The Many Faces of Reform:
Military Progressivism in the U.S. Army, 1866-1916

by

Jason Patrick Clark

Department of History
Duke University

Date:_______________________

Approved:

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Alex Roland, Supervisor

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Richard H. Kohn

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Seymour H. Mauskopf

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Martin Miller

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Dirk Bönker

Dissertation submitted in partial fulfillment of
the requirements for the degree of Doctor
of Philosophy in the Department of
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ABSTRACT

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Abstract

In the years 1866-1916, the U.S. Army changed from a frontier constabulary to an industrial age force capable of expeditionary operations. This conversion was made possible by organizational reforms including the creation of a system of professional education, a coordinating central staff, and doctrine integrating tactics, equipment, and organization. Yet formal structures acted in parallel with the informal culture of the officer corps, which proved far more resistant to change. This dissertation will follow the formulation of these reforms by Emory Upton following the Civil War, through their implementation by Elihu Root in the early twentieth century. It concludes in 1916, when new conditions produced an entirely different agenda for reform.

This period has generally been interpreted in one of two ways. Previous scholarship examining the internal workings of the Army has seen it as a transition from obsolete to modern organization. Despite disagreements as to the origins, impetus, and length of reform, the theme of progress has been consistent. In contrast, the historiography of the Army’s external relationship with society has interpreted reform as a failed attempt to introduce militarism by mimicking foreign military institutions alien to American traditions. Although some of the foreign organizational forms were adopted, society ultimately rejected the militarist aims. This dissertation modifies both interpretations by arguing that these reforms were not as great a break with previous practices as generally asserted. The internal changes were actually a reordering of existing practices made possible by the sudden elevation of the reforming faction to organizational power. Individuals sought to emphasize only those limited aspects of the
old professional culture that they valued. These individual aims often diverged, leading to a series of disjointed reforms that, while successful in altering the army, did so in unanticipated ways. These internal efforts were meant to improve the army's effectiveness; there was little effort to alter the Army's role in society. Yet the next generation of reformers sought such a change under the dubious guise of a return to tradition. In doing so, they falsely portrayed their predecessors as foreign-inspired militarists, a mischaracterization that has been largely accepted by historians.
To Abigail, Faith, and Kelly
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<tr>
<td>ACP</td>
<td>Appointment, Commission, and Personal Branch Files, Entry 297, Record Group 94, NARA I, Washington, D.C.</td>
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<tr>
<td>AGO</td>
<td>Adjutant General’s Office</td>
</tr>
<tr>
<td>FSR</td>
<td><em>Field Service Regulations</em></td>
</tr>
<tr>
<td>GCM</td>
<td>George C. Marshall Library and Archives, Lexington, Virginia</td>
</tr>
<tr>
<td>GSSC</td>
<td>General Service and Staff College</td>
</tr>
<tr>
<td>GPO</td>
<td>Government Printing Office</td>
</tr>
<tr>
<td>IDR</td>
<td><em>Infantry Drill Regulations</em></td>
</tr>
<tr>
<td>JMSI</td>
<td><em>Journal of the Military Service Institution</em></td>
</tr>
<tr>
<td>LC</td>
<td>Manuscript Division, Library of Congress, Washington, D.C.</td>
</tr>
<tr>
<td>MHI</td>
<td>U.S. Army Military History Institute, Carlisle, Pennsylvania</td>
</tr>
<tr>
<td>NARA I</td>
<td>National Archives and Records Administration, Washington, D.C.</td>
</tr>
<tr>
<td>NARA II</td>
<td>National Archives and Records Administration, College Park, Maryland</td>
</tr>
<tr>
<td>RG</td>
<td>Record Group</td>
</tr>
<tr>
<td>UNC</td>
<td>Southern Historical Collection, Wilson Library, University of North Carolina-Chapel Hill</td>
</tr>
<tr>
<td>USC</td>
<td>Caroliniana Library, University of South Carolina, Columbia, South Carolina</td>
</tr>
<tr>
<td>USMA</td>
<td>Special Collections, United States Military Academy Library, West Point, New York</td>
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<tr>
<td>WDAR</td>
<td>U.S. War Department. <em>Annual Reports</em></td>
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Acknowledgments

As solitary as the pursuit of this dissertation has seemed at times, I am humbled as I reflect on how many hands have pushed me along. Whatever faults that remain are my own, for I have had more assistance, advice, and encouragement than I could ever have rightfully expected. The archivists and librarians at each of the institutions listed in the bibliography have been of great assistance, but Anne Miller of the Duke University Library Government Collections, Valerie Dutdut and Deborah McKeon-Pogue of the USMA Library Special Collections, and Joanne Hartog of the George C. Marshall Center Archives have all been notable for their kindness. I must give special mention to Dr. Conrad Crane, David Keough, Michael Lynch, and Dr. Richard Sommers of the Army Heritage and Education Center, a world-class institution where it is truly a pleasure to delve into the archives. Visits to Washington, D.C., were always made far more enjoyable (and cheaper!) by the Coddingtons and Whitakers, who kindly opened their homes and refrigerators, despite the rather poor conversation offered by an archive-addled houseguest.

Several distinguished scholars have lent their time and insights, for which I am grateful: James Abrahamson, Henry Gole, and I.B. Holley. In the early stages of this work, Kim Bowler, Mel Dealie, Sebastian Lukasik, Heather Marshall, and Tim Schultz offered both sound advice and camaraderie. At West Point, a number of colleagues in the Department of History have shaped this work over the course of many conversations: Mike Bonura, Jim Doty, David Frey, Bob Mihara, Dwight Phillips, Kevin Scott, and Sam Watson. Roger Spiller was particularly generous with both his quick wit and wise
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This dissertation would never have amounted to anything more than a cursor and a blank page if not for the determination and discipline that my father taught me from an early age. My greatest thanks go to the wonderful women in my life. In addition to introducing me to the mysteries of Microsoft Access, my mother successfully instilled a
love of learning and unsuccessfully attempted to force me into the bounds of proper English usage. I regret that my two wonderful daughters, Faith and Abby, had to learn the phrase “work weekend.” They are owed many “daddy-daughter dates” with interest. Last but not least, I have to thank my lovely wife Kelly, who seems to always be at the back of the line but never complains. Whether using her freakish ability to decipher late nineteenth-century handwriting, taking the girls on many shopping odysseys so that I could write just a few pages (half of which were soon deleted), or just dealing with the vacant expression of a husband who was off somewhere a century past, she has once again proven that I, indeed, am the lucky one in our marriage.
**Introduction**

In these modern times the success of [armies] depends fully as much upon the professional qualifications of the great body of officers as upon the courage of the men. The art of war has become an all-absorbing, special profession, requiring much education and preliminary training in order to master all the technical details appertaining to it.

- William H. Carter¹

The epigraph neatly summarizes an understanding of warfare that bound a group of reforming American army officers in the late nineteenth and early twentieth centuries. The assumption that the military profession was all-absorbing and required significant training served as the organizing principle for the period of intense organizational change known as the “Root reforms,” which took their name from Secretary of War Elihu Root. Yet Root spent less than five full years (1899-1904) in the War Department, and that time, though critical, encompassed only a portion of a much broader narrative. Its origins lay in the years after the Civil War, when those officers convinced of the necessity of professional revitalization looked to sources as diverse as the antebellum army, European militaries, and civilian society for the recommendations that would one day be taken up by Root. Even more important than the movement’s conceptual beginnings in the nineteenth century was its implementation in the twentieth century. The legislation, orders, and directives that comprised the Root reforms set in motion a period of change that would not conclude until long after Root had left the War Department.

Within this dissertation, the understanding of the military profession expressed by William H. Carter in the epigraph and embodied in the Root reforms will be referred to as military progressivism. At first glance, this term might appear a needless complication, with professionalization or modernization providing suitable and less pretentious alternatives. These terms, however, would not fully encompass all aspects of military progressivism. Also, modernization would not delineate military progressivism from the other, and sometimes competing, efforts that were also efforts to adopt the Army to new conditions. Finally, generic terms would not sufficiently convey the specific conditions that gave rise to military progressivism or the sense of community in pursuit of a common cause. As will be seen, officers explicitly viewed themselves as military progressives and recognized others of like mind as engaged in the same work. Indeed, this self-identification was one of the chief characteristics of military progressivism. Of course, reliance on such an informal identity poses great analytical risks, but it is justified in this case for two reasons. First, the chimerical nature of the military progressive identity masked the conceptual disagreements between reformers, thereby limiting their effectiveness. Thus, the problematic nature of military progressivism has its own explanatory power. Second, military progressivism began when the officer corps was a relatively small group of long-serving members with only a handful of new officers joining each year. In such a small, stagnant community, personal relationships were particularly important, and they operated in parallel with professional exchanges. This gave military progressivism a social dimension that was nearly as important as the intellectual component.

Despite this personal aspect, at the heart of military progressivism was a concept of the military profession. In his 1903 article, Carter described the tenets of military
progressivism. First, because the officers of the regular army were the core of an
effective land defense, the country’s fate should be placed “in the hands of instructed
officers and not be left entirely to the patriotism and inspiration of militia and
volunteers.” Second, if civilians granted the regulars sufficient resources, sound
organization, and professional autonomy to prepare for war, the Army could guarantee
“success in war . . . at less cost of life, treasure, and worry.” Such ideas were by no
means original to the late nineteenth century, and were, in fact, quite common in the
antebellum U.S. Army, which had also shared the belief that the primary purpose of an
army was to prepare for war. Yet the widespread skepticism about the utility of
peacetime “book-learning” undermined the regulars’ arguments, for if war was truly the
only school for war, then the regulars had no basis for their claims of greater expertise
and demands for professional autonomy. The Civil War, however, demonstrated the
tragic costs of delaying preparation until wartime, while European military
developments and analogous trends in civilian professions provided methods by which
the U.S. Army might profitably prepare for war. The military progressives wanted to
organize the army to achieve that aim.

The problem was that the consensus on basic premises did not translate into
agreement on which specific measures should be implemented. This was made more
difficult by changes in the political and international context within which the Army
operated. By the eve of the First World War, military progressivism had evolved to such
a point that the specific issues and concerns of the youngest generation were of a

2 Ibid., 205, 206.

3 William B. Skelton, An American Profession of Arms: The Army Officer Corps, 1784-1861, Modern War
Studies (Lawrence, Kan.: University Press of Kansas, 1992), xv-xvi.
different nature than their intellectual forefathers, even though they continued to claim to adhere to the same principles. Thus, this narrative will follow military progressivism to 1916, as the reformers of that time were concerned with far different issues than those of 1866.

The legacy of military progressivism during the intervening half century was mixed. Tellingly, Root and Carter confessed disappointment with their works. Military progressivism might also be judged in accordance with the aspirations of its original founders. General Emory Upton, a veteran of the Civil War, thought that the Union had suffered from obsolete tactics, incompetent leaders, and an organization wasteful in terms of both “life and treasure.” Root adopted many of Upton’s proposals to remedy these persistent defects, but they were only a partial success. The War Department entered World War I better organized and led than it had entered either the Civil War or the Spanish-American War. But the promised machine-like efficiency was conspicuously absent, and soldiers once again entered the first battles with tactics woefully unsuited to the realities of war.

Within American military history, such unreadiness has often been ascribed to either the inability of armies to do anything other than “fight the last war” or the inherent short-sightedness of civilian politicians. Both notions contain enough truth to

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6 For a description of the organizational changes and the War Department’s increased capabilities, see Daniel R. Beaver, Modernizing the American War Department: Change and Continuity in a Turbulent Era, 1885-1920 (Kent, Oh.: Kent State University Press, 2006), ch. 6-8. For a balanced discussion of the initial doctrinal and tactical shortcomings of the American Expeditionary Forces (AEF) see, Mark E. Grotelueschen, The AEF Way of War: The American Army and Combat in World War I (New York: Cambridge University Press, 2007).
justify their persistence, but the failure of military progressivism to fulfill expectations was due more to its weakness as an organizing precept than the inflexible “military mind” or civilian meddling. The fatal flaw of military progressivism was that it provided its adherents with a sense of unity, which, in the end, was more illusory than real. As a doctrine, it lacked the specificity and coherency necessary to guide a specific agenda of reforms. At its heart, military progressivism was essentially a belief in method.

Certainly the new organizations and techniques—particularly professional schools, field maneuvers, and the General Staff—created by the military progressives were far more potent instruments of professional indoctrination than anything seen before in the U.S. Army. These tools, however, were just that, and not a “philosopher’s stone” capable of transmuting poor thought into good policy.

The first two chapters examine the development of military progressivism from its conceptual formulation in the aftermath of the Civil War through the first tentative experiments at the end of the century. During this long gestation, military progressivism was largely relegated to the organizational fringes of the Army. The third chapter describes the sudden turn of fortunes wrought by the changed organizational, domestic, and international context of the early twentieth-century. These new conditions transformed military progressivism from an idea practiced only in a few organizational corners of the U.S. Army to official policy. The fourth and fifth chapters detail the early implementation of the Root reforms, when the substantial fissures in military progressivism became apparent in the competing schemes of military education. The sixth and seventh chapters follow the institutions created by Root as they began to produce the first series of doctrinal manuals. These tangible products and the manner in which they were produced reveal how the new methods were indeed a great departure
from past methods, but also that professional attitudes and modes of thought were far slower to change. The final chapter will describe how new conditions led the next generation of military progressives to create a fundamentally different agenda than the internal reforms laid out by Upton, Root, and Carter. The dissertation will then conclude with an assessment of both the intended and unintended consequences of military progressivism.

Elements of this narrative will be familiar to many readers. The works of general American military history have long emphasized the importance of the military progressives’ reforms. The first general histories of the U.S. Army were written by two officers—William A. Ganoe and Oliver S. Spaulding—who were both on active duty during the Root era. Not surprisingly, they each portrayed the time as one of enlightened rebirth. Writing in 1924, Ganoe contrasted the “Army’s Dark Ages” of the 1870s with its “Renaissance,” which he described in two stages. The first began in 1881, when General William T. Sherman established the School of Application for Infantry and Cavalry at Fort Leavenworth. Ganoe portrayed military reform as the victory of officers who had become “restless for something better” over a hostile citizenry. “Thus,” he wrote, “the army began to wake itself, unaided, from the dark ages of provincial life into which the nation had thrown it.”7 Ganoe identified a second phase of the renaissance, which began in 1899, the same year that Root was named Secretary of War. Yet Ganoe slighted Root and gave nearly all of the credit for reform to officers. He made no reference to the Secretary of War in his discussion of legislation reforming the National Guard, despite Root’s instrumental personal role in the passage of that bill. Ganoe’s

account of the founding of the Army War College also unjustly ignored Root, who essentially had created the institution single-handedly. Yet Ganoe mentioned the Secretary of War only in connection with Root’s speech at the laying of the school’s cornerstone, in which he paid homage to the influence of Upton.8 Writing over a decade later, Spaulding described the Army of the 1890s as tactically proficient and professionally well-educated, but deficient in organization. In contrast with Ganoe, Spaulding gave Root due credit for his “truly revolutionary” creation of the general staff, which remedied this final fault.9 Yet Spaulding, like Ganoe, emphasized the contributions of officers in these reforms.

Several decades passed before the next significant general history appeared, Russell Weigley’s History of the United States Army.10 Weigley was the first professional historian to undertake such a study, and he provided a far more balanced and scholarly account than the two earlier histories. Yet the essential outlines of Weigley’s narrative were not significantly different from those of Ganoe and Spaulding. Weigley also viewed the Root reforms as a fundamental break from the past; a transition from the obsolete to the modern. He described the romantic obsolescence of the late nineteenth century, when “the lean cavalrmen in dusty blue rode out from their wooden stockades to fight the Indians, and once more the Army appeared a place where officers learned all about commanding fifty dragoons on the western plains but nothing about

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8 Ibid., 397-418.
anything else.”\footnote{Ibid., 265.} Weigley by no means viewed the Root reforms as perfect, complete, or comprehensive, but he saw them as the foundation for the modern army that would emerge during World War I.\footnote{Ibid., 322.} More recently, Edward Coffman has agreed, concluding that “Elihu Root fixed the course for the twentieth century.”\footnote{Edward M. Coffman, \textit{The Regulars: The American Army, 1898-1941} (Cambridge, Mass.: Belknap Press of Harvard University Press, 2004), 415.} Indeed, it cannot be denied that the organization and institutions of the army, which had evolved to support a frontier constabulary, were substantially altered by the Root reforms, enabling a transformation to a much larger, more potent, and expeditionary force.

Brian Linn, however, has recently offered an important caveat. In his study of American military thought, Linn identified three competing intellectual traditions, which he labeled as Guardians, Heroes, and Managers.\footnote{Brian M. Linn, \textit{The Echo of Battle: The Army’s Way of War} (Cambridge, Mass.: Harvard University Press, 2007), 5-9.} Linn identified Guardians by their emphasis on a defensive national strategy relying on technology and Heroes by their belief in the predominance of the human element in war. Linn’s Managers believed that the efficient organization of national resources was the key to victory in industrialized warfare, which was precisely the aim of the Root reforms.\footnote{Ibid., 7-9.} The chief quality of Linn’s narrative is his emphasis on the continuity of thought between the nineteenth- and twentieth-century armies, rather than as a progression from obsolete to modern. The Managerial ideal underlying the Root reforms did not emerge wholly from the mind of Root or any other individual in 1899. Neither did the old army simply disappear.
Organizational charts might be swept away with a stroke of a pen, but habits of thought and patterns of behavior are more enduring. Linn also took exception with what he saw as a “false coherence” imposed on the reform movement by some histories, when, in fact, reformers “were a diverse and often factionalized assemblage, agreeing on one issue and emphatically disagreeing on another.”16 Admirably suited to discerning persistent patterns of thought over the sweep of decades, Linn’s typology of Guardians, Heroes, and Managers is less satisfactory at the individual level. Indeed, he readily admitted that the three traditions were not mutually exclusive and that an officer could have subscribed to the central tenets of two, or even all three, of these intellectual traditions without internal contradiction.17 Because an individual might reflect a blend of these archetypes, they are of only limited analytical use in examining the beliefs of any particular officer. Furthermore, because Linn argued that all three had always been present in the U.S. Army, the categorization does not contain the answer as to why the Managers displaced the Guardians as the dominant paradigm at the beginning of the twentieth century.

In evaluating Weigley and Linn it must be remembered that their purpose was to construct a narrative of American military history, not just the period examined in this dissertation. Other historians have specifically examined this period of reform, focusing particularly on its origins and motivations. Peter Karsten extended his interpretation of naval professionalization to the Army in his essay, “Armed Progressives: The Military Reorganizes for the American Century.”18 Karsten argued that reform was largely the

16 Ibid., 40-42.

17 Ibid., 4-5.

product of “Young Turks” within the officer corps who sought to expand their own professional spheres as a means of relieving the frustration generated by career stagnation within both services. In America Arms for a New Century, James Abrahamson took issue with Karsten’s description of the professional reform as a product of simple self-interest and generational conflict. Instead, Abrahamson described the “reform impulse” as motivated by a sincere desire on the part of officers to better prepare the military for emerging international threats. Although they agreed on little else, both Karsten and Abrahamson placed the impetus for change within the officer corps, rather than with civilians, such as Root. This debate provided valuable insights into the structural conditions underlying this period of reform, yet the discussion of motivation can take us only so far in our understanding. The “reform impulse” was so protracted and multi-faceted that generalizations about motivation must necessarily be either vague or suspect. Abrahamson’s contention that reform sprang from officers’ genuine commitment to preparation for war does little to explain specific policies, as there were many competing notions about how this might be achieved. On the other hand, Karsten’s thesis rests on a suspiciously narrow and specific collective identification of self-interest. It is difficult to imagine any large group of individuals undertaking such a sustained, concerted attempt on the basis of such a slippery concept as self-interest. Furthermore, his argument, however plausible in regard to personnel policies such as promotion, assignment, and retirement, does little to explain reform in areas that were


not so clearly related to personal gain, such as tactics, the use of certain technologies, or professional education. To be certain, some segments of the Army would benefit from specific policies in these areas, such as the expansion of a particular branch or giving preference in promotions to officers with certain qualifications or experience, but those advantages would not extend across the entire generation of younger officers that he argued was driving reform. In fact, they would serve to break up the horizontal cohesiveness of the generation described by Karsten and reinforce the vertical cohesion within branches and departments that had long served as the basis for both professional identification and conflict.

Historians have also disagreed as to when professional reform began. In his study of the antebellum army, William Skelton argued that the professionalization of the officer corps began well before the Civil War.20 Mark Grandstaff has since agreed that a period of reform did take place before the war, but argued that the war produced such a sharp break in the demographics of the officer corps that the subsequent efforts at professionalization must be regarded as a separate entity. Grandstaff identified two distinct groups within the Civil War-generation of officers—those who entered from civilian life as volunteers, and those who were graduates of West Point. He identified this latter group as providing the impetus for reform, particularly William T. Sherman.21

The general histories of Weigley and Linn, the investigations of motivation by Karsten and Abrahamson, and the discussion of periodization between Skelton and

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Grandstaff have established the contextual boundaries of military progressive reform. Nevertheless, all of these contributions, with the exception of Linn, have viewed military reformers as a group, chiefly defined by their opposition to the status quo. As such, these works have missed many of the distinctions separating military progressives. This shortfall has been made up by studies of specific organizations and individuals, providing the building blocks for a bottom-up understanding of military progressivism. The outstanding examples of these works are Timothy Nenninger’s history of the Fort Leavenworth schools and Harry Ball’s history of the Army War College. Daniel R. Beaver’s recent history of the War Department admirably captures the organizational changes of the time. Complementing these institutional histories are excellent scholarly studies of leading reformers, particularly Emory Upton, Arthur L. Wagner, J. Franklin Bell, John M. Palmer, and William H. Carter. Other notable biographies have examined prominent officers of the time, such as John J. Pershing, Robert L. Bullard, Peyton C. March, George C. Marshall, and Frank R. McCoy, which collectively reveal much about the broader context of the officer corps and the effects of reform.


23 Daniel R. Beaver, Modernizing the American War Department: Change and Continuity in a Turbulent Era, 1885-1920 (Kent, Oh.: Kent State University Press, 2006).


Machoian, a historian who produced one of the best of these biographies, has noted that “in the quest to sort intellectual strains into neatly generalized constructs. . . . The reformers’ individual and sometimes divergent contributions, opinions, and motivations are easily overlooked or downplayed in the attempt.”

While such studies of institutions and individuals provide the detail that is necessarily absent from works of larger scope, they also leave gaps in the narrative. The purpose of this dissertation is to build upon previous work by examining the differences between military progressives in their conception of the military profession and war. Previously, these subtle divides have been lost in the panorama of the decades-long battle between proponents and enemies of reform, or not fully contextualized in the close study of individual organizations or officers. Thus, this investigation will set its focus on the space in between. In doing so, it will not only complement the narratives of these other works, but also add a previously missing component that will help explain why the ambitions of the military progressives were not fully realized.


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Earnestness is the chief secret of success in life; of all the men that I have ever met, no one was more thoroughly in earnest than Colonel Upton.

- Major Douglas Campbell

Late on the third day of May 1863, Union soldiers of General John Sedgwick’s Sixth Corps advanced towards the ridge of Salem Church, several miles west of Fredericksburg, Virginia. The previous day, the Confederate corps of General Thomas “Stonewall” Jackson had shattered several corps of the main Union force under General Joseph Hooker with a daring counterattack at Chancellorsville, several miles farther to the west. As Sedgwick’s troops neared Salem Church, the shaken Hooker had already begun pulling his forces back into a defensive perimeter as a prelude to a general retreat. Thus, Sedgwick’s advance was too little, too late. Consequently, historians often give the battle of Salem Church little attention, except perhaps as a final example of Union timidity and incompetence during the disastrous Chancellorsville campaign.¹

For those who fought at Salem Church, however, the engagement scarcely felt like a postscript. Sedgwick’s lead brigade, commanded by General Joseph Bartlett, advanced through woods “thick with harsh, unyielding undergrowth, [but] with little large

¹ For instance, in Battle Cry of Freedom, James McPherson described the Chancellorsville campaign in slightly more than six pages of text, but gave less than two paragraphs to Sedgwick’s activities throughout the entire campaign. The battle of Salem Church was not even mentioned by name in the single sentence describing the action: “Without hesitation Lee dispatched a division which blunted Sedgwick’s advance near a country church midway between Fredericksburg and Chancellorsville.” James M. McPherson, Battle Cry of Freedom: The Civil War Era (New York: Oxford University Press, 2003), 638-645 (quotation on 644).
The Confederate position lay on a cleared ridge beyond the woods. The Union soldiers attacked in dense, orderly lines preceded by a small number of skirmishers in accordance with the official tactics, which were derived from the French drill regulations of 1791 and 1831. The small trees and choking brush “afforded no protection to our troops from the showers of bullets which were rapidly thinning my ranks,” Bartlett noted. Although the woods provided little cover from the Confederate fire, they effectively slowed the Union movement and disrupted the cumbersome formations. Despite these obstacles, Bartlett’s brigade briefly carried the ridge. After its ordeal, however, it lacked the strength to repel the subsequent Confederate counterattack, which quickly regained the position. Over a third of Bartlett’s men were killed or wounded in the battle, but in his official report the brigadier found solace in the “gallantry with which my troops threw themselves against the enemy’s well-selected position. . . . Their enthusiasm carried them beyond all consideration of self, and made heroes of every officer and man.” Among the officers of his brigade, Bartlett noted the conduct of Colonel Emory Upton, commander of the 121st New York, who “led his regiment into action in a masterly and fearless manner, and maintained the unequal contest to the last with unflinching nerve and marked ability.”

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3 Silas Casey, Infantry Tactics for the Instruction, Exercise, and Maneuvers of the Soldier, a Company, Line of Skirmishers, Battalion, Brigade or Corps d’Armée (New York: D. Van Nostrand, 1863), I:5.


5 Ibid., 582.

6 Ibid.
Upton’s report was not so sanguine. He had led his regiment forward in the expectation that he was pursuing a fleeing enemy, which he soon learned was far from the truth. Instead, his regiment received a “heavy fire” that resulted in over sixty percent of his regiment being killed, wounded, or taken prisoner, including his younger brother, who was captured after being wounded. Such a high proportion of casualties would be considered severe under any circumstances, but Upton noted that the ratio of killed to wounded was more than twice the norm. He attributed this unusual lethality to the short distance of the engagement, which he estimated was between 65 and 130 feet at various points. Upton’s account also suggested that the other regiments of the brigade had not performed as flawlessly as Bartlett described in his official report. Upton noted that two of the regiments had not advanced as far as the 121st New York, preferring instead to exchange fire with the Confederates at a greater range, despite the pleas of his second-in-command for them to move forward. Despite his assertion that the regiment “had come out of the action without any demoralizations, and is again ready for any service that may be imposed upon it,” Upton’s admission that

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only half of the regiment initially rallied around the colors following the Confederate
counterattack suggests that the 121st New York might have found its first action more
trying than Upton was willing to admit in an official report. In the midst of a campaign
already lost by generals unequal to their responsibilities, Upton’s regiment went forward
without information of what lay ahead. Then after blundering into a strong enemy
position, they attacked with great élan but using tactics ill-suited to the terrain.

The battle of Salem Church, the Chancellorsville campaign, indeed the entire war,
revealed some of the U.S. Army’s many shortcomings in tactics, organization, and
training. Upton—only twenty-four years old at the time—would spend his remaining
years trying to correct some of these deficiencies. Even before the war and its traumatic
experiences, Upton’s upbringing and temperament produced a zealous, serious-minded
young man imbued with the conviction that personal and societal betterment was a
moral obligation. In other words, he was the ideal reformer. Emory was born in 1839,
the tenth of thirteen children of Daniel and Electa Upton. The family lived in Batavia,
New York, in the heart of the “burnt over” region known for its fervor during the
religious revival of the 1830s. Daniel was a strict Methodist, teetotaler, and active
participant in the Underground Railroad. As such, his actions were consistent with the
widespread belief that the Utopian millennium would come only when society had
attained a sufficient purity; this theology demanded both strict morality and crusading

9 Ibid., 589-590.

10 For a brief synopsis of Upton’s career, see Appendix.

11 Basic biographical information on Upton is found in File 2666-ACP-1881, Entry 297, RG 94, NARA I
[hereafter “Upton ACP”]; Cullum File 1895, USMA; Francis B. Heitman, Historical Register and Dictionary
of the United States Army, 2 vols., vol. 1 (Gaithersburg, Md.: Olde Soldiers Books, 1988), 978-979. Of the
Upton biographies, the best description of his early years is found in Fitzpatrick, “Emory Upton,” 12-27.
evangelism from its adherents. The Uptons seem to have been loving parents, but they nonetheless demanded obedience, hard work, and piety from their children. They also stressed the need for education; all the Upton children received some schooling and several attended college. This upbringing emphasizing moral and intellectual improvement combined with Emory’s natural intelligence and energy to produce an unusually driven teenager. A friend from his early days remembered Emory as being “always in a hurry; spoke like lightning; very quick of perception, for he often cut a person off in the middle of a remark with his own reply, which was always to the point.”

At some point during Emory’s early teenage years, his older brother James suggested that Emory might want to apply for admission to West Point. From that point, he was set on the career of a soldier. His first application to the Military Academy at the age of fourteen was rejected, so Emory followed his brothers to Oberlin College to prepare for entry to the Military Academy. Oberlin was an unusually liberal school open to both women and African-Americans, but it resembled West Point in its strict code of conduct, purposefully limited material comforts, and use of hardship to develop character. Nevertheless, Upton worried that even this Spartan existence was not sufficiently hardening, so he refused to use a pillow lest it make him “round-shouldered.” Already an abolitionist, Oberlin reinforced Upton’s hatred of slavery, which he believed would soon lead to civil war. Determined to play a leading role in

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12 For the religious revival of the 1830s and the theology of Charles G. Finney, an influential preacher and president of Oberlin during Upton’s time as a student, see Fitzpatrick, "Emory Upton," 22-23.

13 “Reverend Father O’Reilly” quoted in Michie, Letters of Emory Upton, 5.


15 “Reverend Father O’Reilly” quoted in Michie, Letters of Emory Upton, 5.
eradicating “the peculiar institution,” Upton wagered a friend that by the age of forty-five he would have attained the rank of general and slavery would be abolished. If correct, Upton was to be rewarded with an engraved revolver.16 His appointment to the West Point class of 1861 was the first step in realizing this ambition.17

Cadet Upton performed better than average in academics and military discipline, but characteristically he became best known at West Point for the strength of his convictions. Early difficulties with the “arts and letters” placed him only halfway in his class after the first semester, but by graduation he stood eighth in a class of forty-five.18 His temperament, upbringing, and time at Oberlin also prepared Upton well for the strict discipline of the Academy; even as a plebe he received only a handful of demerits. Spiritually, he found kindred spirits in the prayer meetings led by Captain Oliver O. Howard.19 Yet the increasing regional tensions of the 1850s were reflected in the corps of cadets. Sectionalism had become so divisive that it was manifested in the living arrangements; the cadet barracks were segregated with one wing given to the northern cadets and the other to those from the southern states.20 Upton’s open abolitionism incurred the wrath of Southern upperclassmen. The most notable event of Upton’s time

16 Ibid., 7.

17 Upton entered West Point with the last of three classes following an experimental five-year curriculum devised by Secretary of War Jefferson Davis; the additional year as a cadet was the first of many hardships that Davis would inflict upon Upton. Originally designated as the class of 1861, it became the class of May 1861 when the following class was graduated after only four years in June 1861. Association of Graduates, The Register of Graduates and Former Cadets of the United States Military Academy West Point, New York (West Point: Association of Graduates, 2005), 4-41 – 4-43.

18 Ibid., 4-43; Fitzpatrick, "Emory Upton," 42.

19 Upton was dismayed by the apathy towards religion that he found at West Point. He even objected to the practice of marching cadets to mandatory chapel services, which he thought desecrated the Sabbath. Fitzpatrick, "Emory Upton," 44.

at West Point was a fisticuffs “duel” fought with a South Carolinian who had suggested that while at Oberlin Upton had had sexual relations with one of the African-American students. Following an evening formation, the two cadets and their “seconds” entered the darkened barracks, while the remainder of the corps of cadets cheered them on from the central square outside. A friend from the class of 1860 wrote that Upton was “ostracized for his political opinions, and had suffered in body and mind for his superiority to sectional influences.” In a revealing letter to his sister, Upton attributed the “perilous times” to the “Wrath of God,” which could only be assuaged by a “return to reason and virtue.” His identification of “Mormonism, spiritualism, intemperance, slavery, [and] corruption in politics” as the ills of the time suggests how closely Upton linked spiritual, moral, and civic virtue. Finally in the spring of 1861, the eruption of the long-simmering rebellion hastened the graduation of Upton’s class by several weeks. As a new lieutenant, Upton would have ample opportunity to fulfill both his duty and his ambition.

Upton’s academic record was sufficiently distinguished to qualify him for duty with the Corps of Engineers—traditionally the most coveted arm of service—but he chose the artillery in hopes of playing a more active role in the war. Following graduation, Upton and many of his classmates journeyed to the capital along with many of the first volunteer units formed for the war. Upton hoped for an assignment to one of the regular infantry regiments, but was detailed instead to assist with the training of the 12th New

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24 Ibid., 41.
York Infantry, commanded by Daniel Butterfield. Upton’s role as drillmaster of the 12th New York was emblematic of the early war effort, during which volunteers struggled to learn the rudiments of soldiering, while the regulars were equally pressed to learn duties of far greater scope than they had previously experienced. The commander of the force gathering near Washington, Brigadier General Irvin McDowell, had been a major in the Corps of Engineers at the beginning of the year. Eager to end the rebellion before the three-month enlistments of most of the volunteers expired, President Abraham Lincoln pressured McDowell to advance on Richmond, but the general resisted. He had yet to build a functioning staff, and had little faith in the competence of his troops. Lincoln recognized the inadequacy of the army, but assured his reluctant commander, “You are green, it is true, but they are green also; you are all green alike.”

As the summer progressed into July, the fledgling army coalesced into larger units of brigades and divisions. Brigadier General Daniel Tyler, commanding McDowell’s First Division, appointed Upton as an aide on his staff before the army began its advance toward Richmond. Tyler’s division led the march and fought the first significant action of the campaign at Blackburn’s Ford, which Upton opened by sighting and firing one of the monstrous 20-pound Parrot guns accompanying the army. The battle was not an auspicious start to the campaign. McDowell wanted Tyler to determine the Confederate dispositions without bringing on a battle, but the inexperienced commanders could not control their men, leading to the engagement that McDowell

25 Fitzpatrick, ”Emory Upton,” 54; Ambrose, Upton and the Army, 16.
27 Fitzpatrick, ”Emory Upton,” 54-55; Ambrose, Upton and the Army, 17.
hoped to avoid. The Confederates occupied a well-concealed and commanding position on the south bank of Bull Run and punished the Union exuberance by inflicting demoralizing losses. This pattern was repeated two days later at the First Battle of Bull Run, when Union forces were once again defeated. Despite the outcome, Tyler praised Upton in his official report, which noted that the young lieutenant had been wounded and lost his horse to Confederate fire. Upton’s competence was also noted by one of Tyler’s brigade commanders, Colonel William T. Sherman.

