

A Staff Ride for the Modern Battlefield

Lionel Beehner, PhD

Col. Liam Collins, U.S. Army

Abstract

The staff ride has long been a staple of Army instructors to educate current and future officers about the lessons of warfare. To keep the staff ride operationally relevant to modern warfare, we recommend staff rides of contemporary battlefields, or so-called warm conflict zones. These are conflicts, whether interstate or intrastate, whose hostilities have recently ceased. This allows students to safely traverse the terrain, interview field commanders, and discuss its key battles and lessons for the current character of warfare. We make the case that these staff rides should be treated more like for-credit courses than as extracurricular field trips, given the level of logistics, research, and student involvement required. We draw on evidence from recent staff rides carried out in Sri Lanka, Bosnia, and the Republic of Georgia.

As an educational tool, staff rides enjoy a long and storied history in U.S. Army circles. Prussian officers are credited with inventing the staff ride back in the mid-nineteenth century. In 1919, West Point cadets were brought to the battlefields of World War I to understand the complexity of trench warfare. Today, staff rides allow cadets to survey terrain, discuss decision-making at the tactical, operational, and strategic levels, and immerse themselves in military concepts that transcend time.

Given today's threat environment, however, there are few existing staff rides that can prepare future officers for, say, a vehicle-detonated car bomb or a cyberattack that wipes out a country's electronic infrastructure during wartime. There is no *Staff Ride Guide: Battle of Antietam* equivalent for, say, the battle at Elephant Pass in Sri Lanka or for the battle of Fallujah in Iraq.¹ Most historical staff rides have little to say about informational warfare or autonomous weapons.

While these "standard" staff rides still have a place—some lessons in leadership, decision-making under conditions of uncertain information, etc., transcend time and are just as relevant now as they were in the nineteenth or early twentieth centuries—there are also unique aspects to the modern battlefield that can only be gained by studying more recent conflicts. To keep the staff ride operationally relevant to modern warfare and pedagogically useful for strategic studies, we recommend staff

rides of *warm* battlegrounds (places where hostilities have just recently ceased). A survey of Sarajevo's terrain—which we carried out with cadets in summer 2015—can teach us more about modern sieges than one of Vicksburg. A visit to the Tamil administrative capital of Kilinochchi in Sri Lanka—like the staff ride we executed with cadets in summer 2016—can teach us more about rebel governance and the role of suicide bombing than perhaps any other battlefield, which is vital to enhance our understanding of the Islamic State. A terrain analysis of the administrative boundary line dividing the Russia-controlled South Ossetian capital of Tskhinvali and the Republic of Georgia—which we conducted in summer 2017—can demonstrate attributes of hybrid warfare fought across multiple domains.

This article makes the case that given the complexities of the contemporary battlefield, from cyberwarfare to information operations, staff rides are becoming more relevant for understanding modern war. However, we suggest ways in which they should expand and evolve to shed light on more contemporary issues, from new doctrines like multi-domain battle to advanced technologies like unmanned aerial vehicles. We also suggest ways in which they can appeal to nonmilitary audiences—for example, students of strategic studies or international relations. Namely, we

Dr. Lionel Beehner is director of research at the Modern War Institute at West Point and assistant professor at its Department of Defense and Strategic Studies. He teaches courses on military innovation and research methods. He holds an MA in international affairs from Columbia University and a PhD in political science from Yale University. Beehner is a member of *USA Today's* Board of Contributors, and formerly a term member with the Council on Foreign Relations, where from 2005 to 2007 he worked as a senior staff writer. His research examines the transnational nature of conflict and combat, civil-military relations, and limited military interventions. His writing has appeared in *Security Studies*, *Military Review*, *Parameters*, *Democracy & Security*, *Orbis*, *The Atlantic*, *Foreign Affairs*, *The New York Times*, *The Washington Post*, *The National Interest*, and *The New Republic*, among other publications.

Col. Liam Collins, U.S. Army, is director of the Modern War Institute at West Point and a career Special Forces officer who has served in a variety of special operations assignments and conducted multiple combat operations to Afghanistan and Iraq, as well as operational deployments to Bosnia, Africa, and South America. He has a bachelor's degree in mechanical engineering from the U.S. Military Academy, a master in Public Affairs and a PhD from Princeton University, and he is a member of the Council on Foreign Relations. Prior to assuming his current position as the director of Modern War Institute, Collins served as the director of West Point's Combating Terrorism Center. He has taught courses in military innovation, insurgency and counterinsurgency, comparative defense politics, research methods in strategic studies, homeland security and defense, terrorism and counterterrorism, internal conflict, international relations, American politics, and officership.

introduce the concept of a contemporary staff ride: an in-country tour of a warm battlefield, just as one would survey the Round Tops of Gettysburg, replete with role playing, *stands* (places where the group stops to discuss key points or events) of battles, and in-depth discussions of terrain and tactics.

