Dog Red
Easy Green
Easy Red
Fox Green
Fox Red
Vierville-sur-Mer
Hamel-au-Prêtre
Les Moulins
St.-Laurent-sur-Mer
Château de Vaumicel
Cabourg
Le Grand Hameau
Colleville-sur-Mer
D-DAY, OMAHA BEACH
NORMANDY, FRANCE
6 June 1944
Planned Landings
Actual Landings
0
500
1000
Yards

Stand Location

You are standing atop the location of German Resistance Nest 73 (Widerstandsnest-73) overlooking OMAHA Beach, Dog Green Sector, on the far western end of the beach on the western bluff nearest the Vierville Draw (D-1 Exit). Your view is looking eastward down onto and across the beach from the German vantage point. Standing at this location while referencing the map gives you the geographical references needed to understand where you are on the battlefield in relation to where significant battle events transpired. Moreover, from this vantage point, you can gain an appreciation of the terrain and the effect it had in shaping this battle.

DESCRIPTION

Widerstandsnest-73 was the German fortified defensive position atop the western bluff adjacent to the Vierville Draw (also known to the Allies on D-Day as the D-1 Exit) off of OMAHA Beach.[84] This position had several machine guns aimed at the beach below along with indirect-fire weapons like 8.14-cm. (Gr.W 34) mortars preregistered to fire on the beach, in addition to a 75-mm. (FK231-f) field gun targeting the beach from a concrete defilade position.[85] The Germans turned OMAHA Beach into a killing ground for the initial American assault waves arriving on D-Day. The first four companies of the 29th Infantry Division's 116th Infantry were decimated by German direct and indirect fires within the first two hours of battle.[86]

Vignette

Harold Baumgarten, a native of New York City, was a private in Company B, 116th Infantry, 29th Infantry Division. He landed on OMAHA Beach, Dog Green Sector, at 0700 on 6 June 1944 as part of the second wave ashore. He recalled:

> Now there are only two of us alive from my boat team, Charles Conner and myself. We had 85 percent casualties [in the] first 15 minutes. . . . I started cursing that machine gun that was on the right flank. I never used foul language, but I had to curse him because he was killing all the guys around me. A fellow named Nicholas Kafkalas was next to me when [he was] cut in half—I saw the machine gunner up there by the glare, the shine on his helmet. So I took my rifle, I was a super-expert, and that rifle fired. I shot at him—no more firing from that machine gun. Later on, when I got up on the bluff, he had his head

84. Peter Caddick-Adams, *Sand and Steel: The D-Day Invasion and the Liberation of France* (New York: Oxford University Press, 2019), p. 553.
85. "German strongpoints in Normandy: Wn 73, Atlantic wall," D-Day Overlord, https://www.dday-overlord.com/en/d-day/atlantic-wall/strongpoints/wn-73, Historians Files, CMH.
86. Caddick-Adams, *Sand and Steel*, pp. 571–75, 600.

Pvt. Harold Baumgarten (*Courtesy of the National WWII Museum*)

shot off, armor-piercing ammunition. I was cursing that pillbox on the right flank and a shell went off in front of me, 88-mm. It blew off this cheek (gestures to his left cheek), gave me a hole in the roof of my mouth. I had teeth and gums lying on my tongue. This jaw was shot away, left upper jaw, the cheek was flapping over my ear. And I looked to my left front and Bedford Hoback, of Bedford, Virginia, got hit with the same shell, right in the face. He was dead. Next to him was a fellow named Elmer Wright of Bedford, Virginia; he was already dead. I figured I'd better get off the beach.[87]

Harold Baumgarten's graphic, personal recollection of his experience landing on OMAHA Beach on D-Day brings the "face of battle" to the students, making them come to grips with the terrible, relentless, unforgiving reality of ground combat and what it was like to be on the receiving end of German fires from the dominating high ground while trying to advance inland. Baumgarten was able to rely on his training and engage the enemy with some effectiveness despite his vulnerable position. He clearly demonstrates the resilience required of the American soldiers that fought on to eventual victory on D-Day.