Stephen Ambrose has noted that “Upton was outraged at what he saw in the first days of the Civil War, and he never forgot it.” Contrary to popular perception—both then and now—the outcome of First Bull Run was very much in doubt until the late afternoon. Lincoln had been correct in his assessment of the equal unreadiness of both sides, which, after all, had grown from the same military traditions. Yet in the troubled early days of the war, this would have been of little solace, even if Upton had realized the fact. He later identified short enlistments, the granting of commissions as a form of political patronage, and the decision to invade Virginia with a barely-formed army as ills stemming from the distortions of political considerations on military matters. He also criticized the naïve chauvinism that produced the “popular but mistaken belief that

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28 Rafuse, Single Grand Victory, 105-111.
30 Ambrose, Upton and the Army, 17.
31 The Confederate order for the battle of First Bull Run was so poorly written that it, if read literally, directed one Confederate brigade to attack another. The order was issued too late and so was far beyond the capabilities of the Confederate army that the eventual Southern success can be partly attributed to the utter inability to carry out any significant portion of the plan by devised General Pierre G.T. Beauregard, a graduate and former superintendent of West Point. Rafuse, Single Grand Victory, 119-120, 139-146.
32 Upton, Military Policy, 235-238, 243-246, 256-266.
because our citizens individually possess courage, fortitude and self-reliance, they must necessarily possess the same qualities when aggregated as soldiers.”

This overestimation of the inherent American military capacity led to “the fatal delusion, that an army animated by patriotism needed neither instruction nor discipline to prepare it for battle.” In Upton’s opinion, armies relying on fervor, like that at Bull Run, were capable of gallant charges, but when the tide of battle turned, this emotion could rapidly disappear. This was all too evident during the battle, when McDowell’s army went from the extremes of confident success during the morning to demoralization so complete that the army could not be rallied for several days, despite the absence of Confederate pursuit. Months later, Upton was still disgusted with the indiscipline of the volunteers. In a letter to his sister, he described disdainfully the actions of the volunteers, who were led by their officers in the pillaging and senseless destruction of a northern Virginia town, which Upton believed to have been sympathetic to the Union. “The conduct of our troops was disgraceful beyond expression.”

Ultimately, however, Upton attributed the defeat at First Bull Run to West Point-trained generals like McDowell. A brief note to his sister following the battle identified the regulars, not the volunteers, as the problem. “I regret to say we are defeated. Our troops fought well, but were badly managed.”

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33 Ibid., 243.
34 Ibid.
35 Rafuse, Single Grand Victory, ch. 9-14. In his unfinished manuscript on American military history, Upton attributed the defeat to the lack of discipline of the raw troops rather than the failings of the generals. Upton, Military Policy, 246.
36 Emory Upton to “My Dear Sister,” 30 September 1861, in Michie, Letters of Emory Upton, 57.
37 Emory Upton to “My Dear Sister,” 22 July 1861, in ibid., 53. Upton was far more critical of Union generalship in his private correspondence—both during and after the war—than in his writing meant for a
service, which included the Peninsula, Antietam, and Fredericksburg campaigns, only deepened his frustration. In a December 1862 letter, his disgust was palpable. “We have been defeated so often when it was not the fault of the brave soldiers that I am losing all patience. There is imbecility somewhere but it does not do to breathe it.” Initially, Upton directed his anger against the Union’s civilian leaders. “Our defeats emanate from Washington, for with poor generals the courage of troops would surmount the obstacles of the rebels opposed to our march.” Yet Upton then turned his wrath towards the generals. “How I would like to see that general who would lead us to great deeds! . . . Never as yet have I seen evidence of great generalship displayed on our side. It is astonishing and depresses one’s spirits to know and feel this.” His disenchantment with the officers above him also fed Upton’s own ambitions, as he came to recognize his own aptitude for war. Writing several years later, Upton confessed that “so long as I see such incompetence, there is no grade in the army to which I do not aspire.” Remaining in the regular artillery, however, offered little opportunity for promotion past captain or major, while field grade commissions within the volunteer regiments could be had by even young West Pointers like Upton. He also realized that his growing reputation as an

public audience. For instance, in Military Policy of the United States, Upton exonerated the Union generals for the defeat at First Bull Run. Peter S. Michie, his friend and editor of his published papers, tried to excuse the critical comments in Upton’s war letters as “the rapid conclusions which his active and brilliant military mind abstracted from passing occurrences based on the fragmentary knowledge he possessed” and not “the results of subsequent digested study when the whole field was clearly presented to his view.” Yet as will be discussed later in the chapter, Military Policy was a polemical work written to convince civilian politicians of the need for a new military policy. To admit errors on the part of regular officers would have undermined the purpose of that work. Also, Upton was a forceful advocate for professional reforms, such as military education and merit-based promotion, throughout his entire career, suggesting that he thought the competence of regular officers could be improved. Finally, in his private correspondence Upton continued to be critical of Union generalship, even while writing Military Policy. Fitzpatrick, “Emory Upton,” 334-335; Michie, Letters of Emory Upton, 75-76. For an example of Upton’s later critical views, see Upton to Henry A. DuPont, 11 April 1877, in Michie, Letters of Emory Upton, 418-419.

38 Emory Upton to “My Dear Sister Louise,” 23 December 1862, Upton Cullum File, USMA.

39 Emory Upton to “My Dear Sister,” 4 June 1864, in Michie, Letters of Emory Upton, 108.
artilleryman might become a trap if the War Department were to deem his technical expertise indispensable.40 Following the Antietam campaign, Upton took leave to travel to Albany in order to lobby for the recently available command of the 121st New York Infantry.

The regiment’s first colonel represented much of what was wrong with the Union war effort. Before the war, Colonel Richard Franchot was an executive for a New York railroad and was elected to the U.S. House of Representatives in 1861. Yet less than two months after the regiment formed in central New York, Franchot decided to resign his commission to return to Congress, despite the regiment having seen no combat during the Antietam campaign. Perhaps the brief weeks of field service had robbed army life of its luster, or perhaps Franchot had achieved his objective of securing the honorific of “colonel.” If the latter was his purpose, then the subsequent three years of conflict seem to have unacceptably devalued the title. In the final weeks of the war, Franchot received a brevet promotion to brigadier general for “gallant and meritorious service,” despite having not served since his resignation nearly three years earlier. He had not even served in Congress for more than a few months after leaving the army, being ineligible for renomination. After the war, “General Franchot” worked for the Central Pacific Railroad, becoming what one historian has described as “probably the first paid lobbyist.” He earned the same salary as the four founders of the company, and might have dispensed millions of dollars through his expense account, for which he did not have to submit a single receipt.41 The contrast between Franchot and Upton could


41 The comprehensive biographical register of officers compiled by Francis Heitman makes no mention of any service for Franchot between his 1862 resignation and his 1865 promotion. The exhaustive War
scarcely have been greater. Upton would struggle mightily against both the Confederates and politicians to earn his promotion to flag rank. Yet at the end of the war, Upton was a brevet major general, only one rank higher than Franchot, who had never seen combat. This must have been infuriating for Upton, who had undergone five years of professional training before the war, then served the full four years, receiving several wounds and undergoing innumerable hardships.

Whatever Franchot’s qualities and motives, his resignation was Upton’s golden opportunity. When Upton took command, the regiment lacked shelter and winter clothing, and many soldiers were too sick for duty. The new colonel was able to wrest some tents and blankets from the quartermaster. But when he was unable to get gloves, Upton appealed to the Ladies Aid Society of Little Falls, New York, for eight hundred pairs of knitted mittens. Within the regiment, Upton instilled rigid discipline, giving particular emphasis to the bothersome requirements of field sanitation. Tents, blankets, and discipline soon dramatically reduced the numbers of soldiers on the sick list. To ensure the soldiers were well led, Upton instituted promotion examinations for those seeking commissions, which helped him to counter requests from Albany on behalf of those with more political clout than military knowledge. Desertion throughout the first winter was a problem, but those who remained began to develop a notable esprit. The regiment gained such proficiency in drill and smartness in camp that it soon came to be

known as “Upton’s regulars.”

The 121st New York’s first heavy action at Salem Church demonstrated that the regiment possessed discipline and élan on the battlefield as well as in camp. In that battle, it suffered the tenth highest number killed in a single action of all Union regiments throughout the war.

Upton’s competence was soon rewarded by his superiors. When General Robert E. Lee invaded Pennsylvania after Chancellorsville, the Sixth Corps was one of the last units to arrive at Gettysburg, and Upton personally saw little action. His brigade commander, however, was given temporary command of a division, and selected Upton as his replacement. Historian David Fitzpatrick has noted that after Gettysburg, the already ambitious Upton became increasingly hungry for promotion to brigadier general.

Indeed, Upton’s friend James H. Wilson later observed that “there was no enterprise too perilous for Upton, if only he might hope to gain credit or promotion thereby.” As a consequence of this increased ambition, Upton began soliciting recommendations from officers throughout the Army of the Potomac. Eventually his portfolio of letters included testimonials from more than a dozen general officers, including some of the most prominent names in the army, such as major generals George G. Meade, Joseph Hooker, Dan Butterfield, and John Sedgwick.

42 Michie, Letters of Emory Upton, 66–70; Ambrose, Upton and the Army, 20–21; Fitzpatrick, "Emory Upton," 64–71.

43 Fitzpatrick, "Emory Upton," 76.

44 Ibid., 84.

45 James H. Wilson, “Introduction,” in Michie, Letters of Emory Upton, xii-xiii.

46 Dan Butterfield’s recommendation was representative: “He possesses skill, energy, devotion + bravery – his presence has been felt in whatever position he has served. He has been noticed for gallantry on every field when he has been engaged.” After these remarks Hooker added, “I cheerfully concur in the foregoing recommendation.” Letters of recommendation and endorsement George M. Meade (24 September and 20
Yet the long lull in campaigning after Gettysburg gave Upton no opportunity to win further laurels until November, when his division, commanded by General D.A. Russell, was ordered to attack a Confederate bridgehead on the Rappahannock River. Russell’s division was opposed by an entrenched force of approximately equal strength occupying a strong natural position. Conventional wisdom held that it would require a costly assault by an attacking force several times larger than Russell’s to seize such defensive works. Yet a surprise dusk assault by the brigade of Colonel Peter Ellmaker caught the Confederates in the outer works by surprise. Upton’s brigade was then ordered forward to protect Ellmaker’s flank by capturing the adjacent entrenchments. By this time, some of the Confederate units had rallied and offered a determined, if scattered, resistance. Nevertheless, Upton’s brigade overran the first Confederate positions, reformed, pursued the retreating defenders, and finally captured the pontoon bridge, trapping the remaining Confederate forces. In this complex night action, Upton exhibited unusual capability in controlling his brigade.47 Before the attack, he had ordered his soldiers to rely solely on their bayonets. If he had allowed his men to return the Confederates’ fire, the resulting confusion would have undoubtedly made it more difficult, if not impossible, to control his forces in the darkness, particularly after the initial melee in the outer trenches. This was by no means an unusual decision, but it was nonetheless sound. Upton also employed a less conventional stratagem that might also have contributed to the success of the attack. Before the assault, Upton gave a loud speech to his soldiers within earshot of the Confederate lines, in which the young colonel

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47 Reports of John Sedgwick and Emory Upton, OR, 29 (1): 574-575, 592-593.
referred to a large supporting force that did not exist. One Confederate officer later claimed that his men had overheard this speech, evidently as Upton had intended, and surrendered as a result.48 Whatever the reasons for the victory, Upton’s losses were low for a bayonet assault—only 11 killed and 52 wounded. The seizure of the Confederate pontoon bridge, however, forced the surrender of two Confederate brigades with their approximately 1,700 soldiers and 4 cannon.49

Despite the spectacular success at Rappahannock Station, as 1863 came to a close, Upton remained a frustrated colonel in command of a brigade, a position which he described before Rappahannock Station “as a half-way step between colonel and brigadier-general.” He had vowed to “take the full step in the next battle.”50 Circumstances had provided him the perfect opportunity, but the success did nothing more than to burnish his already high reputation in the Army of the Potomac.51 As the army prepared for the campaigns of 1864, Upton received crushing news. “My long-expected promotion is not forthcoming,” he wrote his sister. “General Meade has informed me that without “political” influence I will never be promoted. . . . The recommendations of those officers whose lives have been periled in every battle of the war have been overweighted by the baneful influence of the paltry politicians.”52 Unwilling to surrender his ambitions, Upton grudgingly began to enlist the support of

49 Reports of John Sedgwick and Emory Upton, OR, 29 (1): 559, 575.
50 Emory Upton to “My Dear Sister,” 4 July 1863, in Michie, Letters of Emory Upton, 75.
51 Fitzpatrick, "Emory Upton," 93.
52 Emory Upton “My Dear Sister,” 10 April 1864, in Michie, Letters of Emory Upton, 88.
New York politicians.53 “I have not fully despaired of receiving promotion,” he wrote in April, “but I have despaired of receiving it in the manner honorable to a soldier. It is now solely the reward of political influence, and not of merit, and this when a government is fighting for its own existence.”54 It disgusted Upton that the evaluations of soldiers should mean so little compared to those of politicians in the midst of war.

As Upton struggled for promotion, General Ulysses S. Grant prepared the northern armies for a simultaneous assault against the Confederacy. For the Army of the Potomac, the first act of Grant’s campaign was the battle of the Wilderness in early May. Upton’s brigade suffered from the “dense pine and nearly impenetrable thickets” that made the battle a costly, confusing stalemate. Upton’s report recorded constant skirmishing, frantic marches and countermarches, and the horrors of the forest fire that immolated the many unfortunate wounded soldiers in its way.55 But in contrast to earlier campaigns, the Army of the Potomac did not retire after the battle. Instead, Grant made an attempt to envelop Lee’s Army of Northern Virginia. The Confederates countered with a quick move several miles to the southeast, where they took refuge behind well-constructed field fortifications near Spotsylvania Courthouse. There the Confederate infantry manned trenches reinforced with heavy logs cut to provide only small loopholes from which they could fire in relative safety, while the artillery was similarly well-protected behind earthworks. Where possible, the ground in front of the entrenchments was covered by trees felled with their sharpened branches pointing

54 Emory Upton to “My Dear Sister,” 18 April 1864, in Michie, Letters of Emory Upton, 89.
towards the Union lines. Connecting trenches allowed reinforcements and resupplies to be moved under cover within the Confederate lines. 56 Lee’s position between the Po and Ny rivers formed a giant “L” several miles long, but Grant perceived a weakness in the very center of the Confederate position, where a small hill rose slightly in front of the rest of the Southern fortifications. Unwilling to concede this key ground to the Union artillery, the Confederates had created a large salient jutting out from the middle of their lines, which was made more vulnerable by the pine woods masking any movement from the north to within 200 yards of the position.57

The task of taking this salient, known as the “Mule Shoe” for its shape, fell to Upton, who was given his choice of any twelve regiments—the equivalent of a full division—from within the Sixth Corps. He arrayed them in the concealing forest three regiments abreast in four successive lines. Each line was given a distinct mission: the first would overwhelm the defenders of the outermost trenches, then attack to either flank to widen the penetration; the second would occupy the positions captured by the first, then prepare to fire on Confederate reinforcement coming from inside the middle of the Mule Shoe; the third would advance in support of the second line; the fourth would remain in reserve. Except for an hour-long delay of the attack, the initial assault went as planned. The defenders fought well and caused heavy casualties among the first line, but the attackers were able to quickly cross the narrow strip of land between the protective woods and the Confederate positions. Many of the first Union troops to surmount the works were killed, but as the first line battled the defenders in hand-to-

57 McPherson, Battle Cry of Freedom, 728-729.
hand combat, the following lines advanced against relatively little fire. The attack, however, stalled as Confederate reinforcements rushed to the area, while adjacent Union units failed to advance in support. Eventually, Grant reluctantly ordered Upton’s force to withdraw under the cover of darkness. In his report, Upton could only approximate the casualties suffered by his force at a thousand officers and men. He claimed to have inflicted slightly more on the Confederates, including over one thousand prisoners taken. Despite the ultimate failure of the assault to achieve its objective, Grant was so impressed with the twenty-four-year-old colonel that he promoted him to brigadier general on the spot. This appointment was later confirmed by President Lincoln.

In seeking to explain Upton’s success, some historians have assumed that it must have been the result of an innovation in organization or tactics. David Fitzpatrick has soundly rebutted these claims, noting that the basic concept of using successive lines to overwhelm an enemy was hardly new. If anything, Upton’s conduct of the assault was notable for his thoroughness in preparation. As Fitzpatrick has noted, Upton’s assignment of specific functions and objectives to each subordinate unit was unusual for the time. Contrary to some claims, Upton’s force received no special training—he was given only a few hours to prepare for the assault. But he did conduct a reconnaissance of the area with the regimental commanders, and personally briefed all the officers of the force on the plan. This careful preparation contrasted with the norm in the Army of the

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Ibid., 668.

Ulysses S. Grant to Edwin M. Stanton, 13 May 1864, OR 36 (2): 695.

Fitzpatrick, "Emory Upton," 102-103. In Battle Tactics of the Civil War, Paddy Griffith claimed that Upton’s assaults at both Rappahannock Station and Spotsylvania were similar to later “stormtroop” tactics using specially-trained assault troops, which was not the case for either battle. Elsewhere, Griffith seems to
Potomac. “I am disgusted with the generalship displayed,” Upton wrote just a few weeks after Spotsylvania. “Assault after assault has been ordered upon the enemy’s intrenchments, when [the generals] knew nothing about the strength or position of the enemy. Thousands of lives might have been spared by the exercise of a little skill.”

When reflecting on the Mule Shoe several years after the war, Upton remained convinced that “most of our assaults had failed for want of minute instructions, and particularly at the moment of success.” As regulars dominated the higher commands of both armies, this was by extension a criticism of the general competence of regulars. His preparation for the assault on the Mule Shoe was a demonstration of how much could be achieved even with entirely conventional tactics under the right circumstances. The key was to recognize and exploit those conditions that favored an assault, such as the surprise night assault at Rappahannock Station or the quick strike across the narrow killing ground at the Mule Shoe. Just a few weeks after Upton’s success at Spotsylvania, the Union assault at Cold Harbor ended in 7,000 casualties for little gain; the attackers reached the first line of trenches at only one point along the line and inflicted fewer than 1,500 casualties on the Confederates. Luckily for Upton and his men, they did not participate in the

have retracted the assertion that the troops were specially trained, but in the second passage he identified the arrangement of the regiments as cause of success. The West Point military history textbook similarly attributed Upton’s success to “a new tactical scheme of his own devising.” Yet the success was a product of neither special troops nor innovative tactics. Instead, Upton and his division commander, D.A. Russell, took advantage of a poorly-sited enemy position to launch an assault, which though competently led was nevertheless a conventional linear assault. Paddy Griffith, *Battle Tactics of the Civil War*, U.S. ed. (New Haven, Conn.: Yale University Press, 1989), 66, 152; Robert A. Doughty, *et al.*, *Warfare in the Western World: Military Operations from 1600 to 1871* (Boston: Houghton Mifflin, 2007), 433.


63 Emory Upton to Adam Badeau, 26 December 1873, in Fitzpatrick, "Emory Upton," 102.

main assault on 3 June, but in a preliminary attack two days earlier the brigade had lost over three hundred soldiers including a regimental commander.  

The failure at Cold Harbor was one of the more spectacular manifestations of the great difficulty attending the attack during the Civil War. This had not been the case thirteen years earlier during the Mexican-American War, but there had been a great development in small arms in the interim. In America, this new technology was embodied in the 1855 Springfield rifled musket firing the Minié ball. This combination married the high rate of fire of the smoothbore musket with the long-range accuracy of a rifle. Rifled muskets, like the Springfield, were the mainstay of Civil War armies, but weapons with even more sophisticated features, such as internal magazines and metallic cartridges, were also used during the war. The common trait of these new weapons was the effective combination of characteristics that had previously been impossible to incorporate in a single weapon: reliability, long range, great accuracy, and a high rate of fire. This development worked almost entirely to the benefit of the defense. Some of the new power of the defense was due to the greater use of field fortifications, which partly negated the attackers’ equally capable firearms. Also, muzzle-loading weapons were cumbersome to reload while moving, but could be quickly reloaded by a stationary defender. Aside from these physical differences at the level of the individual soldier, the new arms greatly reduced the capability for an attacking general to simultaneously threaten a portion of the defenders’ line with different forms of weapons. If skillful, earlier generals could mix the effects of bayonet, muskets, and artillery to create a dilemma for the defending general, who could either array his army in a thin linear

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formation that provided the most firepower but might be too thin to repel a bayonet assault, or concentrate his forces in massed formations that, while of suitable strength for hand-to-hand fighting, allowed fewer soldiers to fire and were vulnerable targets for the enemy's fire in turn. Forcing the defender into this difficult situation had been relatively easy in the days of smoothbore muskets, when the range of engagements was close enough to allow a determined attacker to charge with the bayonet if given the opportunity. The long range of the new small arms upset this balance. With engagements beginning at hundreds rather than dozens of yards, the threat of the bayonet was greatly diminished; only under special circumstances, such as at Rappahannock Station and the Mule Shoe, were attackers able to close with the defender. In those instances, the conditions of visibility and terrain reduced the effective range of the Confederates' fire to something approximating that of the smoothbore musket, thereby making Upton's charges possible. Furthermore, artillery had not similarly benefitted from the introduction of rifling. The effective range of canister, which was the artillery's most potent ammunition against infantry, had not increased and was less than that of the new infantry weapons. Thus, artillerymen were effectively outgunned in a duel with infantry, further reducing the means for an attacking general to create a fatal rupture in the defender's lines. To use a simple analogy, the effective loss of the bayonet and canister had reduced generalship from a game of rock-paper-scissors to a game of rock.66

66 For a description of the technical aspects of Civil War combat see Griffith's *Battle Tactics*, particularly ch. 3, 6, and 7. I have developed the formulation of Civil War generalship as a problem in mixing bayonet, small arms fire, and artillery canister over the course of three semesters of teaching the Civil War in an undergraduate survey of military history.
Before the war, the official American intellectual response to these developments was feeble. The 1855 manual of infantry tactics developed by William J. Hardee tried to restore the threat of the bayonet by simply increasing the rate at which infantry moved on the battlefield, thereby lessening the amount of time they were exposed to enemy fire during a charge.\textsuperscript{67} The insufficiency of this solution was manifest at Cold Harbor, which would be Upton’s final battle with the Army of the Potomac. Grant, unable to take the Confederate position, displaced Lee with a movement around his flank that brought the Army of the Potomac to Petersburg, a key railroad junction just south of Richmond. With no more room to maneuver and unable to storm the Confederate entrenchments, the Union army settled in for a siege that would last several months. The Sixth Corps, however, was transferred to the command of General Philip H. Sheridan in the Shenandoah Valley. In September, Upton briefly commanded his division at the battle of Opequon (also known as the Third Battle of Winchester), when General D.A. Russell was killed trying to repulse a Confederate counterattack. Upton was severely wounded in the battle, but reportedly continued to command the division from a stretcher. For his role in the victory, Upton received a brevet promotion to major general.\textsuperscript{68}

Upton convalesced at home in Batavia until December, when he received an extraordinary opportunity that brought him back to the field, even though his wound had not fully healed. A friend from cadet days, James H. Wilson, was given command of the new Cavalry Corps of the Military Division of the Mississippi, and he wanted Upton to command one of his divisions. Despite its ponderous title, Wilson intended for the new

\textsuperscript{67} Griffith, \textit{Battle Tactics}, 100-103.

\textsuperscript{68} David Fitzpatrick has concluded that this claim originally made James H. Wilson and repeated by Peter S. Michie might have been a fabrication. Fitzpatrick, "Emory Upton," 124.
division to be a powerful mobile force armed with the new Spencer carbine firing metallic cartridges from a seven-round magazine. After three months of feverish activity to assemble and equip the new unit, Wilson’s corps was finally ready to take the field. General John M. Schofield asked Wilson to conduct a feint towards Selma, Alabama, and Columbus, Georgia, in order to neutralize the troublesome Confederate Nathan Bedford Forrest. The cocksure Wilson proposed instead to take both cities and defeat Forrest. Schofield approved the ambitious plan, and on 22 March 1865, Upton’s division began its part in Wilson’s raid.

Confident in his well-armed cavalrmen, Wilson struck directly at Forrest’s force entrenched at Selma. There Upton conducted a personal reconnaissance through an unguarded swamp thought impassable by the Confederates. During the assault, another division sustained moderate casualties while attacking along the main road into town, but Upton’s division advanced through the swamp with little loss. The victory at Selma dispersed Forrest’s army—the last significant Confederate resistance in the area. After capturing Montgomery several days later, Wilson turned east towards Georgia. At Columbus, Upton’s division captured a crucial passage leading into the city with a night coup de main on a bridge covered in turpentine and ready for destruction. Upton’s plan was characteristically thorough, but he suffered an odd loss of composure in the hours before the attack. After berating a subordinate for a delay that was most likely due to Upton’s own confusion, he was ready to call off the attack rather than risk a fight in

69 Ibid., 125-126; Headquarters, Cavalry Corps of the Military Division of the Mississippi (CCMDM), Special Order Number 36, 13 December 1864, in OR 45 (2): 173.

70 James H. Wilson reports, 3 May and 29 June 1865, Emory Upton report, 30 May 1865, in OR 49(1); 350-370, 471-475.

71 Ibid.
the darkness. Luckily, Wilson happened to be present and urged Upton to let the attack continue. Upton’s biographer has speculated that perhaps the young general had finally reached the limits of his physical and emotional strength.\textsuperscript{72} If so, the end of the war several days later was perfectly timed. Over the month of Wilson’s raid, Upton’s division had rode 600 miles, crossed 6 major rivers, fought in 4 major engagements, and captured over 3,000 prisoners, 39 guns, and 13 battle flags.\textsuperscript{73}

At the end of the war, Upton was still only twenty-five years old, but he had amassed an extraordinary record. From the earliest days of the war, he had built a reputation for consistent competence highlighted by the great success of his commands at Rappahannock Station, Spotsylvania, Opequon, and Columbus. Upton had also acquired an unusual breadth of experience, commanding an artillery battery and brigade, an infantry regiment and brigade, and a cavalry division. He also was well acquainted with the potential of breech-loading repeaters from his time with the Spencer-armed cavalry corps. By 1864, Upton had resolved to develop tactics that might allow an attacker to overcome a well-entrenched defender without suffering unacceptable losses. According to a friend, “Tactics became the theme of [Upton’s] daily conversation, engrossed his mind almost to the exclusion of everything else, and he drew from every battle-field its important lesson.”\textsuperscript{74} Upton’s unquestioned competence, varied practical experience, and intense determination made him unusually well-qualified for the task.

\textsuperscript{72} Fitzpatrick, "Emory Upton," 139-141.
\textsuperscript{73} Headquarters, 4th Division, CCMDM, General Order Number 21, 10 June 1865, in OR 49(1): 478.
\textsuperscript{74} Michie, Letters of Emory Upton, 189-190 (quotation 190).
In the immediate aftermath of the war, Upton had little time to devote to this work. He spent the first several weeks mustering units in Tennessee out of military service.\(^7^5\) While en route to that duty, he happened to share a train with General William T. Sherman, whose account of his operations in the final years of the war reinforced Upton’s conviction that the army had to realign its tactical methods to the reality of the more potent rifles.\(^7^6\) In August 1865, Upton was appointed to command the District of Colorado, which had only an infantry regiment and five companies of cavalry spread among four posts as a permanent garrison. With few threats from the Native Americans, Upton’s primary tasks were cutting costs and mustering excess troops out of service as quickly as possible, leaving him ample time for his work on tactics.\(^7^7\)

At the heart of Upton’s work was the realization that the dense formations necessary to overwhelm a defender in a bayonet charge could not close the distance under typical battlefield conditions. Yet Upton had not abandoned the prevailing belief that only such a charge, or at the very least the threat of one, could dislodge a determined enemy; therefore, his task was not to replace the bayonet but to develop a feasible method of restoring it to the battlefield. Just as Upton’s conception of battle remained rooted in conventional notions, his solution also drew on established practices. His tactics emphasized the use of skirmishers—soldiers firing and moving individually—as a

\(^{75}\) War Department General Order Number 130, 28 July 1865, in OR 47 (3): 679.

\(^{76}\) Fitzpatrick, "Emory Upton," 159.

\(^{77}\) Headquarters, Department of the Missouri, 22 August 1865, and John Pope to Emory Upton, 22 August 1865, OR 48 (2): 1201-1205.
screen behind which the main body could advance. The great advantage of skirmishers was that they could take shelter from the enemy fire by using cover, such as small ravines, trees, and rocks, which was not sufficient to protect a large formation.

Moreover, skirmishers firing individually from relative safety tended to be more deadly with their fire than those in exposed formations, firing by volley, and without the benefit of support for their weapons. Upton intended for a sufficiently large body of skirmishers “to shake the morale of the enemy by securing in every stage of the advance a preponderating fire, at the same time advancing in such small fractions, up to the moment of the final rush or assault, as to reduce the casualties to the lowest limit.”

Enabling this movement by “small fractions” was his subdivision of infantry companies into a basic unit of four soldiers. These “fours” were one of the two distinctive features of his system. Theoretically, a commander could finely control the preparation for the assault by adding only as many “fours” into the skirmish line as was necessary to produce a sufficiently heavy fire to “derange” the defender. In practical terms, however, the fours were only an incremental improvement over existing methods of controlling skirmishers. Furthermore, Upton’s articulation of how skirmishers could

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78 For the use of skirmishers and other forms of light infantry in the eighteenth century and before, see John Grenier, The First Way of War: American War Making on the Frontier, 1607-1814 (New York: Cambridge University Press, 2005), particularly ch. 3.

79 Quoted in Ambrose, Upton and the Army, 64-65.


81 The main limitation of the “four” as a basic unit was that was it was not a permanent organization. Every time the company formed, the soldiers would be sorted in the customary fashion by height. In peace, this would tend to keep the same soldiers together, but in combat, the fours would be in constant flux due to casualties. One critic sarcastically noted that Kino callers would make good company commanders, lampooning the constant renumbering that would occur during a hard-fought battle. Without a fixed
be better integrated into the existing conceptual framework of battle, although important, was nonetheless essentially a codification of the existing practices that had emerged during the Civil War.\footnote{For the use of skirmishers during the Civil War, see Perry D. Jamieson, \textit{Crossing the Deadly Ground: United States Army Tactics, 1865-1899} (Tuscaloosa: University of Alabama Press, 1994), 44.}

Fours were only a marginal improvement in the control of skirmishers because that had never been Upton’s primary purpose; instead, they were meant to make close-order formations more maneuverable. With the benefit of hindsight, it is clear that skirmishers, not the assault line, were the precursors to twentieth-century squad-based tactics, but Upton’s focus was making the conventional linear formations more flexible, and hence more suitable for the modern battlefield. In recommending his tactics, both of the official reviewing boards that evaluated his system also emphasized this aspect.\footnote{Both of the boards reviewing his work agreed with this assessment. Emory Upton to Edward D. Townsend, 13 January 1866; H.B. Clitz, \textit{et al.}, to Adjutant General, January 1867; Report of Board of Officers, 15 July 1867 in Michie, \textit{Letters of Emory Upton}, 191-193, 195-196, 202-204.}

The other distinctive aspect of the new tactics—the reduction of the main assault line to only a single rank in depth—also reflected Upton’s emphasis on adapting conventional tactics rather than supplanting them. This innovation was so central to Upton’s thinking that it gave the name to his manual, \textit{A New System of Infantry Tactics, Double and Single Rank: Adapted to American Topography and Improved Fire-Arms}.\footnote{Emory Upton, \textit{A New System of Infantry Tactics, Double and Single Rank: Adapted to American Topography and Improved Fire-Arms} (New York: Appleton, 1867).} The slow rate of fire of the earliest military firearms had necessitated deep formations with up to eight ranks to maintain a constant fire. The rear seven ranks were engaged in various stages of reloading while the front rank fired. By the 1860s, improvements in firearms structure, fours could not serve as the basis for complex tactics, which would require a designated chain-of-command, one preferably based on competence and trained before battle.
had allowed a reduction in the depth of formations to only two ranks. The introduction of breech-loading rifles, particularly those with internal magazines like the Spencer carbines used by Upton’s cavalrymen, had finally made even a second rank unnecessary. “The feats of dismounted cavalry, armed with the Spencer carbine,” he wrote in 1866, “have demonstrated the fact that one rank of men so armed is nearly, if not quite, equal in offensive or defensive power to two ranks armed with the Springfield musket.”85 In fact, successive ranks were actually disadvantageous, as the soldiers in front interfered with the fire of those in back and the greater density of the formation made it more likely that enemy bullets would strike home rather than harmlessly passing through the formation. Yet these changes were still consistent with the conventional understanding of battle, which held that a successful attack culminated in a bayonet assault. Upton prefaced a later revision of his tactics by reaffirming the importance of both fire and shock. “Whatever changes the breech-loader may necessitate in the disposition and management of troops in battle,” he wrote, “the employment of lines of battle offensively and defensively cannot be dispensed with, neither can the means of massing and deploying troops be omitted.”86 While Upton was no revolutionary, he did establish the trajectory of official American tactical thought for nearly half a century, namely incremental accommodation to new weapons.

By January 1866, Upton was ready to present his ideas to the War Department.87 His official trial came that summer, when Upton demonstrated his system for a board of

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85 Emory Upton to Edward D. Townsend, 13 January 1866, in Michie, Letters of Emory Upton, 192.
86 Upton, Infantry Tactics, viii.
87 Emory Upton to Edward D. Townsend, 13 January 1866, in Michie, Letters of Emory Upton, 191-193.
officers convened at West Point. The board unanimously recommended the new tactics with only a few minor modifications. Early the next year, General Grant endorsed the board’s decision, writing that he was “fully satisfied of its superior merits and adaptability to our service; besides, it is no translation, but a purely American work.”88 Yet enough officers disagreed to prompt the appointment of a second reviewing board, which Grant personally chaired. After a comparative examination with Upton’s competitors, this second board also found in favor of Upton’s system, which was adopted as the Army’s official manual in 1867.89 Although some officers continued to criticize aspects of Upton’s tactics, it was official enthusiasm for the new system that ironically led to a revision just a few years after publication. In 1869, the War Department appointed a new board to “assimilate” the tactics of all three arms so that they would share as many features as possible. In practice, this would have made the artillery and cavalry manuals more like Upton’s infantry system. Although the 1869 board did not yield any manuals and Upton had no desire to revise his own work so soon, the threat of losing intellectual control and his lucrative royalties led him to consent to serve on yet another assimilation board. The result of this effort was a new manual for each arm, all three derived from his original 1867 system for infantry. Accepted by the War Department in 1873, these manuals would govern the army until the 1890s.90

Upton realized that modifications to formations were of no use without competent officers and men. Soldiers could not simply be sent out to act individually as

88 War Department Special Order Number 264, 5 June 1866; Report of Board of Officers, January 1867, and Ulysses S. Grant to Edwin M. Stanton, 4 February 1867, in Michie, Letters of Emory Upton, 196-197 (quotation on 197).
89 Fitzpatrick, "Emory Upton," 160-164.
90 Ibid., 207-217.
skirmishers without training meant to “impress each man with the idea of his individuality, and the responsibility that rests upon him.” Skirmishing in extended order required far more intelligence, self-discipline, and skill than the close-order tactics, which required a great deal of discipline and a mastery of the steps to load a weapon, but little else. The new warfare demanded even more from junior officers and non-commissioned officers, who were no longer simply “file closers” maintaining alignment within the ranks. Upton wrote that these junior leaders were now responsible for ensuring that their soldiers “economize their strength, preserve their presence of mind, husband their ammunition, and profit by all the advantages which the ground may offer.” His assignment as the commandant of cadets at West Point in June 1870 placed Upton in the ideal position to raise the professionalism of the officer corps to the levels demanded by his tactics. During his five years at the Academy, Upton was responsible for the military instruction of 389 graduates comprising 8 different classes, which was more than a fifth of those graduating in the period between the Civil and Spanish-American Wars. The last of this group would not retire from active duty until 1920, and three of his former cadets served as the army’s chief of staff. Indeed, Upton’s greatest influence on the U.S. Army might have been through the medium of those who were cadets during his tenure as commandant.

