



# A Leader's Guide to Conducting Research Staff Rides

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## Preface

The genesis of the contemporary battlefield assessment—a research staff ride to a recent conflict—started in the spring of 2015. Maj. John Spencer, Maj. Matt Cavanaugh, Maj. Mike Jackson, and I were brainstorming the idea of the Modern War Institute. At some point, Matt stumbled across the picture to the right—a picture of cadets departing for a two-month-long study of the Great War battlefields in Europe less than a year after the war's end. It made us think, If we studied recent conflicts in 1919, why aren't we studying recent conflicts in a similar manner in 2015?

We realized we could not bring cadets to ongoing conflicts like Afghanistan and Iraq, but there were many other recent conflicts that we could and should be studying. These conflicts remained largely understudied by the US military, yet they could inform how warfare is likely to be fought in the near future. At the time, I had recently completed my dissertation on military innovation, and one of the cases I analyzed was



Cadets departing for a two-month-long survey of Great War European battlefields in June 1919.

the development of the mine-resistant, ambush-protected (MRAP) vehicle—a vehicle whose advantages against improvised explosive devices (IEDs) was relatively unknown in the US military. The few officers who did understand the MRAP's advantages had grown up in South Africa and were familiar with the vehicle from the Rhodesian civil war. Had we studied the Rhodesian civil war, we likely would have acquired the MRAP sooner and saved dozens or hundreds of service members' lives. It was also clear, at the time, that if the United States had studied the Russian invasion of Georgia in 2008 more, it is less likely that it would have been caught by surprise when Russian forces seized Crimea in 2014 and supported separatists in Ukraine's Donbas region.

Thus, our idea was to re-create the cadet experience of 1919. But lacking the funds to take more than a handful of cadets, we concluded that our best approach was to have a small mix of faculty and cadets with the explicit purpose of producing a report following the immersive research experience so that others in the Army could learn from our findings. Another goal was to infuse the lessons that we learned into the cadet curriculum at the United States Military Academy.

As part of our Defense and Strategic Studies curriculum, we had led staff rides for our cadets and departmental faculty to Gettysburg, Antietam, and Saratoga. While they were useful for studying strategy, tactics, terrain, principles of war, and decision-making, those staff rides had little to offer when considering contemporary threats like electronic warfare, information operations, cyber warfare, or unmanned aircraft systems. So one of my first priorities after getting the Modern War Institute established was to conduct our first contemporary battlefield analysis.

In March 2015 the superintendent of the United States Military Academy agreed to establish the institute, and a generous donor agreed to provide the funding to hire a civilian faculty member and support the first contemporary battlefield assessment. The idea became a reality in a matter of a few short weeks. Maj. Jackson quickly planned and executed the initial contemporary battlefield assessment to Bosnia to study the Siege of Sarajevo, in the summer of 2015, bringing five cadets with him.

After Dr. Lionel Beehner joined the Modern War Institute team in the summer of 2015, he led the planning and execution for subsequent contemporary battlefield assessments to Sri Lanka (2016), the Republic of Georgia (2017), Colombia (2018), the Baltics and Ukraine (2018), and India (2019). We conducted these research staff rides as for-credit courses and produced research reports following each.<sup>1</sup>

The feedback from the students and faculty who have participated in the contemporary battlefield assessments has been so positive that we felt it was important to try to share our experience with others. In that vein, we produced an article and a forthcoming chapter that provide an overview of the contemporary battlefield staff ride, or research staff ride as we called them in each; but word limitations prevented us from providing a more useful how-to guide.<sup>2</sup>

Thus, Dr. Beehner and I created this guide to help others who may want to conduct their own research staff ride for their students. As a final note, we feel that this guide is applicable beyond the study of conflict—it provides a road map for any research staff ride, a team-building exercise that we

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<sup>1</sup> See, for example, Beehner, Collins, et al., *Taming of the Tigers*; Beehner, Collins, Ferenzi, et al., *Analyzing the Russian Way of War*; Beehner and Collins, *Welcome to the Jungle*; Beehner and Collins, *Dangerous Myths*.

<sup>2</sup> Beehner and Collins, “Staff Ride for the Modern Battlefield”; Beehner, Collins, Goldstein, and Musteen, “Staff Rides 2.0.”

hope serves as a useful learning approach for security studies programs, professional military education programs, military units, and others who seek to conduct research staff rides.



Col. (ret.) Liam Collins, PhD  
Founding Director, Modern War Institute

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## Introduction

Dating back to the mid-nineteenth century, armies have been using the “modern” staff ride, developed by the chief of staff of the Prussian Army, Helmuth von Moltke, to educate their officers.<sup>3</sup> The appeal and utility of these exercises transcend time. Staff rides are more than guided battlefield tours; they are tools that provide an unparalleled immersive learning experience, as they allow participants to research characters, discuss the various options or leadership quandaries commanders confronted, and orient themselves to the importance of complex terrain and topography. Through participant observation, discussion, and reflection using the actual terrain where the battles were fought, participants are able to learn more than they could in a classroom.<sup>4</sup>

Traditionally, staff rides bring participants to walk the hallowed grounds of critical battles like the American Revolutionary War's Battle of Saratoga or the American Civil War's Battles of Gettysburg and Antietam. Abroad, staff rides tend to entail seminal battles of World War I or II, such as the Somme, Verdun, or Normandy, or from the Napoleonic Wars, such as Austerlitz or Waterloo.

But there is some debate as to how operationally relevant staff rides are on battlefields of the nineteenth or early to mid-twentieth century, given the complexity of the contemporary battlefield, the advent of new technologies and doctrines, and the changing character of warfare. In today's threat environment, there are few historical 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. While they may hold valuable lessons in leadership or principles of war, which are timeless, most historical staff rides have little to say about information warfare or autonomous weapons.

To keep staff rides operationally relevant to modern war, we recommend staff rides of what we call contemporary battlefields, sometimes referred to as warm conflict zones. These include interstate, intrastate, or extraterritorial conflicts whose hostilities have recently ceased. These can also include staff rides of major events like a cyberattack, terrorist attack, or campaign of ethnic cleansing in a country nominally not at war. Regardless, such a staff ride allows participants to safely traverse the terrain, interview field commanders, discuss key battles with actual combatants, and discuss lessons

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<sup>3</sup> Becker and Burke, “Instructional Staff Rides,” 511.

<sup>4</sup> Beehner, Collins, Goldstein, and Musteen, “Staff Rides 2.0.”

for the current character of warfare. Examples include the Lebanese civil war (1975–90), the Rwandan genocide (1994), the Bosnian War (1992–1995), the Northern Ireland Troubles (1968–98), the Sri Lankan civil war (1983–2009), and the Colombian civil war (1964–2016).

As an educational tool, staff rides of warm conflict zones are not unique to this era. Prussian officers are credited with inventing the staff ride in the mid-nineteenth century. In 1919, West Point cadets traveled to the battlefields of World War I to understand the complexity of trench warfare less than a year after the war's end.<sup>5</sup>

A contemporary battlefield assessment is a dynamic way to bridge the theory students learn about war in the classroom—from Clausewitz to counterinsurgency—with presentations, vignettes, and lessons from the contemporary battlefield. It serves as a pedagogical tool to improve students' understanding of important issues related to strategic studies and military science, like urban or siege warfare (Sarajevo), civil war termination (Sri Lanka, Colombia), hybrid warfare (Republic of Georgia, Ukraine), terrorism (Mumbai, London, Madrid), or humanitarian interventions (Rwanda).

As professors, we have led dozens of staff rides and contemporary battlefield assessments to a wide range of conflicts. We have led staff rides for cadets and officers for the Revolutionary War (Saratoga) and the Civil War (Gettysburg and Antietam) and have participated in staff rides for the Napoleonic Wars (Austerlitz), World War I (Somme, Cambrai, Liege, Ypres), and World War II (D-Day). Additionally, we have led contemporary battlefield assessments to Sri Lanka, Colombia, the Republic of Georgia, the Baltics and Ukraine, and India.

While traditional staff rides are useful for driving home lessons on leadership, principles of war, decision-making, strategy, and tactics, they are far less useful for learning about current tactics, capabilities, and how technological advances impact leadership, decision-making, and principles of war. Based on course feedback and assignments, we find that traditional staff rides improve student learning better than classroom instruction alone, but the learning experience from a contemporary battlefield assessment is even greater. What we term a contemporary battlefield assessment is not solely a battlefield reenactment but rather a dynamic and immersive experience that uses a staff ride—a visit to the location of a historical event that includes systematic preliminary study of the event,

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<sup>5</sup> Beehner and Collins, "Staff Ride for the Modern Battlefield," 66.

extensive visit to the sites associated with the event, and the integration of the lessons that result from the study—to produce new knowledge or understanding.

A staff ride's educational benefits are grounded in experiential learning theory, in which action, dialogue, and reflection produce greater learning potential than learning in the classroom alone. Thus, as a pedagogical approach, a staff ride offers great potential, but it remains largely underutilized outside the military. Yet its use has expanded in recent years. The US Forest Service adopted the use of staff rides in 1999 to increase learning on wildfire training; likewise, the US National Park Service adopted staff rides for public health education.<sup>6</sup>

We make the case for strategic studies programs, not just military colleges or professional military education programs, to incorporate research staff rides into their curricula, during spring or fall breaks, or during the summer. We also feel that the research staff ride approach can be applied to gain greater learning for just about any historical event: the American civil rights movement; the Cold War<sup>7</sup>; the Chernobyl disaster; the 2008 Mumbai terrorist attacks; or the Ferguson, Missouri, protests. Thus, it offers great potential beyond traditional military audiences.

This leader's guide provides a template and list for carrying out a successful research staff ride. First, we outline the logic and value of studying contemporary battlefields. Next, we compare and contrast the research staff ride from other pedagogical approaches that use terrain to enhance learning and leverage learning theory to explain why the research staff ride is such an effective learning tool. We then examine each phase of the research staff ride, providing best practices for each phase: design, preliminary study, field study, and integration. One final comment: with modern technology, virtual staff rides now offer greater learning potential than ever. However, this guide is aimed at research staff rides conducted in the field, so virtual staff rides will not be addressed in this guide.

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<sup>6</sup> Becker and Burke, "Instructional Staff Rides," 512.

<sup>7</sup> West Point's Department of History has conducted a Cold War staff ride for several years and teamed up with West Point's Department of Law and Department of English and Philosophy to conduct an American civil rights staff ride. See Musteen, "Nontraditional Staff Rides at West Point."

## Chapter I — Why Study Contemporary Battlefields?

Staff rides are more than guided tours of historical battlefields; they include systematic preliminary study of the event, extensive visits to the sites associated with the event, and the integration of the lessons that result from the study. The same applies for contemporary battlefield assessments (or other research staff rides); only, they require more time, resourcefulness, intellectual curiosity, improvisation, and patience. The advantages of exploring these literal and figurative battlefields are manifold:

- *Tactical and operational relevancy.* Warm conflict zones provide lessons on the latest in military strategy, doctrinal innovation, and technology. The threat environment should more closely resemble the present era than, say, studying the 1805 Battle of Austerlitz. A nineteenth-century battle cannot present modern-day challenges of how electronic warfare and unmanned aircraft



Mumbai provides insights into the challenges of terrorism and urban warfare.

systems can be combined with artillery to decimate a unit in a matter of minutes.<sup>8</sup> What's more, battlegrounds from previous centuries often do not resemble what they did at the time of the battle—the tree coverage will have changed and monuments may have been erected where none previously existed. In warmer conflict zones, the surroundings should bear greater resemblance to what they did on the day of the battle. This will enhance students' understanding of the terrain.

