



Swedish
Defence
University

Staff Ride Handbook

planning and conducting Staff Rides

Assoc. Prof. Mikael Weissmann
Major Jonas Björkqvist
Patrik Wiklund



Department of Military History
Swedish Defence University

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Assoc. Prof. Mikael Weissmann

Deputy Director, Land Operations Division
Department of War Studies, Swedish Defence University

Major Jonas Björkqvist

Military Teacher, Land Operations Division
Department of War Studies, Swedish Defence University

Patrik Wiklund

Department of Military History, Swedish Defence University

This book has been reviewed by the Department of Military History editorial board.



2024

**Department of Military History
Swedish Defence University**

This handbook is a translation from Swedish of *En handbook om fältövningar: Att planera och leda en fältövning* (Stockholm: Avdelningen för Militärhistoria, Institutionen för Krigsvetenskap och Militärhistoria (IKVM), Försvarshögskolan , 2023). Some minor editorial revisions have been made to the handbook more comprehensible for a non-Swedish audience.

Translation by Alexia Grosjean.

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Cover page: View across the Gulf of Salerno, Italy.

Back cover: Douaumont Ossuary, France.

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Staff Ride Handbook¹

Practical pedagogical tools are central to officer training and these tools form part of a longstanding tradition, not just within the Swedish Defence University but also within the Swedish Armed Forces more broadly. Further, this sphere has always been prominent within the Swedish Defence University, with its long history of using methods including different forms of case studies, map manoeuvres, war games, staff rides, staff exercises and tactical problem solving. This handbook focuses on one of these pedagogical tools: the staff ride.

The authors' starting point is the staff ride as understood and developed by the Land Operations Division at the Swedish Defence University.² This handbook considers staff rides specifically from the perspective of learning about tactics and the operational arts through the lens of historical staff rides, namely, staff rides based on historical events. Traditionally this type of staff ride aims to "learn from history whilst focusing on the present and the future" by studying "the planning and implementation of historical cases".³

Historical staff rides should not be confused with other types of exercises and methods used in studying historical cases through the lens of military history. (See Table 1 below, "Methods for studying historical cases"). A Tactical Exercise Without Troops (TEWT) involves a hypothetical scenario, which is then played out in the field, normally using current doctrine unrelated to historical events.⁴ A "Battlefield Tour" refers to visiting the site of a historical campaign or operation where little or no prior study has been undertaken by the participants.⁵ A staff ride, however,

¹ This handbook is based on the authors' article, "Staff Rides as a Pedagogical Tool in Professional Military Education (PME): Planning and Conducting Historical Staff Rides", in *Journal on Baltic Security* 8, nr2 (2022). It has previously been published in Swedish with the title *En handbok om fältövningar: Att planera och leda en fältövning* (Stockholm: Avdelningen för Militärhistoria, Institutionen för Krigsvetenskap och Militärhistoria (IKVM), Försvarshögskolan, 2023). Translations of quotations from Swedish sources were made by the authors. The authors want to thank the members of the Land Operations Division for their comments in connection to a presentation on 8 December 2021.

² For an overview see, for example, Weissman and Rydberg, "Att leda markoperationer".

³ Högström and Baudin, "Fältövning" in *Militära arbetsmetoder*, p.306. See also Ahlström and Högström, "Fältövningarnas metod" as well as Baudin, "Fältövning". See, further, Schøning for how and why military history and real experience is used in higher officer training.

⁴ Knight and Robertson, "The Staff Ride", p.6.

⁵ Knight and Robertson, p.5.

concerns a historical case, placing maximum focus on the active involvement of the students/participants, with clear learning goals, and includes a follow-up integration phase which is of great importance to successful learning. The Swedish staff ride, much like its American counterpart albeit more flexible, contains three phases: 1) prior to implementation some form of preparation occurs relevant to the case and goals of the staff ride, 2) a visit is made to the site of the historical event, and 3) the learning goals drawn from the first two phases are integrated and synthesised.⁶ There are benefits to including aspects of integration and synthesis during the implementation of the staff ride as this facilitates formative learning.

Table 1: Methods for studying historical cases⁷

	Battlefield Tour	Historical Staff Ride	TEWT
Historical background	Yes	Yes	No
Participant involvement	Passive	Active	Active
Learning goals	No	Yes	Yes
Lessons learned	No	Yes (integration phase)	Yes (after-action review)

The handbook is laid out as follows: firstly, a presentation of the historical background to staff rides, along with a discussion of what a staff ride is and what types exist. Secondly, the focus moves to thoughts on planning and implementing a staff ride, in which we discuss the planning phase, lessons learned regarding the use of reconnaissance prior to implementation, and thoughts concerning the pedagogical aspect to the staff ride. Finally, the handbook closes with a discussion on how to plan and implement staff rides, both from practical and pedagogical perspectives. Here a schematic model is presented on the pedagogical dynamics of

⁶ Knight and Robertson, p.6. See, also, Lasconjarias, "The Staff Ride".

⁷ This table is based on Lasconjarias.

a staff ride as regards various target groups, based on their understanding and the varying complexities of staff rides.