When Upton came to West Point, he was determined to revitalize an institution that he felt had declined in academic, military, and moral standards. He attributed

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91 Upton, Infantry Tactics, 117.
92 Ibid.
93 Register of Graduates, 4-53 – 4-61.
much of this to the complacent and reactionary “old professors” who “allow cadets to pass examinations knowing little of their course.”\textsuperscript{95} Upton particularly disliked William Bartlett, an 1826 graduate who had been a professor of engineering since 1834. When Bartlett retired in 1871 and was replaced by Upton’s friend Peter S. Michie, an 1863 graduate and Civil War veteran, Upton believed that he, other “new professors,” and Superintendent Thomas Ruger could prevent the Academy from sinking “back into the mire of the past few years.”\textsuperscript{96} While Upton had no formal control over the academic program, he was responsible for the discipline of the cadets and their daily military instruction. In his biography of Upton, Michie emphasized the importance of Upton’s duties: “It must be apparent to even a casual observer that the tone of the Corps of Cadets will be determined by the character and disposition of the commandant and his assistant officers.”\textsuperscript{97} One graduate of the era remembered that cadets generally held the Academy’s officers in low regard because they concentrated solely on academic instruction and discipline, but did nothing as “mentors and guides.” He noted only two exceptions, his drawing instructor and Upton.\textsuperscript{98} Upton certainly saw plenty of the cadets. He instituted a policy that all cadets caught violating regulations were to report to his office the following morning for a formal interview, when they could state the reasons for the transgression and receive his punishment.\textsuperscript{99} These personal meetings

\textsuperscript{95} Emory Upton to James H. Wilson, 4 December 1868, quoted in ibid., 176-177.


\textsuperscript{97} Michie, \textit{Letters of Emory Upton}, 251.

\textsuperscript{98} Eben Swift, ”Personal Memoirs,” Swift Papers, USMA, 35.

\textsuperscript{99} Michie, \textit{Letters of Emory Upton}, 249-251.
might have been the best means for Upton to pass on what General Wilson called Upton’s outstanding ability to execute “every order . . . with the greatest possible precision.”

The cadets also came to know Upton’s tactical views. He was devising the assimilated drill regulations of 1873 while serving as commandant. His position allowed him to use the cadets’ military training to test modifications before incorporating them into the manuals. Upton also found that “teaching the tactics of the three arms [to the cadets]” enabled him “to discover many absurdities which [sic] could be done away with.” Through discipline, military instruction, and modeling professionalism, Upton directed the professional formation of an entire generation of officers. One can only speculate how the cadets, who had been children and teenagers during the Civil War, viewed their “much wounded and much honored” commandant, as Upton was described by historian Russell Weigley. Perhaps in view of his outstanding qualifications as commandant—few exceeded him in professional zeal or reputation—Upton remained an additional year past the typical four-year term.

Late during his term at West Point, Upton proposed that he be sent on a professional tour of Europe in order to study military organization and practices there. Sherman, then serving as the army’s commanding general, had become a patron of Upton and enthusiastically supported the request. In fact, as a young lieutenant, Sherman had requested to make a similar trip to see the armies of Asia. The

100 James H. Wilson, “Introduction,” in ibid., xix.
102 Emory Upton to Henry A. DuPont, 17 April 1871, in Michie, Letters of Emory Upton, 208.
103 Weigley, History, 275.
commanding general even wrote a long letter to Upton, detailing several possible routes through Asia, which he regarded as more interesting and applicable to the American military than Europe. After some effort, the War Department allocated the funds to send Upton and two other officers on a tour of both Europe and Asia.104

When he left San Francisco in August 1875, Upton was already convinced of the importance of competent officers, trained soldiers, sound tactics, and efficient organization. Therefore, it can hardly be surprising that he judged the foreign militaries against his existing ideal. Indeed, as David Fitzpatrick has noted, his “observations often tell us more about Upton and his intellectual makeup than they do about the nations he visited.”105 It was clear to Upton that the Japanese benefited from strong central control, while the Chinese suffered from a diffusion of military responsibility among regional governments. The Indian army demonstrated that even “unreliable” native troops made good soldiers under competent officers. The Serbians, then in the midst of a war against the Ottomans, initially fared poorly when relying on untrained militia, but once leavened by Russian officers had performed well. The Austro-Hungarian officer corps benefited from merit promotion. Upton thought the Prussians were superior to the French in officer education, discipline, and organization; he attributed Prussia’s victory over France several years earlier to these differences, particularly the latter.106 The shadows of Upton’s Civil War experience are easily discerned in these observations of foreign armies: uncooperative state governments sapping the strength of the Federal effort; the

104 Fitzpatrick, "Emory Upton," 221-223; William T. Sherman to Emory Upton, 12 July 1875, Upton ACP.
105 Ibid., 234.
106 Emory Upton, The Armies of Asia and Europe, Embracing Official Reports on the Armies of Japan, China, India, Persia, Italy, Russia, Austria, Germany, France, and England (New York: Appleton, 1878), passim; Fitzpatrick, "Emory Upton," ch. 6.
excellent performance of volunteers when led by regulars like Upton; the panic of the barely trained and poorly-led army at First Bull Run; the promotion of politically-powerful incompetents while Upton’s own career stagnated; and the great length of the American conflict when compared to the relatively quick victory of the Prussians in 1871. Nevertheless, the seventeen months did more than simply reinforce existing prejudices. Upton sharpened his ideas through comparison, mulling over the differences and similarities of foreign armies to his own. His observations also suggested specific reforms.

Following the tour, Sherman sent Upton to the faculty of the Artillery School at Fort Monroe, Virginia. Although he liked his work at the school, Upton found it more difficult to write on military policy than tactics. One difficulty was the expansive nature of the topic. During the latter days of the tour, he wrote his family that Sherman had told him “that all I need to do would be to write four or five hundred pages of conclusion. . . . [but] since arriving in Europe, I have discovered that our military organization is so worthless that now I feel that even a thousand pages would not suffice to show it up.”107 Indeed, he soon discovered that his ideas could not be contained within a single book. In late 1877, Upton finished the report detailing his observations and immediate recommendations, which was published the following year as *The Armies of Asia and Europe*. The more ambitious half became a manuscript entitled *The Military Policy of the United States*, in which he endeavored to write a complete military history of the

United States since the Revolutionary War to demonstrate “the enormous and unnecessary sacrifice of life and treasure, which has attended all our armed struggles.”

Upton and Sherman had great hopes for the work, as two politicians, Senator Ambrose Burnside and Representative James A. Garfield, both former Union generals, had shown some interest in military reform. Sherman and Garfield pressed Upton to complete the manuscript in time to influence the deliberations of the bipartisan joint committee chaired by Burnside in 1878. With a congressional audience in mind, Upton endeavored to impress upon politicians their responsibility for national defense. “By the action of Congress the people are therefore bound to abide. If its military legislation be wise, peace may speedily ensue; if unwise, for every mistake the people must yield their life and treasure.” He hoped to appeal to the pragmatic nature of politicians through a detailed examination of the financial costs of earlier wars, which he hoped would prove his argument that skimping on military expenditures in peace was a false economy, as it led to longer and far more expensive wars than necessary. Yet for Upton, bad military policy was also immoral. “Wherever [battles] may be lost, it is the people who suffer and the soldiers who die, with the knowledge and the conviction that our military policy is a crime against life, a crime against property, and a crime against liberty.”

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111 Ibid., 141-142, 191-193, and 267-268.
112 Ibid., xi.
For Upton, the essence of military policy lay in the methods of creating and sustaining armies. One of Upton’s most misunderstood and controversial ideas was his preference for federal volunteers over state militia, which has been cast as an un-American hatred of citizen-soldiers. In the early twentieth century, John M. Palmer, an army officer and influential writer, complained of “old army Regulars who would pull out Emory Upton’s *Military Policy of the United States* to quote chapter and verse on the virtues of an expansible Regular Army and the evils of relying upon civilian components,” a class he elsewhere described as “cryptomilitarists.” Such charges, however, miss the complexity of the matter by conflating three different issues—federal versus state control, professional versus amateur leadership, and volunteer versus militia armies—into the false dichotomy of militarist regular versus traditional citizen-soldier.

Upton was highly critical of the involvement of state governments in military organization, a practice which he thought both inefficient and ineffective. He argued that the maintenance of dozens of different separate part-time armies created obvious redundancies and needless competition for resources in war, particularly for recruits. Furthermore, Upton maintained that state governments were ill-equipped for the task of long-term maintenance of military forces, which was borne out by the generally poor condition of the militia both before and after the Civil War. Therefore, he concluded

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115 Jerry Cooper has noted that despite some exceptions among the northeastern states, by the 1890s most state militias depended upon federal funding for much of their support. “Compared to the antebellum and immediate post-Civil War years, combined state support during the last two decades of the nineteenth century remained significant despite the many disparities. Yet for all that effort, state military spending fell short in supporting a viable volunteer soldiery.” The great increase in the cost of arms, even for the relatively inexpensive infantry, had made equipping modern armies too expensive for the states. Jerry M. Cooper, *The Rise of the National Guard: The Evolution of the American Militia, 1865-1920*, Studies in War, Society, and the Military, No. 1 (Lincoln: University of Nebraska Press, 1997), 41.
that “in proportion as the general government gives the States authority to arm and equip troops, it lessens the military strength of the whole people and correspondingly increases the national expenditures.”\textsuperscript{116} Obviously, federal control would increase the role of regular officers like Upton, and states’ rights advocates would argue that principles more important than efficiency were at stake. Yet one can grant both the element of self-interest and recognize the validity of the opposing view without indicting Upton for attempting to introduce foreign values into American military policy. Indeed, the battle between federal and state power has been one of the dominant themes of American political history. The debate over the proper balance between the two in military organization began during the Revolutionary War with antecedents in the conflicts between the militia and British army in colonial times.\textsuperscript{117}

The matter, of course, was not merely one of federal or state control, but also a matter of regulars versus amateurs. Upton was highly critical of militia officers, who he believed were incapable of forging effective units. He characterized the state militia as “undisciplined troops commanded by generals and officers utterly ignorant of the military art.”\textsuperscript{118} Upton believed that it was self-evident that officers with training were better than those without. As with his preference for federal control, this cannot be viewed as being a particularly novel or distinctly foreign opinion.

The final aspect, Upton’s preference for volunteers over militia, was of more theoretical than practical importance during his own time. Theoretically, all able-bodied

\textsuperscript{116} Upton, \textit{Military Policy}, 66.

\textsuperscript{117} For the early controversies surrounding the proper balance between federal and state power in military policy see, Richard H. Kohn, \textit{Eagle and Sword: The Federalists and the Creation of the Military Establishment in America, 1783-1802} (New York: Free Press, 1975).

\textsuperscript{118} Upton, \textit{Military Policy}, xiii.
adult males were in the militia, making it a true army of citizen-soldiers. More importantly, the state could compel them to this duty if necessary. Yet the “organized militia” was made up of only those who wished to participate in what became more commonly known as the National Guard. These soldiers were in practice state volunteers. Yet there was a crucial legal distinction between militiamen and volunteers. The accepted interpretation of the militia clause in the constitution held that the militia could only be used for defense; hence they were constitutionally prohibited from serving outside of the national borders. It was for this reason that Upton argued against giving militiamen any prominent role in the military establishment.119 Yet in the 1870s, the United States had little need for an army so large that it could not be filled by voluntary enlistments and certainly not one that had to be sent overseas. Thus, Upton’s desire for federal volunteers to displace the state militia was more a product of his mistrust of state governments and the officers they would appoint than an opposition to militia, which was not a matter of great concern at the time. Upton fully realized that future wartime armies would be primarily composed of volunteers, who he knew from his Civil War experience could make excellent soldiers. In 1878, Upton summarized his view in a letter to Representative Garfield, “Whatever military record I have was won as a volunteer, and like all of our people I believe in the future we shall have to look to the volunteers whenever great emergencies arise. Only let us give them a good organization.”120

119 This preference was most clearly seen in his contrasting interpretations of the War of 1812 and the Mexican-American War. Ibid., 91, 100-106, 222.

120 Emory Upton to James A. Garfield, 14 October 1878, quoted in Fitzpatrick, "Emory Upton," 305.
In *Military Policy*, Upton had little difficulty documenting the past flaws of state
governments, incompetent officers, and the militia, but his purpose also demanded that
he demonstrate the superiority of the federal government and regular army.
Accordingly, he identified the founding and later expansion of West Point as bright
episodes in an otherwise dismal tale of American military preparedness, and he
recommended that professional postgraduate schools, like the one at Fort Monroe, be
expanded. Yet Upton’s contention of the unquestioned superiority of regular officers
ran afoul of his own Civil War experience, when he had been highly critical of many West
Point-trained general officers. This was particularly troublesome in his discussion of
General George B. McClellan, a commander whom he had disliked during the war. Yet
Upton attempted to portray McClellan as a talented commander whose drive on
Richmond in 1862 was thwarted by the incompetent and meddling Secretary of War
Edwin Stanton. Reconciling this with the historical record was, in the words of David
Fitzpatrick, “too great a challenge, and he produced a passionate but disappointingly
illogical analysis.” Eventually, this difficulty delayed the manuscript to the point that
Upton would never finish it.

Despite these problems with *Military Policy*, Upton developed a program for
reform. He outlined these ideas in the final sections of *Armies of Asia and Europe*,

122 Ibid., 363-376
123 Fitzpatrick has argued persuasively that Upton’s thoughts on civil-military relations have been badly
mischaracterized by later historians, particularly John M. Palmer, Russell Weigley, and Stephen Ambrose.
Contrary to their interpretations, he argues that Upton was never opposed to civilian control exercised by the
president. Instead, he believed that the Secretary of War, who was not an elected official, could become an
anti-democratic usurper. This was by no means an unwarranted fear, as had been demonstrated during the
early period of Reconstruction, when the army’s commanding general, Ulysses S. Grant, in effect ignored the
orders of President Andrew Johnson and took orders from congressional Republicans through Secretary of
copies of which Sherman provided for the members of the Burnside committee, along with supporting documents provided by Upton.\footnote{Ibid., 341, 356.} The most important of these proposals advocated expanded professional education and merit promotion for officers, and a legal definition of the powers of the secretary of war limiting him to only administrative matters. Upton’s signature proposal was the creation of a force of “National Volunteers,” which would augment the regular army and supplant the state militias. Each regular regiment would maintain a training depot in an assigned geographic region from which it would draw its own recruits. These depots would also serve as an armory for two National Volunteer battalions that would join the two regular battalions of the regiment in case of mobilization. The parent regiment would provide commanders for the National Volunteer battalions and companies, while the lower officers would be part-time soldiers from that area, but with federal commissions. Those serving in peace would be paid for an annual ten-day encampment and thirty “armory drills” each year, but Upton anticipated that more than half of the National Volunteers would not enlist until war.\footnote{Upton, \textit{Armies of Asia and Europe}, 367-370.} Theoretically, this plan, when combined with Upton’s proposals for increased military education and promotion examinations, could provide an army of 150,000 that was better trained and led without an increase in the size of the regular army.\footnote{Upton proposed a peacetime strength for the line arms of approximately 22,825 officers and soldier to be supplemented by slightly more than 300 staff officers. This was actually a few thousand soldiers less than actual strength maintained throughout the 1880s and 1890s. Ibid., 327-351.} It is crucial to note that Upton accepted the traditional framework of American military policy: a peace establishment of volunteers serving either full-time in the small regular army or part-time in the state militias, with a much larger force in war...
that relied as much as possible on voluntary enlistments but supplemented with conscripts as needed.

The legislation proposed by the Burnside committee reflected Upton’s ideas on professional reform, but made no effort to alter the method of raising armies. Although Burnside was a West Point graduate, the committee was no mouthpiece for the regular army. Two of the southern Democrats on the committee were ex-Confederate generals and one of the northern Democrats, although a former Union general, was skeptical of “big army” schemes. Still, the “Burnside Bill” was consistent with the maxim that it is better “to have a good army rather than a large one,” which Upton attributed to George Washington.\textsuperscript{127} The bill reduced the number of infantry and cavalry regiments, the size of the officer corps, and abolished the rank of lieutenant general following the retirements of Sherman and Sheridan. Yet it also contained many provisions meant to raise the professional competence of the officer corps: earlier mandatory retirement, examinations for promotion to field grade rank, and the creation of a general staff-like body by merging the offices of the Adjutant General and Inspector General. It also made a half-hearted effort at addressing the role of the Secretary of War vis-à-vis the Commanding General, by granting the president the authority to explicitly define their relationship and responsibilities.\textsuperscript{128}

The defeat of the Burnside Bill in 1879 has been interpreted by some historians as a rejection of Upton’s ideas due to their fundamental incompatibility with American

\textsuperscript{127} ———, \textit{Military Policy}, 67.

\textsuperscript{128} Fitzpatrick, "Emory Upton," 356-358.
That interpretation suffers from several flaws. First, despite Upton’s undoubted influence, the bill was produced by six congressmen, three of whom were hostile to the regular army. Second, Upton and his mentor Sherman were ambivalent about the compromises and omissions contained in the bill. In fact, Sherman made almost no effort to lobby on its behalf, instead absenting himself from the capital on a tour of inspection. Third, the professional reforms—such as promotion examinations and a general staff—were gradually adopted over the course of the following twenty-four years. Fourth, as shown by Fitzpatrick, the cause of military reform actually fell afoul of two larger issues of far more importance to most politicians than army organization. The effort by southern Democrats in the House of Representatives to include additional measures modifying the *posse comitatus* legislation enacted the previous year led to a deadlock with the Senate, which refused to consider the changes. The bill also fell victim to a schism within the pro-army Republican Party, which was divided over civil service reform between reformers and conservative “Stalwarts.” The latter feared that the professionalizing elements of the Burnside Bill might be passed on to the civil service, thereby reducing the ability of politicians to use government positions as a source of patronage. This was represented in the Senate vote, which actually had more southern Democrats voting for the bill than northern Republicans.

Following the defeat of the Burnside Bill in 1879, Upton suspended work on *Military Policy*, and began a lobbying effort for changes to the methods of officer

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130 Fitzpatrick, "Emory Upton," 372.

131 Ibid., 362-377.
promotion and retirement. He also started a revision of his tactical manuals.\textsuperscript{132}

Whether by necessity or preference, Upton’s work returned to the quest for improvements within the military profession. However desirable a better military policy might have been, Upton believed that that the quality of an army was a direct function of the competence of its officers. In \textit{Military Policy}, he expressed the view that “troops become reliable only in proportion as they are disciplined; that discipline is the fruit of long training, and cannot be attained without the existence of a good corps of officers.”\textsuperscript{133}

Sherman pestered Upton to finish \textit{Military Policy}, but Upton preferred to revise his tactical manuals.\textsuperscript{134} These activities reflected his overarching concern with internal professional reform rather than an effort to alter the Army’s place within society.

In 1880, Upton was promoted to colonel and transferred to the Presidio in San Francisco. The failure of conventional linear assault tactics against entrenched defenders during the recent Russo-Turkish War had reinforced Upton’s conviction that infantry using close-order formations would suffer catastrophic casualties unless preceded by a shield of skirmishers.\textsuperscript{135} The draft of his new manual placed even greater emphasis on skirmishing than previous manuals, by designating it, and not close-order tactics, as the standard formation in training. Yet Upton also greatly increased the size of the infantry company, evidently anticipating greater casualties and wanting to preserve the capability for a company to use both skirmishers and an assault column. He partly mitigated the burden of controlling the much larger organization by providing for

\textsuperscript{132} Ibid., 387-390.

\textsuperscript{133} Upton, \textit{Military Policy}, 67.

\textsuperscript{134} Fitzpatrick, ”Emory Upton,” 401-403.

\textsuperscript{135} Ibid., 400.
two additional lieutenants per company during war, but even with the additional officers the larger company would almost certainly have been too unwieldy in combat, as the fours did not provide an effective intermediate level of control. Upton seems to have realized this fault, as the unfinished manual introduced a new section addressing platoon movements, which might have served as the necessary intermediate level of command. He also had dispensed with much of the system of fours.\footnote{Ambrose, \textit{Upton and the Army}, 147; Michie, \textit{Letters of Emory Upton}, 470-473.}

Upton never finished his new tactical manual or \textit{Military Policy}. For many years he had suffered from headaches and a strange, audible ticking noise, as if from a time bomb inside his head. The metaphor is apt, as a group of doctors writing in 1990 have concluded that Upton most likely had a large, slow-growing tumor in one of his frontal sinuses, which led to a number of physical and psychological problems including the depression that was most likely the cause of his suicide on 15 March 1881.\footnote{John M. Hyson, Jr. et al., "The Suicide of General Emory Upton: A Case Report," \textit{Military Medicine} 155 (Oct., 1990): 445-452.} Before ending his life with his service revolver, Upton wrote several notes. One was to his favorite sister. Another resigned his commission. The third was apparently a note of explanation addressed to the Adjutant General:

\begin{quote}
In my efforts to revise the tactics so that they might apply to companies over two hundred strong, I discovered that the double column and the deployment by numbers, when compared with the French method was a failure. The fours, too, I was forced to admit—.\footnote{Emory Upton to Adjutant General, 14 March 1881, in Michie, \textit{Letters of Emory Upton}, 495.}
\end{quote}

Whether the tactics were truly irredeemably flawed or whether Upton might have found a satisfactory solution if not for his medical condition cannot be known. Without a doubt, however, Upton regarded the problem of the attack as an unresolved dilemma.
His death left the solution to others, but his earlier tactics had provided a model for emulation. Old concepts could be successfully retained as long as one acknowledged that new weapons would require modifications to both the techniques of employing soldiers and the means by which soldiers and officers were trained.

However, Upton’s legacy went far beyond tactics. More than any other officer, he defined the course of professional reform over the three decades following his death. Uptonian military progressivism—which would remain the dominant reformist agenda until well into the twentieth century—sought to improve military effectiveness and efficiency through internal modifications, such as improved officer education, examinations for promotion, the elimination of unfit officers, and better army organization. Upton would likely have gladly accepted a larger role for the army in society and the introduction of conscription, but he made no attempt to radically alter the way in which the Army related to society. The closest that Uptonian military progressivism would come to an external focus was the desire to impose the same sort of professional standards used by the regulars on the part-time soldiers, which Upton had hoped to achieve through the National Volunteers. Of course, such desires were by no means original to Upton. A similar professionalizing spirit had existed in the antebellum army.139 Nor was Upton the only officer to interpret the Civil War as a failure of American military professionalism and organization. Historian Mark Grandstaff has argued that Sherman was the true wellspring of military professionalism following the

Civil War, with Upton serving as the conduit for the commanding general’s ideas.\textsuperscript{140} The richness of the antebellum heritage, the ready example provided by parallel developments in European armies, and the obvious inadequacies revealed by the Civil War make any determination of intellectual primacy impossible. Neither is it necessarily important to do so. Instead, Upton—who was not a particularly original thinker—was important because he set the agenda of military progressivism through his personal contact with a generation of officers at West Point, his tactical manuals, the \textit{Armies of Asia and Europe}, and the unfinished manuscript of \textit{Military Policy of the United States}, which was informally circulated among regular officers.\textsuperscript{141} The depth of this influence will be evident throughout the remainder of this dissertation. A hundred years after Upton’s suicide, one of the most thoughtful and perceptive soldier-scholars of a later generation wrote, “to a greater extent than any other officer since his time, Upton has determined the way our Army thinks. . . . Even those who took issue with Upton did so on the terms that he had established.”\textsuperscript{142} Meant in the narrow sense of civil-military relations, this verdict can be extended to all of Upton’s efforts. Yet just as Upton’s views on military policy have been misunderstood by his opponents, his heirs would be unable to agree on what constituted professional competence, efficient organization, and sound tactics, despite their agreement that these virtues were all necessary for an army.

\textsuperscript{140} Grandstaff, ”Habits and Usages of War,” 535-545.
\textsuperscript{141} Fitzpatrick, ”Emory Upton,” 412.
2. The Organizational Foundations of Military Progressivism: Arthur L. Wagner, Military Education, and Field Training, 1886-1905

We educate a man at West Point in the theory of commanding an army corps or an army, and when he graduates he knows that the best part of his life will be spent in commanding a corporal’s guard. Small blame to our officers that many of them become petty and exacting, that many of them become martinets, and that many of them in whom ambition is dead lose all interest in their profession. ¹

- Congressman George B. McClellan, Jr.

The burden of applying the concepts of Uptonian military progressivism fell primarily upon the generation of officers that graduated from Upton’s West Point in the early 1870s and those following over the next decade. Much as the Civil War had been the defining professional experience for the previous generation, these officers were defined by the conditions of the “long 1880s.” Beginning with the close of Reconstruction, this period lacked an equivalent bookend as a conclusion. Instead, the “long 1880s” evaporated away so that by 1898 the Army’s character was of an altogether different nature than that of 1877, but this change was not the result of a single definable event demarcating the old from the new. Rather, it was the product of a number of powerful but slow-acting influences: the accelerating retirement of the Civil War generation, the slow disappearance of the frontier, and the emergence of new techniques of military education and training. Yet not all officers reacted in the same fashion. Just as the victories of 1865 produced satisfied complacency in some veterans, the simple rhythms and expectations of the 1880s lulled many officers into complacency. Likewise, military progressives would find that their consensus on the need for change did not always extend to agreement about the proper course of reform.

¹ “The Army, Speech of Hon. George B. McClellan, Jr.,” n.p., [1899], Box 12, Swift Papers, USMA.
Conditions varied greatly by locale and arm of service, but the defining characteristic of the 1880s was dispersion. In 1889, despite a strength of approximately 26,000 soldiers and officers, the Army manned over 134 posts—none with a garrison larger than 700 troops. This geographic dispersion was exacerbated by organizational divisions. Officers typically remained with a single regiment throughout their two or three decades as lieutenants and captains. The several hundred officers serving in the ten departments that constituted the staff were separated from the remainder of the army—the “line”—by formidable bureaucratic barricades. The heads of these bureaus were independent of the Army’s commanding general, answering only to the Secretary of War. Their subordinates were similarly autonomous. Even while serving on the staff of a territorial department, these officers were generally more accountable to their bureau chief in Washington than to the local commander. Historian Daniel R. Beaver has described the 1880s War Department as “a complex multipurpose confederation of separate agencies.” Indeed, the vertical organization by function produced staff officers as insular within their specialty as their line counterparts were within their regiments.

The most visible manifestations of this dispersion were the frontier posts scattered throughout the plains, deserts, and mountains of the West. In the late 1870s, the garrison of Fort Benton, Montana, included only two officers, who were forced to lodge at the local hotel—the only two-story building in the adjoining town—for lack of

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quarters at the post.\textsuperscript{5} During its early days, the garrison of nearby Fort Buford normally received mail only once every few weeks and sometimes went three months between deliveries.\textsuperscript{6} Socially, the limited community of frontier posts could be unpleasantly close. A lieutenant stationed at Fort Ringgold, Texas, was the sole eligible bachelor in the garrison, making him the inevitable partner of the commanding officer’s unattractive daughter at every dinner, dance, and afternoon ride. The lieutenant was mercifully transferred after he wired the department headquarters: “Order me away from here quick, or I’ll be married soon.”\textsuperscript{7} Farther to the north, Surgeon Thomas Swift described Fort Yates, North Dakota, as “a desolate, tumble-down, old post, but contains a large garrison, insufficiently housed. . . . Socially everything seems very stupid. Most of the company officers are on some detached service. There is no field officer here.”\textsuperscript{8}

Yet all frontier life was not so bleak. With the proper mix of personalities, the intimate nature of small garrisons could make for wonderful camaraderie. In 1889, one officer brought his new wife to Fort Spokane, Washington Territory, where she was warmly greeted within minutes of arrival. Decades later, he fondly recalled, “There is nothing in my memory more delightful than the cordial reception given in those days by officers and their ladies to a new arrival.”\textsuperscript{9} Some of the larger posts offered a lively social scene. A lieutenant at Fort Supply, Indian Territory, reported to a friend, “We have a

\textsuperscript{5} Edward E. Hardin, ”The Indian Frontier: An Army Lieutenant in Montana, 1874-1876,” \textit{Military Affairs} 23 (Summer, 1959): 90.

\textsuperscript{6} Spaulding, \textit{United States Army}, 346.

\textsuperscript{7} George V.H. Moseley, ”One Soldier’s Journey,” Box 14, George Van Horn Moseley Papers, LC, 50.

\textsuperscript{8} Thomas Swift to Eben Swift, 1 March 1893, Box 1, Eben Swift Papers, USMA.

\textsuperscript{9} Eli A. Helmick, ”From Reveille to Retreat,” Helmick Papers, MHL, 43.
post full of young ladies. They pull us around at hops, etc., and make life miserable for me. We seldom get to bed before two o’clock. The post is a very pleasant one, and everyone seems to be contented.”

Social opportunities were even greater in garrisons near an established civilian community, such as Fort Sam Houston, adjacent to San Antonio, Texas, where the locals were “a very delightful hospitable people and the town and army post made a social unit where everybody knew everybody else and saw much of each other.”

Neither was the 1880s army confined to the frontier. In 1880, a full third of the army was assigned somewhere other than the western stations, with officers having a disproportionate share of these positions away from the frontier, as they made up the staffs at the War Department or regional headquarters in cities such as New York, St. Louis, and San Francisco. There were also a number of detachments guarding the coasts. The garrison of Governor’s Island in New York harbor was only a fifteen-minute ferry ride from Manhattan, which one artilleryman recalled as “a hummer sort of place.” The same officer also served at forts protecting New Orleans and San Francisco. As the son of a provincial doctor from Petersburg, Virginia, he found that he actually grew

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10 William E. Almy to Eben Swift, 29 January 1891, Box 1, Swift Papers, USMA.

11 William Lassiter, “Memoirs,” Box 1, Lassiter Papers, USMA, I:65. Historian Jerry M. Cooper has given a bleak description of life in frontier posts: “The mindlessness and boredom of garrison duty, overseen by far too many unimaginative and autocratic officers, contributed significantly to the service’s inability to get and keep enlisted men of quality. . . . An endless round of teas, dinners, hops, and theatricals all too often assumed the same thoughtless routine attending military duties, with the same guests and dance parties appearing regularly. Judging from the number of courts martial of both enlisted men and officers, preferring charges against one’s inferiors, peers, and superiors must have been one of the few readily available methods of breaking up an otherwise tiresome existence.” Undoubtedly true for some locales, as a general characterization of service in the West it must be regarded with some skepticism. Jerry M. Cooper, “The Army’s Search for a Mission, 1865-1890,” in Against All Enemies: Interpretations of American Military History from Colonial Times to the Present, ed. Kenneth Hagan and William R. Roberts (Westport, Conn.: Greenwood Press, 1986), 183.

12 Coffman, Old Army, 254.
cosmopolitan in military service. Similarly, another coast artilleryman assigned to Fort Adams, Rhode Island, “basked in the light of the Naval War College, and the fringes of Newport high society.” Recruiting, teaching at civilian colleges, and managing civil engineering projects also afforded opportunities for close association with civilian society. The common feature that linked the experience of an officer at a remote frontier station with one defending the harbor of a major city was not their isolation from civilian society, but their remove from other groups of officers. Few locations had more than one or two dozen officers, and they were typically of the same arm of service. One of the important factors leading to the changing professional nature of the Army in the 1890s was the dramatic reduction in the number of army posts during the first years of the decade; approximately a quarter of army posts were abandoned. Although there were still 80 installations in 1894 and the smallest had a garrison of only 60 soldiers, the total number of posts garrisoned by a single company (approximately 100 soldiers or less) had been reduced to a mere 9. This development brought together officers in larger groups and of increasingly diverse professional backgrounds.

13 Decades later, he still remembered the guilty pleasure of playing tennis on the Sabbath during his first assignment to a fort near New Orleans. Such an activity would have been unthinkable in his strict Protestant home. Lassiter, "Memoirs," I:21-28.

14 Johnson Hagood, "Down the Big Road," Box 1, Hagood Papers, MHI, 59.

15 Coffman, Old Army, 282.

16 Samuel Huntington has argued that Progressive Era military reform was the product of military isolation from civilian society during the late nineteenth century, but more recent scholarship has overwhelmingly rejected his premise of military isolation. Military reform is now regarded as part of the wider reforms associated with the Progressive Era. Indeed, contrary to Huntington’s argument that the “military mind” was free to professionalize once unfettered of the retarding influence of civilian society, some of the greatest impediments to change were internal features of military service—deadening routine, lack of clear organizational purpose, promotion by seniority, and excruciatingly slow promotion. Huntington and Jerry Cooper (see footnote 11) were both correct in recognizing the dispersion of the army as a crucial influence in the nature of the American military profession, but they placed too much emphasis on the physical conditions of frontier service—which was neither as isolated nor as dreary as they described. Instead, dispersion made it difficult to build a coherent profession among a group of practitioners widely dispersed
Army service offered wide variations in scenery, comfort, and social life, but those officers serving with troops shared the same military routine. In a cavalry post of the 1880s there were “three great events of the day”: morning stables, when the horses were fed and groomed; guard mount, when the uniforms and equipment of soldiers going on duty were inspected; and retreat roll call, when the entire available garrison was brought together at the end of the work day for a brief parade around the central field. Units typically conducted training—referred to at the time as “drill”—during the morning. The cavalry went to the riding hall or a nearby field for practice in mounting, dismounting, and riding in formation. The infantry marched, practicing transitions between various formations. The field artillery practiced “maneuvering the carriages around in beautiful and exact evolutions.” Their coastal brethren with fixed guns lacked the dash of movement; a sergeant read from the drill manual, while the crews went “through certain movements at the gun by rote, each being explained in detail as we went along, although there was not a corporal in the outfit that did not know the whole thing by heart.” Ammunition was so scarce that they typically fired their guns only once a year. Regardless of the arm of service, the primary function of drill was to irrevocably instill


17 Guy V. Henry, Jr., "Brief Narrative of the Life of Guy V. Henry, Jr.,” Box 4, Henry Papers, MHI, 16.

18 Helmick, "From Reveille to Retreat," 40; Henry J. Goldman to Eben Swift, 28 October 1896, Box 1, Swift Papers, USMA; Lassiter, "Memoirs," I:20; Hagood, "Down the Big Road," 56.
the habit of obedience into each soldier, not to replicate the conditions of combat. Thus, drill was often conducted on the same small, flat drill field that was at the heart of nearly every post. Ceaseless repetition required little from officers other than knowledge of the drill regulations and a strong voice. One officer of the time conceded that “official requirements as to tactical knowledge were exceedingly meager.”19 Particularly at the smaller posts, so many soldiers were engaged in the necessary “fatigue details” of maintaining the buildings and sustaining the garrison that only a fraction of the soldiers could participate in drill. An 1877 West Point graduate found the routine of his first assignment at Fort McHenry, Maryland, disheartening: “The companies are so ridiculously small that I find it impossible to take any interest in drills or indeed in any military duties. I do what I have to do in a perfunctory way and that is all.”20 Although greatly alleviated by the consolidation of posts in the 1890s, this problem persisted in some areas well into the twentieth century. In 1909, Captain Ola W. Bell was transferred from staff duty at St. Louis to Fort Walla Walla, Washington, which was much like travelling back in time to the 1880s. Bell had to consolidate the “handful of men” available for drill from each of the three cavalry troops (equivalent to an infantry company) in order to create an ad hoc “big troop” large enough to drill. After one of these sessions, Bell confided in his diary, “It all seems such a farce. I would go crazy in such a stupid place. The people however [sic] seem contented and happy in spite of the fact that they have been here several years.”21 Drill, administrative work, and supervising

20 Coffman, Old Army, 262.
21 Ola W. Bell, Diary entry, 18 October 1909, Box 3, Bell Papers, USMA.
the care of the horses in the mounted arms took up an officer’s morning, but as the soldiers spent the afternoon in duties supervised by their sergeants, regimental officers typically had few duties after noon.\textsuperscript{22}

With so little work and decades to master the duties of a company-grade officer, garrison life offered little novelty or challenge to stimulate professional interest. From the vantage of 1906, one officer remembered duty in Arizona during the 1880s as one of “hard field service, but in garrison. . . [officers led] a life of idleness and ease.”\textsuperscript{23} Some shirked even the little required of them. One officer remembered his captain, who “generously left all the battery work to the lieutenants, reserving for himself only the signing of the morning report which was brought to his quarters by the First Sergeant every morning before breakfast.”\textsuperscript{24} In the 1870s, Lieutenant Eben Swift’s troop commander similarly delegated to him “roll calls morning and evening, stables, and all drills.” According to Swift, “about all [the captain] did was to sign the morning report.”\textsuperscript{25} Contemporary sources repeatedly refer to the “dry rot” pervading the officer corps, a condition engendered by the dull routine.