The Germans had an incredible advantage operating from the high ground dominating OMAHA Beach. Their machine gun positions had enfilading fields of fire down the length of the beach that decimated the initial waves of Allied troops as they landed. These fires, in combination with deadly 88-mm. and 75-mm. guns in concrete defilade as well as indirect fire from mortars from elevated positions on the bluffs, made initial American advances extremely difficult to impossible. Only the steadfast determination of follow-on waves brought order to the chaos ensuing on the beach. Leaders like Brig. Gen. Norman Cota, Assistant Division Commander, 29th Infantry Division, and Capt. Ralph Goranson, commanding Company C, 2d Ranger Infantry Battalion, organized and led the small unit actions that would start to overcome the formidable German defensive positions. Goranson led the assault up the cliffside to take out

87. Gordon H. Mueller, *"Everything We Have," D-Day, 6.6.44* (London: Andre Deutsch, 2019), p. 135.

Widerstandsnest-73 atop the western bluff of the Vierville Draw.[88] Goranson's efforts enabled General Cota, who had led small unit elements up the eastern bluff of the Vierville Draw into the town of Vierville-sur-Mer, to finally take some Widerstandsnest-72 positions (on the eastern bluff) from behind, and eventually access the D-1 Exit from the back end.[89] These small unit actions, in combination with naval gunfire from Allied destroyers pulling as close into the shoreline as possible to engage the German Widerstandsnest positions, enabled American troops to eventually open up the D-1 Exit (Vierville Draw) and allow 29th Infantry Division elements to exit off of OMAHA Beach.[90]

ANALYSIS

Key Teaching Points

Analysis of terrain, initiative, combined arms, the effect of technology, and the "face of battle."

Discussion Questions

1. How did the terrain and environmental conditions shape and affect the course of the battle for OMAHA Beach?
2. How did the American troops and German troops utilize their weaponry and equipment to their respective advantages?
3. How does the recollection of a soldier like Harold Baumgarten expand and inform your knowledge of what happened on OMAHA Beach?
4. What insights have you gained from seeing and walking through the German position of Widerstandsnest-73 and the OMAHA Beach landing zone for the 29th Infantry Division?
5. How did the American troops finally overcome the formidable German positions on OMAHA Beach?
6. How do small unit actions lead to larger, more significant results?

88. Caddick-Adams, *Sand and Steel*, pp. 605–06.
89. Ibid., p. 625.
90. Ibid., pp. 589–90, 625.

NONTRADITIONAL STAFF RIDE STAND

STAFF RIDE: WORLD WAR II MOBILIZATION

STAND: TEMPORARY BUILDINGS OF THE WAR AND NAVY DEPARTMENTS

ORIENTATION

Situation

Temporary buildings were constructed on the National Mall to facilitate national military mobilization in preparation for World War I. Known as "tempos," these buildings were kept and expanded upon throughout the interwar period and throughout and beyond World War II. Even though the Pentagon was completed in 1943, the tempos remained in use by the Navy and War Departments and the eventual Department of Defense well into the 1960s. They were demolished in the early 1970s.

Stand Location

Constitution Avenue near the intersection with Eighteenth Street NW, Washington, D.C., looking to the southeast.

Note: The use of period and modern photographs side by side allows for a "then and now" comparison of the National Mall when students are walking the ground.

DESCRIPTION

In the early twentieth century, and especially during World War I, temporary buildings were constructed in the city of Washington and used by the Army and other government organizations. Two large buildings were built on the National Mall near the Lincoln Memorial between the reflecting pool and Constitution Avenue. These were the Main Navy and Munitions Buildings, and they were used by the Navy and Army, respectively, during World War I. Built in only six months, the Main Navy and Munitions Buildings were four-story, steel and concrete buildings. They were erected under the auspices of Assistant Secretary of the Navy Franklin D. Roosevelt in order to accommodate the rapidly expanding military bureaucracy of World War I.[91] Although these buildings were supposed to have been temporary, they continued

91. "'Temporary' War Department Buildings," National Mall and Memorial Parks, National Park Service, https://www.nps.gov/articles/temporary-war-department-buildings.htm, Historians Files, CMH.

The Main Navy and Munitions Buildings, ca. 1925. The Washington Monument and the National Mall can be seen behind the building. (*Library of Congress*)

Constitution Gardens today, where the Main Navy and Munitions Buildings once stood.

to be used even after the Pentagon was built in 1943. Other "tempos," as they were called, were built throughout the city of Washington.

