

THE STAFF RIDE

A PLANNING GUIDE



CANADIAN
ARMED FORCES



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THE STAFF RIDE

A PLANNING GUIDE

Lieutenant-Colonel Andrew B. Godefroy
Canadian Army Command and Staff College





ON THE FRONT COVER

Photo by Lieutenant William Rider-Rider (IWM C01970)

Lieutenant-General Arthur W. Currie (standing, centre), Commander of the Canadian Corps, calls a pause during a mission rehearsal for the assault on Hill 70 to mentor the Commander of the 12th Canadian Infantry Brigade, Brigadier-General J. H. MacBrien (right), while Major William S. Woods (left), Officer Commanding the 38th Battalion, looks on.

The Battle of Hill 70 took place from 15 to 22 August 1917, ending with a clear and stunning victory over the German defenders on that part of the front. It was a textbook example of a well-planned assault on a tactical objective, and today it is still considered one of the finest operations ever undertaken in the history of Canada's Army.

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FOREWORD

Colonel Richard T. Strickland, MSM, CD, M.A.
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Professional knowledge is not something that is magically granted to army officers and non-commissioned officers (NCO) when they decide to join the profession of arms. Rather, it is something that is cultivated deliberately by all members of the profession and successively built upon and expanded as an individual progresses in rank and experience. This guide offers a primer on one method that can be used by units and formations to enhance the professional development of their people: the staff ride.

Examining the history, the ground and the context in which operations were conducted affords military professionals unique opportunities to learn from those who have gone before. Looking at how decisions were made, the types of information that were drawn upon and the various factors that were weighed before giving an order are all aspects of our operational experience that can transcend the events themselves. As such, staff rides are a powerful tool that can literally put us on the same terrain as operational and tactical commanders (and their people), forcing us to walk a mile in their shoes as we consider how, or indeed whether, we might have done things differently.

Importantly, conducting a staff ride calls for a degree of understanding of both the continuities and the differences that exist between the context of the time when operations were conducted and now. Being able to discern these two aspects of a context calls for a degree of critical thinking in our people that must be developed and harnessed. In addition, speaking publicly and defending an argument for or against a course of action, as well as decisions made when lives were at risk, demands a degree of confidence and articulateness that all military professionals would benefit from possessing.

Ultimately, military operations come down to decisions made by humans susceptible to fatigue, deprivation, deception, indecision and biases, all of which affect the quality of the decisions made. When we acknowledge the cost, in human and moral terms, of each of these potential lessons, it is not an overstatement to assert that each of us has a moral obligation to learn from the experiences of our predecessors. To disregard them would be folly.

PREFACE

Lieutenant-Colonel Andrew B. Godefroy, CD, Ph.D.
Officer in Charge of Professional Military Education
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“A very large portion of the training was conducted in the open air, and every endeavour was made to teach the officers to study ground and its practical use in warfare. Small tactical problems, as well as larger strategic manoeuvres, attack and defence schemes, the defence of houses, villages and woods, outposts and advance guards, were constantly practiced.”

—Colonel Gerald C. Kitson reporting on the
first Staff Course, 1898

Major-General Sir Edward Hutton, General Officer Commanding the Militia of Canada, instituted a new Staff Course for select officers in 1898 with the aim of generating a sufficient number of trained leaders to form the nucleus of a proper General Staff for Canada’s evolving army. The first four-month Staff Course, led by Colonel Gerald Kitson, culminated in a series of staff rides “by which the work done during the Course was thoroughly tested.” Of the first 14 officers to attend the Staff Course, 12 graduated. Less than a year later, 8 of those officers were deployed as part of a coalition force to fight in the war then underway in the Transvaal, South Africa.

The staff ride continued to form a large part of the Army’s Staff Course curriculum until the outbreak of the First World War. After that, it was largely replaced, first by case studies and later by tactical exercises without troops (TEWT), both in the field and in garrison with the aid of canvas model or sand table demonstrations. Whatever the method, the aim of those activities was to encourage historical mindedness and maintain preparedness through the informed discussion and debate of doctrine and tactics. This was especially important during the inter-war period, when the army generally suffered from a lack of physical resources to conduct complex field exercises and training.