Historical Background

Modern military theory emerged following the Napoleonic Wars and the ensuing period. At this time war theory and its practise was based on historical warfare. Examples from military history continue to serve as good pedagogical tools in basic officer training, for example, as a means to clarify military theory concepts. An important component of officer training in the Prussian army has included various forms of *Kriegsspiele* (war games) from the second half of the 1700s onwards. So-called field trips, based on actual historical military events, began to be included in the military curriculum at the Berlin Allgemeine Kriegsschule from the 1830s onwards, forming an important element of the professional officer training. In contrast to field training exercises engaging entire units, these trips involved discussions and analysis of various tactical solutions without the units. Baron Hugo Raab, the founder of the Swedish Defence University, had himself attended Allgemeine Kriegsschule during the 1850s and revealed the school's influence on him when describing the importance of military history within officer training. Military history naturally formed part of the teaching methods for refining various skills. Berlin's central location facilitated access to a number of sites from the Napoleonic Wars. The main point of these studies was to allow students to practise on-site situational assessment, taking rapid decisions based on historical events. Instead of focusing on the historical military circumstances teaching was focused on students taking tactical and operational decisions, encouraging the students to find their own solutions and alternative actions which then underwent positive criticism. The Allgemeine Kriegsschule thus served as a role model for the Swedish Defence University on its founding in 1878: the two most important subjects were military history and tactics, doubtless due to Raab's influence. In students' final evaluations of their training it was the field trips that ranked highest.⁸

The Germans continued to value the importance of war games even after 1918. Belief in the value of this type of theoretical training for officers remained strong in the Reichswehr and later Wehrmacht. Indeed, the concept of war games expanded within the German army during the 1914-1945 period and came to include a range of different activities. It now included mapping exercises and oral battle exercises to

⁸ Åselius, "Krigshistoriens uppgång och fall", pp.41-44.

battlefield tours and undertaking field trips, currently known as staff rides. The war games were either based on actual historical events and campaigns or took the form of imagined scenarios. The Germans truly believed in the pedagogical value of battlefield tours and field trips as tools which allowed for the testing of new ideas and preparation for future operations.⁹

The concept of a staff ride thus derives from the nineteenth-century mapping exercises conducted on horseback by the Prussian General Staff. Although the various military exercises can overlap, they do serve different purposes. Battlefield tours primarily entail looking back at historical campaigns and can have both military and civilian applications. Staff rides, in contrast, in the main analyse a military operation – rather than provide an historical account – and primarily take the form of a military activity. The concept of the staff ride continues to evolve and nowadays includes tactical exercises without troops, undertaken in the field but usually based on hypothetical scenarios, albeit using modern operational arts, tactics, and materiel. The potential overlap between battlefield tours, field trips and tactical exercises without troops makes it possible, depending on the participants, to combine them while highlighting and discussing a given subject.¹⁰

Staff rides at the Swedish Defence University

Today staff rides play an important role at the Swedish Defence University, both within the framework of basic officer and higher officer training. The students take on one or several military operations from a variety of perspectives, involving both theory and practice, based on the complex nature of the officer's profession.

Land Operation Division teachers have, through the years, evolved and implemented a range of different staff rides based on historical events. The present authors have attended Operation Market Garden (September 1944), Operation Veritable (February-March 1945), and Operation Mercury (May 1941), amongst others. Other staff rides include Somme 1916, Cambrai 1917, the German Spring Offensive 1918, the final allied offensive 1918 (Amiens), the Ardennes staff ride related to the German offensive in May 1944, the "Barmark" staff ride concerning the western campaign in May 1640, along with a staff ride looking at the allies'

⁹ Hall, "IV. The Modern Model of the Battlefield Tour and Staff Ride", pp.37-38.

¹⁰ Melvin, "Contemporary Battlefield Tours and Staff Rides", pp.59-60.

campaign in Italy 1943-1944, the Normandy invasion in 1944, as well as Caporetto 1917 (the 14th Army's attack in the 12th Isonzo offensive 1917).¹¹

Further, fictitious, futuristic, and map manoeuvre-based staff rides are regularly implemented. These have been put in practice within the framework of various courses, involving cadets and officers, and focusing on, different areas of Sweden.

The examples presented in this handbook are mainly taken from the authors' own experiences of the Operation Market Garden (September 1944), Operation Veritable (February-March 1945), Operation Mercury (May 1941), and the allied invasion of Sicily and Southern Italy 1943 staff rides.

Staff rides differ from case studies and map-manoeuvres (in Sweden often referred to as "applex"), namely "very realistic practical cases" including battles, wars, conflicts, catastrophes, and fights precisely because they are undertaken in the field.¹² At the same time, an applex can be the basis of and a means to prepare and/or lay the grounds for an ensuing staff ride.

Staff rides are also related to war games as both are based on fictitious or realistic scenarios. War games can also form part of a staff ride (war games implemented in the field) or they can be carried out as a staff ride. It is even possible to combine war games with staff rides (and applex). One example can be found in the Higher Joint Command and Staff Programme optional course "Land Operations". This is an applex-based staff ride, based on a fictitious scenario in which the world order changes rapidly and a great war breaks out between the Red Country and the Green Alliance. In this scenario a ground assault occurs, with particularly rapid impact on the southerly areas of the Blue Country. The Green countries offer some support to the Blue side. This same fictitious scenario is played out directly linked to a staff ride in the form of a war game.

Staff rides, then, can be based either on 1) a fictitious operation which is to be implemented, 2) case studies using historical examples, 3) something which may

¹¹ More can be read about "Caporetto 1917" in Jeppsson, *Tankar om defensiven*. See also Ahlström and Högström, "Fältövningarnas metod", recommended reading for the background on the Italy 1943-44 staff ride as well as the Ardennes 1940 staff ride.