Put simply, we argue that contemporary staff rides should “go big,” insofar as they should be treated more as a for-credit course than an extracurricular event. Make no mistake, this will involve an extra layer of logistics, time-intensive preparation, readings, and hands-on ethnographic fieldwork away from the battlefield. But, the payoff is greater in terms of the lessons learned, and the ability to link theory with practice is worth the time and effort. Done well, no other pedagogical exercise is more useful to teaching strategic studies.

What Makes a Contemporary Staff Ride Different

It is important to distinguish a contemporary staff ride from other exercises that leverage the use of terrain as a learning tool: tactical exercises without troops (TEWT), battlefield tours, and staff rides (see table, page 69). “A tactical exercise without troops uses terrain, but not history, as a teaching vehicle.”² During a TEWT, a hypothetical scenario is played out using current doctrine on actual terrain. The scenario could take place at a historical battlefield or anywhere else. The purpose is to use the terrain to facilitate learning in a way that cannot be achieved to the same effect in a classroom or tactical operations center (TOC) using maps or imagery. TEWTs almost exclusively fall under the domain of the military.

A historical battlefield tour, by contrast, uses both terrain and history as a teaching vehicle. Like a TEWT, it is primarily a field study, but it may include a limited preliminary study phase, so that participants are familiar with the battle and where it fits into the larger war. A historical battlefield tour is conducted in a lecture format, where a tour guide, professor, or other expert primarily lectures and the participants simply listen and ask questions.

The staff ride also uses terrain and history, but what sets it apart from the historical battlefield tour is the depth of study. In addition to the field study phase, the staff ride also includes a preliminary study and integration phase. The preliminary study requires “maximum student involvement before arrival at the site to guarantee thought, analysis and discussion.”³ The staff ride concludes with an integration phase where participants have the opportunity to integrate the lessons derived from the preliminary and field study phases. “A staff ride thus links a historical event, systematic preliminary study, and actual terrain to produce battle analysis in three dimensions.”⁴ Without effective preparation, a staff ride becomes more of an enhanced battlefield tour than a staff ride.

The military uses staff rides to drive home tactical or leadership lessons. Schools and universities use them to gain a better understanding of the history, leadership lessons,

Table. Tactical Exercise without Troops, Battlefield Tours, and Staff Rides

| | Tactical exercise without troops | Battlefield tour | Staff ride | Warm battlefield staff ride |
|----------|----------------------------------|---|---|--|
| Audience | Military | Military academic corporate tourist | Military academic limited corporate | Military academic |
| Phases | · Field study | · Limited preliminary study · Field study- | · Preliminary study · Field study · Integration | · Preliminary study · Field study · Integration · Research report |

(Table by authors)

or other lessons that are being taught in the class. Finally, companies use staff rides as team bonding experiences to drive home leadership lessons.

A staff ride of a contemporary war also relies on terrain and history as a teaching vehicle. Likewise, it has a preliminary study phase, a field study phase, and an integration phase. But, what sets it apart from a traditional staff ride is that it is fundamentally a research trip with the purpose of generating new knowledge or understanding of the battle or conflict itself to better understand contemporary conflict. It often seeks to answer the following questions: What was the root cause of the conflict? Why was violence conducted in the manner that it was? How can we understand conflict termination and winning the peace? This is what gives such staff rides wider appeal to nonmilitary audiences, such as strategic studies departments and policy programs.

Best Practices

The U.S. Army Center of Military History divides its planning module for staff rides into three phases: preliminary study, field study, and integration.⁵ For a contemporary staff ride, much of the legwork occurs during the preliminary phase. The time and energy required to conduct a contemporary staff ride effectively for both the instructor and student often exceeds that of a three-credit-hour college course. Thus, for professional military education schools or universities looking to conduct them, it should be possible to treat it as a course and give students credit for their work. In terms of preparation, treat the staff ride more like research fieldwork than an organized tour of a battlefield. Much of the learning that goes on is away from the actual battlefield. It is in the local people your students meet, the cultures they immerse themselves in, and the discovery

process students experience in unpacking a modern conflict and its infinite variables. A contemporary staff ride is really an exercise in ethnography.