Like its main allies, after the Second World War the Canadian Army slowly returned to conducting TEWTs and staff rides. By the 1970s, those activities, along with battlefield touring, became a regular part of the precursors to the courses run at the Canadian Army Command and Staff College (CACSC) today.

Interestingly, only the practice of conducting TEWTs persisted at the CACSC through the years of the Afghanistan War. It is hoped that this new guide will encourage yet another revival of this important military practice, assisting all ranks in their study of doctrine and tactics, at all levels and through all phases of operations.

The Army's first official staff ride, Niagara Peninsula, May 1898



Source: Library Archives Canada/C-31361

Officers of the Staff Ride, Niagara Peninsula, May 1898. Fourth from the left, front row, left to right: Lieutenant-Colonel Sam Hughes, Lieutenant-Colonel Hubert Foster, Lieutenant-Colonel W.D. Gordon, Lieutenant-Colonel Gerald Kitson, Major-General E.T.H. Hutton, Lieutenant-Colonel W.D. Otter, Lieutenant-Colonel James Mason, Lieutenant-Colonel Francois Lessard.

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INTRODUCTION

Why should the professional soldier invest in the study of the past? This question is often asked, especially considering that history does not repeat itself nor does it necessarily teach any infallible lessons. In answering the question, therefore, it is important to note the true aim of the staff ride. Leaving aside for a moment the value of the subject for its own sake, the study of war, campaigns, operations and even operations and activities other than war offers a familiar topic that can be used to help soldiers improve their critical thinking through discovery, research, analysis, participation, evaluation and interpretation. As well, staff rides can improve a soldier's ability to communicate ideas concisely, logically and coherently and effectively. This is relevant because the ability to express oneself with purpose through speaking or through operational writing is paramount to becoming a successful leader at all levels. This activity must therefore receive the same disciplined attention in a soldier's life as other essential activities.

As a valuable pedagogical tool for promoting the skills mentioned above, this guide offers ideas for engaging with the past to foster an understanding of the present and the near future. By focusing the mind on military matters that need thinking about, historical examples often reveal trends, signals and signposts that offer warnings about what constitutes poorly conceived plans, actions or solutions. By the same token, those examples may also offer examples of what works well when certain conditions exist or are met. And while the study of those subjects may not necessarily provide perfect solutions to future problems, they will help the soldier understand the origins and evolution of the army's identified best practices and assist them in knowing what questions need to be asked or what problems may need to be addressed in any given situation. In essence, staff riding provides a never-ending resource in the soldier's mind which they may find themselves needing to quickly draw upon to make the difference between mission success and failure.

Developing historical mindedness is important to the professional soldier, as military history is quite literally the sole source of evidence for considering current strategic, operational and tactical art. Since we are unable to accurately predict the future, what often separates good military decision making from baseless opinion and conjecture is the soldier's mature understanding of how they arrived at the present situation. Those who do not know their history are more likely to promote panacea solutions that brief well but result in little meaningful contribution to overall mission success. Soldiers need to know better so that they can do better. This guide offers ideas to help them get there.

Thus, the purpose of this guide is to provide a solid reference tool designed to assist commanders and their staffs in the planning and execution of their own Professional Military Education (PME) programs. Specifically, it describes how to employ the physical and virtual staff ride as a means to encourage critical thought through the integration of historical awareness and to foster critical analysis through the study of cause and effect. In-depth study of past events enables leaders and their subordinates to rise above the problems of the day, and the study of events in context enables them to avoid generalizations that might otherwise lead them to failure. That said, one must keep in mind that studying military history typically does not offer definitive proof, but it does offer insight into and understanding of the lasting challenges every generation of the profession of arms faces. The staff ride, therefore, offers a readily available means to bridge the gap between the unknown and understanding.

DEFINITIONS

Staff Ride. A staff ride is a field study, conducted either onsite where the event occurred or virtually with the aid of technology, for the purpose of engaging in critical thought, military problem solving and professional discourse. As a PME tool, staff rides link real historical events, deliberate preliminary study and physical and/or virtual examination, as well as follow-on informed debate and discussion, to modern-day problems that soldiers are likely to face in their day-to-day work both at home and abroad. As such, staff rides require participants to engage in the process, and they typically involve some degree of participant role-playing.