¹² An example of applex is "a very realistic practical case ... which can "be based on actual historical events or on a fictitious scenario developed in order to create a situation, a dilemma, a problem as well as a chosen geographic background. The case can also be based on a genuine historical battle retaining its basic circumstances, where forces are transformed to represent current organisational and technological levels." (Högström and Baudin, "Fältövning", in *Militära arbetsmetoder*, pp.300-301).

hypothetically occur in the future, or 4) a fictitious teaching situation (often known as an applicational example, or applex).¹³

Table 2: Types of practical moment incl. staff rides

Category	Type	Place of implementation	Fictitious or Historical	Types of Scenarios
Staff ride	Staff ride based on fictitious case (Fictitious staff ride)	In the field	Both	Fictitious task to be implemented
	Staff ride based on historical example, (Historical staff ride)	In the field	Based on, but not limited to, historical example	Case study of historical example
	Staff ride based on possible future situation (Futuristic staff ride)	In the field	Both	Situation which may occur in the future
	Staff ride based on applex, (Applex-based staff ride)	In the field	Both	Fictitious teaching situation (applex)
Applex	Applicational example (applex)	Map, imagination	Both	Realistic practical case, "Based on real historical events or on a fictitious scenario"
War game	War game	Map, imagination, in the field	Both	All the above

¹³ See Högström and Baudin, p.300.

A staff ride can be used to achieve many teaching goals within military education. Peter G. Knight and William G. Robertson's book, *The Staff Ride*, published by the US Centre of Military History, lists 16 goals which deserve to be cited in full:

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

¹⁴ Knight and Robertson, "The Staff Ride", pp.7-8.

In addition to these goals, these types of exercises also contribute to achieving other worthwhile elements of officer corps development and *esprit de corps*, as “a visit to a historic site or battlefield may be an emotional experience, it can reinforce soldiers’ positive feelings for their profession, their units, and one another. If participants belong to the same unit or office, their shared experiences during the exercise may strengthen the camaraderie and esprit de corps that are necessary for workplace cohesion.”¹⁵

Preparing and planning a staff ride

Planning a historical staff ride normally requires quite comprehensive preparations and reading. The successful implementation of a staff ride requires on a very good understanding of the historical example – both within the framework of the case being studied and the wider context of the case. Success relies on the chosen case being a well-studied one, so that the relevant events are fully known, and not just from one side alone. Two good examples of this are Operation Market Garden (September 1944) and Operation Veritable (February 1945).

Further to the rather comprehensive literature on many well-known cases, other kinds of material can usually be found online. This material must, of course, meet source quality assurance, but given that military history tends to attract meticulously minded people there is a good chance of finding suitable material. Some published material is not of sufficient standard, and indeed it can vary greatly (especially given modern technology and publication tools, particularly print-on-demand, enabling innumerable publishing routes, including self-publishing). It is an extensive market, both in terms of output and disposable income, reducing the need for quality assurance. Further, travelling ‘in the footsteps of wars’ has become big business and a range of battlefield tours are available – as is quickly discovered upon arrival in Normandy – and these can often provide hints and ideas, albeit of variable quality. For example, Leger Holidays currently lists 28 specialists undertaking battlefield tours.¹⁶ An international “Guild of Battlefield Guides” has even been established (2001), boasting over 300 members.¹⁷ It is recommended that literature and articles written by recognised military historians and other

¹⁵ Knight and Robertson, “The Staff Ride”, p.7.

¹⁶ Leger Holidays, <https://www.legerbattlefields.co.uk/guides> (2022-11-29).

¹⁷ Guild of Battlefield Guides, <https://www.gbg-international.com/> (2011-11-29).

“quality assured” individuals is prioritised. The Department of Military History’s library is also recommended.

A good starting point can often be found in the extensive amount of published “battlefield guides”. These guides, regardless of variable quality, offer a good starting point for early planning stages. They often also contain maps which can be useful in planning and implementation. For example, Osprey Publishing have a huge number of various guides and other publications aimed at those with military interests. The Osprey Campaign series has, at the time of writing (September 2022), a total of 383 titles, ranging from “military history from the ancient world to modern times. Napoleonic battles, American Civil War battles, World War I battles, and World War II battles are all analysed, as are the major military engagements of the American Revolution, the medieval period, and the 16th to 19th centuries.”¹⁸ Another example is Casemate Publishers, whose extensive output focuses particularly on the First and Second World Wars.¹⁹

Another excellent starting point is, of course, contacting a military historian, such as a member of the Swedish Defence University. These individuals are not just extremely knowledgeable but also very helpful in terms of indicating a way forward and making contributions. When we embark on a staff ride within the Land Operations Division we usually work very closely with our colleagues in Military History, both in the planning and the implementation, as far as resources and time allow. At an absolute minimum, prior to an historical staff ride, at least one lecture is given by a military historian to present the historical context of the intended case study. Military historians frequently attend the actual staff ride, as well as any reconnaissance undertaken during preparation, which has been shown to be a highly beneficial factor. A given officer or student may have extensive historical knowledge, but the level of expertise possessed by a military historian, usually educated to postgraduate level and often either a docent or professor of the subject, and someone who has largely dedicated their lives to military history, cannot be overstated.

Of course, the central issue remains: what is the aim of the staff ride. What is the desired outcome? What should the participants learn? Staff rides are NOT intended to be study tours or “Battlefield Tours” with the sole aim of visiting a given site and

¹⁸ Osprey Publishing, <https://ospreypublishing.com/store/military-history/series-books/campaign> (2022-09-15).