Vignette

Talking about the buildings in a press conference on 19 August 1941, President Franklin D. Roosevelt said:

> When I first came down here in 1933, I said I didn't think I would ever be let into the Gates of Heaven, because I had been responsible for desecrating the parks of Washington. Back in the fall of 1917, the Navy Department needed space, and I took up with President Wilson the possibility of building a temporary building—wooden building—down here on the Oval. And he said, "Why do you select that site?" I said, "Mr. President, because it would be so unsightly right here in front of the White House, that it just would have to be taken down at the end of the war." "Well," he said, "I don't think I could stand all that hammering and sawing right under my front windows." He said, "Can't you put it somewhere else?" So I said, "Of course. Put it down in Potomac Park." "Well," he said, "Put it down there and we will get rid of it."[92]

In 1914, the Army Quartermaster Corps' Construction Division created plans for wartime mobilization camps and temporary buildings and, upon American entry into World War I, temporary military buildings were built on military bases and other sites throughout the country, including the first-generation tempos in Washington, D.C.[93] The tempos, as their name suggests, were supposed to be torn down after their use in the war, but many of them continued to be used by government agencies well after the war, as the government and especially the War Department needed office space for the growing military bureaucracy.

During and after World War I, several new agencies and bureaus were created—for example, the Finance Department, Chemical Warfare Service, and the Army Air Service—and they all needed headquarters in Washington. Following World War I, the Munitions Building housed the Quartermaster General, Army Corps of Engineers, Ordnance Corps, Chemical Warfare Service, Signal Corps, and Army Air Service.[94] In

92. Executive Office of the President Press Conference #762, Franklin D. Roosevelt, 19 Aug 1941, p. 11, http://www.fdrlibrary.marist.edu/_resources/images/pc/pc0121.pdf, Historians Files, CMH.
93. John S. Garner, *World War II Temporary Military Buildings: A Brief History of the Architecture and Planning of Cantonments and Training Stations in the United States*, U.S. Army Construction Engineering Research Laboratories (USACERL) Technical Rpt CRC-93/01 (Champaign, Ill.: USACERL, Mar 1993), p. 22.
94. *Official Congressional Directory, 67th Congress* (Washington, D.C.: U.S. Government Printing Office, 1921), pp. 270–72; U.S. Army Corps of Engineers, *Annual Report of the Chief of Engineers, U.S. Army, Part 3* (Washington, D.C.: U.S. Government Printing Office, 1920), pp. 4137–38; Leo P. Brophy and George J. B. Fisher,

1923, the Army's Finance Office also moved into the building.[95] Then, in 1933, the Army Inspector General's office, Army Reserves, and the Chief of Chaplains' office moved in as well.[96] The National Guard Bureau and Army Industrial College were also located in the Munitions Building.[97] The War Department Headquarters itself was still there (where the Constitution Gardens and Vietnam War Memorial are today, near the present-day National World War II Memorial). Things were getting crowded.

In the late 1930s, as war clouds loomed again, the War Department received additional funding and used much of it to construct military buildings throughout the country, including second-generation tempos in Washington, D.C. These newer tempos occupied the land south of the Lincoln Memorial Reflecting Pool and near the Washington Monument. Bridges were created across the water to allow office workers to cross between the northern and southern buildings. Like the previous buildings, these new tempos had gaps between them resembling combs, but the buildings themselves, being only two stories tall, were shorter than the first-generation tempos. Some people opposed the construction of these buildings because they ruined the aesthetic of the National Mall, crowded in next to memorials and museums.[98]

The Army Headquarters moved from the State, War, and Navy Building (now the Eisenhower Executive Office Building) to the Munitions Building in 1938–1939 because it was getting too big for the sixteen suites that the Army occupied in that building, which it still shared with the State Department. (The Navy had moved out in 1918 to the Main Navy Building because it, too, needed more room.) Increasingly, the Army had to compete with the White House, which sought to use the building for office space. As it seemed likely that the United States would enter World War II, the War Department needed space for a larger staff to plan for the massive military mobilization as well as the industrial and economic mobilizations that would accompany it. This was especially vital as it was assumed that World War II would become a two-front war.[99]

The Technical Services: The Chemical Warfare Service: Organizing for War, U.S. Army in World War II (Washington, D.C.: U.S. Army Center of Military History, 1989), p. 27; Dulany Terrett, *The Technical Services: The Signal Corps: The Emergency (To December 1941)*, U.S. Army in World War II (Washington, D.C.: U.S. Army Center of Military History, 1956), p. 50; *U.S. Air Service*, vols. 5–6 (Air Service Publishing Company, 1921), p. 38, https://babel.hathitrust.org/cgi/pt?id=mdp.39015024398912&view=1up&seq=7.