\textsuperscript{22} According to George Van Horn Moseley, courts martial were not allowed to sit after three o’clock in the afternoon “based upon the opinion prevailing at the time — that no gentleman should be found sober after that hour.” He remembered that most duties were done by eleven in the morning, after which “most of the older officers gathered at the club.” Moseley, “One Soldier’s Journey,” 54-55. See also, Helmick, “From Reveille to Retreat,” 40, 55. Matthew F. Steele, “The Evolution of Military Culture,” Box 20, Steele Papers, MHI; Millett, The General, 61.


\textsuperscript{24} Hagood, "Down the Big Road," 56. A colonel commanding Fort Ringgold, Texas, reduced his work by abolishing “office hour.” If the officer conducting guard mount did not find the colonel in his office, he was to go no further in searching for him. As one lieutenant laconically noted, “The C.O. [commanding officer] is not always in evidence.” Henry J. Goldman to Eben Swift, 28 October 1896, Box 1, Swift Papers, USMA.

\textsuperscript{25} Swift, "Personal Memoirs," 72.
The Army required little of officers, but some nonetheless kept themselves professionally engaged. Lieutenant William Lassiter began his service under an active captain who had his soldiers busy with both infantry and artillery drill. “I count myself lucky to have had my start under his auspices,” Lassiter later wrote. “Many of my contemporaries started under captains who never expected them to do anything very much and a lot of them acquired early dry rot.”26 The studious John M. Palmer commented that “one of the charms of the old army was this abundant leisure.” Yet Palmer recognized that this ease could be a two-edged sword. “It was a wonderful place for a young officer who wanted to read and study, but for those who had no tastes of that kind, leisure frequently became idleness which often required the stimulation of too much whiskey.”27 One of those who made the most of this abundant free time was Lieutenant Louis C. Scherer, who was stationed at a small fort on the Rio Grande in the 1890s. Scherer complained to a friend stationed at the much larger and active Fort Leavenworth, “the greatest trouble of a post of this size is the apathy. . . . Everything is repeated over and over again and a terrible hankering for a change takes possession of a person.” Yet Scherer then described his satisfaction in teaching tactics classes for non-commissioned officers and a project to create a map of the local area. He also translated a German military textbook, reading aloud in English to his wife while she typed.28

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26 Lassiter, “Memoirs,” I:22. Lassiter was not so fortunate in his next commander, who “was interested in chicken incubators and catamaran boats, but military subjects had long ceased to interest him. He was a complete wash-out. The post commander was a Lieut. Colonel who was soaked with liquor most of the time, and was likewise a wash-out.” Lassiter, ”Memoirs,” I:27.


28 Although Scherer wrote in early 1896, his particular situation was quite similar to those that predominated throughout the previous decade. The small garrison and frontier conditions of the Texas border preserved the conditions of the 1880s that were fading in most other regions. Louis C. Scherer to Eben Swift, 23 March 1896, Box 1, Swift Papers, USMA.
While the army routine did little to encourage professional interest, neither did it preclude its existence in units animated by an energetic commander. In describing service on the southwestern frontier, Ronald Machoian has observed that “officers’ lives were almost completely defined by the garrison’s military subculture.” Just as the social and physical conditions of service varied greatly, these numerous subcultures make characterizations of the degree of professional activity necessarily tentative and subject to the inevitable exceptions among the literally hundreds of individual cases. Rather than trying to fix an elusive measure of attainment, it is more fruitful to recognize the diversity of the professional milieu and the centrifugal influence it had on the military profession.

The challenges of distance would have made any attempt to impose professional conformity difficult, but the 1880s War Department made little effort to do so. Instead, the organization was designed primarily for administration, particularly fiscal economy. Geographic dispersion made even this limited aim sometimes difficult. In 1874, a newly commissioned lieutenant inquired at the War Department to learn the location of his assigned unit and the name of his commander. After arriving in Montana, he learned that the company had moved to another post over a year earlier and the captain had been dead for several months. Even the generals commanding the territorial departments often visited their subordinates’ units only once a year for a “perfunctory annual inspection of their posts.” According to one officer, these generals

29 Machoian, Carter, 45.


31 Hardin, "Lieutenant in Montana," 85.
“exerted absolutely no influence over the discipline, the training or the morale of the army.”\textsuperscript{32} In the absence of central control, local commanders, particularly the colonels commanding regiments, became the most powerful arbiters of all facets of military life, including professional standards. Within his regiment, the “colonel was the king,” and “within the regulations, his word was law.”\textsuperscript{33} Lesser commanders enjoyed similar power within their own spheres; one company commander in the Indian Territory forbade any enlisted soldiers from marrying, forcing the company first sergeant to maintain his family in secrecy several towns away.\textsuperscript{34} Because the largest permanent tactical unit within the field artillery was the battery commanded by a captain, officers of that arm enjoyed even greater autonomy, which survived into the twentieth century. An exasperated chief of artillery complained of “the pernicious independence of the light battery commander.”\textsuperscript{35} Officers of all grades and all arms expected the freedom to discipline, train, and direct their commands as they saw fit. With over forty regiments, each with its own character and methods, the Army lacked a central direction in professional matters. This was reflected in Major Edwin V. Sumner’s 1888 assessment of the Army: “We seem to be drifting along, holding our own, to be sure, but making no advance.”\textsuperscript{36}

\textsuperscript{32} Steele, “Evolution of Military Culture,” 3.

\textsuperscript{33} Helmick, "From Reveille to Retreat," 117. On the fringes of settlement, this authority, although without legal basis, could sometimes extend beyond the purely military jurisdiction as well. Moseley, "One Soldier's Journey," 49.

\textsuperscript{34} Helmick, "From Reveille to Retreat," 57-58. The conditions of naval service produced an even more extreme individualism in commanders. Karsten, The Naval Aristocracy, 87-88.

\textsuperscript{35} Lassiter, "Memoirs," II:1.

Functionally, the army of the 1880s had no means of ensuring a minimum level of competence among officers. Prior to the 1890 requirement for lieutenants and captains to pass an examination certifying medical and professional fitness prior to promotion, advancement was determined solely on the basis of seniority. Thus, as one officer bitterly remembered, “All an officer had to do to attain his next higher rank was to outlive his seniors and go on acquiring ignorance from one year to another.” Even with examinations, infrequent promotions meant that officers physically incapable of performing their duties could stay on active duty for years. In his memoirs, George Van Horn Moseley recalled a one-legged lieutenant who had served in the same cavalry regiment. Despite this disability, however, “the Government could not take official cognizance of the fact until he was ordered up for promotion.” The surprising conclusion to the story of the incomplete trooper revealed much about the old army. “In justice to him,” Moseley wrote, “he rode more and better with his one cork leg than most cavalry

37 H. Richard Yarger has noted that these examinations were “an important intellectual step,” but in practice they were far from effective. “The board procedures and questions rapidly became pro forma and served little purpose other than enhancing the concept of professionalism and improving the general level of knowledge of the officer corps.” Harry R. Yarger, “Army Officer Personnel Management: The Creation of the Modern American System to 1939,” (Ph.D. Diss., Temple University, 1996), 73-75.


39 Theoretically, physically disabled officers could be retired, but Congress placed a fixed limit on the number allowed. The scarcity of vacancies on the “retired list” might have been part of the reason for the reluctance of examination boards to find officers physically unfit. In the first eight months that promotion examinations were required, 276 officers were examined but only 15 failed the medical portion. By 1915, approximately the same number of examinations yielded only two medical failures. Yarger, "Army Officer Personnel Management," 73-75; Coffman, Old Army, 233 footnote 38, 281. The best evidence for the boards' low standards is anecdotal. In 1893, Eben Swift received a number of letters of congratulation on his promotion to captain, all assuming that another lieutenant would fail the medical examination. Contrary to Swift’s friends' expectations, the doctor ruled the lieutenant fully fit for duty. In a similar case, one lieutenant was hopeful that another cavalryman who had not ridden in six years would be medically retired. Letters to Swift, March and April 1893, and Herbert J. Slocum to Swift, 21 January 1895, Box 1, Swift Papers, USMA.
officers of the day did with two good ones. It was booze that finally ended him.”

Lesser infirmities were also allowed. Moseley’s post commissary was unable to wear boots or shoes, so he conducted his duties in slippers. Even as late as 1900, when Moseley’s unit first came under the fire of Filipino soldiers, the major commanding the squadron was so deaf that he did not realize he was in combat. The major testily sent a message forward to the lead troops deploying for action: “We will not have any drill here, but we will wait for that until we get into the post.”

The three-hundred pound first lieutenant of Johnson Hagood’s battery was so incapacitated by heat when the unit was transferred to Saint Augustine, Florida, that he could do little more than sit in the shade of his front porch fanning himself.

These examples illustrate the extreme bounds of tolerance afforded to officers who were professionally unfit in readily discernable ways. One could scarcely expect that less tangible forms of competence, such as tactical judgment and technical knowledge, were any better regulated. Indeed, there was no means of doing so, as aside from the predominantly legal and ethical requirements of the regulations, there was no formal definition of professional fitness. Instead, this was left to the determination of individuals, their commanders, and the informal norms of the collective officer corps.

Accordingly, one officer wrote in 1906, “To hold his own, nay, even to advance, it would almost seem that he sometimes has but little more to do than

40 Moseley, "One Soldier’s Journey," 52.
41 Ibid., 68-69.
42 Hagood, "Down the Big Road," 66.
43 Examples of these unwritten standards of conduct related to such conduct as fraternization with the enlisted ranks, lying, and paying debts, with ostracism being the common penalty for failure to conform to these norms. Millett, The General, 84.
to breathe on; it is not necessary for him to surpass competitors. Such conditions can have but one effect—stagnation.”

Even after the introduction of promotion examinations, professional standards for competence were poorly enforced at best. When the Fort Leavenworth school reopened after a brief hiatus during the Spanish-American and Philippine-American wars, the first class did so poorly that the War Department dispatched a brigadier general to investigate the causes. He found that four of the thirteen lieutenants who failed more than one of the four subjects had also failed an earlier promotion examination. In other words, they had failed three separate evaluations of professional competence. Three of these were further categorized by the investigating officer as failing due to mental “incapacity,” yet all three were on active duty more than a decade later and had attained the rank of captain. The one officer who left the service shortly after leaving the school was deemed mentally competent, failing instead “due to indifference, carelessness or general worthlessness throughout the course.” For this he was court-martialed. Laziness was punished, but stupidity seems to have been considered an excusable sin.

Most officers seem to have realized the problems created by this lack of official oversight, but seem to have preferred the occasional outrageous abuse to central control of professional standards. H. Richard Yarger has termed this the “nineteenth-century professional ethos,” which was surprisingly egalitarian in its emphasis on “professional


\[45\] Tasker H. Bliss, Memorandum Report AWC 925, 14 August 1903, Box 8, Entry 292, RG 165, NARA II.
equality, fairness, and a two-way loyalty [between individual officers and the Army].”46 Without formal standards, all officers were “equally professional by virtue of their commissions—individual talent might vary, but position rights did not.” Of course, officers were not blind to differences in ability; in an 1876 letter to Congressman H.B. Banning, Colonel Nelson A. Miles admitted that “certain officers are in excess of the requirements of efficiency.” Miles’s careful wording allowed him to deny the existence of the incompetent officers that Banning wanted to purge as part of a general reduction of the Army at the end of Reconstruction. Miles cared little for calculations as to the proper size of the officer corps based on cost or necessity; he argued that “after an officer has been duly appointed and commissioned, depriving him of his commission, without crime or fault on his part is, if not a breach of contract, at least a breach of faith on the part of the Government.”47 A younger officer with no sympathy for this nineteenth-century ethos agreed that that it was common for an officer to feel “that he had a vested right in his commission from which he could not be separated.”48 This belief posed a major challenge for military progressives trying to achieve Upton’s goal of a more proficient officer corps.

Eventually, professional education would play a major role in reducing the internal divisions of the army and the individualism characteristic of the nineteenth-century professional ethos. Yet it was not until well into the 1880s that military schools developed techniques appropriate for anything more than teaching purely technical

47 Significantly, Miles did argue for a limited number of promotions by merit to combat the tendency for officers to “consider their military education complete when they receive an appointment in the Army.” Nelson A. Miles to H.B. Banning, 8 February 1876, Miles Papers, MHI.
48 Moseley, "One Soldier’s Journey," 51.
matters or more effective than systematized apprenticeship. Formal technical training began at West Point in 1802, initially founded for the narrow purpose of training competent artillerymen and engineers. 49 The Military Academy was not initially intended as a school for military generalists capable of leading armies, although that had probably become accepted as an important secondary function by the end of the Civil War. In postgraduate education, the Artillery School at Fort Monroe, Virginia, was the senior and most prestigious of the handful of army schools.50 Except for a period during the late 1870s and early 1880s, the school confined itself to the technical aspects of engineering, explosives, and long-range fire that comprised the mechanical aspects of coast defense.

The brief interval of balanced instruction owed much to Upton, who was assigned to the school in March 1877 following his world tour. In addition to the technical curriculum, his course in the “art of war” encompassed the study of history, strategy, and combined-arms tactics. Upton’s broad notion of officer education differed from the traditional technical training in two ways. First, Upton was able to look beyond the immediate and limited demands of the peacetime army, in which his students could expect nothing more than responsibility for a few guns and dozens of soldiers. Instead, he sought to prepare them for the next war, when they might command thousands of

49 According to Theodore Crackel, even within this technical realm the training was limited. “By design, the instruction was to impart only the most basic, practical knowledge needed by army officers of that day: sufficient mathematics and practical skills to lay artillery correctly, to construct simple fortifications, and to make rudimentary maps.” Crackel, *West Point*, 48.

50 The original Artillery School of Practice founded at Fortress Monroe in 1824 was modeled on the French equivalent at Metz. The school was suspended during the Civil War, but reestablished by General Ulysses S. Grant in 1868. In 1875, the course was extended from one to two years. In the opinion of Harry Ball, “By the 1880s the Artillery School at Fort Monroe had become the American model for professional military education.” Skelton, *American Profession of Arms*, 183-184, 249-252; Weigley, *History*, 273; Ball, *Responsible Command*, 21-25 (quotation 24-25).
soldiers and units of all types. Upton’s own Civil War experiences commanding an artillery battery, infantry brigade, and cavalry division demonstrated the wisdom of such an expansive military education. Soon after arriving at Fort Monroe, he wrote to a West Point classmate, “You know how ignorant our generals were, during the war, of all the principles of generalship. Here I think we can correct that defect and form a corps of officers, who, in any future contest may form the chief reliance of the Government.”

Second, even when teaching small-unit tactics, Upton insisted on realistic training, in which the students competed against an active enemy played by their fellows, rather than the stale and predictable drill on a featureless parade ground. Yet these innovations had vanished from Fort Monroe by the end of the 1880s, when the traditional focus on the technical aspects of artillery once again dominated the school. By the early 1890s, even instruction within this limited sphere had declined so greatly that the officer responsible for “practical military exercises” complained that the school’s hands-on training was little different than that conducted at any other post. This was a far cry from the school for future generals envisioned by Upton, but it was consistent with the tradition of narrow technical education.

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53 William P. Duvall to Eben Swift, 5 March 1894, Box 1, Swift Papers, USMA. William Lassiter, who was a student at the school during that same period, agreed that the school provided its students with little more than a basic technical education. Lassiter found the first year “very elementary and very dull,” but liked the second year of the course, which included chemistry, steam engineering, and electrical engineering. Yet he remembered the school primarily for the lively officers’ club, which featured marathon games of poker and fresh terrapin soup. “As for additions to my military education,” Lassiter concluded, “I cannot say that they were very great.” Lassiter, “Memoirs,” I:47–49 (quotation from 49). For a detailed description of the technical nature of the course written by the school’s commandant, see Royal T. Frank to Tasker H. Bliss, 3 March 1890, Bliss Papers, USMA.
The other method of officer education was essentially formalized apprenticeship. In the 1820s, artillery and infantry schools of application were established at Fortress Monroe and Jefferson Barracks, Missouri. Although the early Artillery School did have some technical instruction, like its infantry counterpart, it was primarily intended to serve as a “model post,” which meant that all regulations were to be strictly enforced, lieutenants were to be rotated through administrative positions so that they might master the array of routine administrative tasks, and it would have a larger garrison than the typical post to provide greater opportunities for drill. Even these limited aims were not always fully supported by the War Department; the infantry school vanished after just five years and the artillery school continued intermittently until the Civil War.  

The “model post” concept, however, proved remarkably resilient, and in 1891 a School of Application for Cavalry and Light Artillery was established at Fort Riley, Kansas, along those same lines. In fact, both the enabling legislation and the War Department directive establishing the school expressly forbade any classroom instruction at the school in excess of the pittance routinely required of all officers. 

The Infantry and Cavalry School of Application at Fort Leavenworth would eventually change the nature of American military education by introducing a third method that was not purely technical, yet more formal and rigorous than simply modeling right behavior. This development, although encouraged by the Army’s commanding generals, was almost entirely an evolutionary result of continual improvements introduced by the school’s faculty. This allowed for innovation, but also


55 Edward B. Williston, Memorandum on Proposed School Regulations, n.d. [1891], Tasker H. Bliss Papers, USMA.
led to increasing tensions as different views of military education came into conflict. In hindsight, these disagreements were present from the very beginning. In 1878, Upton proposed the establishment of service schools for the infantry at McPherson Barracks, Georgia, and the cavalry at Fort Leavenworth; both were to be modeled on his broad concept of military education then used at the Artillery School.\textsuperscript{56} The previous year, Brigadier General John Pope had also recommended the establishment of a school at Fort Leavenworth, but he envisioned something very similar to the antebellum “model post,” with entire regiments being routinely rotated through the school for the purposes of “military exercises” and only limited theoretical instruction.\textsuperscript{57} In contrast to Upton’s plan, which was meant to prepare officers for wartime duties of far greater scope than their present positions, Pope’s proposal was concerned with training officers for their immediate duties.

Less than two months after Upton’s suicide in 1881, General William T. Sherman established a school at Fort Leavenworth along lines that fell somewhere between the schemes of Upton and Pope. This middle course was as much a result of the pragmatic concerns of the commanding general and his own quirks as a synthesis of competing philosophies. Sherman wanted “practical” instruction for lieutenants, so the students were to assist with the administrative functions of the post and gain familiarity with the other arms through temporary assignments to other units.\textsuperscript{58} This initial guidance explicitly drew on the “model post” method of apprenticeship, but Sherman

\textsuperscript{56} Upton, \textit{Armies of Asia and Europe}, 366.
\textsuperscript{57} Nenninger, \textit{Leavenworth Schools}, 21-22.
\textsuperscript{58} Ibid., 22-24; Grandstaff, “Habits and Usages of War,” 541.
subsequently modified the original order with provisions for more formal training. The students were to be divided into two groups. The advanced section studied basic military subjects, while the lower section followed a more rudimentary professional course to allow for the addition of remedial general education courses. This latter group was largely drawn from a cadre of officers recently commissioned directly from civilian life, many of them without a college education. This lower section studied subjects such as geometry, “writing a plain hand, easy to read,” and “correct reading aloud.” Perhaps a necessary expedient, this did little to enhance the image of the school. The students took to calling themselves the “Regimental Blockheads” and the school the “Kindergarten.”

The students’ belief that the school was a farce became self-fulfilling; Sherman eventually had to threaten the students with dismissal if they did not apply themselves. Yet Sherman might have secretly shared their low expectations. “I confess I made the order [establishing the school] as a concession to the everlasting demands of friends and families to have their boys . . . escape company duty in the Indian country,” Sherman confided to General Phil Sheridan. “The School at Leavenworth may do some good, and be a safety-valve for those who are resolved to escape from the drudgery of garrison life at small posts.” Sherman’s aspirations for professional education fell far short of Upton’s aim of an advanced school producing competent future generals and staff officers.

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60 Nenninger, *Leavenworth Schools*, 27.

61 William T. Sherman to Phillip Sheridan, 31 July 1881, quoted in ibid., 23.
Further limiting the effectiveness of the early Infantry and Cavalry School was Sherman's hatred of legislative oversight. He established the school with a general order rather than seeking Congressional approval, which meant that the school had no specific appropriations or allotment of officers for the faculty. As a result, instructors were drawn from the existing garrison, which could not always furnish an officer with sufficient expertise. In some special subjects, such as military law, student-officers had to instruct their classmates. The lack of funds posed an even greater challenge. Half of the post budget was diverted to the school, but this was still not enough to provide sufficient facilities or resources. Sherman even had to loan the school library several books from his own personal collection.62 This arrangement fostered the impression that the school was an adjunct of the regiment garrisoning Fort Leavenworth rather than a true institution of the Army. Some officers grumbled that the first commandant, Colonel Elwell Otis, subordinated the interests of the school to those of his Twentieth Infantry, and derisively referred to the school as “Otis' 20th Inft’y Seminary.”63

The nature of the school began to change when Colonel Alexander M. McCook became the commandant in May 1886. He resolved to conduct the school “for the benefit of capable officers instead of continuing to be degraded to the level of a common school for the benefit of the inefficient.”64 Accordingly, the 1888 regulations abolished the remedial class, reorganized the school’s departments, laid out a more rigorous six-

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63 Edward B. Williston, Memorandum on Proposed School Regulations, n.d. [1891], Tasker H. Bliss Papers, USMA.

64 Historical Sketch, 6.
day schedule, and emphasized practical, outdoor work in the fall and spring. McCook also required students to pass an entrance examination demonstrating basic proficiency in small-unit drill and tactics, so that instruction could begin at a more advanced level than in previous years.\textsuperscript{65} McCook also benefitted from the support of Sherman’s successors, Phil Sheridan and John M. Schofield. Both generals sought to assign qualified officers specifically for the purpose of serving on the faculty. Also, Sheridan waged a three-year battle for Congressional recognition and funds, which finally succeeded in 1889.\textsuperscript{66} Throughout most of this period, however, the school continued to fall short of Upton’s hope for a war college training future generals. Instead, the Infantry and Cavalry School continued to hone the skills of capable but relatively inexperienced junior officers for their immediate duties. While a logical and altogether appropriate emphasis for the U.S. Army of the late 1880s, as long as Fort Leavenworth remained the only postgraduate professional schooling available, some officers would agitate for a more ambitious curriculum encompassing the duties of high-level command and staff work.

The unlikely leader of this movement was Arthur L. Wagner.\textsuperscript{67} In personality Wagner was nearly the opposite of Upton, but in the estimation of Wagner’s biographer, “He took the place of the brilliant Emory Upton, going far beyond his predecessor in the application of military modernization so much so that by 1898 he was universally

\textsuperscript{65} Nenninger, \textit{Leavenworth Schools}, 28-35; \textit{Historical Sketch}, 6-9.

\textsuperscript{66} Even this effort yielded an initial annual allocation of only $1500, as compared to the Artillery School’s $5000 budget. \textit{Historical Sketch}, 12.

\textsuperscript{67} For a brief synopsis of Wagner’s career, see Appendix.
regarded as the army’s chief spokesman on matters of tactics and doctrine.” Wagner came to West Point in 1870 with the class of 1874, but was “turned back” to the following class after lying to the officer of the day. After this serious infraction—cadets could be permanently dismissed for such behavior—Wagner’s time as a cadet was characterized by numerous smaller misdemeanors resulting from his impish sense of humor and independent spirit. From these earliest days he demonstrated flair with the pen, editing “The Dialectic Howitzer”—a cadet publication of “many jokes and witticisms”—while also annually producing his own unsanctioned summary of the summer’s training in a satirical newspaper, “The Bombshell.” Wagner’s casual attitude towards academy regulations brought him in frequent contact with Upton, then serving as the commandant of cadets. In 1874, Upton confined Wagner to his room as punishment for a written explanation of an unstated offense that was “discourteous in tone and containing irrelevant matter.” Such antics led to Wagner amassing 731 demerits as a cadet—an unusually large number—all of which were meted out during Upton’s tenure as commandant. Wagner’s cadet years culminated in an act of rebellion that nearly ended his military career before it even began. On the eve of graduation, Wagner was once again confined to his room. Although he typically did not attend the dances, Wagner resented being denied the opportunity to attend his graduation “hop,” so he

68 Brereton, *Educating the U.S. Army*, xii.

69 Ibid., 2.

70 Swift, "Personal Memoirs," 42; Class of 1875, 20th Reunion Dinner Scrapbook, 12 June 1895, Bliss Papers, USMA.

71 Headquarters Corps of Cadets, Special Orders #5, 4 February 1874, USMA.

hosted an illegal celebration in his barracks room. With a number of cadets attending and buckets of alcoholic punch fueling the festivities, the noise soon attracted the attention of one of the Upton’s sternest assistants—Lieutenant John F. Stretch. When Stretch knocked on the door, Wagner was already “pretty well loaded” in the words of a friend, so he brazenly treated Stretch as nothing more than a guest at a party. As the lieutenant circled the room, glaring at each cadet in turn, Wagner followed him, happily chattering, “Mr. Stretch, I am glad to have the call. We are having a party you see. If anything is wrong I hope you will mention it.” Without saying a word, Stretch walked out of the room. Many years later, Stretch confided to one of Wagner’s friends that he had wrestled with his conscience, knowing that if he had reported the incident, a number of cadets would not have graduated the following day. 73 Certainly, the greatest punishment would have fallen on Wagner, yet he escaped to graduate fortieth of forty-three in his class. 74 Wagner’s official record belied a sincere professional interest evident even during his time at West Point. Wagner may have devoted little time to his academic work, but he read a good deal of military history and other professional books. 75

Following graduation in 1875, Wagner found that his intellectual interest in military theory did not translate into happiness as a regimental officer. Despite relatively active frontier service including campaigns against the Sioux, Nez Perce, and Ute tribes, within five years of graduation, he requested detached duty. 76 This eventually yielded an assignment to the East Florida Seminary—the present day University of

74 Register of Graduates, 4-56.
75 Brereton, Educating the U.S. Army, 2; Swift, "Personal Memoirs," 67.
76 Brereton, Educating the U.S. Army, 5-7.
Florida—as a professor of military science and tactics in January 1882. Three years later, Wagner reluctantly returned to his regiment at Fort Douglas, Utah, after his request for an extension in Gainesville was denied.\textsuperscript{77} Still dissatisfied with regimental duty, the following year he requested a year’s leave to work in his father-in-law’s business, so that he might “have an opportunity of deciding intelligently upon the acceptance or declination of a position that has been offered to me in civil life.”\textsuperscript{78} Lieutenant General Philip Sheridan denied the request, but several months later Colonel Alexander McCook, Wagner’s regimental commander, requested the lieutenant’s assignment to the faculty of the Infantry and Cavalry School of Application at Fort Leavenworth.\textsuperscript{79} This period as an instructor was the turning point of Wagner’s career.

Despite his misgivings about a military career on the frontier, Wagner had already established a reputation as a military intellectual. While serving as a tactics instructor in Florida, Wagner wrote an essay for the Journal of the Military Service Institution (JMSI), which had been founded the previous decade by Major General Winfield Scott Hancock with the support of other distinguished Civil War veterans such

\begin{figure}[h]
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\caption{The improbable reformer. Cadet Arthur L. Wagner with kepi set at a rakish angle. (Wagner Cullum File, USMA)}
\end{figure}

\textsuperscript{77} Ibid., 7-11.

\textsuperscript{78} Arthur L. Wagner to Adjutant General, 8 July 1886, 2908-ACP-1882, RG 94, NARA I [hereafter “Wagner ACP”].

\textsuperscript{79} Alexander M. McCook to Adjutant General, 3 October 1886, Wagner ACP.
as William T. Sherman and John M. Schofield. The JMSI partly compensated for the geographic dispersion of officers by providing a professional forum for the exchange of ideas. This was seen in the case of Wagner, who despite his professional isolation in Florida, won the institution’s Gold Medal prize in 1884 for the best essay, “The Military Necessities of the United States, and the Best Provisions for Meeting Them.” Both the prize essay and a second article, “The Military and Naval Policy of the United States,” published in 1886, reflected what his biographer described as Wagner’s “Uptonian leanings.” Indeed, the second article had “a format and thesis nearly identical to Emory Upton’s Military Policy of the United States.”

Luckily for Wagner, this professional emergence coincided with McCook’s efforts to improve the instruction at Fort Leavenworth. The new commandant recognized that Wagner’s “attainments, experience as an instructor and his studious habits” made him “especially well fitted for an instructor in the Art of War.” The War Department denied the transfer, undoubtedly recognizing that because Wagner served in McCook’s Sixth

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80 Weigley, History, 274; Coffman, Old Army, 277.
81 Brereton, Educating the U.S. Army, 8-10.
82 Ibid., 19, 20. Historian Russell Weigley has similarly characterized these early writings as “familiarly Uptonian.” In his biography of Wagner, T.R. Brereton sought to distinguish Wagner’s thought from Upton’s as understood in the historiography: anti-democratic and politically naïve. Brereton differentiated Wagner’s “pragmatic spirit” in civil-military relations (p. 10) from Upton’s preference for “militarism over democracy” (p. 20), while admitting that Wagner “shared several of Upton’s opinions” (p. 20) on Army organization and military professionalism. Yet as demonstrated by David Fitzpatrick, Upton was by no means a militarist bent on reducing democracy. Thus, Brereton’s distinction between Upton and Wagner was based on a mischaracterization of Upton. There was, in fact, little difference between the military policy proposals of Upton and Wagner. Russell F. Weigley, Towards an American Army: Military Thought from Washington to Marshall (New York: Columbia University Press, 1962), 145; David J. Fitzpatrick, “Emory Upton and the Citizen Soldier,” Journal of Military History 65 (Apr., 2001): 355-389.
83 Alexander M. McCook to Adjutant General, 3 October 1886, Wagner ACP.
Infantry, the colonel could simply transfer the lieutenant to a company assigned to the Fort Leavenworth garrison. This was, in fact, how Wagner came to the school.84

As an instructor, Wagner authored several tactical textbooks to replace the European works in use when he arrived at Fort Leavenworth.85 These books were the foundation of his reputation as the Army’s chief tactician. Already the author of a book on the battle of Königgrätz, Wagner was given a year of official leave by Commanding General John M. Schofield to write his textbooks in 1892.86 Although the year was not enough time to complete both works, he did finish the first book, The Service of Security and Information, which was published in 1893. The following year, the manuscript of the second book, Organization and Tactics, was sufficiently complete for use at the school before its publication in 1895. Together the two textbooks would go through twenty-one editions and six revisions, and serve as the basis for Fort Leavenworth

84 Brereton, Educating the U.S. Army, 12.

85 Differences between American and European organization, terminology, and terrain were all sufficient reasons to desire an indigenous textbook, but national pride also played a role. This desire to assert the achievements of the American profession of arms was evident in a recommendation written by Lieutenant Colonel George W. Davis, who wrote that Wagner “had profited to the fullest extent by our own military experience, and has done much to make known to the world the brilliant work done by American soldiers on American soil.” Wagner was not above such nativism either. His first book, The Campaign of Königgrätz, compared the Prussian and Union armies and found the latter generally superior. In the introduction, Wagner expressed his frustration that “European critics have generally been loth [sic] to acknowledge the military excellence displayed during the War of Secession.” Even worse were the “small class” of American officers willing to “bestow all possible admiration upon the military operations in recent European wars, not because they were excellent, but because they were European; and to belittle the operations in our own war, not because they were not excellent, but because they were American.” Regardless of European perceptions of the contending armies of the Civil War, one British military journal favorably reviewed Königgrätz: “If the American Army of to-day contains a large proportion of officers as zealous and well-informed in their profession as Lieutenant Wagner . . . the United States may depend with confidence upon her Army in any struggle.” George W. Davis to Adjutant General, 16 June 1896, Wagner ACP; Arthur L. Wagner, The Campaign of Königgrätz, a Study of the Austro-Prussian Conflict in the Light of the American Civil War, 1st ed. (Fort Leavenworth, Kan.: U.S. Cavalry Assn., 1889), 3, 4; Extract from editorial comments, Army and Navy Gazette, 12 April 1890, Wagner ACP.

86 John M. Schofield to Arthur L. Wagner, 18 April 1892, Wagner ACP; Brereton, Educating the U.S. Army, 40-42.

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instruction for well over a decade.\textsuperscript{87} They were also part of the corpus of knowledge tested in promotion examinations until 1905.\textsuperscript{88} This put Wagner’s book on par with the army’s official regulations, and made them familiar to every officer of the line commissioned in the last two decades of the nineteenth century. Following the Spanish-American War of 1898, they were once again used in the basic education of all new lieutenants as well as at the more advanced service schools like Fort Leavenworth.\textsuperscript{89} Thus, it was no exaggeration when one of his friends claimed that “Wagner’s books became as familiar as the drill book.”\textsuperscript{90}

In content, Wagner’s textbooks were a continuation of Uptonian orthodoxies. He acknowledged the “improvements in range and destructive effect of firearms,” and sought to counter them through the use of dispersed skirmishers to weaken the enemy through fire before a climatic bayonet assault by conventional, dense formations.\textsuperscript{91} Wagner’s books were also suffused with the Uptonian conviction that careful preparation was the hallmark of military professionalism. Wagner conceded that war was “the best school” for learning tactics, but maintained that in peace an officer “must attentively consider the recorded experience of those who have learned war from the actual reality.”\textsuperscript{92} Once war began, he stressed the need for the same careful preparation that had characterized Upton’s actions during the Civil War. In fact, one of Upton’s

\textsuperscript{87} Ibid., 41
\textsuperscript{88} War Department Circulars Number 42, 1904, and Number 50, 1905.
\textsuperscript{89} War Department General Order Number 64, 1 July 1902, and Number 102, 22 September 1902.
\textsuperscript{90} Eben Swift, ”An American Pioneer in the Cause of Military Education,” \textit{JMSI} 44 (Jan.-Feb., 1909): 71.
\textsuperscript{92} Ibid., viii.
consistent criticisms of Civil War generals was their consistent failure to conduct adequate reconnaissance, which was nearly the entire subject of Wagner’s *The Service of Security and Information*.  

In 1894, Captain Wagner became the chief tactics instructor and was nearly finished with *Organization and Tactics*. Deeming this a sufficient intellectual foundation for the school, he hoped to “go out of the old groove somewhat” by improving the methods of instruction. To that end, he brought Lieutenant Eben Swift to Fort Leavenworth to make the school more “practical.”  

Although Swift was a cavalryman, the two had been acquaintances since their time as cadets two decades before; in fact, Swift had been one of the attendees at Wagner’s illicit celebration the night before his graduation. Like Wagner, Swift’s professional views bore Upton’s imprint. In his memoirs, Swift recalled his first military training as a West Point cadet. The second-year cadets, Wagner’s class of 1875, served as the instructors for the new arrivals. Before the drill commenced, Upton addressed the cadet instructors, telling them that “a man who could drill one man could drill a brigade.” Decades later, when Swift was a director of the Army War College—the Army’s most advanced school—he recalled Upton’s words before telling the captains and majors of the class that if they could give an order to a patrol, they could give an order to an army corps.  

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93 For instance, in the summer of 1864, Upton wrote: “I am very sorry to say I have seen but little generalship during the campaign. Some of our corps commanders are not fit to be corporals. Lazy and indolent, they will not even ride along their lines; yet, without hesitancy, they will order us to attack the enemy, no matter what their position or numbers. Twenty thousand of our killed and wounded should to-day be in our ranks.” Upton to “My Dear Sister,” 5 June 1864, in Michie, *Letters of Emory Upton*, 109.