¹⁹ Casemate Publishers, <https://www.casematepublishers.com/> (2022-09-15).

following historical developments as noted above. Although basic reading is required regardless of the expected outcome, it remains advantageous to clarify what the intended learning goals are from an early point, both to save time and increase efficiency, and also to ensure the quality of the staff ride.

Yet further useful tools are available which, to varying degrees, contribute to planning the staff ride, depending on which goals are intended, who is participating, and on the case being studied. These tools' accessibility varies. Youtube, for example, contains innumerable clips dealing with historical cases, ranging from well-reputed historical documentaries from producers such as the BBC to more niche productions. Everything from survey documentaries covering wars and campaigns to specific detailed videos of operations, campaigns, and individual battles aimed at audiences interested in military history can be found. Not only are these films potentially instructive but they can also provide good maps, books, and clips which may prove useful. The films can also prove useful to the staff ride participants, depending on their own background, prior knowledge, and time to prepare.

Indeed, war games – both classic board games and digital versions – can serve to illustrate historical examples. For example, Operation Veritable has a game based on it.²⁰ The internet is also a useful resource for finding maps and images which contribute to the planning stages and can serve as pedagogical tools (more about this below). Last, but not least, it is important not just to take a wide-angled approach to literature but also to make use of broader historical texts, both to understand the context surrounding the case study and to find gold nuggets concerning the case. Bibliographic literature, such as different personal memoirs, can prove very enlightening, both in understanding the context and as to why things happened the way they did.

²⁰ A review of this game can be found at MarcoOmnigamer: "Operation Veritable Review", 2012-05-15, <https://www.youtube.com/watch?v=D46fIWblWblSKQ&list=PLCEnfkXgCqYx>, (2022-11-28).

Why use reconnaissance?

Once the initial deskbound research is completed it is time to take the next step in planning, namely, reconnaissance, where the newly gained knowledge is brought to the historical site so as to develop and test the planned visit. It is here that one learns whether any ideas will work, what can be improved, or would be best done differently, and not least: are the logistics adequate to the task?

Although we live in a connected world, not everything can be done remotely.²¹ Reconnaissance is central to a successful staff ride, allowing leaders to be organised, providing plentiful parking options, ensuring the exercise site is still accessible, that open terrain has not become overgrown, observation posts are not currently surrounded by forest, or water courses lost. Changes naturally do occur, this is self-evident and unavoidable, but by planning and preparing in advance these can be managed and sometimes even lead to improvements.

The authors experienced one example of avoided frictions thanks to reconnaissance during the Operation Market Garden staff ride in 2021. The intention was to study the 20 September 1944 attack across the river Waal from the Monument De Oversteek, as one of the authors had done previously, close to the memorial to those who perished, looking out across the site where units from the 82nd airborne division paddled across the wide river before advancing across a large field. However, it became apparent that the northern side of Nijmegen and a 3-kilometre area, including the exercise site, had become a building site. To confound the issue, there was an ongoing environmental project involving a 5-kilometre coastal strip seeking to increase biodiversity at precisely the same spot that the crossing had taken place. It took several hours to access the intended exercise site and closed-off sections rendered the accessible exercise site useless. The whole group was

²¹ Obviously, digital media such as Google Maps, -earth and -street-view, can support the planning stage and both improve and make reconnaissance more efficient in many ways. Social media also allows, for example, for time efficient ways of discovering new exercise sites and even to get an impression of what it looks like away from the map. Services such as Tripadvisor and other guides also aid in home/reconnaissance planning, allowing a lot of work to be completed, saving time and money, and enabling the discovery of better sites, hotels, restaurants, museums and monuments. The worst can be sifted out and an assortment of best options created from home. It is also possible to discover previously unfamiliar sites. For example, the authors found a new monument digitally in Driel, the Netherlands, recently raised by a local association, which then served as one of the exercise sites.

displaced to an ALDI carpark located 300 metres away from the now inaccessible exercise site. The schedule for the entire day became unusable. Thanks to reconnaissance, however, the problem was not only avoided but an even better exercise site was discovered at a spit in the river below the Waal bridge where British troops had advanced across the bridge as part of the river crossing.

This brings up a similarly tedious but central issue, namely, logistics – not least opening hours and parking options. A basic timetable can obviously be created by checking opening hours, making judgements based on previous experiences, and not least making use of services such as Google Maps. All this provides imperfect ideas of travel times to and between game sites, the amount of time required at each site (walking time, queuing, calibrating time required for the exercise), as well as time needed for the baggage to arrive, getting to the hire-car establishment and its parking area – which often takes longer than estimated – and leaving the airport. Given the amount of activities involved, staff ride timetables tend to be tight but the participants should not feel under pressure at the exercise sites, and thus preparation is key. Many exercise sites are often remotely located, either in fields or areas only accessed by minor roads. This makes GPS invaluable for every vehicle, with adequate signposting for the sites and parking. Participants must know where they are going and that it is possible to get there and to find parking. The parking issue may seem odd but it can be surprisingly difficult to find suitable parking spots near an exercise site for either 6 to 8 minibuses or worse, one large bus. Further, as one of the authors experienced on site, local farmers tend to get fed up with large numbers of visitors parking in a small improvised parking spot and are liable to prevent any parking at all, usually by means of a barrier of some kind.