Preliminary Study Phase

In a staff ride, “the purpose of the preliminary study phase is to prepare the student for the visit to the site of the selected campaign.”⁶ The study can take the form of lectures or self-study, or a combination of both. In the preliminary study, students must accomplish four basic tasks: (1) understand the purpose, (2) be actively involved, (3) acquire basic knowledge of the campaign (e.g., weapons used; terrain; climate; chronology; organization, strength, and doctrine of the forces; personality and biographical information on significant leaders), and (4) “develop an intellectual perception of the campaign.”⁷ For students of strategic studies, the tactical details of an individual battle or campaign may be less relevant to the big-picture strategic questions. These kinds of decisions should be made by the instructor beforehand.

A staff ride of a contemporary battlefield is more research intensive because there is no staff ride guidebook that can be pulled off the shelf. Thus, it includes additional tasks: (1) review the academic literature related to conflict in general, (2) determine the research goals, and (3) develop the research plan to accomplish those goals. In addition to developing the content for the staff ride, you must plan the logistics and the daily itinerary.

This phase also should include brief (at least a few days to a whole week) preparatory classroom time to provide students some background of the conflict, a primer on qualitative research methods, and some theory to set up the staff ride. This should be broken into various sections.

Determine research goals. It is not possible to study everything related to a chosen conflict. If you plan to do a research report, you must identify how your research contributes to a greater understanding of the conflict. If the target audience is cadets studying the tactical level of conflict, then a contemporary staff ride will focus more on terrain and individual battles and less on the larger strategic picture or international implications: How does one conduct an urban siege in a dense city? For an internal conflict, it may focus on a certain part of the conflict: Why did the insurgent organize the way it did? How did outside support influence the outcome? Why was the counterinsurgency strategy effective? Why was disarmament, demobilization, and reintegration so difficult? When we went to Georgia, we wanted to understand Russia’s use of cyber warfare, so our questions included: How is a cyber campaign coordinated with the conventional battle? How did Russia apply psychological and information warfare? Your research goals should be consistent with your discussion questions. Try to make the research as student-driven as possible, partly to alleviate work on your behalf but also to allow them to experience how one conducts fieldwork in a postconflict zone.

Develop a research plan. Again, a staff ride is not only a tour of a contemporary battlefield or role playing of key characters. It also involves a level of inductive research and ethnography, including interviews with military officials, combatants, activists, journalists, and others in the local populace. It involves observation of places where key events took place or remnants of the war (e.g., refugee camps). It involves a careful reading of as much primary material available (public testimony, memoirs, truth and reconciliation files, speeches by public officials). Who do you need to interview to accomplish your research goals? Who can facilitate your visit? Ideally, you will want to talk to combatants, local leaders, politicians, nongovernment members, and even family members. Talking to one Tamil widow whose husband was snatched and thrown into a white van by Sinhalese officials and remains missing was particularly impactful on the cadets. Realizing that time is limited, we recommend giving students a one-day crash course in ethnographic methods that includes best practices in interview techniques, ethics, observation, and oral history. Logistical considerations must go hand-in-hand when developing the research plan.

Identify relevant theory. The foundation of a successful staff ride is theory, not history. All modern war is relevant to military theory. Grounding the staff ride in theories of international politics and strategic studies will help students understand the important lessons of the battle, as well as the larger strategy behind the overarching campaign. This should be tailored to the specific conflict. For internal conflicts, it is important to introduce insurgency and counterinsurgency theory so students understand the root causes of violence. For an ethnic or religious civil war, it is more important to understand the theoretical and empirical literature on ethnic conflict and failed states. Without theory, a staff ride will feel academically unmoored, a set of stands serving no larger intellectual purpose. Theory will also help students and cadets make sense of the decisions made by commanders and policymakers. It will also help them apply the lessons to ongoing conflicts they may one day face firsthand.