94 Arthur L. Wagner to Eben Swift, 15 August 1893, Box 1, Swift Papers, USMA.

95 For a brief synopsis of Swift’s career, see Appendix.

96 Swift, “Personal Memoirs”, 25, and “Army War College, 1908-9: Course in Military Art, Verbal and Dictated Orders,” Box 3, Swift Papers, USMA.
capacity for dogmatism, the incident nevertheless illustrates the power of these early experiences. After more than three decades of service, he was still at least partly guided by the model he learned on the very first day of his military service, despite the utter dissimilarity between the settings, the students, and the tasks.

Although military progressives shared formative experiences, they nonetheless interpreted these in their own ways. In the case of Wagner and Swift, their long friendship and similar backgrounds masked fundamental differences in their understanding of the military profession. Because Wagner gave Swift great latitude in his work on tactical instruction, the divergence between the two quickly became apparent. Swift’s initial efforts in the fall of 1893 required the students to establish a line of outposts manned by troops drawn from the garrison. He claimed that the exercise was “a study of tactics and strategy,” but in reality a cordon line manned by several dozen troops was far from the realm of strategy, which even at the time was understood as the preserve of generals. Instead, Swift was teaching low-level tactics that were entirely appropriate for subalterns. Yet Swift was disappointed in the results of his first “attempt to bridge the chasm between practice and theory.” Wishing to take advantage of the fall weather, the field problem was scheduled so early in the school year that there had been little time for classroom preparation. Swift realized that he had attempted too much, too soon. As a result, “the troops were not instructed, indifferent and always tired. The

97 Eben Swift, “Fort Leavenworth 1893-7”, 1.

98 “Field Exercises with Troops Commenced October Ninth and Ended November Tenth, 1893,” n.d. [1893], Box 6, Swift Papers, USMA.
officers were confused and hampered by the task of teaching too many things at a time.”

Swift resolved to develop an intermediate link between the classroom familiarization with regulations and textbooks, and field practice with troops. The task was made much harder by the crude pedagogical methods used at the time. Much of the classroom work was based on the system of recitation used for decades at West Point. Colloquially known as “cramming” or “booking,” students stood at attention next to their assigned blackboards, ready to answer questions about the content of the assigned reading. This system effectively produced officers who could recount “the substance of every paragraph, in the order in which it was printed.” Yet Swift observed that “the knowledge so obtained is deceptive. It develops the memory and not the judgment. . . . Information so easily acquired oozes away as rapidly as it came, and the prime object of keeping in touch with your profession at all times is defeated.” Well-suited to simple, quantifiable problems, the technique was often discouragingly adversarial. When a West Point cadet of the 1880s asked his instructor for assistance, the officer responded, “I am not here to give assistance to cadets, but to find out what they do not know.” In Swift’s opinion, recitations gave “no chance for elaboration, explanation, or for a community of thought.” These methods were, in fact, counterproductive, as they “seldom appeal to the student, do not enlist his enthusiasm, do not arouse him at all.” Thus, it was not

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100 Ibid., 3


103 Eben Swift, “Necessity of Study of Military Subjects,” n.d. [1906-1910], Box 5, Swift Papers, USMA.
surprising that Captain Charles Rhodes observed that too many of his fellow West
Pointers were “wont to drop all serious study after leaving their alma mater, and settle
down into a rut of mental indolence.” The same methods at Fort Leavenworth were
unlikely to produce a different outcome.

Swift’s solution was the “applicatory system” modeled on European, particularly
German, methods of military education. In a typical lesson, the students solved a tactical
problem by writing an order just as they would issue in an actual campaign. In the
subsequent discussion, the instructor would lead the class through a critique of the
various solutions. As the course progressed, the students were given the opportunity to
competitively play out their solutions in Kriegspiel (wargame), or to solve similar
problems outdoors in the countryside surrounding the fort. These tactical problems,
wargames, and “terrain rides” were far superior to recitations, as students had to
creatively apply principles to specific problems. The applicatory method also honed the
practical skill of expressing their intentions in the form of orders. Only after extensive
preparation would the instruction progress to exercises with troops like those that Swift
had attempted in his first few weeks. He took great pride in his methods, and felt that
Wagner did not give them a sufficient share in the curriculum. In his memoirs, Swift
blamed this on his superior’s preoccupation with “his literary work,” which led Wagner
to devote too much time to recitations from his textbooks. Swift believed that Wagner
was never “entirely freed from his preconceived ideas [of education]” and never grasped
the potential of the applicatory system. Despite their friendship, Swift hinted that

Wagner was indeed nothing more than a “book soldier,” a persistent charge that infuriated Wagner. Swift later wrote that because Wagner’s “brilliant attainments were entirely literary and not in practical military matters,” he remained wed to the use of recitations from his own textbooks.106

Whatever the merits of Swift’s harsh judgment, there is no indication in his voluminous writings that he ever realized the divide between him and Wagner went deeper than questions of pedagogical method. The two officers had fundamentally different aspirations for the school. Swift was content with the limited scope of company-grade duties; Wagner wanted a grander institution akin to the war academies of Europe. Before departing for duty in Washington in 1896, Wagner proudly claimed that the “curriculum of the Infantry and Cavalry School is not widely different from the War College at Berlin.”107 Swift, however, believed this was the wrong model to follow: “There was still too much military policy and institutions, strategy, grand tactics, logistics and military geography. It looked like a study of the University-Course before the primer had been mastered.”108 The competing views of Swift and Wagner were reminiscent of the proposals for service schools offered by Pope and Upton two decades earlier. The ambitious goal of the latter was ascendant in 1896, but only because Wagner was superior in rank to Swift. The competing notions of what constituted proper military education remained unresolved within the military progressive ranks.


107 Eben Swift, “Fort Leavenworth 1893-7,” 3.

108 Ibid., 2.
In 1897, this issue was briefly highlighted in the Army’s premier professional forum. That year’s *JMSI* prize essay topic was “The Proper Military Instruction for Our Officers.” Swift submitted an essay describing how the applicatory system might be used outside of the professional schools, but it received only an honorable mention.\(^\text{109}\) Captain James Pettit won the gold prize with an essay that was highly critical of the Infantry and Cavalry School. Pettit claimed that Fort Leavenworth emphasized the theoretical aspects of high command at the expense of the practical preparation of lieutenants for their immediate duties.\(^\text{110}\) This critique identified the dissonance between the stated purpose of the school and its actual curriculum. Pettit reasonably argued that “if [Fort Leavenworth] is to become a *War College* then the qualifications, age, rank, knowledge [etc.] of the students must be changed.”\(^\text{111}\) This opportunity for a reasoned discussion of the proper purposes and scope of professional education was squandered when Wagner responded to Pettit’s essay with a sarcastic, defensive public reply that drew a counter response from Pettit that was published in the May 1898 issue of the *JMSI*. By that time the matter had become academic, as all the Army’s schools had suspended classes due to the Spanish-American War.\(^\text{112}\) Wagner’s thin skin and the war combined to preclude a potentially fruitful synthesis of ideas.


\(^{111}\) James S. Pettit to Eben Swift, 10 March 1897, Box 1, Swift Papers, USMA.

\(^{112}\) Nenninger, *Leavenworth Schools*, 53.
Despite these disagreements among military progressives, the Infantry and Cavalry School was one of the new influences that brought the “long 1880s” to a close. Officers from around the army increasingly sought the faculty’s expertise in training.\textsuperscript{113} The school also afforded opportunities for study that were simply not available to officers serving at the average frontier garrison. “Having for the first time in my army career access to a fine military library,” one instructor reported in 1894, “I have dropped all side issues and devoted myself to an endeavor to absorb some of the professional information at hand here.”\textsuperscript{114} The school’s enhanced reputation began to draw smart, ambitious officers, whose attendance further raised the stature of the school.\textsuperscript{115} Most importantly, the interchange of students and faculty reduced the barriers between regiments and the arms of service.\textsuperscript{116} Yet Fort Leavenworth graduated only forty lieutenants every two years, so this integration was a slow process. On balance, the school contributed to the military progressive aim of professionalization despite its imperfections and contradictions. With Wagner’s transfer to the Adjutant General’s Department in 1896 and Swift’s assignment as an advisor to the Illinois National Guard the following year, the school might have continued in much the same way if left undisturbed.\textsuperscript{117}

\textsuperscript{113} For example, see John M. Jenkins to Eben Swift, 5 June 1894, and Johnathan R. Finley to Swift, 20 September 1894, Box 1, Swift Papers, USMA.

\textsuperscript{114} William H. Carter, Individual Service Report, 10 January 1894, 3543-ACP-1878, RG 94, NARA I.

\textsuperscript{115} Nenninger, \textit{Leavenworth Schools}, 48.

\textsuperscript{116} The desirability of these exchanges was noted in an 1891 memorandum outlining the procedures for the new school for cavalry and light artillery at Fort Riley. “As every regiment has an internal administration of its own founded on traditions and customs of the regiment greater uniformity in the arm will be the result of a two years association together of a greater number of detachments.” Edward B. Williston, Memorandum on Proposed School Regulations, n.d. [1891], Tasker H. Bliss Papers, USMA.

\textsuperscript{117} Adjutant General’s Office, \textit{Official Army Register: 1898} (Washington: GPO, 1898), 8; Eben Swift, “Illinois National Guard and U.S. Volunteers in Spanish-American War, February 19, 1897-May 2, 1899,” Box 7, Swift Papers, USMA.
The Spanish-American War, however, dramatically changed the trajectory of the school and the U.S. Army. In 1898, the United States was ill-prepared to mobilize for an expeditionary campaign, as the War Department had no agency expressly charged with war planning or coordinating the efforts of the staff bureaus. By default, these tasks fell to the Adjutant General's office, which was responsible for issuing orders to the Army's many units. Throughout the war, President William McKinley relied on the competent Adjutant General, Henry C. Corbin, at the expense of both Secretary of War Russell Alger and Commanding General Nelson A. Miles. An important element of the Adjutant General's office was the Military Information Division (MID), the Army's nascent intelligence service headed by Major Wagner. With his access to the information collected by MID and reputation as the officer who had literally written the book on tactics, Wagner was a logical choice to serve as the army representative on the two-man committee coordinating all "matters of offense and defense" involving both the Army and Navy. Within the Adjutant General's office, Wagner and two other officers were the chief planners for army operations. Their proposal for the invasion of Cuba relied chiefly upon regulars, who would be supplemented by a moderate-sized force of volunteers trained for several months before any operations were attempted. This deliberate pace reflected both the regulars' distrust of poorly-trained volunteers—such as

118 Beaver, *Modernizing the War Department*, 29-30.
120 Brereton, *Educating the U.S. Army*, 67-68.
121 Henry C. Corbin to Arthur L. Wagner, 29 March 1898, Wagner ACP.
those that Upton saw defeated at First Manassas—and the belief that no invasion would be possible until the fall, when the yellow fever season would have safely passed.¹²³

This plan fell victim to the same sort of political influences that had infuriated Upton during the Civil War. President McKinley chose to accept more than twice the number of volunteers requested by the War Department rather than alienate governors and other politicians by not accepting units from their states. With Americans in a general frenzy for a war widely expected to be short and glorious, few wanted to be left out of the action.¹²⁴ Theoretically, many of the units being mustered into service were National Guard units already equipped and trained, but in actuality almost every National Guard unit required some additional equipment and some had to be virtually reequipped. The demands of equipping this vast array quickly overwhelmed the War Department’s supply bureaus.¹²⁵ Also, the military proficiency of these units varied greatly. This disparity was made worse by the large number of Guardsmen who refused to be mustered into federal service, which meant that many units were composed largely of new recruits. Some regiments even recruited from the onlookers cheering the trains on their way to the training camps.¹²⁶ With so many untrained units, regular officers were spread thin mustering, organizing, and drilling the new regiments. This was exacerbated by the congressional authorization for a small increase of the regular army


¹²⁴ The decision to mobilize so many volunteers was partly to win the National Guard Association’s assent to other pending legislation. Also, former Commanding General of the Army John M. Schofield urged McKinley not to repeat the mistake of Abraham Lincoln in April 1861, when he called out only 75,000 volunteers for a mere three months, a force too small to end the Southern rebellion immediately. Cosmas, *Army for Empire*, 99-100.

¹²⁵ Ibid., 101.

and the creation of several temporary federal volunteer units, which siphoned off still more officers. These resulting vacancies drew so many petitioners eager for a commission to the War Department that Secretary of War Alger and Adjutant General Corbin found they could only work profitably at night.\(^{127}\)

This confusion was precisely what Upton had hoped to avoid with the National Volunteers. The units and officers to be mobilized in an emergency would have already been identified, allowing the War Department to concentrate on preparing plans for war, rather than attending to the formation of units. It would also have prevented the regular army units from being stripped of many of their best officers on the verge of war. Such considerations were deemed inconsequential by civilian politicians, who were more concerned with building political support and reaping the benefits of the war. Chief among these politicians was President William McKinley who, as one of Wagner’s peers in the Adjutant General’s office noted, had been one of the 1861 volunteers “ignorant of the military profession, as were most of the men on both sides in the Civil War. He emerged from the war as a major, and simply did not have any fear of disorganizing the army by appointments of men no more ignorant of war than he had been.”\(^{128}\) Neither were the political commissions limited to the lower grades. McKinley made Congressman Joseph Wheeler and several other Confederate veterans general officers in an effort to gain support from southern Democrats. In his first action in Cuba, the sixty-


two-year-old Wheeler reportedly urged his soldiers to pursue the retreating Spaniards by yelling, “We’ve got the damn Yankees on the run!”\textsuperscript{129}

Yet not all difficulties were a result of external political influences. Perhaps the most damning indictment of the regular army’s senior officers was that they possessed only marginally better qualifications for high command than Wheeler. In the dispersed army of the late nineteenth century, field grade officers (majors, lieutenant colonels, and colonels) were largely confined to administrative duties, particularly while serving away from the frontier. Major General William R. Shafter, the commander of the Fifth Army Corps, had been a brevet brigadier general at the end of the Civil War, but, other than a brief civilian interlude in the late 1860s, had served in the less demanding grades of lieutenant colonel or colonel until 1897. Like nearly all the former Civil War volunteers, he had no formal professional education of any kind. Furthermore, Shafter suffered from gout and weighed over three hundred pounds; his poor physical condition prevented him from taking an active role in directing the campaign.\textsuperscript{130} Wheeler—a year younger than Shafter—was at least sprightly for his age.

The War Department organization and leadership were also found wanting. The lack of an organization to coordinate the staff bureaus was evident in the numerous bottlenecks resulting from the failure to coordinate the procurement, transportation, and distribution of supplies.\textsuperscript{131} These difficulties were greatly compounded by the decision to concentrate Shafter’s corps at Tampa rather than a larger port with better loading.

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\textsuperscript{129} Trask, \textit{War with Spain}, 157, 221.
\textsuperscript{130} Cosmas, \textit{Army for Empire}, 188-189.
\textsuperscript{131} Beaver, \textit{Modernizing the War Department}, 30.
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facilities and greater rail capacity. One well-placed staff officer later commented, “When the administrative methods, under which we were forced to carry on the war with Spain had become familiar to me, I was surprised that so much was accomplished under a system so defective.”

The course of events contributed to the difficulties. Shortly after the declaration of war, a reinforcing Spanish flotilla unexpectedly appeared and took shelter in the port of Santiago de Cuba, where it was blockaded by an American fleet. In response to the Navy’s urging, McKinley ordered Shafter’s army corps to Cuba in order to seize Santiago, thereby capturing the Spanish fleet or driving it into the waiting guns of the Navy. As no invasion had been contemplated until the fall, McKinley’s June order caught Shafter completely unaware and with only enough shipping to carry slightly more than half of his 25,000 soldiers. The general and his ad hoc staff were unable to control the embarkation, and an unseemly rush for the ships ensued. Units commanded by officers with sufficient rank, alacrity, or bluster commandeered ships and displaced their intended passengers. Cargo was loaded quickly and without reference to what would be needed most urgently in Cuba. When the Fifth Army Corps arrived in Cuba on 22 June, the landing was slow and the troops suffered from shortages of necessary supplies and

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132 Trask, *War with Spain*, 182-185. Adjutant General Henry C. Corbin believed that Alger had selected Tampa as the concentration point for the Cuban invasion due to his friendship with Morton F. Plant, the owner of the sole railway servicing the port. Corbin described Tampa as the “very worst place one could have assembled this force.” Other Florida business interests also had influence with both Alger and General Nelson A. Miles, who was suspected of accepting bribes in exchange for designating certain locations as troop concentration points. Ronald J. Barr, *The Progressive Army: US Army Command and Administration, 1870-1914* (New York: St. Martin's Press, 1998), 32-33.


134 Trask, *War with Spain*, 162-177.
equipment. Only the lack of Spanish opposition allowed the Americans to muddle their way through. 135

One of those coming over the beach was the recently-promoted Lieutenant Colonel Wagner. Fearful of missing the fighting, the army’s foremost tactical expert convinced General Miles to designate him as the head of a Bureau of Military Intelligence in the field. Shafter initially welcomed Wagner, but as they neared Cuba the general became suspicious that Wagner might be a War Department spy, and effectively stripped Wagner of his duties. Unwilling to have come so far only to be relegated to the role of passive observer, Wagner offered his services to Brigadier General Henry W. Lawton, commander of the Second Division. Lawton accepted Wagner as his chief of reconnaissance. 136 In the meantime, the Americans advanced inland towards Santiago. On 1 July, the infantry division of Jacob F. Kent and the dismounted cavalry division of Wheeler attacked San Juan and Kettle Hills, while Lawton assaulted a strong Spanish position at El Caney several miles away. Lawton later recommended Wagner for a brevet promotion in recognition of his “courage and enterprise in voluntarily reconnoitering” the Spanish positions the night before the attack and his services during the battle the next day. 137 Despite his marginal role in the Santiago campaign, which was certainly a personal disappointment, Wagner had witnessed the war from several critical vantages. He began at the War Department during the early mobilization and planning, and then went to Cuba with Shafter’s corps staff for the embarkation and landing, before finally

135 Cosmas, Army for Empire, 190-193; Trask, War with Spain, 185-186.
137 Henry Lawton recommendation, 28 November 1898, Wagner ACP.
ending with Lawton’s division during the culminating battles. Perhaps recognizing this unusual breadth of experience, General Miles requested that Wagner write a report on the operations in Cuba.138

In his report, which was later published by a commercial press, Wagner commended the soldiers and junior officers for their competence and valor, but was critical of the American generals. At the lowest levels, the assaults had used extended order, which was essentially the skirmish line of Upton’s tactics.139 In Wagner’s opinion, the heavy casualties were due to the poor performance of the senior commanders of the brigades, divisions, and army corps, who conducted virtually no reconnaissance, and then did little to coordinate the efforts of their subordinate units. Because of these failures, Shafter’s plan for Lawton to flank the Spanish position to ease the drive of Kent and Wheeler into Santiago degenerated into an uncoordinated frontal assault at both locations. “Though successful,” Wagner conceded, the victory was nonetheless “obtained at a cost of life that could have been easily avoided with more skillful tactical arrangements.”140 Wagner identified the “inefficiency” of the artillery as another critical American weakness in Cuba; this opinion reflected the consensus throughout the army. William Lassiter, an artillery lieutenant at San Juan, remembered the battle as “a very humiliating experience” for the artillery.141 At El Caney, the battery with Lawton’s

138 Brereton, Educating the U.S. Army, 81-83.

139 Jamieson, Crossing the Deadly Ground, 146-148; Cosmas, Army for Empire, 214.


division failed to reduce a Spanish outpost, even after several hours of shelling and the absence of enemy artillery. Farther to the south, the three batteries—eighteen guns—supporting the main assault against San Juan and Kettle Hills were unable to silence the two Spanish guns, which exacted a heavy punishment on the American infantry as they formed for the assault.142

Wagner attributed this failure entirely to the disparity between the obsolete American cannon using black powder and the modern Spanish weapons using smokeless powder.143 While this was a significant disadvantage, other factors also contributed to the gunners’ poor performance. First, Shafter and his staff were no more capable of integrating the artillery into the maneuvers than they were of coordinating the efforts of the three divisions. The same failure to perform adequate reconnaissance before the battle precluded any systematic coordination of infantry and artillery. As a result, the artillery received no useful direction as to how it might best support the assault.144 Yet even if the guns had been modern and Shafter more capable, the artillerymen might not have performed much better. Afterward, Lassiter recognized that the artillery had done nothing to improve upon the obsolete methods of the Civil War. Even in the elite light batteries, officers had been content with unrealistic drill. “How we were to meet the varied requirements of the battle field never entered our heads.”145 This problem was not limited to a few batteries, but was endemic across the light artillery. Several years later, when Lassiter was assigned to a board revising the artillery drill regulations, the

142 Trask, War with Spain, 235-245.
143 Wagner, Santiago Campaign, 116-121.
145 Ibid., I:55-65.
group decided that the old manual needed to be completely replaced, rather than simply updated. The old regulations were “made up almost entirely of drill ground minutiae, but telling practically nothing about the technique to be employed to bring the fire of guns upon a target or of the tactics to be employed in getting guns into the best position for action.”\textsuperscript{146} Not surprisingly, this official preoccupation was reflected in the manner that units trained, which focused on precision movements impossible anywhere other than the flat parade ground. During his year with the battery prior to the war, Lassiter’s unit had never taken advantage of the plentiful open areas near their central Texas post to train under realistic conditions.\textsuperscript{147} This was by no means unusual. The garrison of Fort Sheridan, Illinois, was unusually large and diverse for the 1890s, with a regiment of infantry, two troops of cavalry, and a battery of light artillery. Yet in his four years at the post, one officer could not recall a single tactical exercise in which the three arms operated together. “There was practically no team play among the three arms,” he wrote. “Each arm drilled separately and, in fact, each played “solitaire” all by itself.”\textsuperscript{148} Rather than training with the other arms, the artillery glorified the dash and autonomy of the horse artillerymen. In his annual report for 1895, the artillery director of the Light Artillery and Cavalry School identified youth, activity, and “a natural fondness for horses” as the primary attributes of a good light artilleryman. He made no mention of tactical skill or technical knowledge.\textsuperscript{149}

\textsuperscript{146} Ibid., II:8-14 (quotation on 9).

\textsuperscript{147} Lassiter, "Memoirs," I:63-64.

\textsuperscript{148} Holley and Palmer, \textit{General John M. Palmer}, 65.

\textsuperscript{149} W.J. Randolph, in \textit{Annual Report of the Light Artillery and Cavalry School}, 20 December 1895, Box 13, Swift Papers, USMA.
Thus, the poor performance in Cuba reflected the professional atomization that provided generals with few opportunities to command, isolated the arms and staff bureaus from each other, and even bred a proud insularity within regiments. Despite its sometimes crippling centralization of administrative matters, the War Department had few effective means of ensuring professional standards and providing tactical direction. Historian Graham Cosmas’s description of the army as “a large collection of companies, battalions, regiments, and batteries,” perfectly captures the effect of the professional dispersion of the nineteenth-century army.150

At the end of the Santiago campaign, Wagner fell ill with malaria, but he recovered in time to serve on General Miles’s staff during the invasion of Puerto Rico later that summer. Following the peace, Wagner was assigned as the adjutant general for the Department of Dakota. This duty allowed him to write his history of the Santiago campaign. Late in 1899, he was assigned to the staff of General John C. Bates, then commanding a division in the northern Philippines. Wagner served in Manila until the summer of 1902, when poor health forced his return to the United States.151 For the next three years, Wagner was busy with several transfers, promotion to colonel, and eventually selection for the War Department General Staff. Yet his activities during this period were nearly all concerned with correcting the deficiencies in command and tactics that he had seen in Cuba. Indeed, this was a continuation of his earlier work at Fort Leavenworth, but on a far grander scale. Wagner’s career had finally caught up to his ambitions; at last he could address the subjects of high-level tactics and generalship that

150 Cosmas, Army for Empire, 9.
151 Brereton, Educating the U.S. Army, 80, 88-90.
Swift and Pettit had criticized as inappropriate for lieutenants at Fort Leavenworth in the 1890s.

American officers were familiar with the European practice of grand maneuvers through detailed accounts in professional journals and the reports of officers occasionally dispatched to observe them. Yet nineteenth-century conditions did not favor the import of this practice. Even routine frontier service was sufficiently strenuous to make the manufacture of artificial “hardening” unnecessary. Furthermore, geographic dispersion made the transportation costs for large concentrations of troops prohibitive at a time when Congress was intent on reducing costs, particularly in the absence of any credible threat that might require such a costly innovation. Nevertheless, several generals commanding territorial departments experimented with maneuvers on a small scale. The early efforts in the 1880s stimulated enough interest that by 1890 attempts to simulate the conditions of a campaign were increasingly common. One officer, who had participated in the first large-scale maneuvers at Chilocco Creek, later wrote to a friend: “The war of ’89 [the Chilocco Creek maneuvers] in spite of all its defects seems to have furnished inspiration for a lot of good work in various places.” In the 1890s, the Fort

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152 For examples of these detailed reports, see Carl Reichmann, *The Austro-Hungarian Manoeuvres in the Fall of 1893* (Fort Leavenworth: U.S. Infantry and Cavalry School, 1894), and T. Bentley Mott, “French Autumn Maneuvers,” *JMSI* 29 (Sep. 1901): 228-245.

153 Walter S. Schuyler to Eben Swift, 5 March 1896, Box 1, Swift Papers, USMA. Generals Nelson A. Miles and Wesley Merritt both conducted training within their commands in the late 1880s. Miles’s “maneuvers” were actually arduous training in frontier skills such as fieldcraft and tracking. While suited to the immediate concerns of the Department of Arizona, the exercise did nothing to condition the different arms to work together or prepare the staff to control large units. Charles D. McKenna, "The Forgotten Reform: Field Maneuvers in the Development of the United States Army, 1902-1920," (Ph.D. diss., Duke University, 1981), 19. In contrast, Merritt’s 1889 maneuvers at Chilocco Creek, Indian Territory, brought together three regiments for more conventional operations. Two participants in these maneuvers would go on to play a great role in refining and expanding this type of training in later years. J. Franklin Bell, *Reflections and Suggestions, an Address by General J. Franklin Bell* (Fort Leavenworth, Kan.: Staff College Press, 1906), 1-2; Swift, "Personal Memoirs," 99-100. Such efforts were not restricted to the frontier. That same year,
Leavenworth faculty, in conjunction with the Cavalry and Light Artillery School at Fort Riley, began to systematically refine the rules, methods, and techniques necessary to make such exercises useful.\(^{154}\) At the same time, the disappearance of the frontier hastened the effort, as field service was less common, garrisons larger, and improved transportation infrastructure made concentrating troops easier and cheaper. In addition to these practical concerns, the days of the frontier constabulary were clearly coming to an end, and the army began preparing for a European-style foe, almost by default.\(^{155}\) The Spanish-American War provided the final impetus towards maneuvers by making it clear that generals and staffs required training before war. In 1899, Secretary of War Elihu Root identified “the exercise and training of the officers and men of the Army in the movements of large bodies of troops . . . under conditions approaching as nearly as possible those to be anticipated in executing the plans devised for their action in war” as a necessity for senior officers and their staffs. His reasoning was simple: “Officers who have never seen a corps, division, or brigade organized and on the march can not [sic] be expected to perform perfectly the duties required of them when war comes.”\(^{156}\)

It was not until 1902, however, that the first significant experiment took place at Fort Riley. Wagner directed these maneuvers under the supervision of General John C. Bates. The trial was such a success that Wagner directed an even larger version again the following year, as well as serving as the director for a similar exercise at West Point,

\(^{154}\) McKenna, “The Forgotten Reform,” 21-22.


\(^{156}\) *WDAR* (1899), Elihu Root, Report of the Secretary of War, 1: 48-49.
Kentucky, that same summer.\textsuperscript{157} In 1904, the exercises grew yet again. Wagner conducted a camp at Athens, Ohio, which included a regular regiment and six thousand National Guardsmen, but the biggest event of the year was the maneuver camp at Manassas, Virginia. Although the general commanding the Department of the East, General Henry C. Corbin, wanted the maneuvers to be run completely without umpires, the army chief of staff, General Adna R. Chaffee, insisted that umpires be used. Wagner’s reputation as the “Master of the Art of Maneuvers” and his position on the General Staff made him the logical selection to be the chief umpire of the largest and most expensive maneuvers to that time. The Manassas maneuvers cost more than a million dollars and included over 5,000 regulars and 21,000 Guardsmen.\textsuperscript{158}

Throughout these early years, most maneuvers followed the pattern used by Wagner at Fort Riley in 1902. The participating troops were split into two armies, each receiving a series of orders designed to create a specific situation, such as a rear-guard action, an attack on a convoy, or the assault of a prepared position. General Arthur MacArthur likely overstated the case when he claimed that a 1906 training camp


\textsuperscript{158} \textit{WDAR} (1904), William H. Taft, Report of the Secretary of War, 1: 36-37. For Wagner’s reputation see, Ulysses G. McAlexander, “Remarks on Maneuvers, Mainly for the Use of Company Officers of Infantry,” \textit{JMSI} 37 (Sep.-Oct., 1905): 266.
“simulated all the conditions of war except its tragedy,” but that was certainly the objective. Officers designated as “umpires” were responsible for making the maneuvers as realistic as possible. Following each “battle,” the chief umpire would bring all the officers together to review the plans, decisions, and conduct of each side, bringing out points for improvement throughout the discussion. Umpires often supplemented the field training with lectures on pertinent subjects, particularly for the National Guard units. According to a 1905 JMSI article, a chief umpire should be “one of the most capable of officers, particularly as a tactician,” as well as “free from bias, tactful, dignified, resourceful, and [someone] who possesses a mentality broad enough to cover all the heterogeneous elements with which he will have to deal, yet with courage to state conditions as they are found or are developed.” Thus the qualities required of an umpire were quite similar to those that Wagner had developed as an instructor at the Infantry and Cavalry School. The chief differences were the scale of the problem and the diversity of the audience.

This latter aspect was one of the greatest advantages of maneuvers, as Wagner’s direct influence was no longer limited to officers of the regular army, who were already familiar with his books from professional schools and promotion examinations, but was extended to enlisted soldiers and National Guardsmen. In fact, many proponents of maneuvers regarded these groups as the primary beneficiaries of such training. One officer urged that each regular unit should participate in maneuvers at least once every 

159 MacArthur quoted in McAlexander, "Remarks on Maneuvers," 266.
160 Wagner, "The Fort Riley Maneuvers," 70-75.
three years, so that every soldier would experience this training during his enlistment.\textsuperscript{162} This statement, although not one of official policy, signified a growing acceptance that enlisted soldiers required more than drill and marksmanship training. In 1906, the commandant of Fort Leavenworth told the students that one of the characteristics of “modern military thought” was the recognition of the desirability of cultivating the “soldier’s intelligence and faculties as an individual.”\textsuperscript{163} Yet some thought the chief benefit of field training was the development of tactical proficiency among small-unit leaders, particularly junior officers. This was precisely why Upton had required the Artillery School students to engage in the small unit “force-on-force” training that was quite similar to the twentieth-century maneuvers in everything but scale. Still others viewed the camps as a mechanism for achieving Secretary of War Root’s charge to the regulars to apply “their military skill and experience to the preparation of the militia and volunteer force, which will be associated with them in the next war, for effective service.”\textsuperscript{164} This view, if taken to extremes, made the camps primarily for the benefit of the National Guardsmen, while the regulars, presumably masters of all aspects of warfare, served as nothing more than the training cadre. Beginning in 1906, this was increasingly the case as the War Department embraced smaller, more numerous, semi-annual “camps of instruction” which focused on simpler tactical scenarios and had an even higher proportion of state soldiers. At one such camp, a regular officer was

\textsuperscript{162} Ibid., 274.

\textsuperscript{163} Bell, \textit{Reflections and Suggestions}, 3.

\textsuperscript{164} \textit{WDAR} (1903), Root, 25.
assigned to train each National Guard battalion, which the commanding general
admitted greatly limited the benefit derived by the reduced regular units.¹⁶⁵

Despite this drawback, many regulars welcomed the shift to the smaller camps of
instruction, though not because of their benefits for the National Guard. The early grand
maneuvers had reflected the preoccupation of many, such as Colonel Wagner and
Secretary of War Root, with the training of generals and their staffs. Yet in a 1906 JMSI
article, Major Francis J. Kernan suggested that the army needed “a continuous diet of
regular field training, not an occasional spectacular banquet of the Manassas type.”¹⁶⁶
The camps of instruction were more cost efficient, which allowed more soldiers to
participate, while also providing both junior officers and soldiers with more training
than the ponderous clashes of the largest maneuvers. One of the most elaborate
exercises staged by the U.S. Army before World War I was a mock invasion of the
Philippines in 1910. From the perspective of a high-ranking officer in Manila, the
maneuvers were found “by all officers who took part in them as exceedingly creditable
and useful. Some officers who have seen maneuvers in the States are emphatic in saying
that they believe them to have been the most instructive maneuvers ever held.”¹⁶⁷
Indeed, a similar exercise several years later would be one of the highlights of the early
career of Lieutenant George C. Marshall, a young staff officer at the time. Yet Captain
Ola W. Bell, commanding a cavalry troop, had an entirely different perspective. After six
days of waiting next to his saddled horse in alternating conditions of blistering sun and

to camps of instruction, see McKenna, “The Forgotten Reform,” 99-106.
¹⁶⁷ James G. Harbord to Leonard Wood, 16 April 1910, Vol. 3, Harbord Papers, LC.
torrential rain, Bell’s maneuvers culminated in a “battle royal” of several hours. Bell’s diary entry on the final day of the “war” summed up the exercise as seen from the lower levels: “The work has been easy but the inaction and discomfort tiresome.”\textsuperscript{168} Were maneuvers for the benefit of the soldiers, the officers, the generals, or the militia? The debate was in many ways analogous to that surrounding military education, reflected in the Pope-Upton and Swift-Wagner divides. Just as with the disagreements over the proper scope of professional schools, the military progressives’ overwhelming support for field training did not yield a consensus as to the proper purpose or best methods for maneuvers. The subtleties of this professional debate were lost on many congressmen, who simply thought large maneuvers too expensive. Also, those legislators friendly to the National Guard expressed concern that grand maneuvers sacrificed the training of the state soldiers for the benefit of the regulars. Accordingly, the War Department withdrew its $1.25 million proposal for 1905 maneuvers along the lines of those at Manassas the year before.\textsuperscript{169}

Aside from the matter of scale, there was also some disagreement within the officer corps about what could be realistically achieved with field training. Much of the resistance came from senior officers, many of whom were veterans of the Civil War. The most extreme members of this group entirely dismissed “mimic war” and “sham battles” as counterproductive, stubbornly maintaining that only “war could teach war.”\textsuperscript{170} Even

\hypertarget{footnotetext-168}{\footnotesize\textsuperscript{168} Pogue, \textit{Education of a General}, 120-124; Ola W. Bell, Diary 16-24 February 1910, Box 3, Bell Papers, USMA.}

\hypertarget{footnotetext-169}{\footnotesize\textsuperscript{169} McKenna, “The Forgotten Reform,” 96-98.}

\hypertarget{footnotetext-170}{\footnotesize\textsuperscript{170} For example, see James A. Chester, “Musings of a Superannuated Soldier,” \textit{JMSI} 47 (Nov.-Dec., 1910): 392-394. Not surprisingly, Chester also maintained that professional education was “more frequently overdone than neglected.”}
those who favored maneuvers harbored some doubts as to whether they could replicate all phases of warfare. General Corbin, commander of the Manassas maneuvers, held this middle view, so he ordered the scenarios to cease once the two main forces came into conflict. Corbin reasoned that the participating troops would still gain valuable experience in encampment, logistics, movements, issuing orders, security, and reconnaissance. But Corbin was overruled by the army chief of staff, General Adna R. Chaffee, who thought that maneuvers would “become rather uninteresting unless the outposts are attacked . . . Of course you will have to have battles.” Yet significantly Chaffee objected on the grounds of improving morale, not because he necessarily disagreed with Corbin’s assessment of the value of mock combat. While both recognized the benefit of bringing troops together and having them live as if on campaign, neither was convinced that training could profitably be carried past the preliminaries and into the unknown of combat. Corbin and Chaffee were both competent officers, but neither was known as a reformer. Thus, their views likely represent those of the officer corps at large.

