Master Tutorial Formatting and Sample Proposal

Title Page

- See [Title Page Template](#) for instructions

Body of the Proposal Document

- A summary with a minimum of 900 words to a maximum of 3,000 words (excluding references) that describes the session in enough detail so reviewers can evaluate it effectively.
- References, tables, and figures do not count toward the limit, but appendices do count toward the limit.
- Proposals for master tutorials should describe the specific content to be taught in the tutorial and indicate whether the coverage of the material will be basic or advanced.
- Sessions may be 50 or 80 minutes long.
- Should not be prepared for blind review.

SUBMISSION TYPE
Master Tutorial

TITLE
Qualitative Investigation of Context: Staff Rides for Research and Practice

SHORTENED TITLE
Staff Rides for Research and Practice

ABSTRACT
This interactive session builds participant knowledge for conducting qualitative investigations of context in staff rides. Using a wilderness exemplar we demonstrate observational, analytic and dialogic processes and discuss publication and institutional review board issues. The popular method is repositioned to yield unique contributions for I-O research and practice.

CITATION
Becker, W. S., & Burke, M. J. (2026, April 30 – May 2). *Qualitative investigation of context: Staff rides for research and practice* [Master Tutorial]. Society for Industrial and Organizational Psychology Annual Conference, New Orleans, LA, United States.

WORD COUNT
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Introduction

You just cannot get the full effect of what happened [at the South Canyon Fire] and what it was like until you've walked the ground, felt the steep terrain, seen the vegetation, experienced the heat and had the wind in your face. The whole scenario seemed so different that what I had read.

--W.E Holmes (2005, p. 26)

Staff rides are a type of war game used to teach military strategy. Led on horseback in the open terrain, the first staff rides took place at important battle sites. As noted in the quote above, modern staff rides provide a unique experience by engaging participants in observation, open reflection and discussion. Staff rides have been widely used throughout history and around the world as an important method for developing leaders (Robertson, 1987).

Staff rides have direct application to the research and practice of I-O psychology. Retrospective analysis of historical data provides rich phenomena for understanding context and situated action (Kayes, 2004; Useem, Cook, & Sutton, 2005; Weick, 1993; Whiteman & Cooper, 2011). Staff rides *extend* retrospective analysis because knowledgeable experts gather together to concurrently and publicly reflect on content. Grounded in experiential and dialogical learning, staff rides are ideal for engaging participants in the investigative process. In addition, methods with a high degree of fidelity to the work environment are in demand (Proserpio & Gioia, 2007; Salas, Wildman, & Piccolo, 2009). Further, the increased availability of electronic historical databases encourages innovative use of organizational records (Simonton, 2003). Staff rides respond to calls in the literature for greater attention to experiential methods (Kayes, 2002; Kolb, Boyatzis, & Mainemelis, 2000) as well as prepare workers who face *in extremis* organizational settings (Halpin, 2011; Hannah, Campbell, & Matthews, 2010; Hannah, Uhl-Bien, Avolio, & Cavarretta 2009; Klimoski, 2005; Kolditz, 2006; Vogel-Walcutt, Carper, Bowers, & Nicholson, 2011). Finally, the 2013 SIOP program specifically requests qualitative research methodology.

The focus of the proposed tutorial is the staff ride—the recreation of a historical event for the purpose of understanding organizational phenomena through observation, reflection, and discussion. Importantly, staff rides make unique contributions to research through independent analysis of events outside of organizations by content experts who collectively and concurrently reflect on retrospective data (Becker & Burke, 2012a). The proposed master tutorial reviews the staff ride method specifically for I-O researchers and practitioners. An accurate scale physical terrain model of a wilderness disaster as well as map, photos, and investigative documents are used to demonstrate how content experts can explore context. The method enhances open reflection and dialogue allowing new interpretation of data through independent analysis of events outside of the original event organization.