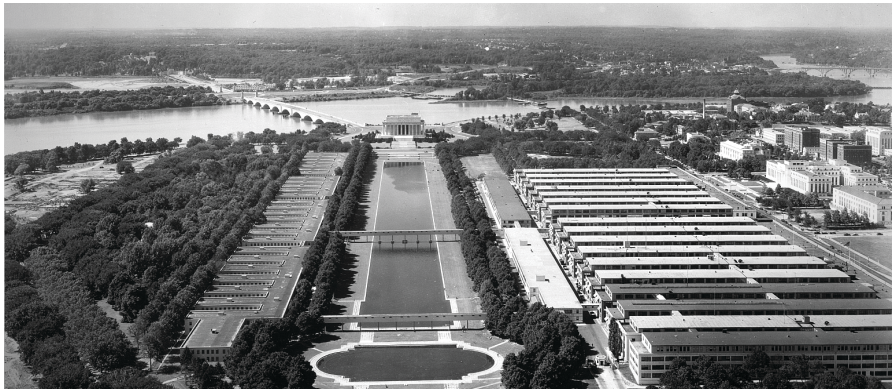
95. "Army Finance Office Moves," *Washington Post*, 4 Mar 1923.

96. "More Federal Bureaus Move Offices Today," *Washington Post*, 4 Nov 1933.

97. *Washington, City and Capital, Federal Writers' Project, Works Progress Administration*, American Guide Series (Washington, D.C.: U.S. Government Printing Office, 1937), p. 871; *Official National Guard Register for 1936* (Washington, D.C.: National Guard Bureau, 1936), p. 3; "Executive Branch Report," *United States Government Manual, October 1939* (Washington, D.C.: Office of Government Reports, 1939), pp. 99–100.

98. "'Temporary' War Department Buildings."

99. Garner, *World War II Temporary Military Buildings*, p. 11.



This view of the Main Navy and Munitions Buildings, ca. 1945, shows how much of the National Mall was covered by these temporary buildings at the peak of their expansion. (*Library of Congress*)

Because of this rapid expansion, it became necessary for the military to launch and supervise a number of programs for procurement, production of war materiel, and military construction in preparation for the probable conflict ahead.[100] Therefore, the rest of the War Department staff moved into the Munitions Building, joining the majority of the War Department staff who had moved there in 1930. This transition, which finally located the War Department headquarters in the Munitions Building, completed a nearly decade-long move.[101]

Secretary of War Harry Woodring and Army Chief of Staff George Marshall both relocated to the Munitions Building in 1939.[102] They soon realized that this building was not big enough for their offices and they again began looking elsewhere for more room. As the United States entered World War II, the War Department (still located in the Munitions Building) initially planned to move into a new building that had been built for them nearby in Foggy Bottom, but Secretary of War Henry Stimson believed this new building (now the Harry S. Truman Building, which houses the State Department headquarters) would also be too small for the 24,000 workers scattered across seventeen different sites and the 10,000 new workers he anticipated needing once the United States entered the war.[103]

Secretary Stimson and President Franklin D. Roosevelt decided that the War Department should instead build something larger in Virginia. The resulting building, the Pentagon, would become the

100. Ibid.
101. "State, War, and Navy Building, July 1875–April 1947," Buildings of the Department of State, Office of the Historian, https://history.state.gov/departmenthistory/buildings/section27, Historians Files, CMH.
102. Ibid.
103. Alfred Goldberg, *The Pentagon: The First Fifty Years* (Washington, D.C.: Historical Office, Office of the Secretary of Defense, 1992), pp. 5–9.

new War Department Headquarters when it moved there in 1942–1943.[104] The Pentagon's larger structure allowed the War Department to have the office space it needed (and had lacked in the Munitions Building) and to centralize that staff and its operations under one roof.[105] This was especially important for mobilization planning efforts, as it allowed War Department staff to be at one location and have the space it needed to fulfill its wartime functions.[106] The Navy, also needing space, took over the Munitions Building in 1943 so it would not have to move its headquarters.