The 1904 maneuvers also marked the resurgence of the nineteenth-century professional ethos, which had not surfaced in Wagner’s earlier efforts. The individualistic belief that the officer’s commission conferred a degree of professional autonomy that could not be infringed upon by the organization was at odds with the purpose of maneuvers, which demanded an honest appraisal of faults during the “big tent” meetings following each battle. Not surprisingly, Corbin, who was already skeptical of the value of feigned combat, eliminated the chief umpire’s post-battle critiques,

171 Adna R. Chaffee to Henry C. Corbin, 2 June 1904, in McKenna, ”The Forgotten Reform,” 83.
claiming that public criticism of officers was counterproductive. Corbin was most likely correct. A younger officer with little sympathy for Corbin’s view agreed that “to put a colonel on the carpet and question his ability to command his regiment was to interfere with a vested right that had been sacred through all the history of the Regular Army.” Senior military progressives found themselves torn between the accustomed personal prerogatives of their professional culture and the logical demands of their philosophy of professional efficiency. After all, would not the incompetent generals of the Civil War have been either improved or dismissed under the harsh scrutiny of an unfettered discussion? But the habits of a lifetime die hard. One of the chief architects of the Root reforms, General William H. Carter, eliminated the “big tent” from a 1906 camp of instruction under his command, because “it had become patent to all officers at former maneuvers that these discussions too often degenerated into personal wrangles and not infrequently show an unwillingness on the part of field-officers of long service to submit to criticism by young lieutenants of short experience.” In fact, Carter did not even use umpires to relegate the maneuvers, as “the ubiquitous umpire and his decisions” had been “one of the most serious hindrances in past maneuvers.” Thus, he eliminated the two primary methods by which the training was made realistic and developmental.

In the midst of this struggle to define the proper scope and methods for field training, the Army lost Wagner. In early 1905, just days after his promotion to brigadier general, he succumbed to complications from the tuberculosis he had contracted while

172 Ibid., 95.
175 Ibid., 465.
serving in the Philippines. On the day of his death, Wagner had served as a commissioned officer for thirty years and a day. In those three decades, he had contributed greatly to American military thought and the institutional methods of training officers. According to General Wesley Merritt, a hero of the Civil War and former West Point superintendent, “All studious and progressive officers of the army consider that Colonel Wagner has conferred a greater benefit upon the service in the way of encouraging the acquirement of military knowledge than any other officer.” Yet Wagner’s intellectual legacy, which was in many ways an extension of Upton’s, would prove to be surprisingly ephemeral, as a significant shift in official doctrine was already beginning even as he lay on his deathbed. But Wagner’s efforts to strengthen the organizational means of disseminating thought—primarily education and field training—would persist. This would soon produce the ironic situation of Wagner’s methods being used to indoctrinate the Army in thought completely antithetical to his own beliefs.

176 Brereton, Educating the U.S. Army, 118-119.


The lucidity, the forcefulness, and the persistence of the arguments by which [Elihu Root] demolished the opposition that apathy, ignorance, and prejudice had arrayed against him, stamp him an extraordinary man.

- Brigadier General Theodore Schwan

Despite the ultimate victory in the Spanish-American War, the public had lost confidence in the Army. In 1902, the New York Times editorialized that “[all Americans], whether soldiers or civilians, must agree that the organization of the United States army [sic] or so much of it as depends on legislation, is dangerously faulty, and that a reorganization . . . is really imperatively demanded by considerations of National safety.”¹ Even before the war with Spain, Lieutenant George B. Duncan, writing in a popular magazine, warned Americans that “time and space are rapidly being annihilated,” a development that menaced American security. All the European states, he warned, were “committed to the policy that a state advances itself by territorial acquisition, and there does not exist a barren waste or fertile field . . . that is not regarded with the covetous eyes of these rapacious nations. That their gaze reaches to the Americas none can doubt.”² Yet even as Duncan’s article was published, it was America that had used the new technology to expand its empire to the Far East. The aggressive foreign policy of President William McKinley and his successor Theodore Roosevelt,


along with the frenzied commercial competition in overseas markets, increased the likelihood of confrontation. At the same time, perceived threats emerged closer to home, as the industrialization and urbanization of America brought less tangible, but nonetheless troubling, changes in social and cultural structures.\(^3\) These fears and the public outrage over the clumsy 1898 mobilization generated a degree of public support for military reorganization that had been absent during the time of Emory Upton. This was complemented by the spirit of the age, leading to a compatibility of military progressive ideas with the practices of Progressive Era social activists, businessmen, and professionals.

Progressivism is such an elusive and controversial concept that there is no consensus as to whether the various social reform movements during this period actually constituted a coherent progressive movement at all. For this dissertation, it will suffice to recognize the quintessence of the time as a pronounced tendency towards reform and an extreme faith in the principles of education, rational organization, scientific method, and centralization.\(^4\) According to historian John Whiteclay Chambers, this interventionism was a response to the problems of a “rapidly emerging multicultural, urban, industrial society.”\(^5\) To reconcile these forces, progressives drew conceptual


\(^4\) Ibid., xiv, 154-157; Alfred D. Chandler, Jr., *The Visible Hand: The Managerial Revolution in American Business* (Cambridge, Mass.: Belknap Press, 1977), 6-11; John Whiteclay Chambers, *The Tyranny of Change: America in the Progressive Era, 1890-1920*, 2nd ed. (New Brunswick, N.J.: Rutgers University Press, 2000; reprint, 2004), 102, 136-140; Peter G. Filene, "An Obituary For "The Progressive Movement"," *American Quarterly* 22 (Spring, 1970): 20-34. Filene has argued that the concept of a "progressive movement" imposes an illusory coherence on what was, in fact, a number of movements with significantly different agendas. While this interpretation of Progressivism might conflict with some interpretations of civilian progressivism, it reinforces the argument of this dissertation, specifically that a sense of unity and shared faith in methods masked fundamental differences in purpose. It should be noted that Wiebe and Chambers also identified the in civilian progressivism similar to those observed by Filene.

\(^5\) Chambers, *Tyranny of Change*, xix.
inspiration from the sciences and practical methods from corporations. While reformers varied greatly in terms of ideology and means, they were unified by a faith in what Chambers has termed the “new interventionism.”⁶ He argued that “the dominant development of the [Progressive Era] was the emergence of an interventionist mood on a national scale.” Despite their eagerness for reorganization, however, the progressives’ goals were conservative; they desired a stable, orderly society as much as the traditionalists.⁷

This interventionist spirit impelled reformers to interfere with matters that previously had been handled locally. Robert H. Wiebe has described the era as one of struggle between centralizing reformers and the defenders of local autonomy within what he characterized as traditional “island communities.”⁸ Within the Army, the insular staff bureaus and regiments were the military analogues to the civilian island communities. As seen in the previous chapter, the military schools had already started to erode these internal boundaries by the beginning of the twentieth century. Following the Spanish-American War, military progressives would continue their assault on the old ways by using strategies of rational organization, scientific method, and centralization similar to those of their civilian counterparts. These methods provided civilian progressivism with a common language by which groups with different agendas could communicate and even support each other’s efforts.⁹ They would serve a similar function for military progressives.

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⁶ Ibid., 276.
⁷ Wiebe, Search for Order, 11-12, 152; Chambers, Tyranny of Change, 136-137.
⁸ Wiebe, Search for Order, 1-4.
⁹ Ibid., 128-129.
The popularity of educational reform reflected the progressive conviction that ignorance lay at the heart of many social ills. Thus, the Progressive Era saw great emphasis on improving education in pursuit of the rational and pure democracy that reformer John Dewey promised would spring naturally from a well-educated public. This effort yielded impressive results: the number of seventeen-year-olds with high school diplomas tripled during the first two decades of the twentieth century and the number of college students doubled. The benefits of general education, however, tended to be ephemeral and difficult to quantify. Subgroups within society looked to more narrowly focused education to secure specific results. The emerging professional groups—doctors, lawyers, and engineers—developed common technical training and qualification examinations to increase public trust, restrict entry into their ranks, define their expertise, and permit the establishment of national standards for their respective fields. All of these ends demanded that the instruction have direct relevance to the practice of the profession. Thus, the term education encompassed what were actually two different activities: education and training. In the abstract, education derived its worth from the general benefits of an enlightened population; thus, it was an end in itself without the need for further justification. Training, on the other hand, imparted specific knowledge in pursuit of a relatively well-defined outcome. The military preference for training

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10 Ibid., 151-152.
11 Samuel Huntington describes three aspects of professionalism: expertise, responsibility, and corporateness. All three, but particularly the last, suggest the need for some collective means of determining technical and ethical standards, as well as requirements for entry into the profession. Sociologist Morris Janowitz also identified internal administration as a hallmark of a profession. Inherent to the idea of administration is the capacity to set standards and, when needed, punish those who fail to meet them. Huntington, Soldier and the State, 8-18; Morris Janowitz, The Professional Soldier: A Social and Political Portrait (New York: Free Press, 1960), 6.
12 I am indebted to my colleague in Jon Due for his insights into the difference in methods, intentions, and results that are encompassed by this distinction.
over education was evident in the controversy surrounding the Fort Leavenworth curriculum, as even those in favor of the most expansive scope for education, such as Emory Upton and Arthur L. Wagner, grounded their plans in clearly-defined needs. Yet Wagner was criticized for preparing officers for potential future duties, while his opponents, such as Eben Swift and James Pettit, opposed any training beyond the needs of the present.

In contrast to the sometimes imprecise benefits of education, the ideal of rational organization provided its own justification. The great success of large, multi-unit corporations such as American Tobacco, Standard Oil, DuPont, and General Electric seemed proof of the efficacy of sound organization. Even those who regarded these “trusts” as a social and economic menace did not doubt their efficiency. Indeed, many progressives regarded the managerial principles of industry as equally applicable to society. The civil service reforms of the 1890s and the introduction of zoning laws—first implemented in New York City in 1916—are just two examples of the quest to impose rationality on society. As with the large corporations, the impetus for these measures was the exponentially greater complexity of rapidly growing government and communities. This was not merely a matter of necessity, as progressives embraced interventionist schemes founded on the belief that well-directed and rational intervention could eliminate virtually any social problem. Not surprisingly, these notions were also taken up within the army as well. Many officers welcomed the

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13 Chandler, *Visible Hand*, pt. II and V.
comparison of war and commerce, which eased the acceptance of techniques inspired by business. At Fort Leavenworth, Captain Matthew F. Steele told his students that “never before to-day was the conduct of war so much like the conduct of any other gigantic business.” The school commandant agreed with the proposition, drawing the logical conclusion that “the management of an army, and each of its units, should, as far as practicable, resemble that of any large, highly organized business undertaking.”

Whether in business, society, or the military, these methods, if not moderated, could become an end in themselves. This led to, in the words of Wiebe, the “endless talk of order and efficiency, endless analogies between society and well-oiled machinery, [which] never in themselves supplied an answer. Instead of careful definitions, they offered only tendencies.” As military progressives adopted these fashionable methods, they too ran the risk of placing too much faith in method.

The common progressive claim for justification in “scientific method” was closely related to the use of rational organization. Typically, such “scientific” methods had no direct relation to the study of nature, or even to the scientific method of testing a hypothesis through rigorous experimentation. Instead, “scientific” was a loosely-applied adjective that implied some combination of systematic approach, intellectual rigor, empirical measures, and foundation in universally-applicable principles. In social activism, the detailed studies of populations to justify or guide reform were examples of

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17 Wiebe, Search for Order, 154.
this trend. The idea of a “military science” had a long history that even predated the United States, but the idea took on new vigor in the age of industrialized warfare. At the Naval War College, Commodore Stephen B. Luce opened the 1886 academic year with the observation that science had contributed “liberally to every department of knowledge and has already done so much towards developing a truer understanding of the various arts . . . that it seems only natural and reasonable that we should call science to our aid to lead us to a truer comprehension of naval warfare.” Many of the commodore’s brethren on land fully shared this view, and, in fact, the Naval War College had been inspired by Luce’s personal experience during the Civil War of operating with William T. Sherman’s army in the Carolinas and his later time at the Artillery School with Emory Upton. In 1900, a civilian writing in Harper’s Weekly prematurely reported that “military practice is now reduced to so fine a point that, given certain factors, it is possible to map out a campaign as the skilled chess-player maps out a game.” The idea of military science was appealing to officers due to its utility as an

18 Chambers, Tyranny of Change, 140; Wiebe, Search for Order, 147-158.

19 A number of Enlightenment thinkers claimed that military operations were governed by universal “scientific” principles, which, if understood and adhered to, would guarantee success in war. The culmination of this school of thought was Antoine-Henri de Jomini, an influential nineteenth-century theorist. Jominian thought had been a staple of American military education since the 1817 introduction of the Simon Francoise Gay de Vernon A Treatise on the Science of War and Fortification to the West Point curriculum. Azar Gat, A History of Military Thought: From the Enlightenment to the Cold War (New York: Oxford University Press, 2001), 27-137; Michael A. Bonura, “French Thought in the American Military Mind: The History of French Influence on the American Way of Warfare from 1814 to 1941” (Ph.D. Diss., Florida State University, 2008), ch. 2.

20 Quoted in Gat, History of Military Thought, 444-445.

21 Ibid., 443-446.

22 Francis E. Leupp, “The Army War College,” Harper’s Weekly (8 Dec. 1900): 1156. The case of Leupp provides a glimpse into the convergence of civilian progressivism and military reformers. In 1905, President Theodore Roosevelt appointed the muckraking journalist as the federal commissioner for Indian Affairs. According to historian Michael McGerr, the progressive Leupp “was Roosevelt’s kind of man.” Michael E.
argument for professional autonomy, particularly to exclude outsiders like the politician-generals of the Civil War. “We have often heard the arguments of a class of men who decry science in military life, who argue against the necessity of a military education,” Eben Swift thundered at his Fort Leavenworth students. “They claim that the military art like the poet’s is born in a man, that the great soldier may go from the lawyer’s desk and the counting house. This insane idea of military art, though often expressed, cannot stand against facts, nor is it sustained by any history.”

The final parallel trend found in both civilian and military progressivism was professional centralization. The rise of professions was, in fact, an outgrowth of the same developing fields of expertise that prompted claims of scientific method. Mainstream doctors attempting to define their field in opposition to alternative medical disciplines, such as homeopathy and osteopathy, were the first to organize with the establishment of the American Medical Association (AMA) in 1846. But this pioneering effort made only limited progress until the late nineteenth century, when the AMA began to dominate the interaction between medicine and society. At that same time, other vocations also organized to various degrees, with professional groups emerging in education, engineering, commerce, and even agriculture. These groups grew as members realized that the surrender of individual autonomy to determine standards or best practices was a necessary sacrifice to guarantee quality, restrict entry into the profession, and maintain collective autonomy. For particularly technical work, such as medicine, theoretical education became a key component of professional identity, which


in turn required some central authority to perform functions such as school accreditation and licensing.\textsuperscript{24} As seen in the previous chapter, the military profession, despite having the natural advantage of an existing organization—or perhaps because of it—was slow to surrender the autonomy of individual practitioners in a similar manner.

A well-known, if somewhat infamous example of the fusion of rational organization, scientific process, and centralization was the system of “scientific management” developed by Frederick W. Taylor. “Taylorism” sought to increase production efficiency by reducing manufacturing to its component tasks, reallocating these tasks among workers according to objective standards of efficiency, and then ensuring that all acted in accordance with the plan. These rigid rules were meant to increase the efficiency of the industrial workshop, not to cater to the preferences of workers. “In the past the man has been first; in the future the system must be first,” Taylor decreed in 1911.\textsuperscript{25} This uncompromising structure often led to conflict within the industrial workshop that was analogous to the larger conflict in American society described by Wiebe and Chambers: reformers who attempted to consolidate organizational power on the basis of scientific method were resisted by those who preferred traditional methods, customary prerogatives, and local autonomy. Taylor sought more efficient production, not social reform. Nevertheless, the principles of Taylorism were widely regarded to be applicable outside of the factory. These ideas even

\textsuperscript{24} Chambers, \textit{Tyranny of Change}, 148-149; Wiebe, \textit{Search for Order}, 112-127.

found favor in the War Department, when Chief of Ordnance William Crozier experimented with them in the Army’s arsenals during the early 1910s.26

Education, rational organization, systematic methods inspired by science, and centralization were by no means innovations of the Progressive Era, but they were employed with a zeal that reflected the spirit of the age. Indeed, there was good reason to emphasize these methods. The problems resulting from great technological and societal change demanded equally great emphasis on competence and efficiency. Within society, the scientist and business manager epitomized these values, which gave anything resembling their methods—even if imperfectly—great credibility. In the words of Daniel T. Rodgers, “It was the merger of the prestige of science with the prestige of the well-organized business firm and factory that gave the metaphor of the system its tremendous twentieth-century potency.”27 Military progressives sought to emulate these ideas whenever possible. Of course, American officers were not intellectually dependent on civilian progressives. After all, most of their reforms had direct precedents in European armies, and, for most of its early history, the U.S. Army directly modeled itself on European armies.28 Yet one should not discount the numerous references to civilian practices, particularly to business, as mere rhetoric. While few direct connections can be proven, an officer corps so well integrated with civilian society must have been influenced by their societal context.29 Rodgers’s observation regarding the interaction

26 Aitken, _Taylorism at Watertwon Arsenal._


28 For example, see Skelton, _American Profession of Arms_, 100-101, 168, 239-259.

29 In his study of General William H. Carter, Ronald Machoian has made this same argument. “Many officers were drawn from the same social segments that spawned Progressive ideals, and thus logically grasped similar solutions for their own sets of issues and problems. If the Old Army lacked efficiency,
between civilian reformers and their milieu can be extended to their military counterparts as well: “If we imagine the progressives, like most of the rest of us, largely as users rather than shapers of ideas, this was the constellation of live, accessible ways of looking at society within which they worked, from which they drew their energies . . . and within which they found their solutions.”30 While the ideals of civilian progressivism probably inspired military officers and influenced their judgments, their most direct contribution to military reform was to make Americans more receptive to the idea of military professionalization. This new consonance of values between army reformers and society was reflected in a 1903 New York Times editorial that dismissed the many congressional veterans opposing “any reconstruction of the army on modern lines,” as relics who refused “to see any use in any improvements of organization which have been introduced since they went soldiering in an amateur way in 1861-5.”31 This dramatic turn in opinion from the time of Emory Upton was due largely to Elihu Root, a corporate lawyer with almost no knowledge of military affairs.

According to Root’s own account, he was quite surprised when a White House aide informed him that President William McKinley wanted him to replace the ineffectual Russell Alger, the secretary of war disgraced by the mobilization for the Spanish-American War. “Thank the President for me, but say that it is quite absurd,” Root responded. “I know nothing about war, I know nothing about the army.” He accepted the post only after the aide assured him that McKinley wanted a competent coherency, and professional purpose, then the reforms that addressed these qualities were “progressive” in nature, whether officers such as Carter ever consciously identified themselves with “Progressivism” or not.” Machoian, Carter, 193.

30 Rodgers, “In Search of Progressivism,” 127.

lawyer to oversee the administration of the former Spanish colonies, not “any one [sic] who knows anything about the army.” 32 Although fellow New York Republican Theodore Roosevelt was a friend of Root, he thought it a “foolish” choice and proof that McKinley did not want any substantive military reform. 33 Despite Root’s modesty and Roosevelt’s piqué, McKinley had some good reasons for selecting the lawyer. His legal expertise was, in fact, needed to govern Cuba, Puerto Rico, and the Philippines. Additionally, Root had a reputation for forthrightness and reasoned intelligence, qualities that even the jealous Roosevelt, who badly wanted the position for himself, admitted would be important in the badly disorganized War Department. 34 Similarly, McKinley certainly regarded Root’s unquestioned integrity as a welcome contrast with Alger, who if not corrupt, was at the least prone to cronyism. Furthermore, military knowledge had never been a prerequisite for the position, which was a political post, and Root had powerful friends among the New York elite. In fact, he was a privileged insider of one of the most exclusive progressive cliques. Through his work as a corporate lawyer, Root was familiar with recent trends in business management and with the pioneering professional reforms of the New York legal community, which was the first to create a state examination board. 35 Due to his many qualifications, several of the most important cabinet members favored Root’s appointment, as did Adjutant General Henry C. Corbin,

33 Theodore Roosevelt to Henry C. Lodge, 21 July 1899, quoted in ibid., 217.
34 Ibid., 215-218.
35 The American Bar Association was chartered in 1876. The New York legal examining board was created in 1894. Wiebe, Search for Order, 117.
McKinley’s most trusted military advisor. Among McKinley’s close advisors, only Roosevelt dissented.36

After assuming his new duties on the morning of 1 August 1899, Root threw himself into his work. The new secretary’s willingness to consider all opinions quickly won over many of the officers working in the War Department, including Corbin and his chief assistant, Lieutenant Colonel William H. Carter.37 Contrary to Roosevelt’s expectations, Root began laying the foundations for military reform almost immediately. Within four months of assuming the post, Root had already established the two premises upon which his subsequent reforms would be based. The first was “that the real object of having an Army is to provide for war.”38 The second recognized the traditional importance of the militia by conceding “that the regular establishment in the United States will probably never be by itself the whole machine with which any war will be fought.”39 To achieve these aims, Root enumerated several specific measures that were as consistent with traditional military progressivism as with the dominant civilian professional trends: professional study for officers, realistic maneuvers for all ranks, merit-based promotions to ensure that “men of superior ability and power may be known and placed in positions involving responsibility and authority,” and the development and maintenance of modern armaments.40 Senator Redfield Proctor, the

36 Secretary of State John Hay and Secretary of the Interior Cornelius Bliss were both in favor of Root. Barr, *Progressive Army*, 50.


38 WDAR (1899), Root, 45.

39 Ibid. 46.

40 Ibid. 45-49 (quotations from 45-46 and 48).
reforming secretary of war who had instituted promotion examinations and annual officer evaluations, wired his approval of Root’s ideas: “The country and Army for all time will bless you for that report. Carried into effect it creates an Army.”

While military progressives were heartened by the ideas found in Root’s first annual report, there was little immediate progress toward these goals. Occupation of the former Spanish colonies required that nearly 60% of the officer corps be stationed overseas at the end of 1899. Also, the critical question of the Army’s postwar strength and organization remained unresolved. In 1898, Congress had authorized a temporary expansion of the regular army for the Spanish-American War, which it effectively renewed for an additional two years in 1899 to deal with the Philippine-American War. This temporary measure was something of a disappointment, as Congressman James T. Hull had sponsored legislation to increase the permanent strength of the Army to 100,000 officers and soldiers—more than three times greater than before the Spanish-American War. But several advocates for a larger army developed competing plans instead of a united proposal. While this disunity undermined the Hull Bill, it ultimately fell victim to the much larger, undecided issue of whether the United States should retain any of the former Spanish possessions. As one congressman noted, “The increase of the standing army and the colonial policy of the Government are so closely interwoven, so intermixed that you can not [sic] well discussion one without discussing the other.” The latter issue would not be resolved for several years. Although Congress rejected the

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41 Redfield Proctor to Elihu Root, 2 December 1899, Box 4, Root Papers, LC.
42 WDAR (1899), Root, 4.
Hull Bill several months before Root assumed his duties in the War Department, the lingering uncertainty effectively held reform hostage during his first years in the War Department. This delay in fixing the permanent organization was not without some benefits. According to Root’s chief military assistant, the extension “gave time for the proper study of necessary army reforms.”

In the meantime, Root made an early effort for reforms that were not contingent on the eventual permanent strength. In February 1900, he forwarded a bill to Congress providing for limited meritocracy in officer promotion by allocating a proportion of promotions to be based on merit with the remainder allocated by seniority as before. In itself, this would have been a significant change, but Root also proposed making all assignments to the War Department staff, even the heads of the departments, temporary rather than permanent positions. Root would later demonstrate a finely honed sense of what was politically feasible, but this was a fatally ambitious reform to undertake with so little preparation. As later military progressives would discover, on no other issue did their aims diverge so dramatically from the rest of the officer corps than the issue of promotion by merit. Not only did the bill arouse general resentment from the officer corps, but it also struck at the smaller but politically powerful staff bureaus.

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44 William H. Carter quoted in Machoian, Carter, 106.


46 In fact, many of Root’s assistants viewed his reforms as a surreptitious means of introducing limited meritocracy. See chapters 4, 5, and 8 of this dissertation.

47 The staff bureaus of the time were the Adjutant General’s Department, Inspector General’s Department, Judge Advocate General’s Department, Quartermaster Department, Subsistence Department, Medical Department, Pay Department, Ordnance Department, and the Signal Corps. In some respects, the Corps of Engineers operated as a staff bureau, as its numerous civil engineering projects and chief based in Washington guaranteed the engineers significant political clout.
Historians have traditionally regarded the bureau chiefs as the principal opponents of army reform and an example of an entrenched bureaucracy. Once selected into these bureaus, officers spent the remainder of their careers—often decades—in that specialty. Few secretaries of war had the desire, knowledge, or time to reign in these long-serving technical experts, giving them an effective autonomy within their functional realm. Staff officers also had ample opportunities to develop political allies in Congress. Not only did they serve for long periods in the capital, but their functions provided a natural form of patronage. The Adjutant General could give choice assignments to relatives of those with political influence, and the other bureaus oversaw nearly all of the War Department’s contracts for services and supplies. Isolated, autonomous, and powerful, many of the staff’s policies were developed for administrative ease rather than to serve the needs of the line, which was notionally their purpose. Root’s attempt to dismantle this system met speedy defeat and was his first lesson in the political power of the staff.

By December 1900, Root was ready to introduce a more modest agenda of reforms in a bill that would also fix the Army’s permanent form before the two-year volunteer units authorized in 1899 would disband. The 1901 Army Reorganization Act authorized a permanent strength more than twice as large as before the Spanish-American War. The law also reorganized the artillery along functional lines, ending the purely administrative practice of grouping incompatible coast defense and field artillery batteries in the same regiment. Root’s biggest victory was the “detail system,” which

48 A sample of the works addressing various aspects of the staff-line divide are Roberts, “Army’s Search for a Mission,” 199-200; Beaver, “War Department in the Gaslight Era,” 105-132; Linn, Echo of Battle, 20-21.

stipulated that most of the lower-ranking staff positions would be filled by line officers temporarily assigned to the staff for several years before they returned to their own arms.\textsuperscript{50} These successes, however, fell short of what Root had hoped to achieve. Despite his intense personal lobbying, Root was forced to allow the senior staff officers to remain permanently in their department and completely abandon his hope of consolidating several of the supply bureaus into a single department. Shortly before the passage of the bill in its final form, an exasperated Root wrote, “The House has cut out all the good things that they understood, and put in all the bad things they could think of. Whether in the result the Lord will protect the right, or the Devil will take the hindmost, I cannot tell.”\textsuperscript{51}

Even the partial successes of 1901 were not replicated in 1902. In September 1901, Filipinos surprised and nearly killed the entire eighty-man American garrison of the village of Balangiga on Samar. Brigadier General Jacob H. Smith’s vicious campaign of indiscriminate reprisals and Brigadier General J. Franklin Bell’s “reconcentration” of villagers in Batangas province on Luzon produced a wave of press criticism, hearings,\textsuperscript{50} Spaulding, \textit{United States Army}, 393-394; Weigley, \textit{History}, 317-318.; 1901 Army Reorganization Act, \textit{US Statutes at Large}, 31, 2 February 1901, 748-758.

\textsuperscript{51} Elihu Root to Leonard Wood, 2 January 1901, Vol. 179, Pt. 1, Root Papers, LC.
and several courts martial.\textsuperscript{52} In a bizarre twist, Commanding General Miles—completely estranged from both Root and President Theodore Roosevelt—had become one of the Army’s most vocal critics.\textsuperscript{53} Root also introduced legislation proposing the creation of a general staff, but with widespread skepticism in the Senate, the opposition of Miles and the chiefs of the staff bureaus was sufficient to defeat the measure.\textsuperscript{54} Despite these setbacks, throughout the late summer and fall Root was quietly building the foundation for a triumphant 1903. It would be both Root’s final full year as Secretary of War and his most successful.

Root achieved two major legislative victories in 1903, militia reform and creation of the general staff. For over a century, the 1792 Militia Act had governed the state troops. With that legislation, Congress had abrogated much of the federal government’s constitutional duty for “organizing, arming, and disciplining” the militia to the various

\textsuperscript{52} Such stories were common in newspapers throughout 1901-1903; one representative example is “Cruelty in the Philippines,” \textit{New York Times}, 13 May 1902. The conduct of the Army in the Philippines remains controversial. Better government for most Filipinos, reduction in banditry and disease, continued foreign domination of the Filipino people, harsh but legal counterinsurgency methods, and outright atrocities are the mixed legacy of the occupation. When compared to other colonial governments, it was not particularly harsh, but there were enough cases of exploitation and brutality to justify criticism. The debate about the nature of the American occupation of the Philippines continues in the historiography. Stuart C. Miller, \textit{“Benevolent Assimilation”: The American Conquest of the Philippines, 1899-1903} (New Haven, Conn.: Yale University Press, 1982) provides a narrative critical of American brutality against the Filipinos, while John M. Gates, \textit{Schoolbooks and Krags: The United States Army in the Philippines, 1898-1902}, Contributions in Military History; No. 3. (Westport, Conn.: Greenwood Press, 1973) portrays the American occupation in a favorable light by emphasizing the civic projects that greatly improved daily life for the average Filipino. The most definitive recent works adopt a middle course. Brian Linn concluded that an “informal but widely accepted pacification doctrine” was split between “conciliation and repression.” Brian M. Linn, \textit{The Philippine War, 1899-1902}, Modern War Studies (Lawrence: University Press of Kansas, 2000), 9. For another balanced account, see also David Silbey, \textit{A War of Frontier and Empire: The Philippine-American War, 1899-1902} (New York: Hill and Wang, 2007).


\textsuperscript{54} Weigley, \textit{History}, 319-320.
By 1903, the transformation of American society from an agrarian society clustered on the eastern seaboard to an industrial, urban society spanning the continent made the fiction of monthly musters of all able-bodied males on the town commons absurd. Regulars were critical of the volunteer militia even before the Spanish-American War, viewing them as little more than social clubs for recreation, exercise, and martial vanity. After the Spanish-American War, even prominent Guardsmen like Charles W. Dick—a major general and congressman from Ohio—conceded that the 1898 mobilization had demonstrated that any “flattering opinions” of the National Guard’s readiness were “utterly mistaken.” Congressman Dick worked with Root to apply the progressive strategies of education, centralization, and rational organization to increase the National Guard’s efficiency.

During the 1870s, Upton had recommended abandoning the state soldiers and creating a federal reserve. This idea, popular among many regulars, had never really been tested. Even the most ambitious attempt at reform since the Civil War, the failed Burnside Bill of 1879, had completely avoided the subject of raising armies. By the twentieth century, at least some regulars advocated a compromise that would provide for a mixture of state and federal responsibilities. In 1900, Captain Lewis D. Greene urged regulars to recognize that reform was possible only “so long as [the National Guard’s] distinctive character as being primarily State troops is not destroyed.” He went on to argue that both efficiency and standardization were possible with the use of conditional

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55 The Constitution of the United States, Article I, Section 8.
56 Cooper, Rise of the National Guard, ch. 1-2.

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federal support as an incentive for voluntary state cooperation.\textsuperscript{58} This was precisely the principle that Root and Dick embodied in the 1903 Militia Act, more commonly known as the Dick Act. It required all state forces to conform to regular army organization and armament within five years and submit to annual inspections by regular officers. To avoid a repetition of the widespread refusals by Guardsmen to serve in the Spanish-American War, all state soldiers were subject to regular army courts martial as soon as their unit was called to federal service; previously they had the option of individually declining muster into federal service. In return for this loss of autonomy, the War Department agreed to pay for the inspections and assume most of the costs of rearmament. Additional support in terms of money, expertise, and equipment would thereafter be regularly provided to states meeting federal guidelines. Education was also provided for in the bill; individual officers would be eligible to attend the professional schools of the regular army.\textsuperscript{59} As early as 1899, Root had recognized that centralization of standards on the War Department’s terms would be essential if the state forces were to be an effective reserve. “The [National Guard] shall have . . . the same arms, ammunition, supplies, and forms and methods of transacting business, and shall have similar organization and discipline [as the regular army].”\textsuperscript{60} Throughout his tenure as secretary of war, Root extolled the virtues of regulars and citizen-soldiers joining to form a homogenous force, a concept frightening to both traditionalist regular and militia officers. Both groups regarded the two forces as fundamentally and properly distinct.

\textsuperscript{58} Lewis D. Greene, "In What Ways Can the National Guard Be Modified So as to Make It an Effective Reserve to the Regular Army in Both War and Peace," \textit{JMSI} \textbf{27} (Nov., 1900): 342-350 quotation from 342.

\textsuperscript{59} “Act to promote the efficiency of the militia, and for other purposes,” \textit{US Statutes at Large}, 32, 21 January 1903, 775-780.

\textsuperscript{60} \textit{WDAR} (1899), Root, 53.
Thus, doctrinaire Uptonians, opposed to anything less than complete federal control, and citizen-soldier idealists, paradoxically strongest in the states that most neglected their troops, found themselves in an unlikely common cause. These extremists were defeated, as most regulars and guardsmen were pragmatic enough to realize the necessity of both forces and the value of cooperation.61

The Dick Act was a watershed in American military policy. It redefined the relationship between the War Department and states by creating a legal basis for greater cooperation and committing the federal government to improving the capability of the National Guard to mobilize and fight. In the face of over a century of Federal non-interference with the states’ militias, Root’s political savvy was a necessary lubricant for reform. As the bill neared passage, he confided to a supporter, “The all important thing was to get into the law the few propositions on which general agreement could be reached and thus take a few steps in advance.”62 Root would have preferred a federal reserve similar to Upton’s National Volunteers. He had read *The Armies of Asia and Europe* soon after coming to the War Department, and one of his assistants provided the secretary of war with additional materials on Upton as the Dick Act was being debated. Root found it “very desirable that the extraordinary concurrence of recent action with the views expressed by [Upton] so long ago should be made the basis for a further discussion

61 Root worked closely with the progressive Guardsmen, who bested their localist brethren at the fourth annual convention of the Interstate National Guard Association (NGA) in January 1902. At that convention, Dick was voted president of the NGA for the following year. Capping the convention was a meeting between leading guardsmen and Root. The following day Dick introduced the bill to Congress. Earlier, Root had promised to send no bill forward without consultation with the militiamen. His success in winning them over was evident in the progression of headlines. Prior to the convention the headlines read “Militia Law to Meet Opposition—Many States Will Fight Plan to Yield Power to the Government,” *Chicago Daily Tribune*, 4 January 1902, 4. But only three weeks later: “Efficiency of the Militia—Gen. Dick Introduces Bill Agreed Upon by Guardsmen,” *Washington Post*, 23 January 1902; *WDAR* (1903), ———, 14; Cooper, *Rise of the National Guard*, 109; Machoian, *Carter*, 186-187.

62 Root to J.C. Boyd, 12 April 1902, Vol. 175, Pt. 3, Root Papers, LC.
of his views on national volunteer reserves.” Although Root was not entirely happy with the eventual compromise which left power with the states, he also understood that he had achieved the essence of what Upton had hoped for—federal standards for the state troops. The procedures and mechanisms of control could be refined, but once the states had accepted federal oversight, time would eventually favor the War Department. The secretary of war confidently predicted, “We shall attain by degrees an end which so many have sought and failed to reach at a single step—the creation of a system of well-trained citizen soldiery, making the United States ready for our own defense without the maintenance of a large standing army.”