Battlefield Tour. A battlefield tour is a professional development activity that typically focuses on heritage, culture, commemoration and remembrance. Unlike staff rides, battlefield tours do not require deliberate preliminary study by the participants to be successful, nor is there any expectation that participants will engage in post-tour study or activity. Battlefield tours are typically conducted using a Socratic method, with a guide / subject-matter expert narrating events and participants asking questions. These tours often include cultural and heritage activities, as well as visitations to significant and sacred places for the purpose of remembrance.

Tactical Exercise Without Troops. A tactical exercise without troops involves the examination of a hypothetical scenario employing current doctrinal concepts, using either conceptual or actual orders of battle (ORBAT) on actual terrain. While TEWTs may take place on an actual battlefield, their relationship to historical events is usually coincidental, as it is the study of terrain and hypothetical elements—not actual events—that drives participant learning in this activity.

TYPES OF STAFF RIDES

Physical. A physical staff ride is conducted onsite or as close to the site of the actual events as possible. Whereas the study of a battle may involve only one site and can perhaps be executed in a day or two, for the study of operations and campaigns it will often be necessary to visit multiple sites over an extended period of time. Physical staff rides often require greater administration and logistics to execute, but they provide the best learning experience for students.

Virtual. A virtual staff ride is conducted elsewhere, often remotely in a battle lab or a similar forum. It is a viable alternative form of staff riding when the actual sites are either inaccessible or not easily accessed without considerable cost or logistics. A virtual staff ride can facilitate the study of operations and campaigns by saving time that would have been spent moving from site to site; however, what it saves in time and logistics, it loses in the fidelity and detail that can be derived only from physical onsite study. Still, it provides a very good learning experience for students.

METHODS

The staff ride is a flexible tool that can be employed using different methods and approaches. The most frequently applied methods include the following:

Socratic Dialogue Method. This traditional method enables a group to conduct a staff ride in a true seminar learning format. It requires a well-prepared staff ride leader who can easily solicit engagement from the entire group, so that the staff ride focuses on its objectives through various discussion threads. When well executed, the Socratic dialogue method can offer the greatest return on investment. This method seeks to avoid devolving into a simple guide-led discussion of decisions made during the event itself. It is not a suitable method if there is limited time available for the staff ride leader and the students to prepare.

Character-Driven / Role Player Method. This popular method seeks to immerse the participants in a historical campaign by allowing staff ride leaders and participants to assume the roles of key actors in the event being studied. Its advantages are that it reduces the preparation time needed for all involved in the staff ride and that, when well executed, it creates rich opportunities for peer discussion both during and after completion of the field study portion of the staff ride. On the negative side, participants tend to forgo addressing larger contextual questions with respect to the event being studied, instead focusing solely on the part their assigned character played. This method is suitable if preparation time is limited, but unsuitable if objectives include larger discussions concerning operational or strategic objectives.

Decision Game Method. This method adheres more closely to Clausewitz's original model of "re-enactment," which placed the staff ride participant(s) at a critical decision point in the battle or campaign and then walked them through why a decision was made, without the bias of hindsight. A selected student or students receive the scenario, spend a few minutes developing a course of action (COA), and then deliver it to their peers for discussion and criticism. This method therefore focuses on the difficulties of the decision-making process and the influence a commander's decisions can have on subsequent actions. It highlights the challenges of fulfilling the higher commander's intent while understanding the possible impact that second- and third-order effects may have on a decision. This method works well with a smaller group and when more time is available. It is less suitable for larger groups or in cases where the study of command decisions is not the central objective of the staff ride.

FOUNDATIONS OF EFFECTIVE STAFF RIDES

Staff riding is a versatile PME tool that enables leaders and stewards at all levels to further the professional development of their peers and subordinates. It offers an opportunity to expose students to the complex problems of campaigns, operations and battles. Depending on the needs of the group, the staff ride can meet a number of objectives. Specifically, staff rides can be used to study the application of the principles of warfare, operational art and the planning and execution of missions. They can provide environments in which to examine combined-arms operations or even the employment of a single corps or branch. Staff rides can also be further tailored to focus on specific topics such as command, logistics, the application of doctrine, the employment of tactics or technologies, unit cohesion, the psychology of battle, the impact of weather or terrain, or even the role of non-military organizations and actors in the battlespace. Last but not least, the staff ride provides an excellent opportunity to simply kindle further interest in the history and heritage of one's profession, regiment, corps and army.