Even after the Pentagon was built and World War II ended, the tempos on the mall continued to be used by the government. Fourth stories had been added to the Main Navy and Munitions Buildings during the war, but even these were not enough to accommodate the needs of the government.[107]

In the 1950s, approximately fifty tempos were still standing. Some were used by the Veterans Administration, State Department, Federal Aviation Administration, Civilian Aeronautics Board, Defense

The former Liberty Loan Building, built in 1919, is the last remaining "tempo" in Washington, D.C. It now houses the Bureau of the Fiscal Service.

104. William Gardner Bell, *Secretaries of War and Secretaries of the Army* (Washington, D.C.: U.S. Army Center of Military History, 2010), p. 8.
105. Steve Vogel, *The Pentagon, A History: The Untold Story of the Wartime Race to Build the Pentagon—And to Restore It Sixty Years Later* (New York: Random House, 2007), pp. 29–33.
106. "State, War, and Navy Building, July 1875–April 1947."
107. "Main Navy and Munitions Buildings," Naval History and Heritage Command, https://www.history.navy.mil/our-collections/photography/places/washington-dc/main-navy---munitions-buildings.html, Historians Files, CMH.

Department, and Central Intelligence Agency.[108] In 1960, the Main Navy and Munitions Buildings still held 7,000 workers from the Navy, Army, Air Force, Veterans Administration, and the State Department. But by the early 1960s, many of the tempos were suffering serious structural problems such as cracks in their concrete piers, cracked and bent walls, and major floor settling.[109] In the mid-1960s, the government began to demolish the D.C. tempos to make room for new buildings. Eventually, the pressure to get rid of the Main Navy and Munitions Buildings on the National Mall resulted in their razing in 1970.[110]

Today, one solitary tempo survives, located just a few blocks away from the National Mall. The former Liberty Loan Building, built in 1919, still stands between Fourteenth Street and the Tidal Basin. It is now the Bureau of the Fiscal Service.[111]

ANALYSIS

Key Teaching Points

Enduring and evolving needs of mobilization and demobilization and corresponding staff support in response to the ramp up, conduct, conclusion, and aftermath of the nation's conflicts.

Discussion Questions

1. The United States has not mobilized for war on the scale of World War II since that conflict. Will the nature of future conflict ever require another such mobilization, or will we fight all future large-scale combat operations only with what we currently have available in the Guard and Reserve?
2. What aspects of the mobilization required increased office space, and would those same requirements for more office space pertain to a modern mobilization of the Army, assuming we mobilized on a large scale as we did for the world wars?
3. Given modern communications capabilities, would it still be necessary or desirable to have all the offices of an expended Army headquarters in proximity to the Pentagon? What would be gained or lost by having some of the offices located remotely? What factors might govern the selection of remote locations?
4. What other insights can you glean from the World War II experience regarding the possible rapid expansion of the Headquarters, Department of the Army?

108. John Kelly, "Answer Man Remembers the 'Temporary' Office Buildings that Once Blighted D.C.," *Washington Post*, 18 Jul 2017.
109. Jerry Landauer, "'Temp' Built in First World War Still Used as Munitions Building," *Washington Post*, 26 Apr 1960.
110. Ellen Hoffman, "Last 'Tempos' Fall in Style," *Washington Post*, 16 Jul 1970.
111. "'Temporary' War Department Buildings."

