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The U.S. Army simply assumes the historical staff ride is a valuable educational tool. Former Army Chief of Staff, General (Ret.) Gordon Sullivan wrote in 2012, “When we stand on a soldier’s battlefield and read his description of his fight, we gain insights that cannot be replicated in any other learning environment.” Colonel (Ret.) Leonard Fullenkamp and Brigadier General (Ret.) Harold Nelson concur and noted that “to understand” an attack it is “necessary to [physically] follow” a “flank march.” They describe that the “soldier instinctively knows” the value of the historical staff ride. This instinct has led to a lot of historical staff riding: one writer estimated that “as many as 300 battlefield tours and staff rides are undertaken each year by British military units alone.” Considering the approximate 5:1 size ratio – it is reasonable to suggest that the U.S. Army annually undertakes thousands of historical staff rides costing in the multiple millions of dollars.

Should all this money be spent based on an assumption? Budget cuts loom and there will be corresponding economic pressures to justify what was previously seen as necessary. Some might ask whether it would be better to instead allocate scarce financial resources to mass computer tablet purchase – with “virtual staff rides” and self-study activities built in as software? Historical staff rides may be valued, but they are certainly not sacred. As Carol Reardon recounts in her book Soldiers and Scholars, historical staff riding was largely absent in the U.S. Army from 1915 through the 1970s.

More specifically, critics charge that historical staff rides lack pedagogical framework, historical rigor, and that they suffer from the age of a twenty-seven year old guide to the activity (William G. Robertson’s The Staff Ride). This essay first engages with these criticisms. Second, the essay suggests applicable educational theory and strategic assessment frameworks. Third, the essay describes an ideal employment of these changes for the most commonly attended American historical staff ride: Gettysburg. Thus, this paper provides an exportable model to other historical staff rides. In short, The Staff Ride requires an update, a “Version 2.0,” in order to preserve the historical staff ride as a critical learning tool that emphasizes the physicality of military judgment to the Profession of Arms.

The Staff Ride, Version 1.0

Americans have built a historical staff ride tradition that dates back to 1906. The key date, however, is 1987, when William G. Robertson published the definitive guide to historical staff riding: The Staff Ride. He defined the event as consisting of “systematic preliminary study of a selected campaign, an extensive visit to the actual sides associated with that campaign, and an opportunity to integrate the lessons derived from each.” He also wrote that “its sole purpose is to further the professional development of U.S. Army leaders.” Lastly, Robertson covered how the staff ride was
to achieve this result, “What the student – the professional soldier – must achieve is what German military theorist Karl von Clausewitz in *On War* defined as *critical analysis*: determine the facts, establish cause and effect, and analyze the results.”\(^\text{14}\)

**Lack of Pedagogical Structure**

The first criticism of the historical staff ride has been the lack of any investigation of the activity’s educational value. Nick Lloyd of King’s College London has pointedly asked, “[H]as there been any critical analysis of the pedagogical value of [staff rides]?”\(^\text{15}\) He responds to his own query, that, “Despite the growing consensus about battlefield tours and staff rides, the available literature remains extremely limited.”\(^\text{16}\) Lloyd observed that in a six-article special edition of *Defence Studies* on historical staff rides, “there were not references to any works on educational theory.”\(^\text{17}\) Lastly, Lloyd assessed the reason why: it is assumed that “these exercises are useful because of the intrinsic value of ‘being there’.”\(^\text{18}\)

It is hard to refute Lloyd’s basic point – the historical staff ride wholly lacks any explicit educational foundation or pedagogical structure. Some would argue that this is not necessary; however this seems reasonable considering the expense historical staff rides entail. Travel costs, hotel bills, and food for masses of hungry military people – it all adds up.