- *Less bias.* Students of military history or strategy tend to focus on US conflicts, where the students will already have sharp points of view about the war as well as a priori knowledge of how the battle turned out. It is hard to stay completely objective studying, say, a staff ride in Vietnam or Normandy. Many of us are influenced by our own country's experience (or perhaps a family member's prior involvement) in a war, but also our views are shaped by the histories of the war we have read. The advantage of a warm conflict staff ride is that it strips

<sup>8</sup> Collins and Morgan, "King of Battle."

some of the favoritism or prejudice out and allows students to focus on the tactics, terrain, and other important characteristics of the war. Often, only limited histories of warm conflicts have been written, thus allowing students to examine the conflict without the filter or bias of someone else's interpretation. By definition, it is fresh. The wounds of the war literally have not healed yet, allowing eyewitnesses and other actors to recite what happened without resorting to the filtered prism of history texts. A good contemporary battlefield assessment is like a whodunit detective novel. There is a discovery process to it, whereby students unpack layers of detail of the war to arrive at their own conclusion on which side or which leaders were correct in their wartime decision-making. When we took students to Sri Lanka, for example, our cadets at first sympathized with the government's use of heavy-handed force to squash the Tamil Tigers. Once the cadets went up north and met with Tamil opposition leaders, activists, and journalists, their views changed and became more nuanced. When it is done well, there should be a process of discovery as the staff ride progresses.

- *Benefit of primary sources (participants).* For some contemporary battlefields, the key decision makers are still alive to interview. Imagine touring Gettysburg if you could interview Dan Sickles or George Pickett. Discussing a campaign with a field commander can provide crucial insight into how and why they or their colleagues made the decisions they did. In Colombia we were able to interview a retired navy captain who was a key negotiator of the peace agreement. A contemporary battlefield assessment also allows for a kind of ethnography of an area or region that is rare among scholars of military affairs. That is, students can immerse themselves in a setting in a way that visiting a centuries-old battlefield cannot replicate. It is impossible to fully appreciate the final phase of Sri Lanka's brutal civil war without walking alongside the lagoon of Mullaitivu, its nearby beachfront scattered with the debris of bombed-out tanks. One downside is that some primary sources, such as memoirs, official records, or oral histories, may not yet have been declassified or publicly released—but this only makes the study that much more important.



A Georgian officer talks about his experience fighting the Russians during the 2008 Russia-Georgia War.

## Chapter II — The Army Staff Ride and Learning Theory

This chapter distinguishes the research staff ride from other pedagogical approaches that use terrain to enhance learning and then summarizes the methodological and theoretical foundations to explain why they offer so much learning potential.

### **Tactical Exercises Without Troops, Battlefield Tours, Staff Rides, and Research Staff Rides**

Militaries utilize tactical exercises without troops (TEWTs), battlefield tours, and staff rides as learning tools. During a TEWT, a scenario is played out on actual terrain using current doctrine. It uses terrain, “not history, as a teaching vehicle.”<sup>9</sup> These exercises are most often conducted in training areas on military bases, but they could take place on a historical battlefield as well. By physically walking the terrain, participant learning is enhanced beyond what can be accomplished in a classroom using maps or imagery. Walking the terrain allows participants to quickly understand concepts like dead space, cover and concealment, and intervisibility lines and how they can exploit terrain to their advantage during an attack or how to mitigate the enemy’s ability to exploit terrain in a defensive scenario.<sup>10</sup> Tactical exercises without troops almost exclusively fall under the domain of the military.

Historical battlefield tours use both terrain and history to facilitate learning. It is a “visit to the site of an actual campaign [or battlefield], but with little or no preliminary systemic study.”<sup>11</sup> It is often led by an expert who can “stimulate thought and encourage student discussion,” but it is limited “by a lack of systemic preparation and involvement.”<sup>12</sup> It may include a limited preliminary study phase, so that participants understand where the campaign or battle fits into the larger conflict, but does not include deep research. The format is more lecture than seminar, although the guide may facilitate discussion. Beyond the military, tourists, academic institutes, and even companies and corporations conduct historical battlefield tours.

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<sup>9</sup> Robertson, *Staff Ride*, 5.

<sup>10</sup> Dead spaces are areas that can’t be covered by direct fire weapons; cover provides protection from bullets, artillery, etc. (e.g., a stone wall or a ditch from direct fire weapons); concealment hides one side from enemy observation but does not protect from enemy fire (e.g., bushes or a wooden fence); intervisibility lines are relatively minor and subtle variations in terrain that can mask one side from the other.

<sup>11</sup> Robertson, *Staff Ride*, 5.

<sup>12</sup> *Ibid.*

The staff ride also uses terrain and history, but what sets it apart from the historical battlefield tour is its depth of study. In addition to the field study phase, the staff ride also includes a preliminary study phase and an integration phase. The preliminary study requires “maximum student involvement before arrival at the site to guarantee thought, analysis and discussion.”<sup>13</sup> The staff ride concludes with the integration phase, where participants integrate the lessons they 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.”<sup>14</sup> Without effective preparation and integration, a staff ride becomes more of an enhanced battlefield tour than a true staff ride. Multiple scholars have questioned staff ride pedagogy and its utility for military professionals, but these generally critique so-called staff rides that are actually battlefield tours.<sup>15</sup> These criticisms are justified, but they do not undermine the pedagogy of a properly planned and executed staff ride.

The military conducts staff rides to drive home lessons on tactics, strategy, leadership, or principles of war. Universities use them to facilitate learning history, leadership, or other lessons that are being taught in a course. Finally, companies use staff rides as team-bonding experiences to drive home leadership lessons. If, however, the preparatory phase lacks depth or the integration phase lacks reflection, then instead of a staff ride, it would be considered more of an enhanced battlefield tour.

Like a staff ride, a contemporary battlefield assessment (or a research staff ride) also relies on terrain and history as teaching mechanisms. It consists of 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 also includes a design phase. It is fundamentally a research trip—there are no staff ride guides, such as *Staff Ride Guide: Battle of Antietam*, that can be pulled off the shelf to follow.<sup>16</sup>

The instructional team must determine what question(s) they seek to answer and then develop the research plan to support. It often seeks to answer the following questions: What was the root

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<sup>13</sup> Ibid.

<sup>14</sup> Ibid.

<sup>15</sup> See, for example, Kiesling, “United States Army’s Historical Staff Rides”; Stowe, Wineman, and Gelpi, “Staff Riding in the Twenty-First Century”; and Cavanaugh, “Historical Staff Ride, Version 2.0.”

<sup>16</sup> Ballard, *Staff Ride Guide*.

cause of the conflict? Why was violence conducted in the manner that it was? How can we understand conflict termination and winning the peace?<sup>17</sup>

### **Research Staff Ride**

At its core, a research staff ride is nothing more than a retrospective case study. It is retrospective in that the events have already transpired. The case study approach is used across a great number of disciplines to develop greater understanding of a particular event.<sup>18</sup> In that regard, a case study “examines, through the use of a variety of data sources, a phenomenon in its naturalistic context, with the purpose of ‘confronting’ theory with the empirical world.”<sup>19</sup> Thus, a research staff ride can test existing theories (such as the various theories that explain civil war onset or variation in drivers of violence in civil wars), use evidence and theories to understand why the events unfolded as they did, or develop a new theory. We define a research staff ride as a staff ride that includes research to generate new knowledge or understanding.

Becker and Burke argue that a research staff ride “can be used for both inductive and deductive purposes and framed within different research traditions, such as positivism/postpositivist, interpretive/naturalistic, and critical postmodernism.”<sup>20</sup> In the positivist approach, researchers develop hypotheses or propositions from existing theory during the preliminary study phase and then collect data and uncover facts during the field study phase to test these hypotheses or propositions. It is a deductive process.<sup>21</sup> For example, a literature review might provide a number of causes for civil war onset, and the research team could develop a set of hypotheses that it could test during the field study.

Using an interpretive or naturalistic approach, the research team could develop a theory inductively “using emergent design to make sense of underlying processes with a goal to develop an understanding of actions and social processes within their natural setting.”<sup>22</sup> In the postmodernist approach, the research staff ride could be used to examine how the historical event and lessons from

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<sup>17</sup> Beehner and Collins, “Staff Ride for the Modern Battlefield,” 69.

<sup>18</sup> George et al., *Case Studies and Theory Development*.

<sup>19</sup> Piekkari, Welch, and Paavilainen, “Case Study as Disciplinary Convention,” 567.

<sup>20</sup> Becker and Burke, “Staff Ride,” 10.

<sup>21</sup> Ibid.

<sup>22</sup> Ibid.

the event “were shaped or constrained by social, political and cultural conditions.”<sup>23</sup> The table below helps to illustrate the differences between tactical exercises without troops, battlefield tours, staff rides, and research staff rides.

*Table 1: Different Techniques Using Terrain to Enhance Learning*<sup>24</sup>

	<b>Tactical Exercise Without Troops</b>	<b>Battlefield Tour</b>	<b>Staff Ride</b>	<b>Research Staff Ride</b>
<b>Definition</b>	A hypothetical scenario (wargame) played out on actual terrain, usually employing current doctrinal concepts without actual troops	A visit to the site of an actual campaign but with little or no systematic preliminary study	A visit to the location of a historical event that includes systematic preliminary study of the event, extensive visits to the sites associated with the event, and the integration of the lessons that result from the study	A staff ride that includes research to generate new knowledge or understanding
<b>Audience</b>	Military	Military Academic Corporate Tourist	Military Academic Limited corporate	Military Academic
<b>Phases</b>	Field study	Limited preliminary study Field study	Preliminary study Field study Integration	Design Preliminary study Field study (research) Integration

## Learning Theory

The theoretical foundation for the staff ride is grounded in experiential learning theory and authentic learning theory. Becker and Burke, who have written extensively about the benefits of instructional staff rides, argue that “experiencing the physical terrain and environmental conditions surrounding the critical incidents that comprise a historical event in the presence of others engenders reflection in and on action and helps to construct new learning.”<sup>25</sup> The purposeful, active, and public reflection “represents the highest level of reflection in adults and the level that leads to learning new meaning.”<sup>26</sup>

If designed properly, the preliminary study phase lays the groundwork for effective field study. The stands, or deliberate stopping points where facilitated discussion occurs, should be designed for

<sup>23</sup> Ibid.

<sup>24</sup> The definitions for TEWT and battlefield tour come from Robertson, “Staff Ride,” 5. A similar table can be found in Beehner and Collins, “Staff Ride for the Modern Battlefield,” 69; but it does not include the definitions.

<sup>25</sup> Becker and Burke, “Instructional Staff Rides,” 513.

<sup>26</sup> Ibid.

critical decision points (e.g., Georgian president Mikheil Saakashvili's decision to preemptively attack South Ossetia while standing outside Tskhinvali), critical events (e.g., the Battle of Little Roundtop at Gettysburg or the August 2008 terrorist attack at the Leopold Café in Mumbai), or critical components (e.g., the role of cyber warfare, while standing in front of the Bronze Soldier Memorial in a military cemetery on the outskirts of Tallinn) within the conflict.