VIRTUAL STAFF RIDE STAND

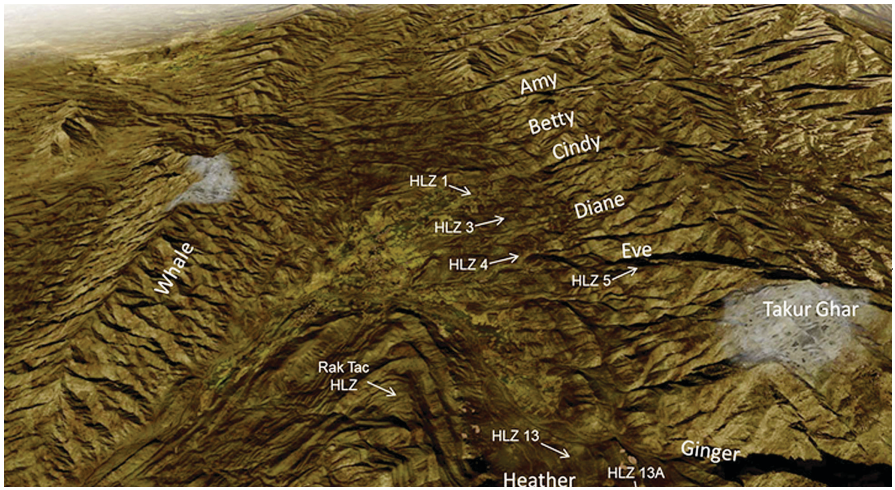
STAFF RIDE: OPERATION ANACONDA, 2-13 MARCH 2002

STAND: SHAHI KOT VALLEY, AFGHANISTAN

Situation

On 2 March 2002, Combined Joint Task Force (CJTF) Mountain attacked to destroy (capture or kill) al-Qaeda operatives in the vicinity of Sher Khan Khel in the Shahi Kot Valley, Afghanistan. Additionally, they were to identify or disrupt al-Qaeda insurgency support mechanisms and exfiltration routes into Pakistan. They were prepared to conduct follow-on operations to clear selected objectives and interdict al-Qaeda operatives' movements in the area of operations. Task Force (TF) 1–87 Infantry landed at Landing Zones (LZs) 13 and 13A with the mission to secure blocking positions (BPs) Ginger and Heather to capture or kill al-Qaeda fighters attempting to escape from the valley floor to the east and south.[112]

Below is a digital terrain screenshot of the Shahi Kot Valley, oriented north to south. TF 1–87 Infantry, LZs 13 and 13A, and BPs



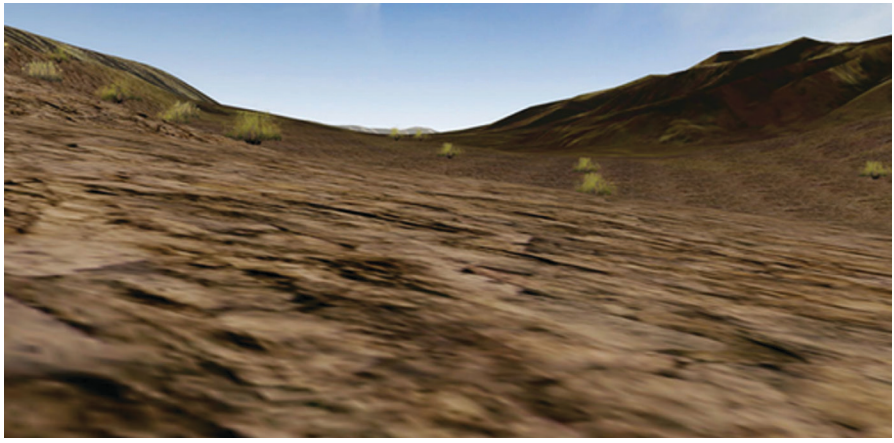
Digital terrain screenshot of the Shahi Kot Valley (*Army University Press*)

112. Adapted from Operational Summary, Opn Anaconda, Capt. Michael Loveland and the 47th, 48th, and 130th Mil History Detachments, Mar 2002, compiled for use as Course Material, U.S. Army Military History Detachment Course 20–003, 11–15 May 2020, pp. 1–9, Historians Files, CMH.

HEATHER and GINGER are located at the bottom right of the screenshot, astride the south and southeastern exits from the valley.

Stand Location

This is a virtual view of the location of Company C, 1st Battalion, 87th Infantry. Below is the digital terrain view from LZ 13A looking south into HEATHER Pass. BP HEATHER was probably somewhere in the middle distance of the pass. Rak Tak Ridge is visible to the right (west). "The Bowl" or "Hell's Halfpipe" is somewhere in the vicinity of the scrub brush on the left side of the screenshot. Company C, 1st Battalion, 87th Infantry, was pinned down in that area taking hostile indirect and direct fires from high ground on both sides of the valley.