January and February 1903 witnessed the culmination of the Root reforms. Just a few weeks after the Dick Act became law, Congress also approved the General Staff Act. Later that year, Root identified the General Staff as the most important change affecting the regular army that year, which was a great understatement. Historian Oliver L. Spaulding, who was a captain of field artillery at the time of the bill, later described the General Staff Act as being “truly revolutionary.” Spaulding’s assessment was closer to the mark. The purpose of the General Staff was twofold. The first was to serve as a central agency to coordinate the existing staff bureaus, which were regarded by many officers as too autonomous. This had long been a source of frustration for officers of the line (those serving in the basic arms of artillery, cavalry, and infantry), who felt that the

64 Roberts, “Army’s Search for a Mission,” 211.
65 Root to Boyd, 12 April 1902.
66 WDAR (1903), Root, 3.
67 Spaulding, United States Army, 395.
staff often made decisions for their own benefit and convenience rather than in the interests of the line, who they nominally were supposed to be serving. Thus, the cart had been placed before the horse. Throughout the nineteenth century, powerful personalities from the line such as Andrew Jackson, Winfield Scott, and William T. Sherman had attempted to break the staff’s power, but they were almost entirely unsuccessful. Staff officers stationed in Washington were able to easily win the favor of Congress by disbursing the patronage inherent in their functions, which could include the awarding of contracts or jobs to political supporters, or choice assignments for friends and relatives serving in the Army. Furthermore, placing the staff under powerful Commanding Generals like Scott or Sherman risked ceding too much of the legislative arm’s control over military affairs. The division of the authority among the staff bureaus was thus a useful check on the accretion of military power in a single individual. Theoretically, the secretary of war supervised and coordinated the different bureaus, but with only a few exceptions, the sixteen different secretaries of war who served during the last four decades of the nineteenth century lacked the drive, knowledge, or length of tenure to effectively control the various bureaus, leaving each to pursue its own course.68

The Spanish-American War changed this by undermining the staff’s credibility with the public as the press and the Dodge Commission brought numerous shortfalls to light: thousands of deaths to typhoid in Florida mobilization camps; boxcars piled up on

68 Skelton, American Profession of Arms, 232-237. One experienced staff officer described the process by which the staff had slowly accumulated power in a 1903 JMSI article. “At Washington the positions of the chiefs of the special staffs . . . have, owing to the growing importance of their functions and their close contact with the legislative and executive branches of the Government, become increasingly independent. Most of them, watching their opportunity, and following a natural and perhaps legitimate impulse, have endeavored, sometime without much reference to the needs of the Army, to enlarge the jurisdiction as well as the number and rank of the officers of their respective corps, and have succeeded.” Schwan, “Coming General Staff,” 4.
rail sidings from Tampa, Florida, to Columbia, South Carolina; thousands of volunteers dismissed from the service without ever having been issued a rifle or uniform; the inferiority of American weapons, particularly the artillery; and, most sensational of all, accusations by the Army’s own commanding general that the Commissary Department had issued chemically altered rations as part of secret experiments.69 In fairness, many of the problems encountered by the War Department were beyond its control, and the staff bureaus did perform many of their duties competently. Nevertheless, the war revealed serious shortcomings in the ability of the War Department to coordinate its own activities.70 Public indignation over these problems led to McKinley’s replacement of Secretary of War Alger with Root, which finally provided the line with a patron capable of politically besting the staff. The second purpose of the General Staff was to plan for war, which had been one of Root’s guiding principles from the very beginning of his tenure.71 This made the General Staff the organization animating all of the Army’s activities in peace and war. To illustrate its importance, Root borrowed from British author Spenser Wilkinson, who described the general staff as the “brain of an army.” 72

The primary means for the General Staff to fulfill these twin functions of coordination and readiness was through the preparation of detailed war plans. It was believed that by developing plans for contingencies such as a British invasion or the

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70 Beaver, *Modernizing the War Department*, 27-30; Cosmas, *Army for Empire*, 322-326.

71 WDAR (1899), Root, 45.

72 Root was greatly influenced by Wilkinson’s 1890 book of the same name. While in Great Britain as a member of the Alaska-Canadian Boundary Commission in 1903, Root took the time to meet personally with the author. Wilkinson to Root, 28 October 1903, Box 38, Root Papers, LC. On Wilkinson’s influence on Root see Jessup, *Root*, 241.
dispatch of an expedition to Mexico, the Army’s exact requirements for units and material, in terms of both quantity and type, would become evident. Theoretically, war planning would ensure that the general staff’s coordination duties would remain grounded in the needs of war rather than degenerating into short-sighted policies that were either the most efficient or convenient in peacetime, but might lead to disaster once war did come. Root wanted the General Staff to occupy the highest organizational vantage from which it could see past immediate demands to the future when America would next resort to arms. This was a natural emphasis, as the most visible problems of the Spanish-American War related to the mobilization: bringing the right mix of equipment, troops, and supplies to the proper place at the right time. The war plans reflected this preoccupation with mobilization. This was also evident in the first edition of the *Field Service Regulations*, published in 1905, which grew out of the requirement to compute the material requirements required by an expeditionary force. This task was impossible without a standard organization for division and armies—the large units that included all of the support and logistical functions necessary for a force to sustain itself in a foreign land.73 Computing the requisite number of such mundane items as bridles, hospital stretchers, and wagons were thus the impetus for the Army’s first overarching tactical doctrine. Not only was this focus a logical response to recent demonstrated failings, it was also entirely consistent with the corporate-inspired craze for centralization in the pursuit of efficiency. Indeed, the problems of mobilization were not entirely unlike those faced by regional railroads or large corporations.

73 Raines, 471.
Yet the general staff was not entirely inspired by corporations. American officers had long advocated the adoption of something similar to the Prussian General Staff, which while very good at mobilization planning, had a far broader understanding of what it meant to prepare for war. A number of American officers visited Germany in the late nineteenth century to observe the Großen Generalstab firsthand, including Tasker H. Bliss, Joseph P. Sanger, William Ludlow, Arthur L. Wagner, and Upton. The first three officers would all personally advise Root, as would Upton through his books, which Root read while secretary of war. Upton particularly stressed the need for a general staff to anticipate changes in war due to his experiences in the Civil War, which had impressed upon him the importance of entering a conflict with good tactics, competent officers, and trained troops. It was this element of professional—rather than material—preparation that Upton believed was the most important function of a general staff. This was a far more expansive role that required not only the determination of equipment and transportation requirements, but also the development of tactical doctrine to be disseminated through schools, maneuvers, and manuals.

In February 1902, Root introduced his first general staff legislation, which was fatally ambitious. Not only did he propose a general staff, but he also sought to reorganize the existing staff departments through consolidation of the Quartermaster,
Subsistence, and Pay Departments into one department, and the dissolution of the Inspector General’s Office and the assignment of its functions to the Adjutant General’s Office. In making his case for this consolidation to the head of the Senate Military Affairs Committee, Root resorted to the familiar appeal to corporate-inspired rational organization: “Economical and business principles seem to justify the bringing together of these bureaus under a single chief, who will have general direction of all and who will be able to decide promptly and on business principles what shall be done by each particular bureau.” Yet Root and the military progressives would learn that the language of modernization could be used just as effectively by their opponents.

Historian Daniel Beaver has observed that the heads of the staff bureaus “protected their interests while appearing, through the use of the language of fashionable trendsetters in the factories, the board rooms, and the engineering schools, to be on the cutting edge of management and organizational theory.” The staff argued—with some logic—that the benefits of their technical expertise would be lost if subjected to the supervision of generalists. Thus, both sides maintained that their methods were more efficient and better met the demands of increasingly sophisticated twentieth-century armies.

Commanding General Nelson A. Miles also opposed the measure, but his objections were philosophically quite different than those of the staff. In March 1902, Miles testified to the Senate Military Affairs Committee that a general staff was unnecessary as the current organization had been sufficient to ably support the victorious Union armies of 1865; he attributed the failures of the 1898 mobilization to

76 Elihu Root to James R. Hawley, 3 March 1902, quoted in Carter, Creation of the General Staff, 26.

77 Beaver, Modernizing the War Department, 32-34. See also, Ball, Responsible Command, 71-72 and Weigley, History, 319-320.
individual incompetence, particularly targeting Commissary General Charles P. Eagan.\(^78\) These arguments resonated with a committee made up entirely of Civil War veterans, while the support of Generals John M. Schofield and Wesley Merritt, both similarly distinguished Civil War commanders, was not sufficient to overcome their reservations.\(^79\) Miles also denounced a general staff as “a system peculiarly adapted to monarchies having immense standing armies. It would seem to Germanize and Russianize the small army of the United States.”\(^80\) The association of the general staff with German practices was a double-edged sword. A *Washington Post* article credited the German General Staff with molding “the German army into a most perfect military machine” with “the ablest scientific corps of officers in the world in its military service.”\(^81\) Yet German institutions were also tainted by the wide assumption that they were incompatible with American democracy. Miles fed on these fears: “It seems to me you are throwing the door wide open for a future autocrat or a military despot. It is not, in my judgment, in accordance with the principle and theory of democratic government.”\(^82\) Miles attacked the general staff as a Root patronage ploy to reward his favorites among

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\(^78\) Eagan was court-martialed in 1899 after denouncing Miles’s Dodge Commission testimony as baseless lies and threatening to ram the contents of a latrine down the Commanding General’s throat. Ranson, “Miles as Commanding General,” 189-190.

\(^79\) These testimonies were not entirely without effect. Root’s primary military assistant thought they had weakened the effect of Miles’s testimony by demonstrating the split among respected Civil War veterans. Machoian, *Carter*, 147-148. This success was partially due to Root’s skill as an advocate; the day of Schofield’s and Merritt’s testimonies, two members of the Senate Committee on Military Affairs most sympathetic to reform were absent so Root privately arranged for Senator F.M. Cockrell to serve as “examining counsel” so that they could express themselves fully. Root to Cockrell, 8 April 1902, Vol. 175, Pt. 3, Root Papers, LC.


the officer corps, and threatened to resign if the bill passed. This opposition proved too great and the General Staff Bill was defeated.83

Undaunted, Root remained committed to the general staff concept and spent the remainder of 1902 preparing another attempt by writing directly to influential editors throughout the country and extensive lobbying in Congress.84 This campaign culminated in December 1902, when his annual report urging the creation of a general staff and reform of the militia received wide editorial praise.85 The following day, the General Staff Bill prepared by the War Department was introduced in both houses with President Roosevelt strongly urging adoption of the measure in his annual message to Congress that same day.86 Root kept up the political pressure by arranging for three of the seven major generals, Henry C. Corbin, Samuel B.M. Young, and Adna R. Chaffee, to attend the Cleveland Chamber of Commerce’s Fifty-Fourth Annual Dinner. With the

83 “Miles Attacks Root Army Bill,” Chicago Daily Tribune, 21 March 1902. The opposition of the bureau chiefs is easily understandable in terms of self-interest, but the tenacious opposition from Miles is a different matter. Miles had long lobbied for powers similar to those that the 1902 bill would have given to the chief of staff over his rivals such as Adjutant General Henry C. Corbin. Edward Ranson has suggested that Miles might have acted against his own best interests simply to spite Roosevelt and Root or in the hopes that he might win the next Democratic presidential nomination. Ranson, “Miles as Commanding General,” 193-196.

84 Examples of this cultivation of the press and Congress are found throughout Root’s correspondence, sometimes dozens of similar letters being sent at a time. Two of these mass mailings went out in 1902, one on 9 May, (Vol 175, Pt. 3) and another on 26 November, (Vol 176, Pt. 1). Root also cultivated individual journalists such as Frank B. Noyes of the Chicago Record Herald, Root to Noyes, 13 December 1902, Vol 180, Pt. 2. All letters from Root Papers, LC.

85 Jessup, Root, 252-256. “[All] must agree that the organization of the United States army [sic] . . . is dangerously faulty, and that a reorganization, on the lines of the Secretary of War’s present report, and of his past reports, is really imperatively demanded by considerations of National safety.” New York Times, 1 December 1902, 8. “It is clearly one of those cases, where reform should begin at the top. The secretary’s argument is unanswerable.” Chicago Daily Tribune, 1 December 2901, 12. Even the Philadelphia Inquirer, which was critical of Root’s treatment of General Miles, supported the creation of a general staff: “In the late war with Spain it was the staff that broke down under the strain and caused most of the mistakes that were made. There was no preparation and there was but a meager machinery for carrying out the suddenly expanded wants of a great army. It is this deficiency that the general staff is supposed to fill.” Philadelphia Inquirer, 2 December 1902, 8.

powerful Senator Mark E. Hanna in attendance and Root positioned under a portrait of the “lamented McKinley,” the secretary staged a masterful demonstration of political and military support for his reforms. It was clear that the majority of senior officers supported him and not Miles.87 Root also divided his opponents by eliminating the proposal to consolidate the logistics departments, and would eventually negotiate away the disbandment of the Inspector General’s Office. Although Inspector General Joseph C. Breckinridge won the fight, his congressional testimony was perceived by the press as shamelessly self-serving and helped turned public sympathy towards reform.88 In a bizarre twist, General Miles volunteered to conduct an inspection of the Philippine garrison. Root, happy to be rid of his erratic nemesis, extended the journey to a world tour.89 Throughout his trip, Miles succeeded in his immediate aim of causing Roosevelt and Root embarrassment by submitting a report that was highly critical of the conduct of commanders and soldiers in the Philippines.90 In the end, however, the passage of the General Staff Act made the tour a good bargain for the administration.

Congress granted the new General Staff Corps a broad purview but few clearly delineated powers, prompting many knowledgeable observers to wonder what exactly the new institution would actually do. The primary task of developing mobilization and campaign plans for future wars was not disputed, if for no other reason than it was not already being performed by any existing agency. But other important General Staff

89 Ranson, “Miles as Commanding General,” 197-198.
90 Miles connived to have the resulting report released publicly, which Root agreed to do on 27 April 1903. “Gen. Miles Report on Philippines Army,” New York Times, 28 April 1903.
functions intruded upon old command and bureaucratic prerogatives. The law gave the
General Staff the right to “investigate and report upon all questions affecting the
efficiency of the Army and its state of preparation,” in order to provide “professional aid
and assistance” to both the Secretary of War and general officers. Additionally, the
General Staff was granted the authority to coordinate on behalf of the Secretary of War
“all the different officers who are subject, under the terms of this Act, to the supervision
of the Chief of Staff.” Root purposefully left the General Staff’s powers of “providing
aid and assistance” to superiors and “coordinating” subordinate officers in nebulous
terms so that the General Staff would not intrude on the clearly delineated
administrative tasks of the existing staff bureaus. Root feared that if allowed to meddle
with administrative detail, the General Staff would invariably do so, and therefore
neglect its most important task of preparing for war. This limited power was sufficient
for the new organization to plan for mobilization, which Root seems to have regarded as
constituting the bulk of effective preparation for war, and the General Staff would indeed
prove its capability in this limited arena just three years later when a large force was
quickly and effectively sent to Cuba in support of the friendly government. Thus, Root
had successfully rectified the glaring fault of 1898, and had done so in a manner entirely
consistent with the practices of contemporary corporations with which he was familiar.

As welcome as these changes were, military progressives had long held a far more
expansive idea of the tasks a general staff should perform. Although Upton was critical
of the hectic mobilization of 1861, he was far more concerned with the bloody battlefields

91 WDAR (1903), Root, 38.

of 1862 and 1863, when the Union Army had still to find competent generals and appropriate tactics. Brigadier General William H. Carter, one of Root’s chief assistants, made this point in a 1902 article in the *North American Review*, using recognizably Uptonian logic. “It is not claimed that a General Staff will prove a panacea for all the misfortunes which may overtake a nation engaged in war,” he conceded. “But, certainly history has shown in a multitude of instances that previous preparation for war tends to abbreviate the period of active hostilities, and thereby to effect a saving of millions.”93

To fully meet the needs of preparing the country for war would require a far more activist general staff than described by Root, as it would have to anticipate changes in warfare, develop appropriate solutions, and train an officer corps sufficiently proficient to carry out its schemes. This assumed that the General Staff would be a worthwhile “brain” for the army, but that depended upon two unproven institutions: a comprehensive military education system and the system for selecting general staff officers. Yet even if the best officers were selected and suitably trained, they would need to impose their will upon the remainder of the officer corps. These efforts would be hampered by the constraints of promotion by seniority and the traditional autonomy of commanders in determining what constituted proper tactics, which made it difficult to improve the quality of commanders and to force their compliance into an accepted system of war. Thus, many challenges remained, even after President Roosevelt signed the General Staff Act into law. Nevertheless, it was a significant achievement. As Carter later wrote, “It is certain that no Army officer, or group of officers, could have overcome the opposition to any

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93 Carter, "General Staff for the Army," 563.
change in the War Department system had not the Secretary safeguarded the bill for a General Staff Corps at every step of its progress through Congress.”

94 ———, *Creation of the General Staff*, 63.

You are one of the comparatively few in the service whose efforts are to raise its tone and standard, and these are the officers who should be recognized.

- Lieutenant Colonel George W. Weeks
to Lieutenant William H. Carter

Few officers had greater influence with Secretary of War Elihu Root than William H. Carter, even though Carter was only a lieutenant colonel with less than two years of service in the capital when Root replaced Russell Alger in 1899.¹ He seemed to be constantly with Root or doing his bidding: routinely accompanying the secretary of war on long horseback rides in the countryside outside of the capital, attentively stationed near Root at official receptions, hurrying between Congressional offices as the secretary’s principal legislative emissary, or accompanying former Commanding General John M. Schofield during his critical testimony in defense of the General Staff Bill. Far more than just an amiable companion and trusted messenger, Root relied on Carter to translate military progressive ideals into organizational reality through legislation, orders, and regulations.² In his final annual report as the secretary of war, Root made special note of Carter’s contributions throughout the process of “devising, bringing about, and putting


¹ For a brief synopsis of Carter’s career, see Appendix.

² One example of this partnership was an undated memorandum written by Carter for Root at some point in 1903 or early 1904. In it Carter suggests that Root direct the General Staff to revise the military legal code and general regulations, reallocate geographic responsibilities among the Army’s territorial commands, and develop recommendations for storing and maintaining supplies for future wartime expansion of the Army. It is not evident whether this memorandum was solicited by Root, but it is clear that Carter advised Root on some of the most important issues of War Department organization and policy. William H. Carter to Elihu Root, n.d., Army War College Document 940, Box 8, Entry 288, RG 165, NARA II.
into operation the general staff law.” Such recognition was the staff officer’s equivalent of being mentioned in dispatches. Carter’s access to the secretary was so great that a decade later, when he returned to the capital as a major general and the assistant chief of staff, he lamented that he had possessed more influence as a mere lieutenant colonel. Although the remark was meant as a complaint about Carter’s strained relationship with then-Chief of Staff Leonard Wood, it provides an insight into how personal relationships, even within such a structured hierarchy as the War Department, can greatly increase or diminish an individual’s power. Even though the fortunes of personality would turn against Carter during his second tour in Washington, his initial assignment to the War Department was defined by the remarkable bond that he developed with Secretary of War Root.

Historian Ronald Machoian described the Root-Carter relationship as a collaborative partnership, a “melding of executive clout with military ideas.” Root’s executive clout and political acumen certainly found a complement in the professional knowledge and experience of Carter, who had excellent credentials: long service on the frontier, including several awards for valor; time as an instructor at Fort Leavenworth.

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3 WDAR (1903), Root, 8.

4 Machoian, Carter, 265.

5 Ibid., 109-111, quotation from 111. Matthew Moten has argued that the Root-Carter relationship was not merely based upon personality but also reflected complementary professional values; he favorably compared the “exceptional capacity for reaching across cultural boundaries—an ability to work with people from other backgrounds, Root with the military, Carter with civilians, both of them with Congress” with the obstructionist Commanding General Miles, who “subordinated himself to civilian authority only under threat of punishment.” Matthew Moten, ”Root, Miles, and Carter: Political-Cultural Expertise and an Earlier Army Transformation,” in The Future of the Army Profession, ed. Lloyd J. Matthews (New York: McGraw Hill, 2005), 737. There is a historiographic consensus that Carter was Root’s primary advisor in matters of reform and the originator of many of the specific details, see also Ball, Responsible Command, 49-50; Nenninger, Leavenworth Schools, 55-57. Although Carter’s own account is highly complimentary of Root’s political skills and general intellect, he does not attribute any specific ideas to Root. Instead, Carter portrays himself as the architect and, in some cases including the restructuring of the military education system, the catalyst for reform. Carter, Creation of the General Staff, passim.
during its peak under Arthur L. Wagner in the 1890s; and, duty as one of the War Department’s principal staff officers during the Spanish-American War. Thus, Carter probably had as full an appreciation of the Army’s strengths and weaknesses as any officer of the time. Nevertheless, Carter’s extraordinary influence over the organization and professionalism of the Army was as much a product of fortuitous timing as it was personality or expertise. He happened to be the chief advisor to a reforming secretary of war just as public opinion was quite possibly more conducive to professional military reform than at any previous time in the history of the republic.

Carter was born to a respected central Tennessee family that remained loyal to the Union during the Civil War, a conflict that shaped his life’s course in several ways. Carter first became interested in attending West Point when Union officers wounded at the battle of Stones River convalesced in the Carter’s home. Several years later, he rode as a civilian dispatch rider for the Union Army during the Nashville campaign, acquiring a taste for military life. A darker legacy of the war was the resentment against Unionists in postwar-Nashville, which led the Carters to leave Tennessee for New York City. Yet this loyalty earned the elder Carter the gratitude of Andrew Johnson, the military governor of Tennessee during the war. As president, Johnson was allowed several nominations to West Point, one of which went to young William in 1868.6

At West Point, Carter found the academics, particularly geometry, difficult, resulting in a fifth year at the Academy and graduation with the class of 1873. Despite his poor academic performance, Carter was not a particularly troublesome cadet. But it was virtually impossible to avoid the occasional transgression of the Academy’s many

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regulations and the obligatory interview in Upton’s office the next morning. Fittingly, Carter’s only serious infraction was evidently a result of his academic frustration. Cadet Carter uttered a “profane exclamation at the board in [the] philosophical recitation room,” a sin which he compounded with an “irreverent explanation” of his behavior afterward. Upton confined Carter to his room for the incident, but the punishment seems to have not dampened Carter’s lifelong admiration for the commandant. In a 1924 monograph explaining the origins of the Root reforms, Carter identified his cadet years as the basis of his interest in military progressivism. Carter proudly claimed to have “served under General Upton [at West Point] when he was perfecting his tactics, as drill regulations were then called, and had followed him through his efforts to secure reforms.” As the conduit for military progressivism between Upton and Root, Carter would do more than any other to translate his mentor’s ideas into reality.

Carter’s first two decades of commissioned service were spent almost entirely in typical regimental service, much of it in difficult southwestern posts. During this time, he developed the conception of the military profession that would later guide his development of officer education. The horse-loving Carter began his career in an unfortunate way; due to his low class standing, he was initially commissioned in the infantry. Only the personal intervention of Secretary of War James Belknap, who Second Lieutenant Carter appealed to during a chance encounter at a train station, saved the young lieutenant from the pedestrian arm. Although Belknap likely gave little

7 Headquarters Corps of Cadets, Special Orders #8, 12 February 1872, USMA.
8 Carter, Creation of the General Staff, 35.
thought to the matter, this was lucky for the army, as Carter became one of its most respected experts on equestrian subjects.\textsuperscript{9}

Carter spent most of the next two decades at some of the Army’s most forbidding garrisons in present-day Wyoming, New Mexico, and Arizona. Under such conditions, many of his contemporaries had found their professional zeal covered by dust, faded by the southwestern sun, and dulled by whiskey, but not Carter. He excelled in his two experiences in combat, the surest means of building a professional reputation. In 1881, at the battle of Cibicu Creek, Arizona Territory, Carter left safety in an attempt to save mortally wounded comrades. After the small party retreated to Fort Apache, he played an important role in the defense of the fort.\textsuperscript{10} For these actions he later received a brevet promotion to captain and the Medal of Honor. Carter’s regimental commander, Colonel Eugene A. Carr, recommended him for another brevet a decade later, after Carter led a mounted charge against Sioux warriors at the battle of White River in the Dakota Territory.\textsuperscript{11}

Aside from these combat exploits, Carter built a reputation for competence in more mundane duties as well. Colonel Carr selected Carter as the Sixth Cavalry’s quartermaster, one of the two regimental staff positions. This was a sign of Carr’s high opinion of the young Carter, as these positions were typically reserved for the two best lieutenants of the twenty-six assigned to the regiment. Carr kept Carter as his quartermaster for eight years, another sign of the lieutenant’s competence.

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\begin{quote}
\textsuperscript{9} Machoian, \textit{Carter}, 29.

\textsuperscript{10} Eugene A. Carr to Adjutant General, Department of Arizona, 24 April 1890, Carter ACP.

\textsuperscript{11} “Military Record of Captain William H. Carter,” Carter ACP.
\end{quote}
Furthermore, Carr often used Carter to fill temporary vacancies, a role that required him to simultaneously serve as a troop commander or the regimental adjutant, in addition to his normal duties. In the army of the 1880s, which was governed by seniority promotion, even the colonel’s favor brought few tangible awards. Unfortunately for Carter, First Lieutenant James H. Sands was also officially assigned to the Sixth Cavalry, even though he had not been with the unit for several years due to physical incapacity. As regimental quartermaster, Second Lieutenant Carter was serving in a position meant for a first lieutenant but without the extra pay, while Sands did nothing but hold the rank. Carter’s frustration with this arrangement was likely heightened by the fear that a well-connected second lieutenant with slightly more seniority might be transferred into the Sixth Cavalry, which would delay Carter’s promotion even longer. Unwilling to accept this state of affairs, Carter wrote several letters suggesting that Sands be placed on the retired list. When Carter was finally promoted to first lieutenant, his commission was backdated to the day that he assumed the quartermaster duties—a belated victory.\textsuperscript{12}

Colonel Carr was not the only senior officer who recognized Carter’s professional competence. In 1883, the departmental quartermaster complimented Carter as being one of the few officers endeavoring to improve military professionalism.\textsuperscript{13} But Carter had few opportunities to display this trait until a routine unit transfer brought then-Captain Carter’s cavalry troop to Fort Leavenworth in 1893. There he taught hippology (the study of horses) and mounted tactics, wrote a textbook and several articles, served on several promotion examination boards, and edited the \textit{Cavalry Journal}, all in

\textsuperscript{12} Machoian, \textit{Carter}, 48.

\textsuperscript{13} George W. Weeks to Carter, 27 July 1883, Carter ACP.
addition to his normal command duties. Yet an even greater opportunity to raise the “tone and standard” of the entire Army came in 1897, when Carter was selected for the Adjutant General’s Department, the most prestigious of the staff bureaus. The detail brought Carter promotion to major years earlier than might have been expected in the cavalry, a new line of work as opposed to the drudgery of regimental duties mastered over the previous twenty-three years, and a guaranteed assignment to large cities like Chicago, New York, or Washington, D.C. However welcome these inducements might have been for Carter, he also had ambitions to remake the education and promotion systems of the Army. When he left Kansas for Washington in 1897, the new assistant adjutant general could not possibly have guessed the manner in which his aspirations would be fulfilled.

Duty in the Adjutant General’s office brought Carter together once again with Arthur L. Wagner. They had first known each other at West Point, when Carter’s last two years as a cadet had coincided with Wagner’s first two years. Like Wagner, Carter preferred reading military history and theory to the math and science textbooks of the curriculum. Two decades after his graduation, Carter’s troop was transferred to Fort Leavenworth in 1893, the year that Wagner returned from his leave to write his two textbooks. They were both instructors until Wagner’s selection for the Adjutant General’s Office in 1896, just two months before Carter received the same promotion.

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14 Machoian, Carter, 90-95.
15 “Military Record,” Carter ACP.
16 Immediately after learning of his staff appointment, Carter requested that Adjutant General George D. Ruggles assign him the task of reforming the officers’ lyceum and promotion examination regulations. Carter to Ruggles, 4 February 1897, Carter ACP.
17 “Military Record,” Carter ACP.
Carter shared Wagner's flair for writing; he contributed to professional journals and authored a textbook on hippology for use at Fort Leavenworth. The culmination of their professional relationship came in 1898 when Wagner, Carter, and Lieutenant Colonel Theodore Schwan—a noted expert on the German General Staff—developed the initial Cuban invasion plan.¹⁸ Unlike Wagner and Schwan, who were soon bound for Cuba and the Puerto Rico respectively, Carter was unable to escape Washington.¹⁹ Ultimately, however, staying in the capital gave Carter both a general's stars and the opportunity to leave a more durable legacy than he probably could have achieved elsewhere.

Carter had served in the Adjutant General’s office for more than two years when Elihu Root arrived. In addition to his work during the Spanish-American War, Carter had also become something of an expert on legislative affairs, having drafted the 1899 bill that created the temporary two-year force for the Philippine-American War.²⁰ Whether it was this expertise, his medal of honor, or a simple matter of personality, Carter quickly became one of the new secretary's trusted advisors on military matters.²¹ According to Carter, he was the first to introduce Root to the ideas of Upton, buying a copy of *Armies of Asia and Europe* for the secretary of war in a second-hand book

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²¹ Several decades later, Carter's personal secretary claimed that Root initially sought out Carter's advice. If true, Root's visit to a subordinate's office would have been an unusual sign of respect for Carter. Harold D. Cater notes of interview with Grace I. Palmer, 3 December 1947, Office of the Chief of Military History Collection, MHI.
store. Root was so impressed with Upton’s ideas that he directed *Military Policy of the United States*, Upton’s unfinished manuscript, published by the War Department in 1904. After reading *Military Policy*, President Theodore Roosevelt wrote to the secretary of war, “I have been on the whole, delighted with Upton’s book, and I think you rendered a great service in publishing it.” Nevertheless, the president was critical of Upton’s “one-sided” account in which the regulars had few faults. He specifically noted that the armies invading Canada in 1813 had failed “because they were under two incompetents, who had seen long service in the army. In other words, Upton should have remembered to qualify continually what he said by remembering that mere length of service . . . [amounts] to nothing whatsoever.” This was an entirely fair criticism, and one that Upton knew from his personal experience to be correct. Simply amassing years of service in the regular army did not guarantee professional competence. Root believed that maneuvers were an essential element of professional preparation for regular officers, and he was instrumental in supporting the efforts of Wagner in the Fort Riley maneuvers. The complement to this effort was an ambitious reform of professional education.

In his first months in the War Department, Root indicated a desire to expand professional education. This reflected his conviction that education was the foundation of society. In fact, Root was passionate about the subject and devoted considerable time to advancing civilian education as a board member of the Carnegie Institution of

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22 Carter, *Creation of the General Staff*, 2

23 Theodore Roosevelt to Elihu Root, 16 February 1904, Box 163, Root Papers, LC.
Washington and as a patron of his alma mater, Hamilton College in New York. In a revealing letter to Andrew Carnegie, Root described his belief that education in earlier eras had benefited only a “few fortunate individuals [who] were, by superior education, withdrawn and separated by a gulf from the great mass of an ignorant people.” This contrasted with what Root termed the “modern method,” which was for “the whole mass.” He believed that expansive education open to all “builds a pyramid in which every part of civilized society has its place, rising without any break from the broad bases of common education up to the peak, where superlative genius reaches forth from a solid foundation.” In Root’s opinion, this inclusive education was the basis of modern society and its achievements, as he doubted that the individual mind had gained any capability over the previous thousand years. Therefore, modern civilization must have been the result of a collective organization that “[massed] behind the ablest individual minds many others nearly as able and advanced, and behind them still others who are almost their equals [would] result in carrying the minds at the top to a height of achievement inconceivably beyond anything which the isolated mind of the past could accomplish.”

Root wanted to apply this understanding to professional education. In his 1899 annual report, he declared that every junior officer would at some point be assigned to a full-time professional school, where he would learn “the science of war, including the duties of the staff, and . . . all matters pertaining to the application of the military science to national defense.” Although within the artillery most officers already attended the

24 For Root’s activities with the Carnegie Institution and Hamilton College, see the numerous correspondence in boxes 15-38, Root Papers, LC.

25 Elihu Root to Andrew Carnegie, 10 February 1902, Vol. 180, Pt. 1, Root Papers, LC.

26 WDAR (1899), Root, 50.
school at Fort Monroe, universal education would be a significant departure from the previous practices of the infantry and cavalry, in which only a portion of the officers received any formal training. The Infantry and Cavalry School of Application graduated only 255 infantry and cavalry lieutenants throughout the entire 1880s and 1890s, but there were a full 842 lieutenants of these arms on duty at the beginning of 1898. Thus, less than a third of junior officers received postgraduate education and the proportion was even less when all ranks were considered.27 Through the efforts of military educators like McCook, Wagner, and Swift, the school had made great progress, but it only influenced a small portion of the officer corps. Even more daringly, Root’s pyramidal structure implied some form of meritocracy in the necessary differentiation of the “superlative minds” from the rest. This was no accident. Root recognized the deadening effect of seniority promotion, which in his opinion was “not merely unjust,” but “[destroyed] ambition and checks the effort of the Army.”28

Despite these lofty notions, Root could do little to advance professional education in 1899. The schools had been suspended the previous year for the Spanish-American War. With over half of the officer corps serving overseas, many serving in temporary volunteer units, Root would have to wait nearly two years before he could even reopen the schools, much less expand them.29 To prepare for the army’s return to normalcy, Root commissioned an investigative board of officers chaired by Brigadier General William Ludlow to develop specific recommendations for education reform. In his initial

27 Figures on school attendance compiled from Historical Sketch and Official Army Register: 1898.
28 Root, WDAR (1899), Root, 50-51.
29 For figures on the large number of officers and soldiers serving in the Philippines see ibid. 5-6; Nenninger, Leavenworth Schools, 53.
letter of instruction to Ludlow, Root confessed that he had “not yet worked out in my own mind the precise form which the [education] organization should take.”30 Indeed, the translation of vision to details would be a recurring difficulty for military progressives. Idea to plan, plan to execution, at each step in the chain, individuals applied their own unique views and experiences to the project of reform inherited from their predecessors. Sometimes these different views would enhance and complement each other, but this was not always the case. Despite their close relationship, Carter would not entirely grasp what Root desired for education.

Root was not the first reformer to try to make professional education universal in the U.S. Army. In the early 1890s, General John M. Schofield had hoped “to give officers an incentive to study . . . [and] to stimulate professional zeal and ambition” by instituting an officers’ lyceum at each post.31 According to Schofield’s plan, every officer would be required to research a topic of professional interest and write an essay on the subject once a year. These essays would be read to the other officers of the post at the lyceum. It was a noble effort, but the lyceum was a disaster. It was asking too much of the nineteenth-century officer corps to simply hope that with so little direction something useful would emerge spontaneously. One literary officer who contributed regularly to the journals and would later write a military history text described the lyceum as a “constipation of ideas in a flux of words.”32 While at Fort Leavenworth, Carter had developed the idea of giving the lyceum purpose and direction by linking it to the

30 Root to William Ludlow, 1 February 1900, Vol. 178, Pt. 2, Root Papers, LC.
31 John M. Schofield, 1892 annual report quoted in Coffman, Old Army, 276.
32 Ibid., 277.
promotion examinations. After his transfer to the Adjutant General’s Department, Carter drafted a plan along these lines, but he was bitterly disappointed when his scheme was rejected in favor of a competing order drafted by Inspector General Joseph C. Breckinridge. Carter’s assignment as one of the two officers initially detailed to assist Ludlow provided him with another opportunity to realize his ambition. At the first meeting of the board in February 1900, Carter was given the critical task of drafting recommendations for the new education system, and he maintained this portfolio within the Ludlow Board through the final report. Shortly after the passage of the Army Reorganization Act in February 1901, Root ordered Carter to devise a new system of professional education; the resulting plan was approved by Root and published as War Department General Order Number 155 on 27 November 1901.