**Insufficient Historical Rigor**

Another complaint is a lack of historical depth. As West Point History Professor Eugenia Kiesling has written, “More often than not, the modern ‘historical’ staff ride aims not at discovery about the past but at illustration of received wisdom with historical details dismissed as trees obscuring the forest.”\(^\text{19}\) Kiesling argues that history is mined in such a way as to increase the likelihood the digger will find something (usually fool’s gold). Historical detail is overlooked in dangerous ways to arrive at “lessons” to carry forward. This argument gains support from the words of British strategist Basil H. Liddell Hart:

> It is only common sense to say that we cannot hope to build up a true doctrine of war except from true lessons, and the lessons cannot be true unless based on true facts, and the facts cannot be true unless we probe for them in a purely scientific spirit.\(^\text{20}\)

It seems here that Kiesling has identified a useful point. Factual history does provide a foundation upon which to build the historical staff ride experience. As such, this paper counsels that the term of art for the event title be returned to a former moniker, the “historical staff ride.”\(^\text{21}\)

Upon reflection, however, it seems this is more an issue of focus. On a historical staff ride, there are two activities occurring in parallel – military historical research and specific study of the conduct of military affairs. On balance, one ought to ask if the historical staff ride should be more about history or military judgment? Considering that attendees will necessarily be time-limited, this question is critical.
Robertson comments on this in *The Staff Ride*: “The commander should view the staff ride as a part of his training program to develop his subordinates,” and that “the staff ride is a continuing professional development exercise.” Moreover, R.A.M.S. Melvin of the British Army commented: “a staff ride is a specific military activity,” which “concentrates more on the analysis of operations rather than on providing a historical narrative.” Interestingly, historian Jon Sumida has addressed this very subject in his recent book, *Decoding Clausewitz*, and is worth considering at length:

In Clausewitizian reenactment, historical authenticity is less important than intellectual and emotional verisimilitude. This is because the aim of reenactment is not the imitation of the behavior of the historical actor, but replication of conditions of decision-making that pose comparable, if not the actual, intellectual and moral challenges of the historical case. The product of such a substitute for actual experience is supposed to be improved intuition, which Clausewitz regarded as, among other things, the main antidote to the negative effects of general friction.

Therefore, on balance, favoring military affairs seems appropriate when one considers the target audience. As military scholar Don Snider has said, “The practice of the military professional [is] the repetitive exercise of discretionary judgment…[more specifically], independent judgments of high moral content.” Viewed with this lens, history is clearly important, but a secondary consideration when compared with the study of battlefield judgment for this audience.

Kiesling's corollary criticism is more cutting: “As staff rides have become common, they have tended to shed some of their essential features and have become, instead, tours.” She finds that the implementation is often without rigor. As she puts it, “Not every trip to a battlefield is a staff ride. Most are not.” Specifically, she describes that most staff rides “probably spend less time” considering General Robert E. Lee's decision to attack on the third day than Colonel Joshua L. Chamberlain’s tactical leadership the previous day. Thus, today’s staff rides focus not on decision-making but on the “individual decision-maker” which devolves into “hero worship.” At best this instance misses the staff ride’s point, at worst this amounts to a clear case of apathy within the Profession of Arms. This criticism must be avoided. One cannot improve judgment by simply studying the actions of a few individuals or events; one must dissect the conduct of war at several levels and from multiple perspectives to improve judgment as a member of the Profession of Arms.

**Educational and Strategic Frameworks**

The last major source of criticism also gains traction, as the seminal guide publication, *The Staff Ride*, is twenty-seven years old. As such, it seems appropriate to make modest adjustments to ensure the historical staff ride stays relevant. This paper will explicitly integrate both educational and strategic theoretical frameworks in order to improve the historical staff ride experience. As education scholar Kurt Lewin wryly observed, “There is nothing so practical as a good theory.”

Beginning with educational theory, Lloyd’s paper suggests David A. Kolb’s experiential learning model as an educational framework. Considering the endeavor this paper endorses Lloyd’s view. Specifically, Kolb defined
experiential learning as “the process whereby knowledge is created through the transformation of experience.”