With this in mind, the foundations of effective staff riding consist of the following:

- Clearly identify the problem to be studied. Not all campaigns, operations, battles and events will provide a suitable "laboratory" in which to examine the problem, and subjects or locales should not be selected based simply on expediency or proximity.
- The primary leader and/or guide(s) must have the appropriate level of knowledge of the campaign, operation or battle. In other words, in the best-case scenario they are a true subject-matter expert. At the very least, the primary leader or guide must have a solid base of knowledge which can be improved upon with each iteration of the selected staff ride. This is important not only to ensure that students' questions are properly answered, but also to ensure that errors in analysis are corrected before they lead to misinformed conclusions.

- The students must be prepared to engage fully in all aspects of the staff ride. The key to successful engagement is ensuring that students have the maximum amount of time possible to complete their preliminary study of the event. Students must not be permitted to begin a physical or virtual staff ride without a working knowledge of the topic, the problem set, and its parameters, nor should they be allowed to remain passive observers during the main study portion or afterwards. Only through informed collective discussion, analysis and debate will the students benefit fully from the staff ride. Depending on the total size of the group, this may be achieved most effectively by breaking into smaller sub-groups.
- The leader/guide must complete the staff ride by integrating the preliminary study and the physical or virtual staff ride and drawing out observations, insights and lessons. Failing to do so will negate the value of preliminary study and simply turn the physical/virtual staff ride into a battlefield tour. If carefully integrated, the follow-on activities of the staff ride will encourage critical thought and analysis as well as generate a greater understanding of the problem being studied. This in turn leads to the accomplishment of several other staff ride objectives outlined above.

STAFF RIDE LEADERS AND GUIDES

Anyone at any rank can lead a staff ride. It requires study, preparation and design on the part of the person(s) leading it, but the work is continuously aided by guides such as this one, as well as the increasing availability of “canned” staff rides (see Appendix A of this guide for an example). Specifically, staff ride leaders should meet the following criteria:

- If the topic is a battle, have a thorough understanding of the campaign or operational context within which it took place. For operations, the campaign context must be understood; for campaigns, the larger political environment and strategy should be understood.
- Understand the organizational, doctrinal, technological, logistical and social parameters of the topic as thoroughly as possible from both sides.
- Know the biographies of the opposing commanders and their key subordinates. Additionally, know the details about any person who played a pivotal role in the event (e.g. a Victoria Cross recipient, a key staff officer or planner, or any similar important actor).
- Know the opposing orders of battle, the sizes of formations and the capabilities of major and/or critical weapon systems.

- Be conversant in the movements and actions of the opposing formations and units in order to identify significant factors that affected the outcome of the event.
- Know the geography and terrain of the site where the event took place.
- Understand current Canadian Army doctrine and terminology so that the students can juxtapose past events to current approaches and draw usable observations, insights and lessons from those comparisons.
- Know one's participants well enough to constantly gauge general interest and identify opportunities for deeper learning.
- Seek constructive feedback in order to refine and improve upon the staff ride for the next serial.

STAFF RIDE SELECTION

One of the most important decisions a staff ride leader must make is the selection of an appropriate campaign, operation, battle or event. Staff rides may be conducted wherever a significant activity occurred, but not all topics automatically make suitable staff rides. Staff ride leaders should seek to answer the following questions in order to help them select an appropriate study topic:

- What is the staff ride's main learning objective? For example, if you want your students to understand learning curves in battle, you might select the first engagement of a war or a unit, or a particularly difficult battle that resulted in failure. Similarly, you might choose a unique problem. If examining defensive operations, you might choose a campaign-level problem such as defending Canada's west coast in the Second World War. Or you could opt for a tactical-level problem such as defending a string of key terrain and vital high ground during the Battle of Kapyong in the Korean War.
- What levels of command, intelligence, manoeuvre, force protection or logistics do you want to examine? Small engagements or skirmishes might offer excellent topics for the study of command or manoeuvre, but larger operations and campaigns may be better suited to studies of intelligence or logistics. Make sure that your chosen topic offers your staff riders enough substance to dive into the desired learning objective.
- What type of terrain or formation/unit are you examining? If you are trying to engage students in the tactical problems associated with battle group operations in Central Europe, for example, you are not going to study a

company-level skirmish in the desert. Similarly, if you are trying to examine the problems of land–air cooperation in operations, 18th- and 19th-century battles will not provide sufficient substance.