Materials for the master tutorial will be provided in advance of the conference on SIOP's new social media interface, http://www.siop.org/socialmedia/ In recognition that tutorial participants will be of diverse and varying background and expertise concerning qualitative investigations, the presentation will avoid jargon and offer clear learning objectives as follows:

1. Familiarize attendees with the qualitative methodological foundation of the staff ride;

2. Develop attendees' und er standing of three phases: the preliminary study, the field visit, and the integration;

3. Engage attendees in a recreated wilderness staff ride to demonstrate how to examine and analyze decisions made during a staff ride; and

4. Discuss the strengths and limitations of the method, including recommendations for Institutional Review Board (IRB) concerns and the publication of qualitative cases.

Time requested to address these learning objectives is 80 minutes. The approximate time for each learning objective is noted below, along with further description.

Learning Objectives

#1: Familiarize Attendees with Methodological Bases (10 minutes)

German military strategist Helmuth von Moltke first led officers on horseback devising simple plans that could be applied by leaders in the heat of the battle (Robertson, 1987). The first U. S staff ride took place at Fort Leavenworth, Kansas in 1906. Twelve officers engaged in a two-week reconstruction of Sherman's 1864 battle at Atlanta. Today, staff rides are used at the Army War College to develop strategic decision-making (Ossad, 2006). Military staff rides throughout the world use sophisticated technology such as cell phones, digital video, satellite-imaging, and electronic mapping. The U.S. Forest Service adapted the staff ride as part of interagency training in fire behavior in 1999; weather forecasts, fire danger predictions, maps, video footage, shift plans and photographs are used to recreate important fire events. We participated in a U. S. Forest Service wildfire recreation in Missoula, Montana which stimulated the idea for using staff rides for qualitative investigations of applied psychology.

Significant contributions to research and practice can emerge from unconventional settings and with innovative contexts and samples (Bamberger & Pratt, 2010; Bansal & Corley, 2011; Johns, 2006; Siggelkow, 2007). As in the case study, staff rides identify problematic or interesting events and relationships occurring naturally in the real world (see Starke & Strohschneider, 2010, p. 115). Data from multiple sources examine organizational phenomena in naturalistic context, confronting theory with the empirical world (see Piekkari, Welch, & Paavilainen, 2009).

For this learning objective, the presenters will emphasize critical incident analysis for the development of episodes that comprise an event. In addition, the foundational role of

experiential and dialogical theories of learning will be discussed, with emphasis on how the staff ride promotes public reflection-in-action and dialectical knowing (Becker & Burke, 2012b).

#2: Develop Attendees' Understanding of the Three Phases of the Staff Ride (15 minutes)

Staff rides have potential for research and practice in I-O psychology; as a flexible method, it can be adapted to focus on specific areas of interest. For example, we have conducted staff rides that examine organizational knowledge creation, safety, inter-agency communication, and individual and team processes, such as team mental model development and self and team efficacy formation.

Three phases of the staff ride will be demonstrated: 1) a preliminary study of the incident in detail including background of the case; 2) a field visit that recreates the context, and 3) a discussion that integrates the first two phases (Becker & Burke, 2012a). The purpose of the preliminary study is to prepare background material, basic knowledge and information about the case, a general outline and chronology of significant events, maps, etc. In the second field study phase, investigators observe incidents in chronological order. The integration phase involves moderated discussion through which participants organize and articulate the data derived from the study.

Constructing a staff ride requires locating specific information sources of the historical event. Attendees will be provided with a developmental template (Table 1) for identifying the information needed for the preliminary study, map resources, and other materials needed. The potential value of developing a web site for ride participants to access materials in advance of the field study phase will be discussed with attendees. Reference materials will also be provided (e.g., Baird, Holland, & Deacon, 1999; Burke, Scheurer, & Meredith, 2007) on how to unfold the discussion within the integration phase of the staff ride.

#3: Engage Attendees in Portions of a Recreated Wilderness Staff Ride (30 minutes)

Attendees will participate in and discuss a modified, shortened version of a staff ride. This aspect of the master tutorial will develop attendees' procedural knowledge for conducting a staff ride and promote understanding of how to examine and analyze decisions made during a historical incident while taking context into consideration. An outline of the activities and the approximate times for each phase of the demonstration ride are presented in Table 2. Tables 3 and 4 provide more specific information on the staff ride exemplar that will be provided to attendees.