Build the syllabus. Provide a detailed syllabus of readings ahead of the trip, including whatever preparatory coursework or class time is required. Students should be advised to download or print all articles ahead of time, given the limited internet of some places. (We recommend using tablets for easy accessibility.) The preparation session should not only introduce the participants of the staff ride but also introduce the war and different theories on conflict. Start general and provide basic information about the country and the conflict, including maps, outlines of the main characters, the international context, and other features of the conflict (role of religion, ideology, ethnicity, etc.). The best sources for this are secondary (e.g., newspaper articles, history books). Once the war has been outlined, then work in more primary documents (e.g., memoirs, speeches, etc.). The syllabus is shaped by the research goals of the project.

Develop the logistics plan. Most contemporary battlefields are not like Gettysburg or Antietam. There are no guides or signposts, no observatory towers or copse of trees to orient visitors. This makes it difficult, but not impossible, to plan one's staff ride and

determine the best locations to discuss the terrain. First, we recommend hiring a local driver, a local guide and interpreter, and take along a subject-matter expert—either a researcher or, preferably, a postdoctoral researcher—who can provide greater context on the war. Second, there may be visas and paperwork to contend with. For military organizations, it is recommended to make contact with the appropriate U.S. embassy's Defense Attaché Office. Finally, extreme caution should be taken when traversing these battlefields. In a staff ride of, say, the Balkans or Lebanon, there are still parts of the country pockmarked with unexploded ordnance.

Finalize the itinerary. An itinerary should be highly structured so there are no large gaps in the schedule, yet flexible enough to account for delays (which are inevitable)—traffic, meetings running late, or late additions to your itinerary. For a typical day, we recommend an hour of classroom in the morning, followed by interviews or meetings with officials, academics, journalists, or local representatives, with immersion or observation in the afternoons or evenings. Cadets or students should be assigned either a battle to discuss or a character to role play. Keep it focused on learning objectives, but it should also be fun. On a recent staff ride of the 2008 Russia-Georgia conflict, we had a participant take off his shirt to role play Vladimir Putin.

Determine the stands. A stand is a battle or event location at which the group stops for discussion. A normal staff ride can include several dozen stands. We recommend narrowing it down to under ten, depending on the conflict. Each stand should last thirty to sixty minutes. Let these be student-run but staff-guided as much as possible. Be sure students orient the group to both the operational terrain and time. For role-playing characters, try to avoid students just reciting a biography cribbed from Wikipedia. Encourage them to bring lots of energy to get over the jet lag and to get into character; some may even bring props. The more in character, the better. On one staff ride to Germany, a student was playing Helmuth von Moltke the Younger so well, it encouraged the other students to get into a debate with him as if he really were Moltke. Also, advanced reconnaissance is recommended to case out one's surroundings, but it is almost impossible when carrying out a staff ride abroad. Reliable local maps are essential for any staff ride. Survey the terrain online beforehand. Check the weather, as conditions can fluctuate throughout the day, month, or year. When determining stands, allow for some flexibility in your itinerary and build into your agenda time for traffic, restroom breaks, and other obstacles that inevitably arise.

Field Study Phase

The second phase of any staff ride is the field study phase. For the staff ride, this serves to drive home the relevant lessons for professional development by reinforcing the analytical conclusions developed during the preliminary study phase. The staff

ride is designed to visit significant sites and designed in such a way to be chronological while attempting to minimize backtracking. At each planned stand, the facilitator leads the discussion, orienting the students chronologically and spatially and then having the students in designated roles describe what occurred and what their character was thinking, followed by the facilitator-led discussion. The main difference between a contemporary staff ride and a standard staff ride is that the field study phase for the contemporary staff ride is much more resource intensive, insofar as it involves interviews and somewhat trial and error to figure out where to stop on the ground because there is no existing staff ride book telling you to stop at a specific intersection to have a discussion. We still recommend supplying students with character packets, visual aids, and readings to minimize classroom time in country. And, we recommend the field study portion include a robust mix of classroom time, interviews, observation, immersion, and staff ride of battlefields.

Classroom. It is important to include some level of in-country classroom time but not too much, as this defeats the purpose of traveling halfway around the globe. But, it is vital to have time to discuss among the students the sites you see, the interviews carried out, the students' impressions, and so forth. This will contribute to their level of understanding of their character's role, their stand, and the larger significance of the battle under study. We recommend no more than two hours of lecture time per day (one hour preferred) while in country; this can be accomplished by holding class on the bus or van, holding less-structured discussions over dinner, or bringing in local guest speakers. Bring handouts, as the hotel's conference room facilities may have spotty wireless or lack multimedia facilities. We recommend class in the morning to set the day's battle rhythm and prepare your students for who they will be meeting and what they will be seeing for the rest of the day. To that end, you should bring along detailed instructor notes that include information on stands and that lay out each day's itinerary (addresses, biographies of interviewees, etc.).