Another element related to the above is that reconnaissance allows for a positive exchange with local inhabitants, forging good relations and preparing them for the arrival of a study group in a given number of weeks. This kind of exchange not only increases the likelihood of a successful staff ride but can also generate helpful tips and advice regarding visiting artefacts in the local area – for example, the presence of a bunker on a neighbouring farm.

During reconnaissance the intended exercise site is visited. It is advantageous to have a variety of exercise sites to visit, indeed, this cannot be undervalued. One does not simply stand near or on a bridge or somewhere in the vicinity of a battlefield, without a thought to positioning. Only certain spots provide the necessary viewpoint, making the participant part of the environment. There is a

view over the allied troops' passage through the Hochwald Gap towards Xanten, from which they could see the top of Xanten cathedral and beyond which lay the destination, the Wesel. Simply "being" in the general area, near where something happened, is not the same thing as being on site. In fact, it reduces the value of undertaking a staff ride, to put it mildly. Another example is the Ardennes staff ride, which occurs within the framework of an optional course in ground operations within the Higher Joint Command and Staff Programme. Usually, the participants stay at the same hotel at which Guderian rested for a few days in May 1940 while on the western campaign which forms the basis for the staff ride. This same exercise considers the fighting at Bouillon, where the XIV corps crossed the Semois on 11-12 May, at a site which serves as the location for a photograph with a German Pzkw 1 tank: the hotel Panorama, where the participants stay – just as Guderian did – is visible in the background.

Last, but not least, it is vital to document the visit, both for the participants' own sake and for the institution's records. It may seem exaggerated but logging every single site of interest visited on a GPS (incl. parking spots) is important as is determining the logic and structure behind the names chosen. One of the authors found himself stuck in mud in the middle of a field while trying to make sense of the road signs, including restaurant names, exercise sites, potential sites, historical monuments, various bunkers, shops, hotels and other items he never did discover what they were, when he was seeking the "correct" exercise site for a very specific moment that occurred in northern France. One might consider plotting one's course on Google Maps, perhaps. Another necessary tool for documenting is a camera. One must not overly rely on one's memory during reconnaissance, no matter how perfect one believes it to be. The parking issue rears its head again here, and it is recommended that parking areas be photographed. It may seem silly but, a whole year later, it may suddenly become clear that the staff ride will involve a large group comprising up to 8 vehicles – or worse still, a large bus – while the "remembered" good parking spot only related to the one vehicle used for reconnaissance. In these situations, Google Maps is very useful, albeit sometimes imperfect. Nowadays most mobile phone cameras are adequate, but one must remember to take the images and then save them in an easily accessible document/folder so that a year later the images make sense to you and anyone else who needs the information.

Building an esprit de corps

Many other advantages are gained by reconnoitring an upcoming staff ride, not least that of improving the whole experience. In addition to gathering maps and literature which can only be obtained in situ – those related to the exercise site and tourist maps of towns, road maps and such like – it also enables checking the suitability of a hotel, the services it offers, such as a gym or a sauna, and whether there is suitable space for socialising. The ability to hold informal gatherings not only prevents the group from splitting up or individuals from hiding away in their own rooms, but it also generates a unified formative learning experience by combining leisure- and exercise-time, where conversations begun earlier can be continued and deepened over extended periods. Achieving this is far too important to leave to chance. Communal evening meals, along with cultural and social activities, also play a role. Enjoying a meal in good company is not the main goal but it facilitates the aforementioned processes. As well as generating a positive atmosphere it also encourages participants to socialise before and after the meal, making it a focal point which binds the group together throughout the staff ride. It can be likened to the mess, which aims to foster a sense of community, collegiality, and shared identity. At this point the authors would like to emphasise the necessity of not just selecting an appropriate restaurant for the participants, but even to ensure that the premises can accommodate not only the size of the group but their needs. For example, if the group tends to burst into song it may be advisable to find premises distanced from any other patrons.

Despite all this the authors also want to emphasise the need for balance between group- and personal-time. Too much of either can generate a less than optimal atmosphere as it requires accommodating the needs of whichever group is being catered for. Similarly, due reconnaissance regarding the suitability of the hotel and evening meals is not the same as simply spending more money. In fact, the opposite is true. The difference lies in staying in a good, well-situated hotel and eating at a good restaurant rather than dealing with a rundown hotel and mediocre food for the same price.

The above comments are not intended to be directives in themselves, but taken together they can play a deciding role in the success of a staff ride. This is not to be overlooked as staff rides also contain elements of leadership-development, community-building, and identity-shaping as well as network-expanding opportunities for the participants. The true value of a staff ride often lies well beyond the formally achieved learning goals or new skills, as can surely be attested

from personal experience by many officers. This is where the officer corps is developed, their networks formed, and a positive *esprit de corps* is created, along with a shared identity.

In conclusion, reconnaissance is usually necessary. If the staff ride is brand new, or if extensive changes are being made to an existing staff ride, then reconnaissance is a must. If it has been a long time since the staff ride was last implemented, then reconnaissance is certainly required. In other situations, the need for reconnaissance can be decided on a case-by-case basis. It need not be lengthy or extensive reconnaissance, but it usually serves to avoid unnecessary friction. A first-time staff ride requires comprehensive reconnaissance, whereas minor changes or checking the situation following a long period between implementations can be dealt with more quickly. Yet further requirements arise when courses are transferred between instructors, especially when some of the instructors are brand new.