- Do you have access to ample resources to conduct the staff ride? Specifically, is there enough developed historical literature for the students to examine during the preliminary study phase? If you plan to conduct a physical staff ride, is the integrity of the historical setting still intact enough to examine? Do you have sufficient administrative and financial support to cover transportation, accommodation, meals, etc.?
- Do you have enough time to achieve your learning objectives? Have you marked off the calendar for all three phases? Staff rides require time to complete and some topics may simply be beyond the reach of your formation or unit. An alternative to this is the conduct of a virtual staff ride, but these can also require additional time for adequate preparation.

NON-TRADITIONAL STAFF RIDES

Military staff rides have traditionally focused on the subjects of command, doctrine, tactics, battles and the combat arms. However, the staff ride tool may also be applied to other military topics such as stability operations, peacekeeping, aid to civil authorities, organizations, administration, capability development and procurement, and even law and discipline. Non-military topics such as politics, budgets and even natural disasters that have impacted military organizations and operations can also be studied physically and/or virtually using the staff ride tool. The following are some examples of non-traditional topics:

- The securing of Canada’s borders during the Fenian Raids (1866–70).
- The Kinmel Park Military Mutiny and Riots (1919).
- Military responses to the 1918 influenza pandemic.
- The Army and the Sydney, Nova Scotia, coal miners’ strikes (1923).
- The Army’s BOBCAT APC Project (1950s) or the Leopard Tank procurement (1970s).
- The integration and unification of the Army with the other Canadian forces (1964–68).
- Domestic operations, natural disasters, and the Red River Floods (1950,1997).

- The Somalia Affair and strategic reform (1993–97).
- The impact of the “dot-com” force structure on the Army (2003–05).
- The Army and the Managed Readiness System (2000s).

Any of these topics could invite further investigation, examination and reflection.

THE STAFF RIDE: THREE PHASES

Whether virtual or physical, staff rides are typically divided into three phases. There is no set length of time for each phase, nor is it necessary to spend the same amount of time on each phase. The subject chosen will dictate, for example, whether more time is needed for preliminary study than for walking the ground, or vice versa. Similarly, the last phase can range from a simple summary to several weeks or months of follow-on learning. Specifically, the three phases are the following:

Preliminary Study Phase. The first phase of a staff ride is the preliminary study. Prior to visiting either the physical or virtual site(s) of the chosen staff ride, students will engage in directed self-study and exploration of the topic and its main elements. Questions to be discussed during the next phase of the staff ride should be distributed during this phase so that students may adequately prepare to be actively engaged during the field and/or lab study.

Field and/or Battle Lab Study Phase. During this phase, the staff leader(s), guide(s), and students come together at the location(s) of the staff ride and, under the direction of the staff leader, work through the topics and problems of the case. Students will draw on the knowledge gained during the preliminary study phase and combine it with what they are seeing on the ground or in the lab. Depending on which method or approach the staff leader and guides have taken, students will investigate, examine, challenge and analyze the problem from a number of perspectives and points of interest. For example, discussions may revolve around leadership and command, tactical decisions, technological challenges and the like, allowing the students to make observations and draw insights from their examination of the elements, which in turn will assist them during the next phase of the staff ride.

Observations, Insights and Lessons Phase. Having completed their field study and/or virtual lab, in the third phase of the staff ride students bring all the pieces together: preliminary study, field observations, investigations and discussion, and their own analysis. From those, they draw judgments and insights that may identify salient lessons, and they can then assess whether the Army has forgotten or learned those lessons. In some cases, there may be no clear answer,

but that does not diminish the value of asking the question. Indeed, one of the greatest returns on investing in a staff ride is seeing students develop their own investigative abilities and, by doing so, become better military problem solvers. Again, depending on the method applied, the last part of this phase may involve a student deliverable: an individual or group presentation, or perhaps a service paper or research report. This activity should be strongly encouraged, as it offers a chance for the students to further organize their thoughts as well as practise the key communication skills of speaking and operational writing.