For this process to work, Kolb envisions the learner passing through four stages (Experiential Learning Model at left): “concrete experience; reflective observation; abstract conceptualization; and active experimentation.”

The second challenge is how to embed a strategic framework within the historical staff ride to improve study of judgment. The Staff Ride states that an objective is to “provide an analytical framework for the systematic study of campaigns and battles.” Yet Robertson does not follow this up with any suggestion for what might be a basic, generalized framework to enable the study of conflict. This paper advocates for a framework based upon Colin Gray’s concise observation that, “War has a constant nature, but an ever-changing character.” There are some things about war that follow “age-old truths.” For example, “Time and space still matter. Soldiers are still human. Friction and misunderstanding are ever present.” These are objective conditions of war – true for all individuals at all times. Oppositely, there are subjective concepts about warfare that are constantly changing – some examples would be uniforms, weapons, technology, and information sharing and use.

Thus, this paper’s objective is to integrate Kolb’s experiential learning theory and Gray’s strategic framework into Robertson’s seminal work on the historical staff ride. What follows is an attempt to describe the ideal staff ride process (“Version 2.0”) according to the three phases outlined in The Staff Ride.

**Preliminary Study Phase**

Historical staff rides begin with preliminary study. Robertson defines the “optimum” experience as combining “lecture, individual study, and group discussion moderated by the instructor team.” He suggests, “creating mini-experts on particular subtopics” in an effort to generate “lively discussion and divergent viewpoints among participants.” This phase merits minimal adjustment, however, the challenge still exists to enable the educational and strategic frameworks to be fully implemented in the Field Study and Integration Phases. One need also be mindful of Kiesling’s criticism, which suggests that many historical staff rides lack any true scholarship. Logically, one needs to know what happened at the battle, in general, in order to actively participate in Kolb’s experiential learning cycle. Moreover, one needs to have a sense of context in order to contribute to an analysis, which separates war’s nature from temporal warfare characteristics.

Therefore, to implement educational and strategic frameworks into a notional Gettysburg historical staff ride, one ought to conduct three events.

**Preliminary Event One:** Broad history lecture on the origins of the war, preferably by a professional historian.

**Preliminary Event Two:** Small group discussion with historical staff ride leadership on the battle’s main historical contours. To prepare, this paper recommends the short (109-page) book, Gettysburg: The Final Fury by Pulitzer Prize-winning author Bruce Catton.
Preliminary Event Three: “Functional Briefings” by historical staff ride participants. While on the battlefield, the majority of characters and events are related to direct combat. These operations heavily favor what would be considered contemporary “maneuver” branches (i.e. Infantry, Armor, Cavalry, Aviation). Additionally, fires (Field Artillery, Air Defense Artillery), mobility (Engineers), logistics, transportation, and signal are often discussed while on the battlefield. There are, however, other functions that provide critical context for participants in the Field Study Phase. This essay suggests short (perhaps four to five minute) briefings on these functional topics, subject to time availability. Topics might include:

- Infantry: weapons
- Cavalry: role
- Intelligence: geography; spies
- Finance: how soldiers were paid; economic cost of the war
- Adjutant General: unit insignia; enlistments; battle and war dead figures
- Chemical Corps: literal fog of war – how smoke obscured battle
- Medical Corps: surgery (Sickles); death by type; Lee’s heart condition
- Judge Advocate General: Lieber’s code
- Chaplain Corps: Father Corby

Field Study Phase

The Staff Ride is vague about the actual time spent on the battlefield. Perhaps this was intentional so as to provide maximum flexibility to the historical staff ride leadership, but it might have resulted in some of the negative commentary addressed at the beginning of this essay. The first issue is selection of stands, which is entirely dependent upon time and physical limitations. There are many historical staff ride guides that cover in great depth the selection of stands. The goal in selecting which topics to address is to move beyond a simple recreation of what happened. This is important, and ought to be considered necessary, but is clearly not sufficient as a military relevant activity. One must truly “get inside” the heads of the actors involved. Therefore, primary sources, compiled in compendiums like the U.S. Army War College’s Guide to the Battle of Gettysburg are critical.