Digital terrain screenshot of Landing Zone 13A (*Army University Press*)

DESCRIPTION

Al-Qaeda fighters were not in the villages on the valley floor as initial intelligence reports had predicted. In fact, the enemy was located in elevated positions overlooking the valley. Enemy mortars were particularly effective against soldiers from Company C, 1st Battalion, 87th Infantry, who were moving to occupy BPs GINGER and HEATHER. Company C began taking small-arms fire as soon as they hit their LZs. As the 1st and 2d Platoons attempted to move off the LZs toward their designated blocking positions at HEATHER and GINGER, respectively, the enemy opened up with rocket-propelled grenade and machine-gun fires. Both platoons were forced to take cover, but 1st Platoon moved forward and established itself on BP HEATHER. Suddenly, the enemy dropped a succession of mortar rounds onto their position, wounding the platoon leader, platoon sergeant, and eight others. Almost half the troops on BP HEATHER became casualties. Mortars from Company C, 1st Battalion, 87th Infantry, who were accompanying 2d Platoon, were set up and began returning fire, but

they soon expended all of their rounds. The 2d Platoon was also being hit, and the Company C commander, Capt. Nelson G. Kraft, pulled his men back and placed them in a company strongpoint in a nearby crater later known by the nickname Hell's Halfpipe. This single strongpoint attempted to block both avenues of approach down the valley that were originally to be blocked by BPs HEATHER and GINGER.[113]

Vignette

S. Sgt. Andrzej Ropel, a Polish immigrant who aspired to become a citizen of the United States, joined the U.S. Army in 1996. In March 2002, Ropel found himself serving as a squad leader in Company C, 1st Battalion, 87th Infantry.[114] In the 2005 work entitled *Not a Good Day to Die: The Untold Story of Operation Anaconda*, author Sean Naylor contextualizes Sergeant Ropel's firsthand account of the fighting in Hell's Halfpipe:

> As Ropel scanned the face of the ridgeline opposite him, he saw a black shape moving about 175 meters away. Peering through a three-power scope that he'd removed from a set of night-vision goggles and fixed to his M4, he realized that what he'd seen was the head and torso of an enemy fighter. The figure was in a bunker made by building a stone wall to connect a boulder to the side of the mountain. It was through a little window in the wall that Ropel could see the enemy. Because Ropel's ridgeline sloped down to the north, the bunker offered an excellent view of the Halfpipe. . . . Ropel immediately surmised the figure he could see was the observer who had been causing them so much trouble. But killing him proved difficult. The guerrilla knew he was being watched and seemed to enjoy the attention. He teased Ropel by popping his head up for a split second, then ducking before Ropel squeezed the trigger. After each shot Ropel fired, his target would yell "*Allah U Akhbar!*" – "God is Great!"
>
> Ropel quickly tired of this "cat and mouse game." He couldn't afford to waste the ammo, and so slunk back out of sight and waited for his adversary to lose patience. By now his men were also eyeballing the guerrilla's hiding place. Ropel told them not to fire. He had a better line of sight. "I did not want to scare him so he would go away," Ropel said. "I wanted him to think that we were gone." . . . Ropel and his men watched and waited. Finally, as Ropel had figured he would, the figure raised himself for a couple of seconds to look around, exposing his head and upper torso. That was all the Polish NCO needed. He lined up the man in his sight and pulled the trigger.

113. Ibid., pp. 7–8.
114. Sean Naylor, *Not a Good Day to Die: The Untold Story of Operation Anaconda* (New York: Berkley Books, 2005), pp. 229–31. Ropel put his application for citizenship on hold to deploy to Afghanistan.

> "I don't know if I hit him or killed him, but I didn't hear any more 'Allah U Akhbar!'" Ropel said. There was also a pause in the mortar fire, lending credence to Ropel's suspicion that his target had been calling it in.[115]

During the next eighteen hours, the soldiers of Company C fought back al-Qaeda attempts to outmaneuver them and overrun their position in Hell's Halfpipe. Conserving ammunition, the 10th Mountain Division soldiers defeated every enemy attack but absorbed additional casualties.