Interviews. Interviews are a vital part of a warm-conflict staff ride. Invariably, these are semistructured and open-ended. If they are too scripted, they can yield little beyond canned answers or talking points. Be prepared by reading up on your interviewees. We recommend assigning each day a "rapporteur," or note taker, to avoid students needlessly duplicating each other's efforts, or worse, a collective-action problem with no one taking notes. One consideration is that sometimes it is best to "divide and conquer." Depending on the size of the group, there is the real potential to intimidate the interviewee if too many people attend.

Observation. In many ways, a contemporary staff ride is an ethnography of place. This requires getting out and observing one's surroundings as well as the local customs, norms, and behaviors. This will help students put the conflict into a larger cultural, social, and demographic context. A good example from the Balkans might be the observation that the three warring groups show very few discernible ethnic features to distinguish them from one another. For observation, we recommend ei-

ther breaking into smaller groups or giving students an assignment to describe a place they observed and how it captures the local culture.

Immersion. Immersion should also be used to complement interviews wherever possible, and can take many forms. On a recent staff ride in the post-Soviet state of Georgia, for example, we went for a hike in the Caucasus Mountains. If you are doing a staff ride to Normandy, you may not want to start the formal class at six in the morning, but that is a perfect time to go for a run on the beach followed by a quick dip in the channel to get a feel for what it would have been like during the initial invasion.

Integration Phase


The final phase of the staff ride is maybe the most important, as it allows staff and students to reflect on their experience and synthesize the lessons learned to apply them to their own operations. Integration can take many forms. It can occur directly on the battlefield, in the classroom, on the bus, or as part of a group or individual assignment. When possible, it should be immediate and interactive. Focus on the following when crafting discussion questions:

Space and terrain. Note details of *where* interviews and meetings are conducted. In a meeting with a European ambassador in Tbilisi, for example, it was pointed out that the portrait of the president was buried along a cluttered side wall, out of sight to most visitors. The hidden meaning of this could be interpreted as a lack of support for the president. The terrain of a warm conflict staff ride is more likely to resemble what it did on the day of battle. How does modern terrain shape our understanding of war and tactical decision-making?

Discussion questions. Depending on the intended audience, these can include questions related to leadership (Did the officer make the correct decision?), tactics (If you were in the officer's position, what would you have done?), strategy (Did the battle achieve its objective?), theory (Did the campaign uphold our theories of how wars end?), morality (Is suicide bombing justifiable for a weaker opponent?), or civil-military relations (Was the civilian leadership interfering with the military operations?), among other topics.

Assignments and presentations. A staff ride can encompass one central question or theme, or it can tackle a number of sub-themes. We recommend assigning written assignments each night to let students internalize the lessons of the day and then share with the wider group (we also do this over dinner). We also recommend formal in-class presentations as a way of letting the students or cadets "own" as much as possible of the research and information collected. This also will provide greater structure for the non-staff ride portions of the trip. The assignments should all inform the larger objectives of the staff ride.

Conclusion

Staff rides are the ideal teaching tool for today's soldiers and civilian strategists to appreciate and understand modern or multi-domain battle, to visualize complex terrain, and to draw lessons from faraway conflicts relevant to their future careers. They allow cadets to bridge the theory of the classroom with the operational lessons of an actual battle in a way no classroom text or PowerPoint presentation can replicate. This applies to both military and nonmilitary students. In this article, we made the case for contemporary staff rides and proposed a set of best practices to assure success in their design and execution. Like the West Point cadets discovered after World War I, the most engaging and pedagogically effective way to study the modern battlefield is to experience it first-hand. 

Notes

1. Ted Ballard, *Staff Ride Guide: Battle of Antietam* (Washington, DC: U.S. Center of Military History, 1987).
2. William G. Robertson, *The Staff Ride* (Washington, DC: U.S. Center of Military History, 1987), 5, accessed 19 March 2018, [https://history.army.mil/html/books/070/70-21/CMH_Pub_70-21\(2014\).pdf](https://history.army.mil/html/books/070/70-21/CMH_Pub_70-21(2014).pdf).
3. *Ibid.*
4. *Ibid.*
5. *Ibid.*
6. *Ibid.*, 11.
7. *Ibid.*, 13.