Conducting staff rides

A staff ride can be conducted in a variety of ways, depending on a range of factors: the ride's aim, location, teaching outcomes, participants, and time and budget allowances. Although space limitations prevent us from presenting a detailed walk-through of a staff ride, we can offer an overview of what a traditional staff ride might look like. The focus here lies on offering a toolbox of pedagogical tools to be selected according to personal needs and choices.

*A traditional staff ride*²²

In a traditional historical staff ride the participants are divided up into smaller groups or into two-person units (determined by the number of participants, the number of exercise sites, and the number of instructors) who then become responsible for their own exercise site and are each handed a specific theme. Then they

-	Brief terrain orientation (5 minutes)
-	Brief onsite historical presentation (10-15 minutes)
-	Group presentation (10 minutes)
-	Seminar questions (20-30 minutes)
-	General conclusion (5 minutes)

²² See also Scoll, "Battlefield Tour/ Staff Ride Didactic Value", p.6; Melvin, "Contemporary Battlefield Tours and Staff Rides", pp.75-76; Godefroy, *The Staff Ride*, pp.14-15.

prepare, both individually and as a group, by seeking out literature not only on the exercise site they are dealing with, but also the wider context of the historical example as well as relevant academic military research and related Swedish regulations and handbooks.

Once on site, sometimes called a seminar site, the chosen group delivers its prepared seminar on the pre-assigned theme along with a presentation of the site's historical events. Often some form of text is required and the participants need to prepare seminar questions for general discussion on site. This text and questions are distributed prior to departure for the given seminar.

Normally proceedings begin with a brief terrain orientation (5 minutes), followed by a brief account of the site's historical events (10-15 minutes). Sometimes an accompanying historian or one of the instructors delivers an introductory presentation. Then the whole group presents their own findings on their given theme (10 minutes), leading into a discussion of the related seminar questions (20-30 minutes). Before departing a brief general conclusion is offered (5 minutes). The usual time allotted at each exercise site is one hour. Less than 45 minutes is insufficient.

Further to the actual seminar, additional time is allotted to give the participants a chance to experience the location, visit local monuments, see artefacts and read any onsite information. The time required is entirely site dependent: some need longer periods, others perhaps have little extra to offer. If the site is extensive the visit can be combined with a break or lunchtime, allowing participants adequate time to explore the site. For example, staff rides to Ouvrage La Ferté on the Maginot Line or at Pointe du Hoc need much more time than sites relevant to crossing the Meuse or traversing the Ardennes in May 1940.

Pedagogical toolbox

There are a variety of tools available to support the implementation of a staff ride and increase learning opportunities. Below we will discuss a few tools which may be useful. This is obviously not a comprehensive list, but it does provide examples of useful tools appropriate for staff rides.

Two important tools are maps and exercise compendia or handbooks. **Large format maps** are extremely useful, as is providing participants with a **detailed map compendium**. At the very least maps covering the case being studied must be provided. Any kind of **compendium or handbook** on

the given exercise site is also a great resource for both instructors and students. These can take a variety of forms depending on the actual requirements of the staff ride and the prior knowledge and experience of the participants. This could be one general handbook or separate handbooks for the instructors and the students. If there are two separate handbooks this usually leads to further resource requirements for the staff ride instructors.

Visual aids should not be undervalued, particularly when the participants are not very experienced and need support in understanding and visualising what happened on site. If the group is not overly large **videoclips** can be used on site, both those from movies and from documentaries (especially with the help of an Ipad). For example, the authors have made use of clips from “A Bridge Too Far” when seeking to visualise the British forces advancing across the Waal bridge. It can also be useful to use simulations of the historical event, albeit this may be more appropriately done during preparations or at the hotel on a large screen. **Historical**

Table 4: List of pedagogical tools

- | |
|--|
| - Maps in large format |
| - Map compendia |
| - General compendium or handbook |
| - Visual aids (ie video clips, historical photographs) |
| - Local museums and exhibitions |
| - International law quizzes |
| - Wider context quizzes |
| - All-encompassing subject perspectives |
| - Enrichment discussions |
| - Terrain exams |
| - Dividing up the history |
| - Consequences of battle |
| - Short games |

photographs can also be used, again in large format, to help in understanding exactly what the environment looked like. This is especially handy when the site has undergone changes, whether through the presence of a new building or other types of infrastructure but also useful for showing what a site looked like after extensive fighting had occurred. On the Operation Market Garden staff ride, for example, when at the exercise site near Elst, it significantly benefits the participants to see a photograph of the muddied state of the battlefield.

Further, well-planned visits to relevant **local museums and exhibitions**, often close to monuments and locations of focal historical events can also be useful. For example, the authors would strongly recommend the exhibition housed in the Nativity of Mary church near the monument in Driel. Similarly, any “then and now” books which can be found would be useful. It is also a good idea to contact and employ local guides and museums and their expertise. On the Land Operations Division staff ride in Kobarid, Slovenia, led by Lieutenant Colonel Patrik Lidbeck, the knowledgeable guide from Kobarid museum proved very helpful with regard to the history and the local geography.

International law quizzes and integrating the legal aspect into the staff ride can also prove beneficial. In terms of the quiz, it is suggested that participants receive short questions about the legality of historical events, or that questions raised on what can be learned/done in a future situation that would be legal, illegal, or lie somewhere in between. Including the legal context in staff rides is important given the significance of adhering to the law in war. It is also vital to studies of and an individual’s own use of tactics. For example, how should we consider the German decision to allow large areas of land to be flooded in order to facilitate their defensive actions in Normandy in 1944 and in the Rhineland in 1945? Similarly, how to respond to the blowing up of important bridges in operational areas or dam destruction on Swedish rivers in order to achieve the same effects as in Normandy and the Rhineland?

