

TRAINING NOTES



Modoc Indian War, 1873 A Battle Staff Ride for Company Leaders

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In the Army National Guard and Army Reserve, professional development at company level is difficult because of the limited training time available. In an infantry rifle company such as ours, inactive duty training (IDT) periods must focus on mission essential tasks at squad and platoon level. There is rarely an opportunity to train on the doctrinal subjects that are essential to a military leader's professional development.

The battle staff ride is an effective tool for training leaders in applying doctrine, specifically that in Field Manual (FM) 100-5, *Operations*. Through the study of an actual battle and personal observation of the terrain on which it was fought, leaders can better visualize the effects of training, planning, and effective (or ineffective) execution of a variety of operations.

At the company level, this is especially true when the staff ride covers a battle that took place in the western United States in 1873. Unlike the large-scale engagements of the Civil War, the conflicts that occurred during the Indian campaigns of that era were primarily small-unit actions, usually involving elements of company size or, at most, battalion.

The Modoc Indian War of 1873 is an excellent example of this type of campaign. Operations were focused in the region surrounding Tule Lake and the

Modoc Indians' ancestral homeland, which sits just below the Oregon-California border, south of the city of Klamath Falls and adjacent to or within the Lava Beds National Monument.

Since the area of operations was easily accessible to our unit in Eugene, Oregon, this is the campaign we chose to study for our company level battle staff ride.

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Artillery Regiment, the Oregon "Volunteers" militia, and some ad hoc militia units from Northern California and various settlements in the region. In all, about 1,000 U.S. troops were fighting about 50 Modoc warriors for six months.

The Modoc Indians were a relatively small but warlike tribe dwelling in the chaparral region of the headwaters of the Klamath River. As early as 1853, they had developed a fearsome reputation for raiding settlers traveling the Applegate branch of the Oregon trail. To put a stop

to this, the United States government moved the Modocs to a reservation on the shores of Upper Klamath Lake about 45 miles to the north of the Modocs' ancestral home. Dissatisfied with reservation life, a party of Modocs under the leadership of "Captain Jack" left the reservation and returned to the Tule Lake region, where they resumed their old practice of raiding ranches and wagon trains.

Various peace commissions were sent to put a stop to the band's depredations, the final one under the personal direction of Major General Edward R. S. Canby of Indiana. General Canby was given wide discretion in trying to solve the problem, including the authority to grant the Modocs their own tribal lands as their exclusive reservation. This offer was never made, however. The Modocs smuggled weapons into the peace negotiations on the southern shore of Tule Lake and killed or wounded the unarmed members of the peace commission in a surprise attack. General Canby was one of those killed. The Modocs then withdrew into the natural fortifications of the nearby lava beds.

Having anticipated a need for combat troops, the War Department had already sent a combined arms force into the region to force the Modocs back to the reservation. This force proceeded to invest

the Modocs in their stronghold, and the terrain, weather, poor logistics, inadequate training, and bungled execution of operations on the part of the Army protracted the campaign into one of many months.

The operation unfolded like a real-life "Duffer's Drift," but this time the same mistakes were made over and over. Eventually, the Army accomplished its objectives, but this resulted more from enemy attrition—through hunger, exposure, and illness—than from any decisive victories on the battlefield.

Preparing for Training

To prepare for this training, we had to develop subject-matter experts on the specific engagements. Six months before the scheduled training, the commander gave a warning order that we would conduct a staff ride. Four months ahead, he assigned battles and orientation subjects to each of the company's key leaders. He decided against requesting teaching support from the National Park Service. Although this help would have been educational, it would have impeded the training value of having the junior officers and NCOs become subject matter experts and trainers.

The instructors for this event were primarily platoon leaders and platoon sergeants, with the commander, the executive officer, and cadets briefing orientation topics. These leaders were required to research their topics on their own time, to backbrief the commander periodically on their progress, and to develop a presentation designed to discuss their assigned topics using the tenets of FM 100-5 as an interpretative tool. Progress and planning sessions took place off-duty, usually either immediately after company training meetings or after IDT periods. The need for relevant visual aids was strongly emphasized.

The XO had to come up with transportation, lodging, and a means of feeding the soldiers who would be attending the staff ride. Assuring attendance was also a problem that had to be addressed, since asking soldiers to spend an additional weekend away from their families is a hardship that many are reluctant to undertake.

We determined that a 44-passenger Army bus would be the most economical, the safest, and the most comfortable means of transportation available to us. An Air National Guard base in Klamath Falls proved to be ideally situated for billeting. (A bivouac site in the field would have required a more extensive advance party and the use of more Army vehicles to transport tents, cots, and the like.) In addition, we needed a classroom for the first phase of our training, and the base was happy to provide such facilities.

Paying for the meals and lodging was another issue. Our company had some discretionary RMA (readiness management assembly) funds earmarked for leader training, one RMA usually being used for one individual's eight-hour training period. We determined that by providing two RMAs to each individual participating in the weekend-long training we would be able to reimburse our lead-

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ers for their lodging and meals. While these funds did not match the earnings of a normal MUTA-5 weekend, particularly since the participants had to pay for meals and lodging, they did ensure that no one lost money as a result of the training event.

To make the most of the training time without conflicting with civilian work schedules, we deployed from our home station on a Friday night and arrived at Kingsley Field in the early hours of Saturday morning. The company leaders were able to get a few hours of sleep, were bused to a local restaurant for breakfast, and then returned to Kingsley Field for half a day of classroom lectures. Meals for the entire training exercise were handled this way, with our soldiers being bused to a restaurant before or after

training, and buying sack lunches from local markets and delicatessens for the field phase of the training.