Becker and Burke argue that “the public reflection and dialogue permits participants to assimilate new knowledge and envision their own behavior more deeply.”<sup>27</sup> It forces participants to place themselves in the role of the decision maker, where they “compare and contrast their own behaviors with those of [the decision maker] to learn for the future.”<sup>28</sup> The “discussion and analysis combined with a tangible presence in the field more fully engages participants, making staff rides instructively memorable.”<sup>29</sup>

Why the process described above is so effective can be explained by experiential learning theory. According to Kolb, the theory defines learning as “the process whereby knowledge is created through the transformation of experience. Knowledge results from the combination of grasping and transforming experience.”<sup>30</sup> Unlike the transmission model of learning, “where preexisting fixed ideas are transmitted to the learner,” the experiential learning model “proposes a constructivist theory of learning whereby knowledge is created and recreated in the personal knowledge of the learner.”<sup>31</sup>

The idealized learning cycle is characterized as a spiral when the learner “touches all the bases”: experiencing, thinking, reflecting, and acting. Concrete experience and abstract conceptualization are two dialectically related modes of grasping experience, and reflective observation and active experimentation are two dialectically related modes of transforming experience. Concrete experience refers to the new experience or situation, or the reinterpretation of existing experiences. Reflective observation is developing observations about one's own experience. Abstract conceptualization is the creation of theories to explain observations learned from the experience. Finally, active experimentation involves applying the theories or ideas that have been learned to the world around

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<sup>27</sup> Ibid., 512.

<sup>28</sup> Ibid.

<sup>29</sup> Ibid.

<sup>30</sup> David A. Kolb, *Experiential Learning*, 41.

<sup>31</sup> Alice Y. Kolb and David A. Kolb, “Learning Styles and Learning Spaces,” 194.

them.<sup>32</sup> According to Kolb and Kolb, “Concrete experiences are the basis for observations and reflections. These reflections are assimilated and distilled into abstract concepts from which new implications for action can be drawn. These implications can be actively tested and serve as guides in creating new experiences.”<sup>33</sup>

True reflective observation and active experimentation are challenging to pull off in traditional staff rides. The same goes for counterfactual reflection, which requires the students to have internalized the lessons and the events to propose alternative actions or outcomes. An example we put forth to West Point cadets standing over the city of Tskhinvali is to imagine a Georgian land invasion whereby its forces bypassed the South Ossetian capital rather than get bogged down in block-by-block fighting. Cadets must consider how that might have sped up their advance to close the Roki Tunnel ahead of Russia’s impending ground assault, given that the Georgian forces were poorly trained in urban warfare and the terrain was not advantageous to them.

The discussion, analysis, and discovery that take place at physical locations during the field study of a staff ride provide concrete experiences for the learner, providing them with “instructively memorable” experiences. According to Raelin, the group discussion and public reflection “promotes the integration of spirals of activity with tacit and explicit knowledge.”<sup>34</sup> The active and purposeful learning bridges experience and learning through cognition and feeling. This high level of reflection “leads to learning new meaning.”<sup>35</sup>

West finds that group reflection is particularly important for innovation and learning new meaning.<sup>36</sup> But this learning does not occur spontaneously; it requires time and deliberate action. This explains why the design phase is so important. West distinguishes between shallow and deep reflection, with deep reflection facilitating greater learning. This level of reflection is driven by the facilitator at stands during the field study phase and during the integration phase.

An example of a facilitator question that would only facilitate shallow reflection would be, Why did Union Gen. Dan Sickles decide to move his troops forward at the Peach Orchard during the

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<sup>32</sup> Ibid., 193–94.

<sup>33</sup> Ibid., 194.

<sup>34</sup> Becker and Burke, “Instructional Staff Rides,” 513; Raelin, “Public Reflections as the Basis of Learning.”

<sup>35</sup> Becker and Burke, “Instructional Staff Rides,” 513.

<sup>36</sup> West, “Reflexivity, Revolution, and Innovation in Work Teams.”

Battle of Gettysburg? An approach that would facilitate deeper reflection would be to ask, Do you believe that Gen. Sickles's actions, although forcing Gen. George G. Meade to commit his reserve before the battle even started, ultimately helped win the battle for the Union? Afterward, the participants could debate both sides.

Instructors can even introduce counterfactual reflection, modifying some portion of the prior event and then assessing the consequences of that change (such as a key decision), to further enhance learning. Often, the group learning will facilitate individuals conducting counterfactual reflection on their own; but if not, the instructor can facilitate with a direct question: How might the battle have turned out had Sickles remained in place? This purposeful group reflection forces participants to leverage abstract conceptualization, reflective observation, and active experimentation at the concrete experience, which enhances learning.

The theoretical foundation for the staff ride is also grounded in authentic learning theory. According to authentic learning theory, learning occurs by applying knowledge to real-life contexts or situations. While there is some debate about which authenticity is the most important, Herrington and Herrington argue that “it is the *cognitive authenticity* rather than the *physical authenticity* that is of prime importance in the design of authentic learning environments.”<sup>37</sup> Thus, to learn about violence and civil war, one need not experience actual violence; one can learn if provided the right cognitive authenticity.

Thus, combining a study of civil war theory and the history of a specific conflict with interviews with combatants and victims on their home turf can provide the cognitive authenticity for an authentic learning environment. We have seen this play out in practice. One of our students was particularly moved by a Tamil widow's testimony of how her husband was snatched by a government white van only weeks before the end of the war and how years later the government had yet to acknowledge having taken him. This immersive experience into an authentic learning environment can generate an emotional experience for many, which further enhances learning.

Herrington and Oliver outline nine critical characteristics of authentic learning theory: (1) “an authentic context that reflects the way the knowledge will be used in real life,” (2) authentic activities, (3) “expert performances and the modelling of processes,” (4) “multiple roles and perspectives,” (5)

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<sup>37</sup> Anthony J. Herrington and Janice A. Herrington, “What Is an Authentic Learning Environment?,” 70.

“collaborative construction of knowledge,” (6) reflection, (7) articulation, (8) “coaching and scaffolding,” and (9) authentic assessment.<sup>38</sup>

The research staff ride captures many of the characteristics stipulated by authentic learning theory. First, the theory that is taught during the preliminary study phase is applied during the field study phase. Second, it includes “authentic activities,” which, according to Herrington and Herrington, are ones that are ill-defined and have real-world relevance. These tasks are often the learning objectives or research questions of the research staff ride. For a contemporary battlefield assessment, a task could be to explain the onset of the war or why violence was employed in the manner that it was. Likewise, by its nature, a contemporary battlefield assessment is (as any research staff ride should be) multidisciplinary. As we argue later, this is why the research team should include a diverse mix of faculty and students.

The facilitated discussions that occur during the stands are collaborative experiences that produce new knowledge in the students and force all the students, not just the facilitator, to articulate their thoughts, which are being developed as the discussions unfold. The importance of reflection was discussed earlier. Likewise, if designed properly, “integrated assessments of learning” occur throughout the research staff ride during graded and ungraded events: formal stand presentations, reflective discussions, formal presentations, interviews, or reflective essays. Finally, the student-teacher relationship during a research staff ride is not a didactic one, with the teacher telling the students what they need to know. Instead, it is much more of a coaching role, given that the teachers don’t know the answers to questions either; it is a research experience for them as well. Thus, experiential and authentic learning theory demonstrate the enormous learning potential that can result from a well-designed research staff ride. The next section provides a road map of how to execute a successful research staff ride that is grounded in these theories.

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<sup>38</sup> Janice A. Herrington and Ron Oliver, “Instructional Design Framework”; Anthony J. Herrington and Janice A. Herrington, “What Is an Authentic Learning Environment?” 70–73.

## Chapter III — Research Staff Ride Design

The US Army Center of Military History divides its planning guide for staff rides into three phases: preliminary study, field study, and integration.<sup>39</sup> Given the fact that a contemporary battlefield assessment, or any research staff ride for that matter, does not have an off-the-shelf manual that someone has written, it requires a significant amount of prep time. Thus, we add a fourth phase to the research staff ride: the design phase. This is the most time-consuming phase but also the most important. If the work is not done in advance, then in-country opportunities will be missed, time will be wasted, and student learning will be greatly degraded.

### Design Phase

This phase starts with a determination of the research goals and location of the research staff ride. Next, the instructional team must develop the research plan to accomplish those goals, which includes the syllabus, itinerary, and logistical plan for execution in the subsequent phases. This section lays out the major considerations of the design phase. See annexes 1 and 2 for useful references for the design and subsequent phases.

- *Determine the research goal(s).* Determine what it is you wish to study. We conduct most of our contemporary battlefield assessments as courses worth three credit hours in the summer. They typically last two to three weeks, but they need not be this in-depth. With scaled-down goals, a quality research staff ride, with the appropriate preparatory work, could be conducted over a spring or fall break in ten days or less. Either way, the first step is to determine your research goals. Do you want to study an interstate conflict, civil war, or act of terrorism or cyber warfare? Next, determine the location. For example, if you want to gain a better understanding of civil war termination, then Sri Lanka or Colombia would be good locations. If the goal is to learn about urban, subterranean, or hybrid warfare, then Israel or Ukraine would be ideal.
- *Develop the research plan.* In order to achieve the determined goals, you need to figure out whom to interview, which locations to visit, the sequencing of the stands, and what academic theory informs your research question. You also need to select the instructional team who will help

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<sup>39</sup> Robertson, *Staff Ride*.

you develop the research plan. The syllabus, itinerary, and logistics plan are the products that will be used during the execution of the staff ride. Logistical considerations go hand in hand when developing the research plan.

- *Select the research team.* We recommend keeping the team to no more than one dozen—any larger and it makes it more difficult to conduct meetings and interviews and makes it more challenging to transport everyone together (which is beneficial if conducting some classes while in transit). For most of our contemporary battlefield assessments, we had four resident faculty members, one nonresident subject matter expert (postdoctoral or professor), and six to



Faculty team in Georgia: cyber expert, Russian expert, active duty Army colonel (MWI director), and MWI's research director.

seven students (cadets). Faculty members shared in the teaching responsibility and contributed to syllabus development. Since it is a combination of a course and research trip, publishing research was an expectation of the faculty team. The research goals drive the faculty team selection. For our contemporary battlefield assessment to the Republic of Georgia and the Baltics and Ukraine, we added a Russian expert from our political science department to the team. Likewise, for both assessments, we added a professor from our Army Cyber Institute, since one of the goals was to better understand cyber warfare.<sup>40</sup> Just as we seek out broad expertise in the faculty, we find that bringing students of all learning abilities from different disciplines allows them to bring unique perspectives, approaches, and analyses. We recommend having students write short essays (as a screening criteria) and interviewing them prior to selection. In a research staff ride, valuable traits include motivation and strong interpersonal skills. A long and bumpy van ride with no working air conditioner in Sri Lanka can feel like a foxhole, so you will want students who are adaptable and easygoing.

- *Design the syllabus.* Theory is the foundation for most research staff rides. It is relevant to all conflicts (or case studies), whether related to the causes of war (e.g., security dilemmas or

<sup>40</sup> For India we included an expert from another university who was phenomenal since half the people we met in-country seemed to know her.

grievances), how wars endure (e.g., resource curse, ethnic political entrepreneurs), or why wars are hard to end (e.g., credible commitment issues). Grounding the contemporary battlefield assessment in theories of international politics helps students understand how important lessons of the battle at the tactical and operational level impact the larger strategy behind the overarching campaign. It also enables them to ascertain whether the war supports or challenges various theories of interstate or intrastate conflict. A primer on, say, Clausewitz or Sun Tzu, not to mention Kenneth Waltz's structural realism or James Fearon's bargaining logic of war, is recommended for a good contemporary battlefield assessment.<sup>41</sup> In addition to theory, the syllabus should include sources related to the actual conflict you are studying; roughly half the course should be dedicated to general theory and research methods, with the other half devoted to readings focused on the specific conflict being studied. For example, for Colombia we included a mix of theory on civil wars (with an emphasis on civil war termination, since that was our focus) and criminal organizations, as well as more journalistic or historical accounts of Colombia's civil war with the FARC. Most of the lessons occurs during the preliminary study phase, yet others should be saved for the field study phase and related to that day's research. A history- or literature-focused research staff ride may not be grounded in theory in the same way as a security studies staff ride, yet the same thought must go into developing the syllabus, in terms of including the underpinnings from the academic discipline.