All-encompassing subject perspectives involve wider concepts beyond the staff ride’s subject or main focus, thereby broadening subject perspectives to include other areas. For example, when studying a water-crossings short presentations on technological aspects, logistics, tactics, leadership and the law can be useful. The group can discuss bridge construction and their load-bearing capacities, as well as the best way to destroy the said bridge. Similarly, the capacities of assault-boats, the best methods of defending a bridge, how a leader can best show leadership in

that defence, as well as under which conditions is it permissible to blow up a bridge – these are all examples of discussion points.

In **terrain know-how**²³ the participants, either individually or in groups, tackle a question or a problem posed by the course leader, which is then evaluated and reviewed on site in the open field. Generally, a page of written response would suffice, making it achievable in a short time at a specific exercise site. Obviously, flexibility is key and the task can instead be completed while the group is being transported between two locations, or even during a break in the scheduled events. The point is, however, that it should be completed and reviewed in conjunction with a certain monument, and that it should not be so onerous that takes all day.

Divide up the history and its contemporary significance between groups. The aim is here to avoid over-emphasis on the exercise site at the expense of its relevance to the modern day, or that the significance of the historical event is subsumed by the introduction of other aspects. Dividing it up lets participants know what they need to focus on in their preparatory work. For example, a group could present a historical run-through at one site using lessons learned at another site where another group was tasked with presenting the history. Another version sees some of the instructors or a military historian responsible for presenting the historical account when the focus lies specifically on lessons learned for modern times. Or, even, as is often done within Land Operations Division staff rides, that a military historian or instructor presents the wider overview of the site whilst the participants concern themselves with tactics.

Consequences of battle is yet another useful tool, which deals with actual events. For example, the centre of discussion lies on one individual, one event, or leadership. Another focus could be the human aspect of warfare, and in this letters home from the front can be read out, creating a direct connection between the historical example being studied and the human dimension.

Short games, namely brief moments during which the participants practise taking decisions based on pre-determined reasoning. A three-step process can be used: establish the tactical circumstances (time, place, unit), describe the events which led to the historical example (the dilemma), followed by reconnaissance of the site,

²³ Sometimes referred to in Swedish as “lappis” or “side-reflection”. Lieutenant-Colonel Daniel Rydberg came up with the concept of ‘terrain know-how’, a term cleverly reflecting those moments simulating short tests in the open field (even though they do not necessarily form part of an actual exam).

terrain, and its character. Once the decision has been reviewed a discussion can follow.²⁴ When making use of short games it is important to tailor them to the group's size, the participants' experience, and the group's composition.

Various forms of **war games** can also be used during a staff ride. These differ from short games in that they are inspired by traditional rules-based games which are played on site. Usually, a specifically created map of the battlefield is required or a rudimentary terrain model and some gaming-pieces to represent different military units. The game can be based on a historical case and the aim is to achieve goals which are relevant to the modern day and future events and conflicts. One can also play a hypothetical contemporary scenario in the same environment (such as posing a geographical or tactical situation or a new dilemma).

A good example of war games is Ponte Dirillo in Sicily, which allows you to study how, on 10 July 1943, the allied forces attempted to move through the restricted territory of a hilly area covered in bunkers. This is an ideal site, not only because the modern-day terrain in this part of Sicily is largely identical to how it was in 1943, but also because the site is shaped like an amphitheatre. There is a 5 by 5 metre gun emplacement, perfect for a map- and game-master. Behind it lies a large hillside where a large group of participants can stand, gaining a good view of the "game field" and its surrounding terrain.

Pedagogical approach and the staff ride setup

A successful staff ride needs a clear aim and pedagogical approach, which can be based on either war planning as a course or on educational learning goals. The staff ride must be tailored to the intended audience's prior knowledge, particularly the participants' skills and qualifications, previous experience and training. Obviously factors such as time and resources play a part, as integral to the planning and implementation of a staff ride.

A key aspect to consider when planning and developing a staff ride is the prior knowledge of the participants. It is important to consider and understand the participants' degree of knowledge and skills when determining the level of complexity of the staff ride. A staff ride pitched beyond the ability of its participants will be equally a suboptimal learning experience as an over-simplified staff ride.

²⁴ Here, for example, the "ODO" method (orienteering, decision, order) can be implemented.

Each group of participants has a level at which maximum learning is achieved, beyond which instruction has a decreasing impact. (See model 1 below).

Prior knowledge is an individual and not directly measurable quality. Senior officers, including those attending Higher Officers programme, have more advanced levels of education and experience than that of an officer cadet, just as it must be assumed that a group of brigade commanders are at a more advanced level than a group of platoon leaders. Somewhat simplified, a spectrum exists ranging from senior officers through junior officers to officer cadets. Among the officer cadets one should also acknowledge a difference between those having just enrolled and soon to be commissioned officers. We would here expect instructors at military academies to have extensive prior knowledge, though the level may vary between groups with different background and experience.