Training

The four-hour block of classroom instruction involved briefings designed to orient the participants on the Modoc Indian War. It included lectures on the conduct of a staff ride, Modoc culture, the customs and problems of the settlers, the political situation leading to the conflict, Army organization, equipment, and training in the post-Civil War era, and the specific events that led to the initiation of hostilities.

The second phase consisted of ten vignettes selected for their particular suitability to our training objectives and for their accessibility (many of the locations are now on privately owned land). On site, the platoon leader assigned as the subject-matter expert for that site was given ten minutes to set up his graphics and orient himself and his platoon sergeant to the terrain. He then briefed the rest of the participants on the events at that location, pointing out how the terrain was used by both sides and drawing analogies to modern infantry operations. The platoon leader then analyzed the battle using the characteristics of the offense outlined in FM 100-5; he was immediately followed by his platoon sergeant, who discussed the characteristics of the defense as it applied to the situation.

The same pattern was repeated at the location of all ten engagements covered during the staff ride. A few short orientation stops to give the soldiers an overview of the battlefield were planned and executed from various viewpoints. At the site of the first engagement of the campaign, instead of focusing solely upon the characteristics of the offense and defense from FM 100-5, the platoon leader determined that the nature of the engagement was more suitably analyzed from the perspective of present-day operations other than war. More specifically, that particular operation was a poorly planned and executed cordon and search, an exercise that our company had trained on earlier at the Jungle Operations Training Center in Panama.

In the final phase of training, the commander conducted a brief review of the key concepts discussed over the two-day training period. He then incorporated the lessons learned into a discussion of current U.S. Army doctrine and its application to small-unit infantry tactics of the type on which our unit regularly trained.

Keys to Success

Before parceling out the subjects to be briefed, the commander must be thoroughly familiar with the campaigns so he can designate subject-matter experts. To bring everything together, one leader must be in charge, and the company commander is the logical choice. He has the clout to demand things and see that they are done. He is also the most likely expert on staff rides, since he participated in a staff ride in the Infantry Officer Advanced Course. Because of the limited time available, he must be clear on the importance of each event so that he can include the incidents and engagements that will have the most training value.

A detailed timetable must be laid out early in the planning stage, with the instructor, the location, and the subject clearly communicated to the designated trainers, along with a clear expression of the tasks to be accomplished and the standards to be met. The commander must require all instructors to submit a copy of their briefing outlines for inspection well before the event. In an IDT unit such as ours, where we see each other only once or twice a month, this is critical to quality control and keeping the instruction in line with the commander's intent.

To fully involve all participants, it is important that the campaign be studied from the perspective of both sides of the conflict, and that everyone understand the cultural context in which the events occurred. Without this sort of preliminary information, it is more difficult for the group to grasp the constraints under which the military operations took place.

The exercise of and improvement in research and briefing skills was a significant secondary learning event, and some very relevant and meticulously done graphics were used to support the briefs. These graphics required some innovation on the part of a few of the trainers, since

a number of the battle sites were accessible only on foot over rough, lava-strewn terrain.

After-action reports (AARs) should be required from each participant. These reports enable the chain of command to assess the training value of the event, to determine whether such an event should be repeated, and to learn how future training along these lines can be improved. Generally, the response was that the staff ride was a highly successful learning event and should be repeated each year if possible. The platoon leaders learned some of what will be expected of them during their officer advanced course and the platoon sergeants had an opportunity for professional development not generally available to them. The trainers were all aware that the written and oral communication skills they demonstrated during this event would be reflected on their evaluation reports, a knowledge that tended to encourage great attention to detail and ensure a professional presentation.

Every soldier who participated in the staff ride appeared motivated, despite the fact that most had never heard of a staff ride or the Modoc Indian War. Some of the officers and NCOs felt that the squad leaders who participated as observers in the staff ride should be encouraged to do briefings themselves at the next such opportunity, and the consensus among squad leaders was that they would like to have been more heavily involved in the instruction. Some platoons did use their staff sergeants to help prepare graphics and—to a limited extent—as briefers, though most squad leaders participated as observers only. The drawback to heavier involvement by more junior NCOs is that it detracts from the training opportunity such an event offers to platoon leaders and platoon sergeants, who have a more immediate need for such skills.

A well-executed staff ride can also serve as a bonding experience, lessening the effect of the time lost from home and family and the low pay provided. In an IDT unit, there are few opportunities for the kind of social interaction that is normal among active units.

The photographs we took for display in our unit armory let the soldiers who

had been unable to participate know of the efforts of their leaders to develop their professional knowledge and skills. In fact, each participant received a training certificate, either as an instructor or as a student, to help emphasize the importance of continuing professional development.

A staff ride provides an excellent professional development experience. It showcases current doctrine through a comparative analysis with the operations as they actually occurred. It is also an effective means of applying theory to practice at a pace that enables leaders to absorb the subject matter being studied. It compels soldiers to devote time to concentrating on and learning about their profession. Orders drills and terrain-board exercises are also useful for this purpose, but a staff ride is a novel and effective teaching tool that accomplishes many of the same goals.

The primary training objective of this particular exercise was to teach FM 100-5, and we believe we succeeded in that goal. It also developed research and communication skills in officers and NCOs and built esprit de corps in the group. One platoon sergeant (referring to an engagement that involved a company-sized element that was surprised and overrun while establishing a temporary bivouac site without local or far security) mentioned that he would never again occupy an assembly area without thinking about the numerous errors made by the officers and NCOs of that unit and the tragic consequences of those errors. That engagement still has special meaning to all the key leaders of our company, and the Modoc Indian War staff ride was well worth the effort.

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