Lt. Col. Paul J. LaCamera, commander of TF 1–87 Infantry, and his battalion tactical command post had accompanied Company C on the assault and set up their operations near BP Heather. This command post was also hit and suffered six casualties during the course of the fighting. By the day's end, some twenty-five soldiers of the 10th Mountain Division were wounded, four seriously. The enemy fire began to dissipate by nightfall, and the soldiers of TF 1–87 Infantry were able to safely access their rucksacks, attach their nightvision goggles, and employ them to their distinct advantage to control the battlefield.[116]

Note: The vignette (embedded above) brings in the human element and the "face of battle" to the students. This vignette refers to the terrain feature nicknamed Hell's Halfpipe, which was observed in the digital screenshot above and is easily explored in the VSR by navigating over to view that precise location from multiple angles, including both Sergeant Ropel's and his adversary's perspectives.

Students gather at the completion of their virtual staff ride. (*Army University Press*)

115. Ibid., pp. 267–68.
116. Ibid., p. 8.

Note: In a virtual staff ride, the digital terrain is depicted for ease of reference and juxtaposed with pertinent operational maps or other visual aids on the adjacent viewing screen as seen in the picture above. The computer operator can navigate around the digital terrain affording students multiple viewing angles and depths by which to explore and analyze the area of operations, while the operational map depicts the scheme of maneuver. These elements combine to animate the area of operations in the minds of the students.

ANALYSIS

Key Teaching Points

Maintaining command and control, decision making under direct fire, adjusting the battle plan to enemy contact, analysis of terrain, balancing survivability against mission accomplishment in both planning and execution.

Discussion Questions

1. How did enemy actions influence on-the-spot decision making for Capt. Nelson G. Kraft and for S. Sgt. Andrzej Ropel while pinned down in Hell's Halfpipe?
2. How did terrain and environmental factors influence the ability of Company C, 1st Battalion, 87th Infantry, to respond to the enemy?
3. How has exploring the terrain of the Shahi Kot Valley affected your assessment of the performance of the various small unit leaders involved in the operation?
4. What insights can you glean from this operation that would help you in future combat engagements?

POINTS OF CONTACT FOR ADDITIONAL ASSISTANCE

B
APPENDIX

Advice and assistance on how to plan and conduct staff rides may be obtained from the following sources:

IN THE CONTINENTAL UNITED STATES

U.S. Army Center of Military History
ATTN: ATMH-FPF
Collins Hall, Building 35
102 4th Avenue
Fort McNair, DC 20319-5060
(202) 685-2726 / DSN 325-2726
http://www.history.army.mil

Army University Press
ATTN: ATZL-CSH
290 Stimson Road, Unit 1
Fort Leavenworth, KS 66027-2345
(913) 684-2131/2082 / DSN 552-2131/2082
http://www.armyupress.army.mil

U.S. Army War College
Department of Military Strategy, Plans, and Operations
122 Forbes Avenue
Carlisle Barracks, PA 17013-5050
(717) 245-4483 / DSN 242-4483

U.S. Military Academy
Department of History
West Point, NY 10996-1793
(845)-938-3300 / DSN 688-3300

IN EUROPE

U.S. Army Europe
ATTN: AECS-MH
APO AE 09014-9351
49-0611-143-537-0131 / DSN (314) 537-0131

IN THE REPUBLIC OF KOREA

Headquarters, Eighth U.S. Army
ATTN: EAHO
APO AP 96205-0010
011-822-7915-3570 / DSN (315)-732-6544

ABBREVIATIONS

AAR	after action review
AR	augmented reality
AUP	Army University Press
BP	blocking position
CJTF	combined joint task force
CMH	U.S. Army Center of Military History
CSI	Combat Studies Institute
CTC	combat training center
GPS	global positioning system
LZ	landing zone
NCO	noncommissioned officer
ODA	orientation, description, and analysis
OCS	Officer Candidate School
ROTC	Reserve Officer Training Corps
RTTP	reacting to the past
TEWT	tactical exercise without troops
TF	task force
TRADOC	U.S. Army Training and Doctrine Command
USMA	U.S. Military Academy
VBS3	Virtual Battlespace 3
VSR	virtual staff ride