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The Gettysburg Leadership Experience

Learning, Leading, and Following

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The Gettysburg Battlefield has been called “the finest classroom in America,” and not just for the study of history and military tactics, but also for contemporary leadership development. We believe that classrooms for leadership development are best understood as places of learning rather than teaching. The Gettysburg Leadership Experience (GLE) is a fresh, unique approach to leadership development that is designed to use history as a metaphor for contemporary leadership issues. The program incorporates an assortment of learning styles, including large- and small-group interaction. Our diversity of learning experiences includes in-depth case studies, a variety of experiential learning activities, and creative use of video as an auxiliary dimension of historical case studies that define transformational leadership, the common thread of our entire program. The keystone of the program’s learning experiences is visits with expert facilitators to sites on the battlefield where focal events of the case studies occurred in July 1863.

The Conceptual Framework

The distinctive character of The Gettysburg Leadership Experience is based on eight pillars of learning. These are:

We treat every participant as an adult professional. We seek to engage each participant in a variety of learning experiences, many of which are action-based, that recognize her or his unique potential for professional growth and development.

We design the program to incorporate diverse learning experiences, ranging from classroom discussions to experiential team activities and visits to the historic Gettysburg Battlefield, that synergistically reinforce the core leadership concepts.

There are literally dozens of leadership concepts; our core leadership concepts are transactional and transformational leadership. The emphasis is on developing participants’ transformational leadership skills and capabilities so they may direct organizational change and lead people at the strategic level.

We deliberately decided not to be “an expert knowledge transfer program”—in fact, we are not sure leadership can be taught, but we know that it can be learned and developed. We deal with that paradox by putting our expertise into the program’s design. Through a variety of learning techniques we facilitate and encourage participants to think, think differently, more seriously, more creatively, and more critically as they develop a higher level of understanding of the conceptual framework of

strategic thinking and action.

We use the history of Gettysburg as the foundation for our uniquely designed case studies and stories that illustrate timeless leadership principles in action, principles that were present in 1863 and are equally present in today's professional and organizational lives. Through these case studies we identify leadership metaphors that allow participants to learn emotionally as well as intellectually. The Gettysburg Battlefield becomes a leadership laboratory that includes a specific emphasis on understanding the important role of followership in organizational performance and how to develop followers as partners in building effective, high-performing teams.

We believe in and practice continuous improvement and over time have incorporated participant feedback and our own reflection in ways that have deepened and enriched the program. We are proud of this program and we know it is not perfect. We strive to learn from each program, and we apply our learning to improve future programs.

We deliberately incorporate sustainability elements to encourage participants to engage in ongoing development after the Gettysburg portion of the program ends. These elements include the creative use of historical metaphors that act as mental bookmarks, the commonsense application of the transactional and transformational leadership concepts to leader responsibilities, the emotional staying power of Gettysburg, its history, and a special emphasis on the value and use of proactive reflection as an important tool for continuous growth and self-awareness.

We do not offer a "one size fits all" program. We discuss each group's purposes, objectives, and priorities, and, within the limits of our capabilities, we design and deliver a program tailored to their special needs.

The Case Study as Archetype

Though all eight pillars are important components of the program, the GLE case studies have become the program's signature elements for most of the participants, and as such merit special mention. We have developed ten case studies, with two others under development. Each emphasizes different aspects of leadership, followership, or organizational dynamics.

All of the case studies differ in terms of content; however, they all take about a half day to fully unfold, and all have a common design template as follows:

- discussion of the leadership concepts to be explored
- video portion of case study based on an event in the Battle of Gettysburg
- visit to Gettysburg Battlefield, where events in video transpired
- return to classroom for wrap-up small-group/large-group discussion.

These four structural parts of the case study correspond to the underlying four-step learning design that is common to each regardless of the content:

- clarity of concept(s) in the initial discussion
- visualization of the concept(s) in behaviors in the video portion
- reflection on the various possible meanings of the issues using the battlefield visit as stimulus
- application of meanings to the participants' contemporary professional situations during the small-group/large-group discussions.

Given this design, the key to learning is in the reflection and application phases of the case studies,

where participants use parallel or lateral thinking to apply insights from historical events to their current professional challenges and opportunities. When that process is explained carefully to groups, with concrete examples of how other participants have actually done it, they tend to embrace the process and use it creatively. It is their own engagement at this stage that defines each program's outcomes. Our experience has been that most exceed their own expectations.