The unique format of the staff ride stimulates interaction with high relevance to researchers and practitioners. In regard to staff rides in general and more specifically for the Great Bear Wilderness demonstration, attendees will become aware of issues related to:

- Selecting a case study and staff ride site;

- Selecting ride participants;

- Developing a chronological time line for the historical event, and identifying key episodes or decision points in the case;

- Developing visual aids including a possible physical terrain model;

- Guiding ride participants (using the visual aids) through a discussion of actions taken and decisions made during each episode of the event;

- Facilitating discussion within an integration phase that follows an "after-action-review." The Great Bear Wilderness demonstration will provide information for how the staff ride enhanced researchers' insights into the dynamics that influence team processes.

#4: Discuss Strengths and Limitations, Navigating the Institutional Review Board (IRB) Process and Publishing Staff Ride Research (15 minutes)

Advantages of staff rides will be provided, including the recreation of incidents while interacting with knowledgeable content experts. The open reflection and dialogue allow new interpretation of data through independent analysis of events outside of the original event organization. Ideally, staff ride participants relive the environment, the operational setting, decisions that were made, and values at risk. In addition, the presenters will discuss methodological challenges such as data that is incomplete, subject to bias, deliberately controlled, or repressed. Practical limitations will be noted such as the time and expense to develop and implement staff rides and difficulty assembling or locating individuals or material needed (Alexander, 2002). Importantly, attendees will be provided with information for modifying staff rides for conduct at academic conferences, classrooms, and web-based seminars so as to create some flexibility in addressing these challenges.

Attendees will also be provided with information concerning when a staff ride is considered research subject to Institutional Review Board (IRB) review and special considerations in navigating this review process related to obtaining or requesting a waiver of written informed consent. Furthermore, special considerations in publishing staff ride research will be discussed with attention being given to theoretical sampling of cases and pointers concerning how to write a staff ride paper

Summary and Wrap-Up (10 minutes)

The authors have previously conducted staff rides with a variety of academic and professional audiences (Becker, 2008; Becker & Burke, 2012b; Burke, 2010). The information

provided in the proposed tutorial is suitable for CEU credits, and is structured so that

researchers, practitioners, and graduate students can understand and benefit from the interactive

session.

The master tutorial develops attendees' understanding of the elements of a staff ride, the

steps to be taken to develop and conduct a staff ride, and awareness of advantages and

challenges to the use of the method in qualitative investigations. Our expectation is that

attendees will view the staff ride as an innovative, interactive research method to better

understand context in qualitative investigations of organization and team processes. The session

will conclude with a general, open discussion of the efficacy of the staff ride for qualitative

research.

Presenter Information

Michael J. Burke is the Lawrence Martin Chair in Business in Tulane University's

Freeman School of Business and he holds an adjunct appointment in the Department of

Environmental Health Sciences in Tulane's School of Public Health and Tropical Medicine. Prior

to coming to Tulane University, Professor Burke was a tenured Associate Professor of

Management at New York University's Stern School of Business. He has held full-time positions

in management consulting, and was a Visiting Professor at the University of Sheffield's Institute

of Work Psychology during 2004. Currently, he serves as the Chair of Tulane University's

Social-Behavioral Institutional Review Board.

Professor Burke continues programs of research on learning and the efficacy of workplace

safety and health interventions, the meaning of employee perceptions of work environment

characteristics (psychological and organizational climate), and the role of individual and

situational factors as antecedents to individual, group, and organizational outcomes. In addition,

he continues to contribute to the literature on the statistical properties and applications of meta-analytic procedures and procedures for estimating interrater agreement. He has authored numerous articles, book chapters and technical reports in these and related areas.

During 2007-2010, Professor Burke served as *Editor* of *Personnel Psychology.* He has also served on the editorial boards of *Academy of Management Review, Computers in Human Behavior, Industrial and Organizational Psychology: Perspectives on Science and Practice, International Journal of Selection and Assessment, Journal of Applied Psychology, Journal of Management, Journal of Occupational Health Psychology, Journal of Organizational Behavior, Human Resource Planning, and Personnel Psychology;* and he served as an *Associate Editor* of *Personnel Psychology* in 2006-2007.