- *Balance the sources.* Try to include sources that convey both sides of a conflict, not just the government's (or victor's) side. Always maintain a fair and neutral portrayal of the war to avoid priming students or biasing their opinions once they are in-country. This will allow them to wrestle with the facts on the ground and how they might have acted based on the environment, their military capabilities, doctrine, and level of discipline among their units. Again, sources should include a mix of primary—such as oral histories, translations of national security documents, and presidential



Virtual meeting with an RT reporter located in the Ukraine's Donbas (conflict) region.

<sup>41</sup> See Waltz, *Man, the State, and War*; Fearon, "Rationalist Explanations for War."

statements—and secondary. On the latter, provide a mix of both native non-native authors, academic and journalistic, historical and multidisciplinary. In traditional staff rides, we have a better understanding of what happened; the history has been written and dissected. We can assess the decision-making based on what transpired afterward. For contemporary battlefield assessments, the jury is often still out. War could flare back up. Victims often remain displaced. There is not always reconciliation among the sides. This makes the fog of war foggier and our assessment of what transpired on the battlefield harder to put into historical context. Do not forget film or video. We have included Hollywood movies like *Hotel Mumbai* and documentaries such as *Winter on Fire* (about Ukraine's Maidan Revolution) as part of the syllabus.

- *Determine the stands.* A stand is a deliberate stopping point during the field study where facilitated discussion occurs. They are purposefully designed to analyze a critical decision point, event, or function that supports the staff ride's research goals. A stand in a contemporary battlefield assessment could be a traditional tactical battle, such as the 2008–9 Battle of Kilinochchi in Sri Lanka,<sup>42</sup> or have a



The site where the Mumbai attackers disembarked.

functional nature, such as a discussion of cyber warfare while standing near the Bronze Soldier memorial at the Tallinn Military Cemetery. Since the movement of the Soviet World War II memorial by the Estonian government to a cemetery on the outskirts of town triggered a Russian denial-of-service attack that crippled government and banking systems, it provided the perfect location to discuss cyber warfare.<sup>43</sup> A traditional staff ride can include several dozen stands. We, however, recommend narrowing it down to only a small handful for a research staff ride, given the amount of research time that must be invested into each. Assign an instructor and student to each stand. The student conducts research during the preliminary study phase and then briefs the stand during the field study phase, while the instructor mentors the student and helps facilitate the discussion and deep reflection in the field. There should be

<sup>42</sup> Beehner, Collins, et al., *Taming of the Tigers*, 29–31.

<sup>43</sup> Tapon, “Bronze Soldier Explains Why Estonia Prepares for a Russian Cyberattack.”

roles assigned to other students of key characters, who should present in character the dilemmas facing each person (discussed later).

- *Develop the logistics plan.* Make no mistake, research staff rides are very logistics intensive. Most obviously, there are security issues to consider, as there are parts of postconflict zones still littered with unexploded ordnance or contested borders. Extreme caution should be taken when traversing these battlefields. Second, there is likely to be visa and administrative paperwork to contend with. If you are traveling



Teaching class from the bus in Ukraine.

as a military group, we recommend contacting the defense attaché at the US embassy in the country you are visiting. Some countries, for political and also security reasons, will not allow foreign travelers without a government-licensed guide or minder. Lodgings need to be arranged well in advance, but beware, many places do not take credit cards, which is the preferred, or sometimes only, form of payment for the military or some universities. In Colombia we had to withdraw hundreds of dollars of cash from an ATM over a two-day period to pay for the bus, since the bill exceeded the daily withdrawal limit and the company wouldn't accept credit card payment. In another case, it took us months to figure out how to pay the bill from a hotel outside Trincomalee, Sri Lanka, since the resort didn't take credit and there wasn't an ATM anywhere close. We recommend lodging that is centrally located and has a private conference space, fast Wi-Fi, and printer and copy facilities. Finally, because of the nature of these types of wars—asymmetric, fought across multiple domains, unclear frontlines—almost inevitably a warm conflict staff ride will be driven rather than walked. There are few Pickett's Charges in modern war. Secure a comfortable sixteen-passenger (or larger) bus with a microphone (or be prepared to talk loudly) to allow for lessons or discussions during long trips. Book a local driver who speaks English if possible. If self-driven, be sure that you have drivers who can drive manual transmission vehicles. Be sure that you have a good medical plan: get the required immunizations in advance, bring an ample supply of medications for traditional travel ailments, and know the capability and locations of the in-

country health care system. Assign the logistics to a staff member or student; a single person cannot plan and execute the content of the staff ride and the logistics at the same time.

- *Finalize the Itinerary.* The in-country classes, stands, interviews, logistical constraints, and cultural excursions must all be considered when building the itinerary. The itinerary should be structured so that there are no large gaps in the schedule yet flexible enough to account for inevitable delays, such as meetings starting late or going long (some cultures have different concepts of time), bad traffic, or getting lost, or opportunities—late additions to the itinerary that develop while in the field. For a typical day, we recommend an hour of classroom time in the morning (at the hotel) followed by either interviews or meetings with officials, academics, journalists, or locals, with immersion or observation in the afternoons or evenings. Group dinners are encouraged and provide a great opportunity to reflect. This requires intensive planning ahead of time, and although this is difficult to organize before traveling, it is strongly recommended. Finally, staff rides typically proceed sequentially according to a conflict's chronology to understand the impact of past decisions on the present. But this is often a logistical challenge in research staff rides. Design an itinerary that makes the most sense and allows the group to see the most in the shortest amount of time. Not every battlefield will make the cut. In Sri Lanka, for example, our cadets carried out a staff ride of the final phase of its civil war in *reverse* chronological order, mostly because the logistics of driving the terrain dictated that.
- *Conduct (limited) reconnaissance.* For staff rides, reconnaissance is often recommended to case out the surroundings, orient oneself, and optimize the best location to conduct stands. But advanced reconnaissance is almost impossible when carrying out a research staff ride, without incurring the significant cost of sending out a team in advance. Also, in today's wars, clearly delineated frontlines are rare and positions often fluid. This makes it more difficult to visualize where individual stands should take place to operationalize the battlefield. That is especially true of the battlefields of guerrilla wars or wars fought across multiple domains (How does one tour, say, fiber-optic cables?). To mitigate this, do your homework. Good maps (especially topographical ones) are essential for any staff ride. Try to do as much surveying of the terrain online beforehand as possible, whether through Google Maps or other mapping software. Use local maps, experts, and other sources to prepare the localities of the staff ride. Be sure to check the weather, as this may impact the staff ride—for instance, don't go to Sri Lanka or

India during monsoon season. Finally, allow for some flexibility in your itinerary and prepare for the worst—bad traffic, blocked access to the battlefield, hospitalizations, vehicle breakdowns (or break-ins), and so forth. Always have a plan B. When we went to India, our travel to Jammu and Kashmir was canceled by the embassy only days prior to travel—anticipating this possibility, we had a solid backup that we executed.

### **Preliminary Study Phase**

The Army's official staff ride guide states, "The purpose of the preliminary study phase is to prepare the student for the visit to the site of the selected campaign."<sup>44</sup> The preliminary study phase prepares the students through a mix of lectures, individual study, and group discussion. Students must accomplish the following: understand the purpose of the course, become active participants, acquire basic knowledge of the conflict (e.g., weapons, organizations, significant participants, chronology, terrain), and "develop an intellectual perception of the [conflict] that will be either reinforced or modified during the field study phase."<sup>45</sup> When the course is worth three credit hours, we recommend about a week for the preliminary study phase and two weeks for the field study and reflection phases. If the field study will occur over a spring or fall break, then the preliminary study phase could be conducted in the weeks leading up to the travel portion.

- *Design your syllabus and coursework.* 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 all articles ahead of time, given the likelihood of limited internet access during the field study. We recommend using tablets to allow for easy accessibility and bringing at least one printed copy of the readings as well—in some countries, it may be risky to bring laptops or any electronic media due to the risk of exploitation. It is best to start with general theory and then dive into the specifics of the conflict. Start general and provide basic information about the country and conflict, including maps, outlines of the main participants, the international context, and other features of the conflict (e.g., the role of religion, ideology, ethnicity). The best sources for this are secondary (e.g., newspaper articles, history books). Once the war has been outlined, the students can use more primary documents for their individual research. Provide an example of what leading a good (and maybe a bad) stand looks

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<sup>44</sup> Robertson, *Staff Ride*, 11.

<sup>45</sup> *Ibid.*, 13.

like—use a video from a previous year to demonstrate. Typically, we like to have class for three to four hours in the morning and provide the students the rest of the day to read for the next day's lessons and to conduct research for their assigned stand(s) and character(s).

- *Leverage subject matter experts.* During the preliminary study phase, we recommend leveraging subject matter experts (e.g., historians, think tank fellows with policy expertise, military officers who served as foreign area officers), if not in person, then over video conference (such as Zoom or Skype). They provide a level of context, analysis, and engagement that a textbook cannot. Students need to move beyond a Wikipedia-deep knowledge of the country or region to understand the cultural nuances of its history, leaders, social practices, economy, values, and customs.
- *Teach research methods.* A contemporary battlefield assessment is much more than a guided tour of a recent battlefield or assuming the persona of key characters; it also involves at least a basic level of ethnography so students can maximize learning during interviews, participant observation in places where key events took place or remnants of the war remain (e.g., refugee camps), and a careful reading of as much primary material as possible (public testimony, truth and reconciliation files, speeches by public officials, memoirs). Realizing that time is limited, we recommend giving students a one-day crash course in qualitative methods that includes best practices in ethnography, interview techniques, ethics, observation, and using archives or oral history. For staff rides, qualitative methods are generally more applicable than quantitative methods.
- *Prepare for class, field research, and field stands.* In addition to preparing for the next day's lessons, students must use their time during the preliminary study phase to prepare for their stand, since they will not have time once they start the field study phase.
- *Do not forget arts and culture.* We advise students to watch at least a few films about the country or conflict, whether fictional or nonfictional, before departure, and to be aware of its classic literary works. No student of the Colombian civil war should be unaware of the artist Fernando Botero. Students of the Sri Lanka civil war should appreciate the architecture of Geoffrey Bawa, the novels of Michael Ondaatje, or the fact that Arthur C. Clarke made Sri Lanka his home to observe the heavens. In short, require students to read beyond their role, stand, or battle. They should be aware of the country's literature, its culture, and its history. This will

not only help enliven the staff ride presentations but also help put into cultural perspective the decisions commanders and their lieutenants made during the war. In cases of civil wars, it will also shed light on the often confusing and sometimes overlapping identities of the combatants (a crash course in constructivism can help on this front).