Metaphors and Meaning at Gettysburg

Each GLE case study has a metaphor attached to it. For example, for the case of Union General John Buford, whose actions on the first day positioned his army with a strategic advantage, our metaphor is the High Ground. For the case study of Joshua Chamberlain, regimental commander of the 20th Maine, who defended the left flank of Little Round Top, the metaphor for a real or potential organizational vulnerability that requires risking one's assets to protect is the Left Flank. The metaphors function as mental bookmarks in the minds of the participants, enabling them to easily recall the full case study in the future; they also serve as a common vocabulary for the participants, and groups use these metaphors to communicate among themselves for years after the program. Yet the metaphors serve even more powerful purposes: A CEO told us recently that it was the shared experience of the GLE case study of Union Fifth Corps Commander General Daniel Sickles's behavior at Gettysburg that enabled him to work out a serious disagreement with a senior subordinate and keep him on the team; he said that one outcome alone justified the cost of the program to his company. In this case, the subordinate realized that the CEO had interpreted his behavior as insubordinate rather than constructive initiative.

Our case studies are designed and facilitated to avoid cookie-cutter thinking or outcomes to complicated issues. We probe, test, and challenge all ideas that tend toward rigid, one-right-answer judgments, in a belief that the complexity of the issues under discussion justifies this continuous questioning and that effective use of the Socratic process in decision-making is itself a valuable tool for participants to learn. In practice it is not unusual for our case studies to conclude with differences of opinion among the participants regarding the interpretation of the contemporary meaning of historical events or the application to current circumstances. But whatever their opinion, all believe they were thinking more clearly and critically.

A potential vulnerability to history-based development programs is the tendency to reason backward, instead of thinking forward. Since the participants are aware of the historical outcomes, it is easy for them to engage in types of "Monday-morning quarterbacking" that then pass for leadership lessons. We try to reduce the risk of this occurring in our early preparation phases of the program, which include a discussion of "learning traps," really logical fallacies associated with prior knowledge of outcomes. We identify three of these traps to specifically avoid as we process the case studies: (1) the error of backward causation, in which the outcome alone is taken as proof of the efficacy of the leadership inputs; (2) the "myth of inevitability," in which past events are assumed to have been inevitable and thereby it is possible to miss the ambiguity and complexity of the times, and the leadership issues inherent in that complexity; (3) and the tendency to pick and choose only those parts of the historical experience that reinforce preconceived attitudes and biases, and to reject new perspectives. Discussing learning traps has proven valuable for keeping these errors of reasoning out of the program, but it has become a minilesson in itself as participants recognize that these fallacies are commonly used as persuasion techniques in current organizational and political processes.

Thus in the case study on Robert E. Lee's order to General Richard Ewell to "take that hill if practicable," participants usually conclude with several new thoughts regarding effective communication within organizations, appropriate delegation of authority to subordinates, and

leader/follower dynamics that have overtaken a common initial assumption that Lee should not have added “if practicable” to his message to Ewell. Similarly in the case study on Pickett’s Charge, participants usually conclude with many new thoughts as to how organizations might more effectively manage disagreement over policy issues, and have long since discarded the initial idea that a key lesson is that Lee should have followed Longstreet’s advice, and instead are focusing on thinking about why Lee, and they in similar circumstances, might not have followed such advice.

Like many programs here we often conclude with a walk across the fields of Pickett’s Charge, always a powerful emotional and reflective journey, and say our farewells to the group at the Angle on Cemetery Ridge, near the high-water mark of the Confederacy. One point we stress for further thought is contrary to conventional wisdom: The repulse of Pickett’s charge was not the “end.” The battle may have been over, but the Gettysburg Campaign and the Civil War were not, so the defeat may be better understood as the beginning of a new reality for both the Army of the Potomac and the Army of Northern Virginia in which new leadership demands were placed on both organizations. Indeed, we have a case study on Lee’s retreat from Gettysburg and Meade’s pursuit that examines organizational crisis management and how skillful leadership in the face of adversity might prevent a major tactical failure from becoming a strategic failure for the organization.

The Dual Role of Leader and Follower

A noteworthy characteristic of the GLE, from its inception, has been an emphasis on the importance of effective followership in determining organizational performance. We designed three Gettysburg case studies devoted to examining followership and developed a sound conceptual model to support the studies. The followership focus has always received strong positive feedback from participants, most of whom said they had never been exposed to a professional assessment of the concept and that it accurately described their organizational experiences. The followership case study has become one of the most requested by participants.

Our followership focus was transformed in 2005, when General Michael Mosley, then Air Force vice chief of staff, brought his team of general officers to the program. Their contribution to the richness of the case studies’ reflection and application phases was extraordinary; many of their insights have been incorporated into the program, enabling new groups to benefit from their perspectives as well. Perhaps more important, their presence led to an ongoing relationship with the US Air Force in which we designed a new program for Air Force chief master sergeants; in “The Dual Role of Leader and Follower,” concepts of followership are a central theme.