Wendy S. Becker is Associate Professor of Management, John L. Grove College of Business, Shippensburg University. In 2010 she received the Research Excellence Award from the Academy of Human Resource Development and Research Awards from Shippensburg University in 2008, 2010, 2011 and 2012. She is current principle and co-owner of Becker-Dale Consulting. She is an Officer on the Executive Board of Metropolitan New York Area Association of Applied Psychology and past editor of *The Industrial-Organizational Psychologist*. Previously, she served in leadership positions at HRStrategies and Development Dimensions International.

Wendy earned her Ph.D. in Industrial/Organizational Psychology from the Pennsylvania State University. She teaches courses in organizational behavior, human resource management, industrial- organizational psychology, business ethics, and personnel development at the undergraduate, Master's, Ph.D., and Executive MBA level. She has taught in the United States,

Austria, Portugal, Spain and the United Kingdom. Becker has received graduate teaching awards and is an active member in psychology and management professional associations.

Becker's research examines organizational and team effectiveness and appears in *Forensic Science Policy & Management, Human Resource Development Review, Journal of Human Resource Education, Organizational Dynamics, Organization Management Journal, People & Strategy, Personnel Psychology, Research in Organizational Behavior, Team Performance Management,* and others. She is co-author (with W. Mark Dale) of *The Crime Scene: How Forensic Science Works* (Kaplan) and *Applying Business Principles to Forensic Laboratory Management* (forthcoming, Taylor & Francis).

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Appendix A
Staff Ride Development Template

Phase 1 – The Preliminary Study

Identify initial data (observations, interviews, documents, audio-visuals), construct general outline and chronology of significant events, conduct initial data analyses, and develop theoretical arguments or tentative findings. The following material and information may be gathered during the preliminary study.

Observations:

- Descriptive notes using observation protocol

Interviews:

- Eyewitness accounts (in person or previously recorded)
- Oral history audio recordings

Documents:

- Investigative reports, government reviews, after-action management reviews
- Historical memos, letters, press releases, chronologies, timelines of the event
- Research articles, research reviews, related case studies □ Newspaper articles, editorials, magazine articles, books
- Biographies, autobiographies, journals, medical records
- Organizational charts, job descriptions, internal memos
- E-mail transcripts, text messages, phone transcripts
- Web pages
- Longitudinal data including archival data sets

Audio-Visuals:

- Photographs, along with descriptive geographic or historic orientation to site location
- Maps, e.g., MapQuest, Google maps, Yahoo maps
- Topographical maps
- 3D Google Earth animated fly-around
- Videos, tapes
- GPS data
- Sketches
- Physical terrain models
- Sand maps
- Tactical decision exercises

Phase 2 – The Field Visit

Visit the site (or recreate a site), review incidents in chronological order, make observations, take part in presentations, collect new data, refine and discuss hypotheses or theoretical arguments, and develop preliminary results.

- Use observational protocols for recording visual data
- Use interview protocols such as structured, semi-structured, open-ended, focus groups, etc. for asking questions and recording answers during interviews
- Record information using notes, journals, diaries, audiotape, videotape
- Record demographic information, e.g., time, place, date of field setting
- Collect quantitative information, e.g., surveys, research measures
- Examine physical trace evidence, e.g., equipment failure, damage to property, etc.
- Examine additional relevant stimuli, e.g., sounds, smells, tastes, etc.

Administrative materials to assist research facilitator while conducting Field Visit:
- Travel directions
- Schedule (showing discussion times and movement times for events)
- Field guide (with cues for maps, route access, terrain orientation, key events, and important discussion points for the Field Visit)
- Terrain model, sand map, tactical decision exercise or other strategy to generate group discussion and interaction during the Field Visit □ Eyewitness accounts (in person or recorded)

Phase 3 – The Integration

- Transcribe all notes, tapes, videos
- Provide information, where appropriate, on the reliability of data sources
- Validate the accuracy of the information gathered
- Use qualitative and possibly quantitative data analytic techniques for transforming raw data, organizing and preparing data, reading through all data, coding all data, identifying themes and description, interrelating themes and descriptions, and interpreting themes and description □ Revise findings
- Refine original hypotheses or theoretical arguments