### Field Study Phase

The field study phase of a staff ride is “designed to visit all significant sites associated either with the selected campaign or with the portion emphasized in preliminary study.”<sup>46</sup> For a research staff ride, this is also the phase where the bulk of the research is conducted. We recommend the field study portion include a robust mix of classroom time, interviews, observation, immersion, culture, and staff ride of battlefields. As the US Army’s official staff ride guide suggests, “If the preliminary phase has been systematic and thorough, the field phase reinforces ideas already generated.”<sup>47</sup> During the field study, the itinerary gets put to the test, and just like any military plan, it rarely survives first contact. But if the itinerary is well designed, the team can thrive and account for unexpected, sometimes literal roadblocks, as well as leverage unexpected opportunities that appear. Included below are best practices for the field study phase.

- *Hire a fixer.* If you aren’t able to include a subject matter expert who also speaks the language as part of your faculty research team, we recommend arranging for a fixer, someone familiar with the local context and surroundings who can assist in previewing the locations of stands, translate, and provide local context. It is important that a fixer, based on their race, tribe, or political affiliation, does not bias or disrupt the research elicited in interviews. Ideally, the fixer should be nonpartisan, but a biased fixer could still be instructive, provided students recognize the bias. However, be aware that your fixer may have trouble translating jargon that he or she is unfamiliar with. In Colombia we had to have one of our Special Forces officers translate, because our fixer did not understand military terminology. While the officer was fairly strong with the Spanish language, he was not fully fluent. Likewise, when we were interviewing two former Ukrainian volunteer fighters, we had to swap our linguists. One of the former fighters

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<sup>46</sup> Ibid., 14.

<sup>47</sup> Ibid.

refused to speak to our cadet because she was native Russian, so we had to switch her with our fixer who could also speak Ukrainian.

- *Find classroom space.* It is important to include some classroom time during the field study phase, but not too much, as this defeats the purpose of traveling. We advise no more than an hour of formal classroom time per day while in-country, either at the hotel or on the bus, but it can be supplemented with less structured discussions over dinner. Bring handouts, as contemporary battlefield assessments often correlate with spotty wireless coverage and a lack of multimedia facilities. Prepare as if you will be teaching class in a remote cave, and you will never be unprepared. We recommend conducting class first thing in the morning, to review the itinerary (which will have almost surely changed), to prepare students for who they will be meeting and what they will be seeing for rest of the day, and to ensure that they know their responsibilities. Use the space available, but always be prepared for surprises. When using a hotel lobby in Colombia, we had to contend with the hotel's toucan, which liked to jump from student to student occasionally biting them on the ear in an attempt to disrupt class.



Teaching class from a rented conference room.

- *Conduct the Interviews.* Interviews are an essential part of a research staff ride, and they should include ex-combatants, participants, victims, officials, and other experts, to understand the event in question. These are invariably semistructured and often occur in the interviewee's workplace. When possible, try to conduct interviews in a less formal or less structured environment. This will allow for more candid comments and richer conversations. Establish any restrictions upfront, such as whether the discussion or interview will be on background or on the record or whether it can be recorded or not (this may require an informed consent, depending on one's research and



Meeting with Hemant Oberoi, the head chef at the Taj Palace Hotel during the Mumbai attack.

Institutional Review Board specifications). In Sri Lanka we interviewed an ethnonationalist Tamil priest at a barbeque along a beach in Trincomalee. Over the course of dinner, he revealed why he viewed suicide bombing as morally justifiable, which raised eyebrows among the students. It is likely that he would have been less forthcoming if the discussion occurred in his parish office. The downside of doing interviews outside a formal place of work is that note-taking can often be more difficult. We recommend assigning a “rapporteur”—or notetaker—for each interview, to avoid all students acting like stenographers, which is distracting, and to avoid needlessly duplicating one another’s efforts. This also allows for greater active listening. We like to keep the size of our group under a dozen—if the group is too large, then some subjects may be less forthcoming. Another option is to split the group to conduct different interviews and share notes later. Take copious notes and record everything. We would have the rapporteur for each meeting submit their typed summary notes at the end of each day.

- *Maintain a balanced perspective.* Do not just get one side of the conflict. No one would ever conduct a staff ride to Gettysburg and only cover the Union side. Nor should one only interview government officials in a warm conflict zone; students would come away misinformed. Be sure to interview decision makers and combatants on both sides. In asymmetric wars involving rebel groups, this can prove challenging but can be done. Think creatively; it may require interviewing ex-guerrillas or ones living abroad. In Ukraine we interviewed a field reporter based in the Russian-occupied area of the Donbas from *RT*, a Kremlin-sponsored news network that is an arm of propaganda, to get a Russian perspective. In authoritarian states, access to opposition figures may be curtailed. We advise trying as best as you can to question more than just the sources supplied by official authorities. Seek out members of civil society, journalists, academics, and activists, to round out the official view of what happened. Use an interpreter to avoid language bias; sources who speak English tend to be more urbanized, educated, and perhaps more liberal, which can distort one’s data.



Meeting rehabilitated FARC members at a FARC reintegration office in Bogota.

- *Do not forget observation.* Observation—sometimes called “participant observation”—is a necessary part of any warm conflict staff ride to put the larger battle into greater historical or social perspective. A war with no underlying social meaning is just a war, absent of history or cultural context. By “observation,” we mean “active looking” to understand routine behaviors, social cues, power hierarchies,



We observed NATO (and EU) flags throughout the Republic of Georgia.

cultural symbols, or other everyday activities. Often it involves observing the routine, taking the temperature of a place, like a downtown square or busy souk, to understand a country’s or city’s ethnographic makeup. An observation of New York City might require a researcher to sit on a bench in Times Square and record the sea of humanity they see. Likewise, in Sri Lanka we instructed our students to observe the fish market in downtown Trincomalee, a predominantly Tamil city in its Northeast. There, the students noticed men missing limbs, pungent smells, and the clatter of tuk-tuks. Observation should be unstructured, as its purpose is to take in one’s surroundings to identify rules and meanings that govern actions—to be a fly on the wall and provide a “written photograph” of a situation (too much structure and people will know they are being observed and change their behavior).<sup>48</sup> Some advice: it should be interactive—ask lots of questions; look for nonverbal social cues or expressions; determine how participants communicate; and try to identify status markers, practice reflexivity, and be aware of biases (to borrow the example above, Times Square is not representative of all of New York, so the sample of participants observed will be biased).

- *Immerse in the culture.* When possible, immersion should be used to complement interviews. On our contemporary battlefield assessment to the Republic of Georgia, we not only traveled to Gori and met with EU monitors at their headquarters; we also tagged along in their vehicles as they patrolled the border with Russian-controlled South Ossetia. This was vital to not only understanding their mission but also to understanding the topography of the terrain along this border, which was a flash point during Georgia’s 2008 war with Russia. True cultural

<sup>48</sup> Schatz, *Political Ethnography*.

immersion is impossible to pull off in the span of a few weeks, but research staff rides should try to expose students to as much native culture as possible. Do not hole yourself up in a downtown hotel inhabited by Western tourists. Mingle as much as possible with locals. A vital part of a warm conflict research staff ride is the ethnography necessary to understand the society, space, and human terrain in which the war took place. Take in an evening theater show. Eat at a restaurant frequented by locals. Get outside the capital whenever possible. Often, there are museums near the battlegrounds, with many offering tours in English. Museums are an excellent place to get a pulse on the narrative of national history. What is omitted? What debatable claims are made? What would local eighth graders believe about their own past after visiting? The Stalin Museum in Gori, for example, remains deliberately unchanged from the early 1990s, save for a final room at the end that captures some of Stalin's atrocities.



Joining EU monitors on the administrative border line near Abkhazia.

- *Execute the stands.* At each planned stop, the assigned student should (1) orient the group in space and time, (2) discuss the historical event and key individuals, (3) facilitate the discussion of key issues and ask questions to facilitate deep reflection, and (4) summarize to drive home key lessons.<sup>49</sup> They should be student run but staff guided, as much as possible. Facilitating the discussion is the most difficult. Good



A cadet briefing the 1984 siege of the Golden Temple in Amritsar, India.

discussions include description, interpretation, generalization, and application.<sup>50</sup> Each stand should last no more than an hour. Students are active participants and often take on the persona of the characters they were assigned during the preliminary study, describing what the characters did and why in the first person. For role-playing characters, try to avoid students

<sup>49</sup> Cavanaugh, "Historical Staff Ride," 6.

<sup>50</sup> Ibid.

just reciting a Wikipedia biography. Encourage them to bring lots of energy to get over the jet lag and to get into character. But note that there are cultural sensitivities to account for; to role-play a commander in a contemporary battlefield assessment, if done improperly, may come off as insensitive to locals. At the monument in Tallinn, for example, the US Embassy advised us not to take photos, given local Russians' sensitivities to the event. Role-playing someone like Robert E. Lee or Joshua Chamberlain may be commonplace at Gettysburg, but you might not want to have someone role-playing Stalin or Hitler in public locations. In Mumbai the owner of the Leopold Café reveled in recounting the Mumbai attack in his bar, pointing out the bullet holes still left in the wall. However, when a student was describing the attack in the lobby of the Trident Hotel, staff ushered us out of the lobby and into a conference room. Unlike staff rides of familiar battlegrounds, there may be little footage or photography online about the terrain, so bring multiple devices to record stands and the surroundings. In Bogotá one of our cadets had to compete with a raucous group of street performers while executing the stand. See annex 3 for a more detailed discussion on staff ride stands.

- *Planning meals.* Meals are always challenging, at least during the first few days when you are still trying to get a lay of the land. Even in the military, we have yet to conduct a staff ride with a group consisting entirely of Army Rangers where we could tell them to skip a meal and expect them to be fine. We recommend finding a hotel that offers breakfast or has quick options nearby so that you can start the day with one less meal to worry about. Lunch is always the toughest, as many locations lack fast options (that are safe). It ends up being a lot of time walking, driving, and sitting (and a little eating), when you could be interviewing. Even if you allocate sufficient time into the schedule for lunch, it may still take longer than you think. If the school, corporation, or sponsor is paying for the meal, then settling the bill is not an issue. But if not, consider how you will pay for the bill immediately after ordering, or you will end up with a dozen people trying to individually pay when you are already late for your next meeting. In this case, it is best to get the check early, collect the money in a manner that works for the group (quickly), and settle the entire bill with a single payment. Dinner is less of an issue, because you usually do not have events afterward, so you can afford to have a longer meal. We encourage using dinner to reflect on the day's activities to see what participants have learned. Dinner is also an opportunity to conduct a meeting or interview in a more relaxed setting—we would recommend a couple of dinner interviews but no more, given that the

participants need organized time for daily reflection. Keep in mind that acoustics are generally pretty poor, so students and a single faculty member should sit near the guest. The rest of the instruction team can sit at the other end of the table or at a different table completely.

- *Conduct reconnaissance.* Since you are likely only able to conduct limited reconnaissance prior to departing home, it is important to conduct reconnaissance after arriving. Verify the locations of interviews and meetings with participants at least a day in advance (with the assistance of your fixer, if required) and then verify the location, route, and time of travel with your driver or fixer (if using taxi or ride-sharing service). If you have multiple faculty members, you always have the option to send one out in advance to verify the next location.

- *Plan a recovery day.* While it is normal to want to maximize every waking minute in-country to conduct your research, we strongly advise against this. The team will burn out if they don't have some down time. Typically, we will use one of the weekend days to let them escape for a day, and we find that they are fresh and energized, ready to continue. Rather than a completely free day, we recommend a group cultural excursion



Watching India's theatrical changing of the guard at its Wagah border with Pakistan.

and some unstructured time. In Sri Lanka we climbed Sigiriya, a massive column of rock that stands nearly 200 meters high; in the Republic of Georgia we went for a hike in the Caucasus Mountains; in Colombia we went for a horse ride (though it was more of a race) through the jungle to a beautiful beach on the Pacific Ocean and then raced back at the end of the day; in India we went to the theatrical changing of the guard at the Pakistani border in the sweltering heat; and in Ukraine we toured a decommissioned nuclear missile silo and surrounding base.