What follows are some examples of potential Gettysburg sites that lend themselves well to suitable “nature of war” topics which maximize discussion on Gray’s strategic framework:

- “Strategic Judgment” (Introduction stand)
- “Civilians” (Burns monument) (See also Wade story)
- “Command” (Reynolds killed)
- “Tactical Judgment” (20th Maine)
- “Operational Judgment” (Sickles/3rd Corps)
- “Duty” (1st Minnesota)
- “Uncertainty” (Meade’s Council of War/Lee’s Plans for 3 July)
- “War Termination/Reconciliation” (VA Memorial)
- “Chain of Command” (Longstreet’s Assault)
Conducting Stands

In The Staff Ride, Robertson lays out what stands entail in “Appendix A” – he counsels to include “situation,” “teaching points,” and a “vignette.” He also wrote, “The instructor team should ensure that students are correctly oriented both chronologically and spatially throughout the exercise. This orientation must be a continuous process…most students will tend to become disoriented at some point along the field study route.”

Unfortunately, that is all – this is too thin and could do with some more specificity in this critical part of the historical staff ride.

R.A.M.S. Melvin has written about the five steps to an effective stand. He begins with the terrain orientation, that “The preferred approach is to pick out a number of key reference points that give the framework for subsequent narrative and discussion, using the standard method of 'DIRECTION-DISTANCE-DESCRIPTION', working left to right, front to back.” Second, he counsels a concise historical description; third, an introduction to the discussion. Fourth, a “discussion period in which the training audience poses questions to the historians and the military directing staff”; fifth, the “Exercise Director should sum up in a few minutes, highlighting the key lessons for contemporary and future operations.”

Melvin’s work is useful as it layers on specificity – beyond what Robertson wrote in his guide. But Melvin’s process lacks the linkage to educational theory, which would likely provide a greater learning experience.

This essay suggests a simpler model for each stand:
1. Terrain orientation
2. Historical discussion of events and individuals
3. Discussion to enable contemporary reflection
4. Summary

Facilitating Discussion

Clearly, part three is the most difficult. This essay counsels use of the “Five Questions Model,” developed to adapt Kolb’s experiential learning model for classroom use. What follows is a modified version of the “Five Questions Model,” molded to connect with Gray’s strategic framework. The following questions are to guide the historical staff ride leadership in facilitating the experiential learning process:

1. **Describe:** Did you **notice** X from the battle?
2. **Interpret:** **Why** did X happen in this battle?
3. **Generalize:** Does X happen in warfare **today**? Or not? Is X part of the nature of war, or the character of conflict?
4. **Generalize:** **Why** does/doesn’t X happen in warfare today?
5. **Apply:** How can one use this knowledge to **improve military judgment** as a member of the Profession of Arms?
Integration Phase

The Staff Ride defines the integration phase as "a formal or informal opportunity for students and instructors to reflect jointly upon their experience." Robertson further states,

The Staff Ride may be conducted on the battlefield immediately following the field study phase...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.

This description is not enough. According to Kolb’s research, ceasing at informal discussion is not sufficient to enable future growth and learning from the activity. The historical staff ride ought to include a written product that follows the event – after some period of individual reflection.

Kolb & The Integration Phase

Kolb describes an active participant undertaking a concrete experience. The second step is reflection, or time out from “doing,” pausing to consider what has been done. This stage is characterized by group discussion. John Dewey’s definition of “reflective thinking” is the objective here, the “active, persistent, and careful consideration of any belief or supposed form of knowledge in the light of the grounds that support it.” This is typically the stage at which The Staff Ride culminates. However, according to Kolb, there are still two stages to complete.