In their professional responsibilities, the chiefs are near-perfect examples of the need to simultaneously perform effectively in both leader and follower roles. Their contributions in discussion and feedback based on the realities of their own experiences in both roles have led to a continuous strengthening in the followership portion of the GLE. As a result, a specialized instrument to measure follower styles, the Performance and Relationship Questionnaire (PRQ), was developed. The followership case studies, the followership model, and the PRQ now form a substantial stand-alone component of the program increasingly requested by clients who have completed the leadership portion of the program.

The Whole Is Greater Than the Sum

Though the eight pillars define the program and the case study has become its signature element in the minds of the participants, it is the careful sequencing and blending of these with other important

learning initiatives that together provide the power of the learning experience in influencing participants to take the Gettysburg Experience and translate it into enhanced job performance.

Proactive reflection. We begin each program with a short presentation on the importance and power of proactive reflection as a primary tool of continuous learning and personal growth and development. We then begin each subsequent day of the program with a session of reflection, in which participants discuss the meaning of the previous day's activities in terms of their own personal and professional lives. We encourage participants to continue this process of proactive reflection after they return home and provide examples of how they might comfortably do so. In a strategic sense, the proactive reflection is the glue that ties together the entire program for its duration and can continue the experience indefinitely into the future.

Expertise vs. experts. We aim to have real expertise in all phases of the program, minimizing the use of experts. GLE is about the participants, their needs, their leadership, their followership, and their goals and objectives. Our expertise is designing and delivering a set of experiences that enables them to learn and grow. We do not lecture or try to shape discussions to influence them to think as we do. We do try to answer all questions accurately but also in ways that stimulate critical thought. There is always more to learn, and experience shows that over time we learn much from the participants and then incorporate that insight into the program through our commitment to continuous improvement. The participants are the "experts" in applying the insights and lessons learned in the context of their professional lives.

History. We are not a history program or a military strategy program. Gettysburg's history is seductive, and, therefore, we continually pay attention to ensure that the program doesn't drift into more and more history. The historians in us tend to want to ask whether the story is true and to go ever deeper into factual discovery, spending more time on the battlefield. Instead, we ask participants to seek the leadership issues in the story much as we would in reflecting on Shakespeare's insights into human nature. We allow the program's reflection and application phases to play out to their full potential, so the battlefield experience may serve as an inspirational catalyst for those processes and not be permitted to become the program's focus. Participants have identified the battlefield experience as an emotional component that lends power and credibility to the program.

Transactional and transformational leadership. One of our eight pillars, yet here the issue is the enormous benefit of having a core proven leadership concept with a solid research base to serve as an anchoring theme. There are just too many concepts of leadership to float among them, and the word leadership itself is so loosely used that it can lose any actionable meaning. Of course, it does not have to be transactional/transformational leadership, but choosing the right one for the material has provided this program with power and conceptual legitimacy.

Diversity. The GLE is committed to the value of cognitive diversity both as a learning technique and as a serious dimension influencing organizational performance. That commitment is designed into the case studies and is re-inforced in facilitating the program, in which Americans of all ethnic, gender, and religious groups or affiliations are made comfortable, productive participants. The outcomes of the reflection and application phases of the case studies continuously demonstrate how important this is to our learning model.

Preparation, preparation, and preparation. Our programs range between two days and five days in length depending on the objectives of participants, who ideally number about twenty and who mostly are unfamiliar with the history of Gettysburg. We depend on appropriate preparation to have all group members ready from day one to fully participate in all aspects of the experience. To accomplish this we assign a preseminar reading of Michael Shaara's book *Killer Angels* (New York: Ballantine Books, 1987), which functions as a common starting point for our case studies, as well as selected

readings on transactional and transformational leadership. Whenever possible, we meet with group members for about an hour before they come to Gettysburg to orient them to the program's philosophy and flow, to introduce ourselves to them, and to hear from them directly about any concerns or issues regarding their upcoming participation. We hold an opening reception and dinner event to set the stage for the program. Finally, by opening the program with proactive reflection, we bring them directly into the conversation by concluding the preparation phase and smoothly transitioning into the case studies.

Conclusion

On the bottom line, the key to the GLE case-study methodology is facilitation that engages, excites, and delights the participants by enabling them to feel that this experience is connected to new ideas, new information, new perspectives, and new insights about issues that are important to them. Leadership is a choice! The essence of leadership is a fervent willingness to accept responsibility for influencing the future. It involves the heart and mind of the one who commits and the hearts and minds of those followers who willingly are influenced by the leader. Thus, groups and organizations are transformed one person at a time. That reality is the spirit of The Gettysburg Leadership Experience.