- *Take advantage of professional development opportunities.* Whether conducted with cadets, undergraduates, or graduate students, the research staff ride offers the faculty an immense potential to model proper behavior and mentor students during the field study. For example, one of the authors would go for a run of eight-plus miles nearly every morning, sometimes waking at 4:30 or 5:00 to get it finished before the start of class or early travel, demonstrating personal discipline and the importance of maintaining physical fitness. In Ukraine the

ambassador invited our cadets over to her residence for a function with senior Ukrainian military officers, offering them the opportunity to interact in an extremely formal setting. The ambassador remarked at how impressed she was with them, and on this specific trip, they were relatively young, with most having just completed their freshman year. In Sri Lanka one of our faculty members learned what happens if you fail to close a balcony door in the jungle. Upon returning to his room, he found his room ransacked. His first thought was to blame the maids, but upon inspection of his room, we saw that he left his balcony door opened just wide enough for a monkey to squeeze through—something we were warned about at check in. Assigning a junior faculty member or student to plan or help plan the logistics is a great developmental opportunity, but like any developmental opportunity, it requires supervision and mentorship.



Cadets with the US ambassador to Ukraine during an event at her residence.

## Integration Phase

After the design phase, the integration phase is perhaps the most important phase of the research staff ride. It allows students and staff to reflect on their experience, synthesize the lessons, and apply what they have learned. It is the phase that locks in the learning. This phase “requires students to analyze the previous phases and integrate what they learned in each into a coherent overall view”; “it provides a mechanism through which students may organize and articulate their impressions of the [conflict and its lessons]”; and it allows students to “gain additional insights from sharing these impressions with their peers.”<sup>51</sup> It should be immediate and interactive and can occur on the battlefield, in the classroom, on the bus, or as part of a group or individual assignment. Perhaps one of the best locations is over dinner at the end of a busy day.

- *Reflect on daily notes.* Have your rapporteurs transcribe their handwritten notes into digital notes that they can submit each evening. This is not simply a literal transcription of the handwritten notes into digital form. Instead, it is a combination of their notes and a reflection on those notes based on what else they have learned (from other meetings, classes, etc.). Often, it will

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<sup>51</sup> Robertson, *Staff Ride*, 17.

include a list of questions they seek to address in subsequent meetings. Students should reflect on their notes from the day or week, noting the details of where interviews and meetings were conducted. During the day, they are often running from meeting to meeting with no time for reflection, so you need to force time for reflection each evening. Often it is not what's said that's most revealing but what's *not said* or the peculiar environment or surroundings of where the source said it. For example, the official government stance in Sri Lanka was that they didn't kill any civilians during the conflict. While one army general never admitted that any civilians were killed, he did acknowledge that in war, there are always civilian casualties. In another meeting, with a foreign ambassador in Georgia, we noted how the picture of his president was barely visible, a potential sign of the leader's unpopularity. The terrain is also important. While there are few wide-open expanses akin to Pickett's Charge, one can observe a FARC training camp in the jungles of Colombia's Meta department or the vulnerable terrain of South Ossetia's capital, Tskhinvali, to appreciate the Russian army's advance southward. Because the terrain more closely resembles how it did during the battle, this allows students to appreciate how it would have influenced decision-making at the tactical level.

- *Design discussion questions to facilitate deep reflection.* Discussion questions are critical to framing each stand, interpreting the roles of key players, and contributing to the learning goals of the course. Be sure to widen the aperture, as the battle is typically an entrée into a larger discussion about strategy or tactics. Query students on how the battlefield outcome or decisions made may have gone differently. During the stands, dinners, or other locations during the integration phase, ask questions that provoke deep reflection. Draw on lessons they have learned and how they might be relevant for other contexts, perhaps in Iraq or Afghanistan. For example, after studying Colombia's counterinsurgency with the FARC, we asked our students how what they learned might be relevant to building a lasting peace with Afghanistan. Finally, bring battles back to the theoretical discussions from the preliminary study phase—Do they confirm or contradict hypotheses or propositions that were formed during the preliminary study phase?
- *Complete the final assignment.* A research staff ride can encompass one central question or tackle several. Inevitably, some issues related to the war will not be covered. These can be given to students to conduct independent study or to give final presentations. During our staff ride to the Republic of Georgia, we divided cadets into two groups. One delivered a short presentation on how the 2008 Russia-Georgia War fit into the literature on ungoverned spaces,

and the other group discussed the war's information operations campaign. In Colombia we concluded with group presentations tackling the complex issues of paramilitaries and counterinsurgency, the nexus of crime and insurgency, the challenges with ensuring a lasting peace, and leadership decapitation strategy. Given how important integration is to learning, time must be allocated to the students for them to write papers or prepare quality presentations at the end of the course.



Cadets delivering their final presentation in a shared workspace.

- *Conduct assessments on student learning.* To know if deeper learning about modern warfare and personal, professional, and leadership development (for our cadets) is happening, we recommend reflection essays, student surveys (both before and after the staff ride), and follow-up assessments, to measure how the research staff ride prepared them for other relevant coursework. Despite being fatigued after a long weekend at Gettysburg or a three-week contemporary battlefield assessment, students' reflection essays are particularly rewarding to read—it will be clear how much they learned and how the study impacted them both personally and professionally.
- *Produce faculty research.* As discussed earlier, an expectation for all faculty should be to produce research related to the study. The audience for our contemporary battlefield assessment extends beyond the cadets and faculty that participate—the goal is to share what is learned with the broader defense and academic communities. For each of our research staff rides, we have published a contemporary battlefield assessment report, in addition to articles in scholarly and professional journals.<sup>52</sup> We realize your primary audience for you research staff ride is your students, but we would encourage you to think about how you can share what you learn with the broader community.

<sup>52</sup> See, for example, Beehner and Collins, “Can Volunteer Forces Deter Great Power War?”; Beehner and Collins, *Dangerous Myths*; Beehner and Collins, *Welcome to the Jungle*; Beehner and Collins, “What Colombia Can Teach Us about Afghanistan”; Beehner, Collins, Ferenzi, et al., *Analyzing the Russian Way of War*; Collins and Beehner, “Baltic States’ Militaries Buttressed by Volunteers”; Beehner, Collins, et al., *Taming of the Tigers*.

## Assessment

While assessment is not a formal staff ride phase, we recommended conducting a formal assessment at the conclusion of any course or experience in which you and the participants invest so much time and energy. The intent is to make the next iteration even better. But even if you never plan to conduct one again, simply going through the process is useful in its own right, as lessons can be gleaned that apply much more broadly. Two distinct but related assessments must be conducted: an assessment of participant learning and an assessment of the staff ride itself. To avoid confusion, we will refer to the assessment of student learning as “assessment” and the assessment of the staff ride as the “after-action review,” or “AAR.” See annex 5 for a more detailed discussion on assessments.

## Conclusion

Staff rides let students at any level engage in military history—from role-playing key decision makers to walking and visualizing the terrain—in a way that reading textbooks in a classroom cannot. Even though armies no longer launch Napoleonic assaults, these battles can be unpacked in staff rides to understand the enduring lessons of war, from leadership to flanking maneuvers. There are, however, limitations. Joshua Chamberlain's bayonet charge on Gettysburg's Little Round Top can teach us something about bravery and courage; but it has little application to an officer confronting unmarked "little green men" in Ukraine or combating a sophisticated cyberattack.

As warfare grows more complex, the contemporary battlefield staff ride is a useful pedagogical tool to teach the nuances of modern warfare. Such an undertaking is not easy to pull off. It requires logistical support, deep knowledge of a country's history, intellectually curious students, sufficient financial resources, and a flair for improvisation. But the learning potential is immense. These types of research staff rides are part military historiography, part ethnography, and part cultural immersion. They can involve dinners with combatants and commanders or visits to refugee camps.

Over the past four years, we have carried out over a half dozen research staff rides. The feedback from our West Point cadets and fellow faculty has been overwhelmingly positive. Students tend to marvel at the candid responses they get from the victims of war, but they also are surprised at the human side displayed by some of the senior commanders we meet. For example, one senior Sri Lankan naval officer appeared almost to admire the tenacity of the Tamil Tigers he fought against for over two decades and even appeared to justify their use of suicide bombings against military targets as being within the norms of acceptable practices for wartime. It is these kinds of candid interactions with the actual participants of modern combat that cadets will never get inside a classroom or from any textbook.

Yet at the same time, foreign militaries can also come across as black boxes with little overlap with our own military. Because of their different command and control, norms, cultures, and rules of engagement, some might wonder how generalizable the lessons of a foreign battle are to us. We argue that a Sri Lankan infantry unit provides certain lessons and principles of warfare that are generalizable across time and space and that US military officers would be wise to study their contemporary peers

engaged in similar types of combat across the globe to avoid making the same mistakes, to understand the enemy (which is often the same one we face), and to improve our own military doctrine.

Anecdotally, we find growing demand among public policy and strategic studies graduate programs to inculcate the staff ride into their curriculums—with some opting for research staff rides as opposed to off-the-shelf staff rides. Thus, we've created this leader's guide with that in mind. Trying to conduct a research staff ride for the first time may seem like a daunting task, but we hope that this guide can help mitigate some of those fears and provide a road map of how to conduct a successful one. And given the impact that concrete experiences can have on learning, especially when designed and facilitated effectively, we hope that the use of research staff rides continues to increase.

To prepare future generations of scholars and soldiers and to bring staff rides into the twenty-first century, we recommend studying battles relevant to what modern warfare—increasingly complex and fought across multiple domains—will resemble. As the West Point cadets did after World War I, the best way to study the modern battlefield is to experience it firsthand.

Annex 1 — Research Staff Ride Matrix

	Design phase	Preliminary study phase	Field study phase	Integration phase	Assessment
<b>Research goals</b>	Determine what to study and goals Select location	Ensure team knows goals	Ensure team is accomplishing goals	Use reflection to drive home goals	Were goals met? Sustain? Why? Improve? How?
<b>Research team</b>	Determine size and expertise required Interview and select students	Assign responsibilities	Leverage professional development opportunities	Conduct integration	Assess learning AAR staff ride
<b>Syllabus</b>	Balance the sources Include theory, research methods Assign lessons to instructors	Conduct classes Download all readings Print out copy of readings	Conduct classes (1 class per day)	Build integration into syllabus	Sustain? Why? Improve? How?
<b>Guest lectures</b>	Select and schedule experts	Conduct virtual lectures	Conduct virtual lectures	-	Sustain? Why? Improve? How?
<b>Stands</b>	Determine location and number Geographical? Functional? Assign (1 per student w/faculty)	Assign and research Provide example	Execute (student led, instructor facilitated)	Provoke deep reflection	Assess learning Sustain? Improve?
<b>Assignments</b>	Select to support research and learning goals	Assign and research	Execute and evaluate Allocate time to prep	Reflective essay and final assignment	Assess learning
<b>Meetings/ interviews</b>	Determine who to interview Maintain balanced perspective Consider location	Provide class on interviewing and ethnography	Assign rapporteur Transcribe Submit daily	Students reflect when transcribing	Provide students feedback on notes Assess learning
<b>Arts/culture</b>	Include in syllabus Recovery day: plan local activity	Include in prelim study	Semistructured recovery (group and individual time)	Consider culture during reflection	Sustain? Why? Improve? How?
<b>Museums/sites</b>	Identify relevant museums/sites Include cost in budget	Confirm museum hours	Conduct observation Consider guided tour	Conduct reflection	Sustain? Why? Improve? How?