RESOURCES AND EDUCATION AIDS

In today's connected world, there is an abundance of resources and education aids that one may draw from to support staff ride development. For Canada's army, one of the best sources is its PME website, Line of Sight. Additionally, the Fort Frontenac Library at the Canadian Army Command and Staff College offers a trove of resources and documents, many of which are available either via the Line of Sight website or through traditional interlibrary requests and loans.

Staff ride leaders should take the time to prepare a simple yet adequate read-in package for delivery to the students during the preliminary study phase. It need not be exhaustive, but it should offer enough to get the student started in the right direction. Packages should be dynamic and contain a mix of materials—maps, photos, copies of original documents and primary sources—and, where a contentious subject is being examined, a sample of opposing views and debates. This material will help bring the topic to life for the students and facilitate their investment in the staff ride during all phases.

Information sourced for the students should be as accurate as possible, and factually based even when the choice is made to include differing perspectives or points of view. Pure conjecture and conspiracy pieces should generally be avoided, though in some cases these discussions during the field and lab study phase can sometimes prove useful to the examination of certain subjects.

Lastly, do not burden the students too much during the preliminary phase. Read-in packages should give just enough to enable the student to participate fully in the next phase. Those who want to gain further insight are free to pursue additional sources as they see fit. In the end, the staff ride should be an enjoyable learning experience that leaves the students talking about it even after the formal activity is over.

ADMINISTRATION AND LOGISTICS

The administration and logistics of planning for a staff ride will differ greatly depending on the topic chosen. Staff leaders should give themselves sufficient lead time to plan for travel, meals and accommodation as needed if heading out on a physical staff ride, or for appropriate levels of space and information technology (IT) support if undertaking a virtual staff ride in garrison. Either way, keep planning as simple as possible so as not to jeopardize one's time during the staff ride itself—you do not want to be dealing with administrative issues in the middle of a staff ride when you should be leading students through the topic at hand.

BEYOND THE STAFF RIDE

There are many ways to continue with individual PME beyond the staff ride. Those who show skill as communicators should be strongly encouraged to organize and share their experiences and insights from the staff ride through some form of publication. A summary of what they have learned could be provided in a report to other Army organizations to assist with their own work, or even turned into a podcast, a webinar, a website media entry, or an article for a professional or scholarly journal.

Another option might involve making a contribution to another ongoing project. For example, soldiers recently returned from a staff ride examining a battle that involved their regiment might use what they learned to improve some aspect of their garrison or regimental museum. Knowledge gained from staff rides might lead to a professional development activity for the local military community, the creation of a display or the improvement of existing information already posted.

FINAL THOUGHTS

The aim of the staff ride is to foster critical thought, military problem solving and professional discourse amongst soldiers. Although traditional military historical subjects offer a ready venue for the development of these skills in a practical sense, staff rides should not confine themselves to studying only strategy and tactics. Modern land forces face many challenges all along the capability development continuum, from force generation through to its employment. A properly prepared staff ride can reveal any of these subjects to students and invite them to engage in examining them from a fresh perspective. The choices are nearly endless.

APPENDIX A: FURTHER RESOURCES AND REFERENCES

Canadian Army Command and Staff College Staff Ride Handbooks

Staff Ride 1: Worthington Force examines the background, enemy opposition, planning, intelligence, command decisions, fire support, logistics and execution of the battle, all within the context of the series of disastrous events that ultimately led to the total destruction of this Canadian battlegroup during the second phase of Operation TOTALIZE, 8–9 August 1944.



SR1 is the first in a new series of completely self-contained staff rides produced by the Canadian Army Command and Staff College to support formation and unit PME programs. Available both in hardcopy and in electronic format from Line of Sight.ca, this handbook is optimized for study and decision gaming at the battle group and combat team levels, but may be easily applied to junior leadership education and training more broadly.

Line of Sight

Line of Sight is the Canadian Army Command and Staff College's main hub and resource Internet website for informal PME. Here you can find not only electronic versions of all the CACSC Staff Ride Handbooks, but also online access to the Fort Frontenac Library where you can explore other resources, archives and reading list recommendations to further your own research and study into Canadian Army operations, formations, units and history.