Kolb’s next stage is abstract conceptualization, which is to make sense of what happened and interpret the relationships between them. Can one model them? Can one understand the relationships between them or connect to broader learning? Last comes active experimentation, which is a plan to seize on the learning and put into practice how one will test this new learning out.

To achieve this full learning process, this essay counsels that the staff ride ought to add a step beyond field study discussion. The reflection ought to be a written product, which generally addresses the prompt:

What does this historical staff ride experience mean to my future role in the Profession of Arms?

In order to answer this ultimate question, one might consider: How did this experience reinforce what I already know or believe? What challenged my ideas or surprised me? What new information interested me? What other reactions did I have to this experience? How might this experience make me a better member of the Profession of Arms?

Conclusion

The objective for this process is to develop “reflective practitioners” to enable a more thoughtful Profession of Arms. This is critical despite what former West Point
Superintendent Major General Samuel Koster said in 1970, "we’re more interested in the ‘doer’ than the ‘thinker.’"\textsuperscript{65} Clearly, military officers must be both. Army Chief of Staff Raymond Odierno recognizes this and recently called on the organization to focus on educating leaders “to grow the intellectual capacity to understand the complex contemporary security environment” and to “cultivate strategic perspective.”\textsuperscript{66} This is challenging when the budget knives are out. Justification for the historical staff ride should to be more explicit; further study is merited. This essay was an initial effort at integrating educational and strategic frameworks into a twenty-seven year old publication.

This experience ought to be updated to ensure utility and validity for another hundred years. The Staff Ride requires this “Version 2.0” in order to preserve the historical staff ride as a critical learning tool that emphasizes the physicality of military judgment to the Profession of Arms.

\textbf{Disclaimer:} This essay is an unofficial expression of opinion; the views expressed are those of the author and not necessarily those of the US Military Academy, Department of the Army, the Department of Defense, or any agency of the US government.

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resolution maps augment the text. The Defense & Strategic Studies Program there is also at work developing a mobile application for the Gettysburg Staff Ride.


10 Eugenia Kiesling, “The United States Army’s Historical Staff Rides: History and Historiography,” *Defence Studies* Volume 5, Issue 1 (2005), 49

11 Robertson, CMH Pub 70-21, 1987 (plus info above)

12 Robertson, 5.

13 Ibid.

14 Ibid, 4.


16 Ibid.

17 Ibid.

18 Ibid, 178.

19 Kiesling, 56.


22 Robertson, 6.


26 Kiesling, 54.

27 Ibid.

28 Ibid.

29 Kiesling, 55.


32 Lloyd, 179.

33 Kolb, 38. Note: author’s original italics.

34 See Kolb, 21. See also “David Kolb,” *University of Leicester*, http://www2.le.ac.uk/departments/gradschool/training/eresources/teaching/theories/kolb

35 Lloyd, 179.

36 Robertson, 6.

37 Colin S. Gray, “War – Continuity in Change, and Change in Continuity” *Parameters* (Summer 2010), 6. Note: others have made this observation – none have stated it so clearly.
39 Personal email with Colonel (Ret.) Rick Swain (October 15, 2013).
40 Robertson, 12.
41 Ibid.
46 Guelzo, 18, 178-79.
47 See Brian Mockenhaupt, Three Days in Gettysburg: An Intimate Tale of Lost Love and Divided Hearts at the Battle That Defined America (San Francisco: Byliner Original, 2013).
48 Guelzo, 22, 142-148.
49 Guelzo, 76-78, 270-275.
51 Guelzo, 122-123. See Brian LeeHan, Pale Horse at Plum Run: The First Minnesota at Gettysburg (Saint Paul, Minnesota: Minnesota Historical Society Press, 2002), 49-58.
53 Guelzo, 139-140, 374-383.
54 Guelzo, 181-182, 434-452.
55 Guelzo, 473-482
56 Robertson, Appendix A.
57 Robertson, 15.
58 Melvin, 76.
59 Ibid.
61 Robertson, 17.
62 Ibid.