	Design phase	Preliminary study phase	Field study phase	Integration phase	Assessment
<b>Logistics plan</b>	Assign individual/team planner(s)	Provide packing list	Anticipate problems	Anticipate problems	Sustain? Why? Improve? How?
<b>Lodging</b>	Consider location, cost, safety, type of payment	Confirm lodging accommodations	Ensure lodging is suitable, move if required	Ensure lodging is suitable, move if required	Sustain? Why? Improve? How?
<b>Transportation</b>	Reserve transit to/from region and in-country transit (bus/rentals) Forecast transit times Confirm method of payment	ID drivers (if required) Are vehicles manual transmission?	Does driver speak English? Do transit times require reassessment?	-	Sustain? Why? Improve? How?
<b>Meals</b>	Best to do breakfast at hotel Consider cost, time, etc.	Confirm any dietary restrictions	Consider interviews during meals	Include reflection at dinner	Sustain? Why? Improve? How?
<b>Classroom</b>	Reserve hotel/rental space AV/Wi-Fi considerations	Recon before class Test AV/Wi-Fi	Recon before class Test AV/Wi-Fi	Recon before class Test AV/Wi-Fi	Sustain? Why? Improve? How?
<b>Medical</b>	Get immunizations Gather travel meds ID in-country location(s) and capability	Confirm all have shots and travel meds	Know nearest location(s) and capability	Know nearest location(s) and capability	Sustain? Why? Improve? How?
<b>Fixer</b>	Find fixer (if required)	Confirm fixer (if required)	Use fixer (if required)	-	Sustain? Why? Improve? How?
<b>Admin/safety requirements</b>	Obtain visas (if required) Country clearance request (if govt)	Confirm admin complete Purchase gifts for select meetings	Provide thank you gifts for select meetings Consider safety issues	-	Sustain? Why? Improve? How?

## Annex 2 — Suggested Materials and Resources for the Research Staff Ride<sup>53</sup>

### Design Phase

- Informational sources required to build syllabus (seek balance and consider the bias for each):
  - Research (academic) articles, book chapters, etc.: theory, ethnography, interviewing, research methods, etc.
  - Documents, research articles, book chapters related to the incident or subject of study
  - Investigative reports
  - Podcasts or radio interviews
  - News articles or editorials
  - Nongovernmental organization (NGO) reports
  - Think tank reports
  - Documentaries
  - Literary fiction and nonfiction
  - Historical memos, letters, audio or video recordings, interviews, news releases, photos
  - Identify and set up guest lecturers for preliminary study and field study phases
- Identify experts and set up meetings and interviews with the following (consider balance):
  - Government, military officials
  - NGOs
  - Combatants, participants, witnesses
  - Think tanks
  - Academics
  - Members of civil society
  - Members of the media who may have covered the subject of study
- Department of State ([www.travel.state.gov](http://www.travel.state.gov)): visa requirement, vaccinations, travel advisory
- Map resources (e.g., Google Maps)
  - Determine stands locations, transit times, etc.
  - Topographic or other maps as required

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<sup>53</sup> This list is partly derived from Becker and Burke, “Instructional Staff Rides,” 517.

- Search engines, travel websites, other websites
  - Lodging (e.g., Kayak): consider location, safety, cost, convenience, conference room facilities
  - In-country travel: contract bus, rental vehicles, trains, planes, etc.
  - Meals (e.g., Yelp, Trip Advisor): have a tentative plan and adjust after arrival
  - Museums (e.g., Google): both subject relevant (history, military, etc.) and cultural
  - Tours (e.g., Google): take advantage of the culture and immersion
  - Art and culture opportunities: any concerts, cultural events to see
  - Other points of interest
  - Identify location and activity for recovery day: Is there a must-see cultural attraction (e.g., Taj Mahal)? National park?
  - Weather: to help with packing list and dates of travel (seasonal monsoon rains, busy religious festivals, etc.)
  - Local and national calendars (e.g., Google): Meetings will be tough to schedule during holidays; likewise, a major festival or sporting event can wreak havoc on travel
  - Find a local fixer if one is required
- Develop tentative itinerary after determining travel, meetings, movement, lodging, etc.

### **Preliminary Study Phase**

- Syllabus: print at least two copies and digital location of documents for easy access
  - Laptops/tablets: have students download all sources
- Print out itinerary (for all): include emergency numbers at embassy and medical locations
- Lesson plans (for instructional team): be ready for technology to fail
  - Classroom: Wi-Fi/speaker/microphone for virtual lectures
- Smart Traveler Enrollment Program (<https://step.state.gov/>): register to receive emergency updates from the US embassy (for US citizens)
- Risk assessment / safety brief to participants: consider reaching out to embassy security officer
- Website/location to post staff ride materials: photos, presentations, notes, itinerary, etc.
- Packing list: clothing, plug adapters, power cords, etc.
  - Adjust based on weather just prior to departing but be prepared for it to change
  - If you can manage with just a carry-on, that is always safer, easier, and cheaper

## Field Study Phase

- Syllabus: bring at least two printed copies of all readings
- Computers/tablets with all readings downloaded (leave behind for areas at high risk of electronic exploitation)
- Daily itinerary: meeting times, attire, meal plan, assignment of rapporteur duties, etc.
- Lesson plans (for instructional team): bring printouts and be ready to conduct if technology fails or from a bus (assign a backup faculty advisor or cadet in case of sickness or any other contingency)
- Assignments (for students): stands, character roles, reflection papers, field notes, final assignment, etc.
- Evaluation/assessment forms (for instructional team): bring printed forms
- Meetings: be clear on rules (background, record, etc.)
  - Assign rapporteur (note taker) for each meeting, turn in summary daily
- Classroom:
  - Wi-Fi/speaker/microphone for virtual lectures
  - AV capable if visual products are required
- Print out itinerary (no more than two days in advance due to likely changes)
  - Provide update at beginning and end of each day (for the following day)
  - Confirm travel plan with driver and fixer
  - Adjust as required based on challenges and opportunities
  - Confirm meal plan for the following day, adjust based on learning
- Smart phones (with international plans): needed for GPS and for communication
- Road maps: for GPS failing or for sites that cannot be found on Google Maps
  - Log planner and instructional team should have travel plan
- Risk assessment / safety brief: update if required based on movements, learning, etc.
- Debit/ATM card: pay for rooms and meals, get petty cash for meals, snacks, souvenirs, etc.

## Integration Phase

- Discussion guide / facilitator questions: for group reflection
- References and assignment(s) for participants
- Classroom: AV capable if visual products are required for final presentations or classes
- Evaluation/assessment forms: for final presentations
- Website/location to post staff ride materials: photos, presentations, notes, itinerary, etc.

## Assessment

- Self-assessment of learning by students: have preprinted if conducted before return
- Staff ride AAR/Assessment: bring AAR outline
  - Leader's Guide to AARs: [https://pinnacle-leaders.com/wp-content/uploads/2018/02/Leaders\\_Guide\\_to\\_AAR.pdf](https://pinnacle-leaders.com/wp-content/uploads/2018/02/Leaders_Guide_to_AAR.pdf)
  - Guide to the AAR: [https://www.cebma.org/wp-content/uploads/Guide-to-the-after\\_action\\_review.pdf](https://www.cebma.org/wp-content/uploads/Guide-to-the-after_action_review.pdf)

### Annex 3 — Research Staff Ride Stands

This annex provides additional details on the execution of stands, given their importance to learning and the fact that many participants (and possibly instructors) may be unfamiliar with them. As discussed earlier, a stand is a deliberate stopping point where facilitated discussion occurs. If executed effectively, they can significantly contribute to student learning.

The instructional team selects the stands during the design phase based on their importance to the event being studied. A stand could include a critical decision point, a critical event, or a critical component. We recommend assigning each participant a single stand, which they will research during the preliminary study phase and execute during the field study. Additionally, we recommend assigning an instructor to help mentor the student during preliminary study and to facilitate discussion at the stand during the field study.

Given the nature of a research staff ride, the assignment of roles and stands differs from a traditional staff ride. In a traditional staff ride, such as Gettysburg, participants are typically assigned roles, such as Gen. Robert E. Lee, Gen. George Pickett, or Gen. Dan Sickles, while the instructional team runs the stands. The first time a character is introduced, the participant describes the character (in the first person) and, assuming the persona of the assigned character, discusses the character's actions at the particular battle site. The character may have appearances at several stands based on the action, and the student describes the character's role (in the first person) at each stand. A staff ride to Gettysburg or Antietam could include a dozen or more stands yet several dozen characters.

This technique, however, generally does not work for a research staff ride, due to the broader nature of the study. A research staff ride is usually more akin to studying the American Civil War as opposed to the Battle of Gettysburg. Thus, an instruction team studying the American Civil War would select stands that are most useful in understanding the outcome of the war. Thus, rather than stands such as Little Round Top, the Wheatfield, the Peach Orchard, or Pickett's Charge, stands would include seminal battles or events such as the First Battle of Bull Run, the Battle of Gettysburg and the Gettysburg Address, Antietam and the Emancipation Proclamation, or even the Missouri Compromise.

In keeping with the spirit of the traditional staff ride, when we assign our students stands, we also assign them a significant individual from the stand. This allows them to assume the persona of the individual and explain the event from the individual's perspective. We force them to discuss the action in the first person to help them understand the action from their characters' perspective. For example, for the 2008 Russia-Georgia War, a critical decision point that we chose for a stand was President Saakashvili's decision to preemptively attack South Ossetia. Thus, we assigned the student the role of Saakashvili and the start of the war, beginning with Georgia's preemptive attack through the initial fighting between Russian and Georgian forces in the large South Ossetian town of Tskhinvali.



Leading the discussion outside South Ossetia's town of Tskhinvali.

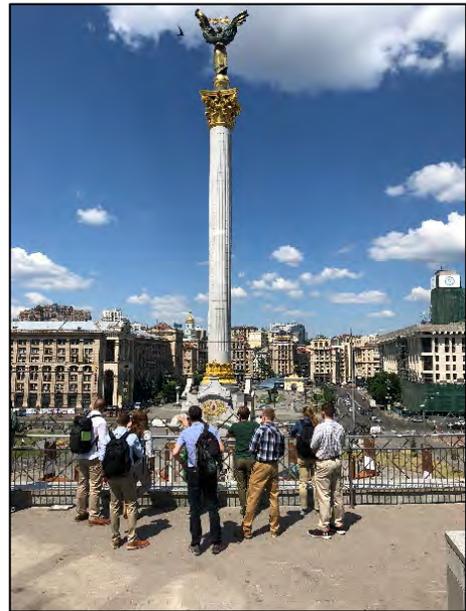
We could have conducted the stand from Georgia's capital of Tbilisi, but a better location was a hill overlooking Tskhinvali (we were not allowed to cross the boundary line into South Ossetia). From Georgia's side of the administrative boundary line, we had an excellent view of the town in the valley below. In addition to providing an excellent location to describe the start of the war and the opening battle, it also offered the opportunity to discuss military tactics, which was especially relevant given that our students were cadets. It offered us the opportunity to discuss key terrain, where to place artillery, the challenges of fighting in urban terrain, and other concepts that they had studied in their military science classes using maps. We could reinforce these important concepts, using actual terrain and an actual conflict to drive home learning.