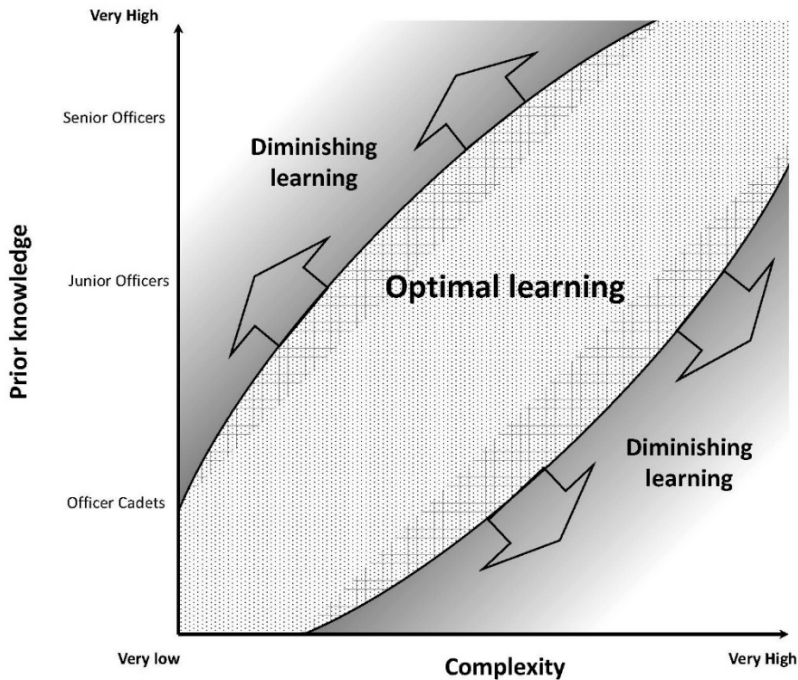
Having identified a group's prior knowledge, the complexity of the staff ride must be tailored to suit the participants so that the aim and pedagogical goals are achievable. Staff ride complexity can be increased or reduced in many different ways. For example, planning a historical staff ride can encompass several leadership levels and operations of varying levels of complexity, involving a range of military branches, where the complexity can be determined by pedagogical choices and limits. Taking a more general approach to a comprehensive historical example, such as Normandy 1944 or the landings in Southern Italy 1943, creates a complex staff ride with higher demands on prior knowledge than a more specific staff ride, such as one focusing on the 14th Army's advance during the 12th Isonzo offensive 1917. Of course, one could preselect one single element in the Normandy landing to lessen the complexity of the staff ride.

Other variables that influence or can be adjusted to alter the level of complexity are, for example, the nature of the demands placed on the level and extent of learning, the number of and the advanced nature of the learning goals laid out, how much responsibility is placed on the individual, the extent of prior reading expected (both in amount and breadth), as well as the extent and number of demands in the participants' required contributions at the exercise sites.

The relationship between the participants' prior knowledge and the staff ride's complexity can be displayed in a diagram (see the model presented below, "Visualising the prior knowledge and the setup of the staff ride"). The shaded area of the diagram represents where maximum learning can be achieved. Outside this area any learning will be suboptimal, with diminishing returns the further away one

is from the shaded area. This is true for both directions, namely, whether the staff ride complexity is too limited or too extensive for the target audience.

Figure 1: Visualising the prior knowledge and the staff ride setup



The logic of this model also applies to already developed staff rides which need to be tailored to a new group. One simply uses the same method as when developing a brand new staff ride, namely, identifying and understanding the participants' prior knowledge and altering setups and implementation so that maximum learning is achieved, or – if this is not possible – then to achieve the nearest outcome possible. Another situation that may arise is that the participants form a group of mixed prior knowledge. If the discrepancies are too wide it becomes difficult to achieve maximum learning, but one still retains it as the goal.

As discussed above, regardless of who the participants are and the complexity, a staff ride always consists of three phases: preparation, implementation, and follow-up work. No single correct division between these three phases exist as they are dependent on a range of variables, from pedagogical approach to resources and time available. The way that time is apportioned and what is done within the

framework of these three phases is key to achieving maximum learning. The amount of time spent on the three phases when planning a staff ride is one of the key tools in optimising the achievability of the aims of a staff ride.

In principle, none of the three phases should be left out, but otherwise everything rests on the conditions and goals, and on the participants. The amount of preparation required is a function of the level of participants' prior knowledge and the complexity of the staff ride. Over-all, complex staff rides demand more extensive preparation than less complex rides, and similarly more experienced participants require less extensive preparation than those with less experience.

A high level of prior knowledge allows for a successful staff ride to be implemented with relatively little preparation (although not necessarily). However, staff rides of a more advanced level are often more complex and generally require a not insignificant amount of preparation.

Although one can undertake a staff ride without follow-up work this is not recommended as some form of synthesis is necessary to achieve successful learning.

In terms of percentage and time required this depends on a combination of conditions and pedagogical choices. A week's worth of preparation for a week-long staff ride can be sufficient, even though a shorter time may be adequate for a more experienced group. The implementation is dependent on the location and the aim, but experience shows that successful staff rides can last from a few days to a little over a week. Follow-up work is important as that is where synthesis occurs around the lessons learned. Some of this can be done on site but is better undertaken after the staff ride is completed.

In conclusion, a staff ride is a fantastic tool for achieving many learning goals, not least those which are key to the officers' profession. Further, staff rides serve as an excellent tool for testing proven experience and to develop tactical skills. Last, but not least, during a staff ride the officer corps often also benefits from further development, building networks, and developing a positive *esprit de corps* and a common identity.

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