This example also offers the opportunity to reinforce the importance of various safety considerations. For a contemporary battlefield assessment, unexploded ordnance (mines, artillery rounds, etc.) is often a concern. So we hired a guide who knew the area, to stay safe. When one of our faculty members started to stray too far (trying to obtain photos for our research), the guide was quick to advise that he not venture any farther. Likewise, the embassy warned us that there was a threat of kidnappings near the administrative boundary line. Occasionally, South Ossetians would snatch someone near the boundary line and hold them inside South Ossetia to use as a diplomatic bargaining chip.

In terms of running the stand, we recommend the following model:

- Orient the group in space and time.
- Discuss the historical event and key individuals.
- Facilitate the discussion of key issues and ask questions to facilitate deep reflection.
- Summarize to drive home key lessons.

We like our students to lead the orientation and discussion, with the faculty mentor interjecting as required. The faculty member leads the facilitation and summary. Each will briefly be discussed.



Leading a stand from Kiev's Maidan Nezalezhnosti (Independence Square).

- *Orient the group in space and time.* Rarely does a research staff ride offer the ability to be conducted chronologically, as a staff ride to Gettysburg or Antietam would be, so it is important to remind the group of when the action is taking place. The logistics—the tyranny of geography and transit time—will likely drive an itinerary that is not chronological.
- *Discuss the historical event and key individuals.* The student introduces the key individuals and describes what happened at the event and why the terrain or locale was important. If the student was assigned a character, then he or she will introduce the character as well. Characters should be presented in the first person and only include information relevant to the war or historical event, to maximize time. When the briefing concludes, the other participants should have a good understanding of what occurred and why but also what might have occurred had decisions gone otherwise.
- *Facilitate the discussion of key issues and ask questions to facilitate deep reflection.* This is the most difficult and critical part, so it should be instructor led. Even a group of experienced students, such as PhD candidates, senior executives, or senior military officers, likely lack the skill, experience, or preparatory time to effectively facilitate discussion and develop questions required for deep learning. Ensure that the following stages of learning occur and in this order:

- Interpret. Why did *X* happen? How could *Y* have been prevented?
- Generalize. Does *X* happen (in warfare, etc.) today? Why or why not?
- Apply. How does this knowledge impact your decision-making, military judgment, etc. in the future?

Another approach to accomplish the first stage is to pose a counterfactual query: change a decision, action, etc. from the event and then ask the participants to assess how that would have changed the outcome of the event being analyzed. To return to the earlier example: How might the opening stages of the 2008 Russia-Georgia War have turned out if Saakashvili had not preemptively initiated the war? Or what would have changed if Georgia had successfully closed the Roki Tunnel (the only feasible route for the Russian forces into South Ossetia) and prevented the Russians from entering South Ossetia at the beginning of the war.

Another technique used by the military is to frame the counterfactual proposition in a concept its participants will understand: a course-of-action assessment. This is nothing more than a counterfactual perspective couched in a vernacular the audience understands. Returning to Gettysburg, the instructor would ask the participants to compare Dan Sickles's actual course of action at the Peach Orchard—defending extremely far forward while leaving large gaps in the Union lines, which caused Gen. George Meade to deploy his reserve prior to the start of the day's fighting—to a different course of action, such as defending from his assigned position.

Questions that generalize and apply the lessons should be designed to generate deep reflection. For our contemporary battlefield assessment, it is fairly easy to generate purposeful reflection. Given that our students will be joining the profession of arms, it is not difficult for them to see how they might apply the lessons they are learning, in the future. Yet for any research staff ride worth taking, there are always relevant lessons that can be applied more broadly—the key is asking the right questions to generate this reflection. The students must see how it is relevant to them personally, not just as an exercise of analyzing someone else's actions. For corporate staff rides, they are trying to drive home lessons of leadership. While corporate members are unlikely to fight in a war in their future, staff rides remain popular because some of the leadership lessons are universal.

- *Summarize to drive home key lessons.* The instructor that is assigned the stand concludes by summarizing the key lessons. This should reinforce the learning objectives of the staff ride. It is prepared in advance but modified based on important points that came out during the discussion and reflection.

As a final note, consider filming the stand (with the approval of the participants) to use in the future to demonstrate how to conduct an effective (or ineffective) stand. Also, be sure to take pictures of the stand and the surrounding area since they may come in handy down the road.

## Annex 4 — Research Staff Ride Integration

This annex provides additional details on integration, given its importance to learning and the fact that many participants (and possibly instructors) may not have experience with integration. As discussed in the section on learning theory, the integration phase is where abstract conceptualization occurs—the final step in experiential learning theory—so it is a vital part of the staff ride. It is the part of the learning process where the participant internalizes the lessons from the subject of study and is able to apply them more broadly.

While the Army's staff ride guide describes the integration phase starting after the conclusion of the field study phase,<sup>54</sup> we believe it is important to consider integration as something that can and should be conducted during the field study and at the conclusion of the staff ride. This phase “involves participants moving deeper into understanding the event to derive meaning—through dialogue and reflection.”<sup>55</sup> This is best accomplished with the right thought-provoking questions, so it is important for the instruction team to spend time developing these questions. As discussed in the section on learning theory, it is important to generate questions that provoke deep reflection.

During the field study phase, these questions can be asked during stands toward the end of the facilitated discussion or during dinner. Sample questions might include the following:

- What surprised you most about the actions or decisions taken by leaders in the stands covered today?
- Based on what you heard or learned, how might you have responded differently?
- Which of the characters discussed today did you admire most and why?
- How did the interviews shed light on—or maybe even contradict—what we read ahead of the staff ride?
- Which of the stands do you think was most practically relevant for your future careers and why?

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<sup>54</sup> Robertson, *Staff Ride*, 18.

<sup>55</sup> Becker and Burke, “Instructional Staff Rides,” 518.

Reflection essays can also be used to achieve the objectives of the integration phase. We require our students to write reflection essays following our annual Gettysburg staff ride and research staff ride. For Gettysburg, they are encouraged to write their essay on the bus ride back to the academy, while it is still fresh. Yet even if participants are not students in a formal class, we still recommend having them write a reflection essay, given how effective it can be in terms of learning. Example questions are below:

- What role did leadership play in how the war unfolded? What lessons are most useful to you as a future officer?
- What does this historical staff ride experience mean to my future role in the profession of arms?
- Compare the staff ride you researched to another war or battle from your history books. What are the common parallels? How is modern war qualitatively different? And similar?

While this individual reflection is important, group discussion and reflection are also an important component to the formal integration phase. Like the Army's staff ride guide, we find that it "is most successful when it follows field study as closely as circumstances permit."<sup>56</sup> We strongly advise against waiting until you return home to conduct the integration—it will not be as fresh and the participants will become distracted (or pulled away) by other pressing requirements. Do not make the mistake of being so focused on maximizing every minute away on field study that you try to conduct interviews or stands until the minute of departure. For Gettysburg we conclude with sixty to ninety minutes at the cemetery for formal integration and provide our instructional team a set of discussion questions.

We find it best to break large groups into smaller groups of four to five participants for the facilitated discussion (if your participant-to-instructor ratio permits). If we are running behind, we cut the stands short to allow adequate time for integration. For our research staff rides, we generally set aside the final day for the integration. We start the day with formal briefings from our students—assignments they were given at the start of the course that address some of course's learning

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<sup>56</sup> Robertson, *Staff Ride*, 18.

objectives—and then finish with the instructor team leading group integration. Below are some examples of integration questions:

- How does the war uphold or contradict our theories of international relations (or civil war, etc.)?
- How did the war objectives change throughout the course of the conflict on both sides?
- What role did civilians play in the conflict?
- It is often said that the nature of war is fixed but that its character changes. What are the similarities of the nature of this war with past wars? What about the character of this war is different?
- Based on what you observed and learned, how does this war help explain the future of war, in terms of the role of leadership, technology, doctrine, norms, and other factors?

## Annex 5 — Research Staff Ride Assessment

Any course or staff ride should be assessed to make the next iteration even better. Two distinct but related assessments must be conducted for the research staff ride: participant learning and the staff ride itself. To avoid confusion, we will refer to the assessment of participant learning as “assessment” and to the assessment of the staff ride as the “after-action review” or “AAR.”

### Assessment

To best assess participant learning, assessments should be considered during the design phase. The assignments, whether part of a formal course or as part of a professional development experience, should be purposefully designed so that they allow the instructors to assess how well the participants have achieved the staff ride’s learning goals. Stands, reflective essays, and final presentations or papers all offer opportunities to assess learning. Likewise, meeting summaries and dinner discussions offer the opportunity for assessment; and when timely feedback is provided, participant summaries and the depth of discussion should improve throughout the experience.

Beyond the formal (or graded, if in a course) requirements, we recommend a formal assessment at the end of the course. Provide the participants with one to two pages (no more) of open-ended questions that contribute to the assessment and AAR. We also recommend a group session. Some participants may not want to share some of their thoughts in front of the group, and conducting the group session first can bias individual feedback, so it is important to conduct the individual assessment first. The group session is useful as issues can be discussed in greater depth (most participants would rather talk than write) and the group dynamic allows participants’ comments to feed off one another to get to greater depth. The group session should include discussion on both participant learning (assessment) and questions relating to the staff ride itself (AAR). The group session should be kept under an hour, so it is important to prioritize the questions you want to ask.

Example questions for the participant assessment:<sup>57</sup>

- What was the most important takeaway from this experience?

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<sup>57</sup> Some of these questions come from Wendy Becker, who provided a review of the paper.

- What could be improved? How?
- What should be sustained? Why?
- What did you find most surprising? Why?
- How did the staff ride compare to your other courses or other training?
- Will you change your work practices as a result of the staff ride? If so, how?
- Would you recommend this staff ride to others? Why or why not?
- How relevant was this staff ride to your future work or professional development?
- What methods were most useful in conducting research for this staff ride?

### **After-Action Review**

To assess and improve the staff ride, we recommend using an AAR approach. Generally, an AAR focuses on the following five questions:<sup>58</sup>

- What was supposed to occur?
- What actually happened?
- What went well and why? Or what should be sustained and why?
- What can be improved, and how?
- What should be done differently the next time?

We find it best to ask these questions for each phase of the research staff ride. For the design phase, it is primarily an exercise for the instructional team. For the remaining phases, it is important to include feedback from the participants, since they often have a different perspective from the instructional team. The discussions on the design and field study phases are usually the longest.

The assessment should focus on issues that will apply to any staff ride, since a specific research staff ride is not likely to be repeated. For example, saying “meeting with individual X was not useful”

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<sup>58</sup> US Army, *Leader's Guide*, 2–3.

might be helpful for a repeated staff ride to Gettysburg. You simply drop the individual from the itinerary and find someone different the next time. For a research staff ride, however, it is important to find out what led to planning a meeting with someone that you thought would be useful but was not. Thus, ask questions that will be helpful in the future. Why did you want to meet this person? Why wasn't the meeting productive? Where did the interview take place? Might it have been better if conducted at a different location? These types of questions can help you get the best out of future interviews.

Both assessments should be captured, either formally or informally, in a document. If informal, the content must be effectively articulated so that it is useful to anyone who may need to reference it. If you are executing a research staff ride on an annual basis, it will likely be months from the time you finish the assessment until you start planning the next one. Likewise, it may be a different instructional team that will be executing the next staff ride. The assessments should be completed immediately after completion of the research staff ride.

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