According to the order, “the object and ultimate aim of [military education] is to train officers to command men in war.” To achieve this goal, Carter created a system with four different components: the garrison schools, the special service schools, the General Service and Staff College, and the Army War College. The garrison schools would provide elementary training for all officers, but the other three components would accept only the best students from the previous level of schooling, until only an elite few destined to fill the Army’s highest staff and command positions would graduate from the

33 Carter, Creation of the General Staff, 1-3; Machoian, Carter, 93-101; Carter to George D. Ruggles, 4 February 1897, Carter ACP.

34 A fourth officer, Lieutenant Colonel Joseph P. Sanger, was later added at Ludlow’s request. Sanger had been a friend of Upton, having been one of his two companions on the world tour that culminated in Upton’s The Armies of Asia and Europe. Ludlow to Root, 1 May 1900, Box 10, Root Papers, LC; Ball, Responsible Command, 61-69; Carter, Creation of the General Staff, 2-11; Machoian, Carter, 113-137.

35 War Department General Order #155, 27 November 1901.
Army War College.\textsuperscript{36} In this broad outline, the system seemed to conform perfectly to Root’s desires.

Finally given the opportunity to reform the lowest level of education, Carter replaced the widely despised officers’ lyceum, which he thought “obnoxious,” with garrison schools, which were to train new lieutenants in basic skills.\textsuperscript{37} At each post, the senior officers of the unit would guide their subordinates through a course of instruction intended to complement the lieutenants’ regular duties, with over a third of the lessons covering such tasks as filling out property accountability forms, administering military justice, and supervising guard duty. The remainder dealt with “field” tasks, but only a small portion was actually related to tactics and combat.\textsuperscript{38} Thus, one might rightfully question whether the garrison school, which was the only obligatory element of the new system, truly met Root’s vision of training every officer in the “science of war.” Carter allotted very little time for what might be an officer’s only postgraduate instruction: they attended the school for a mere two hours a day and only for three months between fall field exercises and spring marksmanship training. Once a lieutenant passed the final examination at the end of the second year, he was presented with a certificate excusing

\textsuperscript{36} War Department General Order #155, 27 November 1901. Root’s initial instructions to the Ludlow Board specified such a succession of progressively more advanced and selective schools, but it cannot be ascertained whether this idea was originally Root’s or had been first suggested to him by Carter. In any case, the War Department had shown official interest in such a scheme for at least a year before General Order Number 155. Carter, \textit{Creation of the General Staff}, 3.


\textsuperscript{38} These other campaign skills included assorted field engineering tasks; military topography and sketching, field sanitation, establishing a bivouac site, and unit-level logistics. The directive stipulating the garrison school curriculum was issued in the name of Brigadier General Carter, at the serving as the acting Adjutant General. War Department General Order No. 102, 22 September 1902.
him from further garrison school work.\textsuperscript{39} On the other hand, those “who fail to acquire a proper degree of efficiency” would be deemed unfit for promotion.\textsuperscript{40} The centrally-mandated curriculum, limited period of instruction, and the direct tie to promotion were the biggest differences between the garrison school and the officers’ lyceum. Yet for all of the changes to the structure of the garrison schools, Carter seems to have primarily regarded them as a tool for identifying those officers exhibiting “the most aptitude and intelligence” for further education, rather than as a means of providing a comprehensive education for the mass of officers.\textsuperscript{41} Carter seemed keener to avert a “degradation of the service schools” by excluding the dullards than to educate them.\textsuperscript{42}

The five service schools were the second element of Carter’s system. The Artillery School at Fort Monroe and the School of Application for Cavalry and Field Artillery at Fort Riley were simply reopened after their hiatus for the Spanish-American War. Carter also created three new schools: the School of Submarine Defense at Fort Totten, New York; the Engineer School of Application in Washington, D.C.; and the Army Medical School, also in the capital.\textsuperscript{43} The names indicated their specialized focus on skills unique to each arm of service, essentially functioning as extensions of the garrison school curriculum for the technical arms.\textsuperscript{44} Together the garrison and service schools fulfilled the need of teaching lieutenants the skills needed to function as officers.

\textsuperscript{39} War Department General Order Number 155, 27 November 1901.

\textsuperscript{40} Ibid.

\textsuperscript{41} War Department General Order Number 155, 27 November 1901.


\textsuperscript{43} Ibid.

\textsuperscript{44} Carter to Corbin, 25 May 1901, and “Memorandum No. 1,” both in Carter, \textit{Creation of the General Staff}, 5-9.
The third element of the new education system, the General Staff and Service College (GSSC) at Fort Leavenworth, was a different case entirely. Carter assigned it a function that was completely new to the U.S. Army. The GSSC was to provide advanced theoretical training in the art of war for the brightest officers from all arms in preparation for high-level command or staff positions. Although the need for such skills had been long recognized, the development of this ability had heretofore been left to experience, intuition, and innate “genius.” Despite its novel purpose, this new school was to be based on the old Infantry and Cavalry School. Placing the GSSC at Fort Leavenworth made great sense from a practical standpoint, as it had the largest existing facilities and ample space for future expansion. But Carter intended to use far more of the old school than just its physical infrastructure. Despite its new purpose, much of the old curriculum was also adopted. It is revealing that the only modification Root made to Carter’s final draft of General Order Number 155 was to insert a passage honoring the old Leavenworth school as the antecedent for the GSSC. Root’s recognition of the Infantry and Cavalry School as the model for future education was a direct result of Carter’s influence, who had “urged [Root’s] interest in the school.” As General Order Number 155 did not give details about the course of instruction of the school—that would be left to another order that would appear the following year—an officer in 1901 might

45 War Department General Order Number 155, 27 November 1901.
46 Brereton, Educating the U.S. Army, 93-94.
47 Carter remembered that he “was so pleased with [Root’s] gracious suggestion that I asked him to change the order in his own hand.” Carter, Creation of the General Staff, 11.
well have wondered how exactly an “enlarged and developed” Infantry and Cavalry School would provide training applicable to officers of all arms.\textsuperscript{48}

Carter created the Army War College to be the fourth and highest level of his educational system. Whereas General Order Number 155 perhaps tied the GSSC too closely to existing forms, the Army War College suffered from the other extreme. It was tied to no existing institutions, allowing for great originality in its conception. Yet without available facilities it languished as merely an idea until 1904—three years after General Order Number 155 was published—and even then only nine officers could attend for lack of a suitable building.\textsuperscript{49} Part of this delay was due to Root’s problems in persuading Congress to accept a general staff; Carter intended for the school to function as an integral portion of the general staff, performing a similar war-planning function as the Naval War College at Newport, Rhode Island, which he had visited while drafting the order.\textsuperscript{50} Without a general staff, there was no need to train general staff officers.\textsuperscript{51}

Yet Newport was not the only possible model for the Army’s top school. In contrast to the collegial “learn-by-doing” method of the Naval War College, where the officers were essentially probationary general staff officers rather than students, the

\textsuperscript{48} “The Infantry and Cavalry School at Fort Leavenworth, Kansas, shall be enlarged and developed into a General Service and Staff College and shall be a school of instruction for all arms of the service.” War Department General Order Number 155, 27 November 1901.

\textsuperscript{49} The initial site was nothing more than a rented house off of Jackson Square in Washington, several miles northwest of the State-War-Navy building. Ball, \textit{Responsible Command}, 94-95.


\textsuperscript{51} In the absence of a general staff, the War College Board—the committee established by Root to implement the school—served as a surrogate coordinating body throughout 1903. George S. Pappas, \textit{Prudens Futuri: The U.S. Army War College, 1901-1967} (Carlisle Barracks, Pa.; Alumni Association US Army War College, 1967), 38.
nineteenth-century Fort Leavenworth method was more similar to the Prussian
*Kriegsakademie* (War College), which had a structured curriculum of lectures,
recitations, practical work, and examinations.52 It was this type of formal education that
Upton had in mind when he urged the creation of an equivalent to the European war
colleges.53 Aside from Upton’s powerful influence, many American officers were familiar
with foreign military organizations, naturally leading them to a similar conception of a
war college as a place for knowledge to be imparted to students.54 Carter briefly
considered simply renaming the Kansas school the Army War College; his decision not to
do so was possibly due to his realization that the Army needed its own versions of both
the *Kriegsakademie* and Newport.55 Although General Order Number 155 did not
explicitly delineate a division of responsibility between the GSSC and the War College,
the different internal structures of the schools logically suggested that students should
leave Fort Leavenworth with all of the training necessary for a general staff officer.

Carter stipulated that the top school would draw its students from the best
graduates of the GSSC. Several months before General Order Number 155 was

52 The early Army War College did not designate the officers sent there for instruction as *students*. Rather
they were officially categorized as *temporary personnel*. The faculty was also made rhetorically distinct
from the established army roles. The War College had a president, directors, and permanent personnel in
lieu of the commandant, instructors, and assistant instructors found at Fort Leavenworth and other army
schools.

53 Emory Upton to Henry A. DuPont, 1 April 1877, in Michie, *Letters of Emory Upton*, 418.

54 As with other elements of military reform, German organization was a benchmark. In his final report
before leaving Fort Leavenworth, Arthur Wagner cited similarity of the Infantry and Cavalry School
curriculum to that of the German *Kriegsakademie* as proof that the American school had reached maturity.
It is revealing that Wagner’s critics accepted this contention, arguing that a war college education was too
advanced for the lieutenants detailed to the school. The most vocal critic, James Pettit, accused Wagner of
having turned the Infantry and Cavalry School into a war college in all but name. Thus, Wagner and Pettit
both reflect the common notion of a war college as a formal school similar to the existing American military
Instruction for Our Officers,” 29-31.


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published, Carter considered drawing War College students from both Fort Leavenworth and the Artillery School, making them coequal. It is not clear why, in the intervening period, the Fort Monroe school was demoted, but such a far-reaching decision was certainly deliberate rather than a mere oversight.\textsuperscript{56} The determination of prerequisites for entry to the Army War College was vital because Carter intended for graduates of that school to be given preference for assignments of high responsibility.\textsuperscript{57} This elevation of the GSSC over the technical service schools reflected a judgment about what constituted essential professional knowledge for general staff work and other important duties. The GSSC curriculum, which was built upon the old Infantry and Cavalry School, was deemed so important by Carter that all officers had to have it in order to qualify for the Army War College, but he did not believe that the technical skills of the artillery and engineer were sufficient for a well-rounded officer.

Despite Root’s intention, General Order Number 155 was little more than a refinement of the pre-1898 education system. Carter certainly faced a host of practical problems that would have hindered more ambitious efforts. The Army’s great expansion earlier in 1901 made training the thousands of newly-commissioned officers an urgent necessity despite a potential shortfall of instructors, as many senior officers were serving in units, staffs, or colonial governments overseas.\textsuperscript{58} At the same time, Root was trying to

\textsuperscript{56} In a memorandum written at some point during the summer of 1901, Carter outlined the major features of what would become General Order Number 155. The majority of his discussion was given to what would become the GSSC. But then—apparently as an afterthought—Carter wrote that all of the previous items would apply to the Artillery School as well. The pages devoted to Fort Leavenworth and the single sentence given to Fort Monroe reflected Carter’s complete indifference to the Artillery School. “Memorandum No. 1, Subject: Instruction of the Regular Army” in ibid., 6-8.

\textsuperscript{57} War Department General Order Number 155, 27 November 1901.

\textsuperscript{58} The 1901 Reorganization Act nearly doubled the size of the officer corps. The new officers were a mix of former enlisted regulars, volunteer officers from 1898 and 1899, and civilians without any experience at all. Root’s acknowledgement that they placed a “burden on the older and more experienced officers” greatly
curry congressional support for the Dick and General Staff bills, so he sought to economize whenever possible. This certainly compelled Carter to use the physical infrastructure of the existing schools. Finally, the artillery and engineers each had a brigadier general serving as their chief, and any changes to the technical service schools would have required their consent.

Even when taking these constraints into account, Carter failed to take full advantage of his opportunity to reform officer education in the bold manner that Root had envisioned. Fort Monroe was reconstituted in the narrow, technical fashion of the 1890s rather than the intellectually broad manner of the 1880s, and the new Submarine Defense School at Fort Totten, New...
York, was essentially an extension of the Artillery School, both in method and content. The Engineer School at Washington Barracks had a similarly technical course of instruction, which was primarily concerned with civil engineering. Surprisingly, Carter’s neglect extended even to the School of Application for Cavalry and Field Artillery at Fort Riley, which was scarcely a school at all, but a “model post” with the officers of the assigned units doubling as instructors and students. A frustrated instructor complained that this system doomed the school to “always be a Kindergarten and never a post graduated [sic] course for practical Cavalry and Light Artillery work.” This return to the “model post” school was even more perplexing in light of the changed conditions of the twentieth century. The concept was developed when the conditions of frontier service in the antebellum army made it nearly impossible to even drill satisfactorily.

60 The Artillery School of 1901 had no equivalent to the Military Art department headed by Upton at Fort Monroe two decades earlier. It and the School of Submarine Defense at Fort Totten had nearly identical curricula that were nearly exclusively technical in orientation. Both of these schools had departments of Electricity, Mines, and Mechanism; Chemistry and Explosives; and Special Subjects. The Artillery School also featured a department of Ballistics and Seacoast Engineering. In fact, the two were so closely aligned that the School of Submarine Defense would survive as an independent school for only six years until the creation of a Coast Artillery Corps in 1907, when the two were merged. Memoranda from G.F. Landers and John W. Ruckman to Adjutant, School of Submarine Defense contained in report from William Chamberlin to Tasker H. Bliss, 11 August 1902, Box 1, Entry 288, RG 165, NARA II; War Department General Order Number 109, 15 August 1901, and General Order Number 145, 8 November 1901.

61 War Department General Order No. 146, 9 November 1901; William M. Black to George L. Gillespie, 18 July 1902, Box 3, Entry 288, RG 165, NARA II.

62 With his previous experience as a Fort Leavenworth instructor, it would not have been surprising if Carter had chosen to make Fort Riley into a simpler version of the GSSC. Such a change would have benefited the cavalry, which would have gained a preparatory school for the GSSC. This would presumably have led to more cavalrmen qualifying for positions at the Army War College. Alternatively, he could have made Fort Riley into a technical school, treating the horse as equipment analogous to guns or mines, which were the subjects of the other service schools. In 1907, this was precisely what happened, when the school was renamed the Mounted Service School. The curriculum was devoted to horse care, training, and riding, all subjects in which Carter was regarded as a leading expert.

63 Stephen L. Slocum to William D. Beach, 8 February 1903, Box 5, Entry 288, RG 165, NARA II. An artilleryman stationed at the school at this same time offered a similar assessment. “Neither the theory nor the practice of the combined use of the two arms was included in the curriculum of the school or the program of training of the troops. The cavalry spent most of its time in drill book exercises on the flat ground near the post, and the artillery had most of the rest of the reservation to use as it saw fit.” Lassiter, “Memoirs,” II:4.
Since that time, the partial success of consolidation efforts and Root’s intention to introduce field maneuvers went a great way towards eliminating the conditions that such schools were meant to mitigate. Furthermore, the collective, informal nature of “model posts” could not be reconciled with Carter’s organizing principle of identifying the elite. This was recognized by the commandant of the Fort Riley school in 1907 when he urged that both the limited tactical training and the use of grades be eliminated, as those practices were “out of place at this practical school.”\textsuperscript{64} The many contradictions, oversights, and faults relating to the service schools in General Order Number 155 suggest that Carter was utterly indifferent to the schools at Forts Monroe, Totten, and Riley.\textsuperscript{65} This contention is further borne out by the lack of central control exerted by Carter and the other members of the War College Board over these schools, which were generally allowed to determine their own methods and organization. In contrast, the War College Board exercised close control over the GSSC and Army War College.\textsuperscript{66}

\textsuperscript{64} WDAR (1907), Edward S. Godfrey, Report of the Commandant, Cavalry and Light Artillery School of Application, 4: 272.

\textsuperscript{65} Carter wrote one of his earliest proposals for Root in the early summer of 1901, offering plans for Fort Leavenworth in great detail, but spared only one sentence for the Artillery School. Even that was to merely say that all the provisions for Leavenworth would apply to Monroe as well, even though several obvious differences between the schools made this a nonsensical statement. This same pattern of inattention is repeated throughout his other correspondence and in General Order Number 155. This lack of care contrasts with Carter’s close attention to detail in other matters. For instance, he personally supervised the initial order for furniture, equipment, and books for the Army War College. Carter specified not only the thirty-three individual volumes for the library, but also differentiated between the three models of typewriters, the three sizes of maps, and the four types of chairs that he desired. In light of his demonstrated capacity for detail, Carter’s inattention to the service schools can only be seen as a matter of choice. Memorandum No. 1 in Carter, \textit{Creation of the General Staff}, 8; Carter to Root, 2 June 1902, Box 1, Entry 288, RG 165, NARA II.

\textsuperscript{66} The artillery and engineer schools submitted their proposed courses of instruction to the respective branch chiefs with copies furnished to the War College Board, which took no official action on the matter. In contrast, the War College Board was active in reviewing the GSSC regulations, modifying the course of instruction, and selecting instructors. This might have partly been a consequence of the absence of infantry or cavalry equivalents to the chiefs of the technical arms, but then the War College Board would have also logically been active in the administration of the Cavalry and Light Artillery School, which was not the case. For examples of the technical schools setting much of their own courses, see Chamberlin to Bliss, 11 August 1902, and Black to Gillespie, 18 July 1902, NARA II. In contrast, the War College Board’s close oversight of
Thus, Carter seems to have split the Army’s postgraduate schools into two groups by design. The first consisted of the garrison schools, GSSC, and the War College which comprised an integrated, progressive system. The second consisted of the various service schools, which had nothing in common other than their isolation from Carter’s path to success. Even those elements that he emphasized were remarkably feeble. A hypothetical lieutenant of infantry or cavalry who graduated first in every school he attended would likely receive only fourteen months of formal instruction between the garrison school and GSSC, and perhaps another ten months of supervised staff work and lectures at the Army War College, a mere twenty-four months of training to fit him for an average career of over four decades. A less capable officer with no aptitude or inclination for schooling would receive only six months of training at the local garrison school—a mere 180 hours! This was such a poor education that a later General Staff study asserted that General Order Number 155 was “intended more as a suggestion and guide for both student officers and instructors than as a complete exposition of what is necessary for an officer to study to equip himself thoroughly for the proper performance of his duties.” From this observation, the report concluded that it had always been intended that local commanders would supplement the training required by the War

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67 Carter’s intent for the service schools continues to puzzle historians. Timothy Nenninger has described them as the second level of a four-tier system, with the GSSC simultaneously operating on both the second and third levels as a service school for the Infantry and Cavalry and as a staff school for the entire Army. Ronald Machoian has argued instead that this interpretation imposes a logical order that was absent from the muddled order, which did specify a clear function for the service schools. Nenninger, *Leavenworth Schools*, 55-59; Machoian, *Carter*, 134-137, 330 n. 54.

68 War Department General Order Number 102, 22 September 1902.
While it was correct in asserting that Carter’s plan was inadequate professional preparation, nothing within General Order Number 155 implies that Carter regarded it as merely a “suggestion.” In light of Carter’s dissatisfaction with the officers’ lyceum, which also depended on local commanders for its success, it is unlikely that he placed any faith in commanders to exceed the mandated training dictated in the order. It is far more likely that Carter’s neglect of basic education was a deliberate omission, not because he expected post commanders to exceed expectations.

The schools developed by Carter might have been inadequate for providing a comprehensive professional education as Root wished, but they were more than sufficient to meet Carter’s primary goal of identifying those “officers who have uniformly shown the greatest interest and most proficiency [in military education]” for assignment to the General Staff. The schools were merely a tool to remedy the existing system in which “influence [was] more potent than trained talent and fitness.” Carter logically assumed that general staff officers, with their knowledge of mobilization plans and contacts in Washington, would be well-placed to assume command of the large volunteer armies in future wars. While the ultimate selection of generals would remain with politicians, military progressives could create a pool of qualified candidates from “which future generals could be selected without fear of disaster.” In essence, Carter hoped to

69 First Division, Provisional General Staff, Memo Report #460, 29 July 1903, Box 6, Entry 288, RG 165, NARA II.

70 War Department General Order Number 155, 27 November 1901. The General Staff Corps was not officially formed until 1903, but in several internal memoranda written in 1901 Carter explicitly stated that he was anticipating this development in the near future. Carter, “General Staff for the Army,” 564. See also, Carter, Creation of the General Staff, 20-21.

71 Carter, "General Staff for the Army," 564.

72 “Memorandum No. 1: Instruction of the Regular Army,” n.d. in ———, Creation of the General Staff, 6.
use competitive entry to the General Staff to mitigate the unpredictable political forces
governing general officer selections—one of Upton’s greatest frustrations. It was this
consideration that led Carter to melodramatically warn Root that “one detail made to the
General Staff Corps, based upon personal, social, or political influence will do more harm
than can well be imagined.”

Carter’s link between the schools and the General Staff would give education
great legitimacy, but only if the “capable and ambitious young and middle-aged officers
of the Army, who have no hope of preferment based upon other than recognized merit”
came to regard the General Staff as the “mecca [sic] toward which the roads of
professional endeavor lead.” This was quickly the case, as officers came to refer to the
General Staff as the “golden circle” within months of its creation, while some on the staff
modestly called themselves the “Brain Trust.” But there was some skepticism as to
whether meritocracy had truly taken hold or whether influence and “pull” still held sway.
In a 1905 letter to the Army and Navy Journal, Matthew F. Steele, a Fort Leavenworth
instructor, conceded that “many of the ablest officers” had been selected for the General
Staff, but he added that there were “many others throughout the service doing straight
regimental duty just as able as most of the members of the General Staff.” Steele claimed
that success was dependent on having had “the luck to serve with general officers and
others whose recommendations have weight with boards.” This attitude, if

73 Carter to Root, undated memorandum in ibid., 52.
74 Ibid.
75 In his memoirs, a former General Staff officer referred in a deprecating manner to the “Knights of the
Silver Star and Braid,” a reference to the insignia worn by all General Staff Corps members. Hagood, “Down
the Big Road,” 112; Clarence R. Edwards to James G. Harbord, 3 November 1903, Vol. 1, Harbord Papers, LC
76 Matthew F. Steele to Army and Navy Journal, 8 February 1905, Box 2, Steele Papers, MHI.

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widespread, would become a self-fulfilling prophecy as the best junior officers would shun the schools in favor of assignments where they might gain an influential senior officer’s favor. There was also skepticism about whether lingering disdain for the army schools would fatally undermine the system. Captain Alonzo Gray, a West Point graduate, argued that Carter’s plan would discriminate against West Pointers because they would be denied the opportunity to go to Fort Leavenworth by regimental commanders who still thought of it as a “Kindergarten” fit only for those commissioned from the ranks or civilian life. This was a valid fear, as the following year Arthur L. Wagner attempted to help a captain eager to attend Fort Leavenworth but whose colonel maintained that West Pointers had no need for further education.  

Of course, not all commanding officers continued to hold this view, but it was common enough that as late as 1918, Matthew F. Steele felt it necessary to state, “It is a great mistake to suppose that [an officer] can acquire all the science of warfare in four years of instruction at West Point. . . . In fact, considered as a technical military institution, West Point is only a preparatory school.”

Harry Ball, a historian of Army education, has called General Order Number 155 “a benchmark in the professionalization of the officer corps of the United States Army.” While correct, two caveats must be kept in mind. The first is that in regard to education, the principle underlying the plan was the benchmark, not the immediate effects of the

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77 Alonzo Gray to the Adjutant General, 27 January 1903, Box 4, Entry 288, RG 165, NARA II. This was indeed the case for those officers assigned to the 15th Cavalry. One of the captains in the regiment had to write to the War Department seeking assistance because the regimental commander refused to send West Pointers to the Fort Leavenworth school. Francis J. Koester to Arthur L. Wagner, 17 February 1905, cited in Brereton, Educating the U.S. Army, 110.

78 Matthew F. Steele, “Evolution of Professional Culture,” [1918], Box 20, Steele Papers, MHI.

79 Ball, Responsible Command, 68.
order. The commendable requirement for all officers to attend some form of postgraduate education was largely nullified in practice by the meager preparation given by the officers’ schools. Of course, the best officers would continue on to the more advanced schools. But Root understood what Carter did not: the mediocre need for education as well. Furthermore, it might be argued that the best measure of a profession is not the heights that its most talented members reach, but by the average competence of its masses and the depths of incompetence it allows among the worst practitioners. Certainly these latter measures would have provided a better gauge of the army of the 1880s than a sample of the Uptons, Shermans, and Sheridans. Despite his failure to use education as a means of improving officer professionalism, Carter’s plan was revolutionary in its attempt to systematically identify the best officers and place them in positions of responsibility. It was particularly daring in equating academic performance with capacity for high command, a notion that was regarded with skepticism by an officer corps that derided “book soldiers.” Captain Rufus Longan’s contention that “we have no way of determining the outward qualifications of an officer by his ability to recite from text-books” was typical of this attitude. That Longan won the JMSI’s silver medal prize for his essay only underscores how common such views were among officers. Moreover, any system of meritocracy naturally created an organizational imperative to formally define and measure professional competence, which once fully developed would be a deathblow to the nineteenth-century professional ethos. To overcome the certain resistance to General Order Number 155, Carter urged Root “to make it thoroughly known to the Army that it receives the unquestionable approval of the Secretary of

Although Carter had failed to provide Root with a plan that met his idea of raising the proficiency of the officer corps through education, he was perfectly in accord with the secretary's intentions regarding the benefits of meritocracy. As the school system evolved, other military progressives would find that education and competition were not always easy to accommodate.

The tensions inherent in the varied purposes of education were exacerbated by the different notions of what constituted education. Quite simply, military progressives—including Carter and Root—were talking past each other. The word *education* was everywhere, but it had diverse meanings that seemed not to have often been recognized. The greatest source of this confusion was the multi-faceted and changing nature of the military profession from which most of the ideas on education were derived. One of the chief sources of disagreement was the differences between the various arms. Each arm defined itself in relation to technology in a slightly different way, each of which had implications for military education. For obvious reasons, of the combat arms the Artillery Corps placed the greatest emphasis on technical skill. Coast defense batteries used massive guns to hit fast, armored targets several miles distant through the coordination of a network of optical range finders, control centers, and guns all linked by telephone communications. This work made technical skills the *sine qua non* of professionalism within the artillery. Furthermore, because coast artillery was

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81 Carter to Root, 14 October 1901, in Carter, *Creation of the General Staff*, 10. This concern was well-founded. Just two years after the publication of General Order Number 155, one well-connected junior officer speculated that “the army seems to be getting a little tired of so much school” and that Root’s replacement would soon sweep it away as just another “fad.” Guy V. Henry, Jr., to “Mother,” 10 January 1904, Box 3, Henry Papers, LC.

82 Until 1907, the Artillery Corps encompassed both the coast artillery and field artillery. The desirable locations near major cities, the allure of the technically sophisticated systems, the small size of the field army, and the limited opportunities for employing artillery in the Philippines all contributed to the greater

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emplaced in fixed positions, commanders had few of the opportunities for the creative thought and tactical innovation that field campaigns afforded. Thus, the nature of the task encouraged a close association of technical skill with professional worth. Johnson Hagood, a coast artillery officer, captured the essence of this professional outlook in describing Chief of Artillery Arthur Murray, who Johnson described as “perhaps the greatest Coast Artillerymen that ever lived.” For Johnson, this ideal officer “not only knew the technical details of every element of the Coast Defense better than anyone else, but he knew how to coordinate and harmonize those elements as no other man in this country has done before or since.”83 Technical virtuosity was the measure of professionalism within the artillery.

The method of commissioning West Point graduates reinforced this orientation. Cadets were allowed to choose their arm of service according to class rank, with the top cadets generally selecting the Corps of Engineers first, followed by the Artillery Corps and Ordnance Department, and the last half of the class choosing between the Infantry and Cavalry. With the majority of the curriculum devoted to math, science, and engineering, and the preferred pedagogical method being recitation of memorized facts, those who did well enough academically at the Academy to qualify for the Artillery Corps had already successfully passed a technically-oriented school.84 The means of selecting

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83 Hagood, "Down the Big Road," 110-111.

84 Throughout the 1880s, every cadet who graduated first in his class went into the Corps of Engineers. Of the top ten graduating cadets in each of these classes (the average class size after four years was just over 50 cadets), only 8% went to the cavalry and 7% to the infantry, despite these arms accounting for well over half
officers and the conditions of service by no means created a monolithic professional outlook across the artillery corps, but these influences encouraged an identification of professional competence with technical skill. The curriculum of the early twentieth-century Artillery School indicates that this was at least the case at Fort Monroe.85

The Infantry and Cavalry lacked such clear structural influences that might have created a consensus on the value of technology. Some infantrymen and cavalrymen emphasized the importance of the soldier; others emphasized the weapon. After observing the Russo-Japanese War, Captain Peyton C. March seemed to hold both views. The combination of firepower and entrenchments had made any assault during the day impossible, “unless the enemy’s position has been thoroughly shaken by artillery fire.” Yet from this he concluded that “the progress and development in killing capacity of the modern rapid-fire field gun and rifle have forced the attack, if it desires to live at all, to return to the old methods of a century ago when the individual man and his bayonet was the winning factor.”86 Of great interest to the infantry and cavalry, the artillery had no comparable debate over whether the gun or the man was more important. In the same manner, the process of commissioning did not systematically steer those arms towards either technophilia or technophobia in the same way as the artillery. The absence of academic distinction at West Point that placed most of the officers in these branches did

85 For instance, the 1904-1905 academic year featured 58 days of ballistics instruction, 87 days of electricity, 17 days of explosives, 20 days of coast defense, and only 41 days of “Artillery Proper,” of which only a portion was dedicated to addressing how artillery functioned in relation to the other arms. “Report of the Artillery School,” WDAR (1905), 4:76-81.

not in itself signify a particular attitude towards technology and the profession. Wagner, who was cognizant of the power of modern weapons without being a technological enthusiast, had graduated fortieth out of forty-three in his class.\(^{87}\)

In a similar fashion, the functional differences between the arms produced varied opinions of what constituted the core characteristics of the military profession and how narrowly it should be defined. Some of this disagreement was a product of the simmering resentment between staff and line. Staff officers claimed that their functions could only be competently performed by experts in their respective fields; line officers claimed that specialists became myopic bureaucrats who were unable to place the greater good over their individual routine.\(^{88}\) Carter, who was a staff officer himself, retained enough of the line prejudices to insist that general staff officers maintain their “soldierly spirit” by occasionally returning to regimental service, lest they “degenerate” into bureau officers.\(^{89}\) Undoubtedly, few officers in the bureaus appreciated his choice of terms, but the phrasing provides some insight into how Carter perceived the profession. But the question of specialization was not simply one of staff functions, as even within the combat arms officers disagreed as to how finely the military profession should be differentiated. While studying for a year at the French Army’s equestrian school, cavalry Captain Frank Parker argued for greater specialization within the cavalry. Specifically, he suggested that West Point should be split in two, one section to train cadets destined for the technical arms and the other to train cadets destined for the infantry and

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\(^{87}\) Register of Graduates, 4:56.

\(^{88}\) Beaver, Modernizing the War Department, 31-33.

\(^{89}\) Carter, "General Staff for the Army," 564.
cavalry. He thought American cavalrymen compared poorly to their French counterparts in both practical equestrian skills and general professional theory.

According to Parker, the broad education of West Point was no longer sufficient preparation for a military career: “No amount of general information and mind training can take place of professional knowledge. . . . These are the days of specialists. To do one thing and to do it well is within the reach of us all.” Major Robert L. Bullard of the infantry disagreed. He thought that talk of specialization was nothing more than individuals “straining every nerve and all their imagination and initiative to segregate their service, create artificial differences in mere trifles . . . all for the sole aim of separating themselves in some way from the balance of the army.” For instance, Bullard objected to the practice of calling equivalent units company, troop, or battery depending on the branch. Aside from this pet peeve over nomenclature, Bullard wanted a far more fundamental standardization that would even extend to adopting a standard firearm for both the infantry and cavalry. This recommendation strayed into intruding on functional differences, as the cavalry carbine was shorter than the infantry rifle due to the need for a handier weapon while mounted. Bullard was an experienced and intelligent officer, so his quick dismissal of the carbine as nothing more than a “foolish

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90 Parker was not the only advocate of two academies. West Point professor Samuel Tillman ignited a controversy that lasted for nearly half of a year, when he made a similar suggestion in the JMSI. Tillman, “Is There Necessity for a Second West Point?,” JMSI 35 (Jul.-Aug., 1904): 1-14.

91 Although Parker was in accord with the specialist-professional ideal embodied in Carter’s directive, he suggested a different approach. Parker wanted to require a general college-level education before admitting cadets to West Point, which would then allow cadets to pursue separate specialist tracks tailored to their future arm. In essence, he wanted to give cadets the equivalent of Carter’s garrison and service schools even before commissioning, with the service schools then providing an even more advanced curriculum. Report from Frank Parker to the Adjutant General, 3 August 1904, Box 1, Frank Parker Papers, UNC, 15-18, quotations from 15.

92 Entry for 19 January 1902, Notebook #2, Box 4, Robert L. Bullard Papers, LC.
district” suggests a depth of emotion that prevented rational consideration. Bullard went on to gloomily predict that the army would soon “have nothing but stilted specialists; a general will be impossible.”93 As officers sought to define themselves as a professional group based on their expertise, they found it difficult to determine how far to take this differentiation of knowledge. In essence, it became a question of whether there were in fact multiple military professions, with the answer having clear implications for professional education.

Discussions of professional education were also made difficult by the pervasive anti-intellectualism of the officer corps. Major James Chester—a Civil War volunteer and, somewhat surprisingly, a former instructor at the Artillery School—argued that education might develop a counterproductive dogmatism in students. “It is possible,” he wrote, “to teach a young army officer too much. He gets to be proud of his familiarity with his textbook, and will follow it on all occasions to the letter.”94 Evidently, Chester believed that ignorance produced a more flexible mind. This reflected a widespread distrust of “theory” that was even expressed in General Order Number 155, which cautioned “that the object and ultimate aim of all this preparatory work is to train officers to command men in war. Theory must not, therefore, be allowed to displace practical application.”95 Lloyd Matthews has traced this enduring characteristic of the U.S. Army to American society, which has traditionally assumed that “Active Man” and

93 Ibid.
95 War Department General Order Number 155, 27 November 1901.
“Contemplative Man” are exclusive. In 1898, Captain George Anderson used nearly the same language as Matthews in an essay written for an officers’ lyceum. “It may be said that a commander should be both a learned man and a man of action. This is most desirable, but history shows very few such, and they were born, not MADE.” Anderson’s assertion that the qualities possessed by a “man of action” were innate implied that professional education was irrelevant. This extreme view was countered by those who, like Major William Murray Black, disagreed with the notion “that a commission, a uniform, and plenty of good will, with or without some knowledge of drill regulations, are all that are required to fit a man to be a soldier in any grade.”

Most officers seem to have intellectually accepted Black’s view that education was necessary in the abstract, but were emotionally guided by the anti-intellectualism of Anderson when confronted with specific details of army schools. This was manifested in the common distinction between practical and theoretical. In some cases, the former was used in the narrow sense of work either conducted outdoors or with military equipment, such as guns or laboratory apparatus. This sense contrasted with theoretical work carried out in the classroom. More commonly, however, practical was everything


97 George S. Anderson, "Practical Military Instruction," JMSI 47 (Nov.-Dec., 1910): 336. Anderson’s essay was a polemical attack on those who would stuff “education down our throats like a Strasbourg goose.” Ironically, the essay was originally written in 1898 to fulfill the War Department requirement that every officer write a professional education to present at their post’s officers’ lyceum. Anderson’s use of the lyceum to loudly—and picturesquely—damn the idea of mandatory education illustrates the limits of what could be achieved by decree.


99 In 1905, General Jesse M. Lee commented on the garrison schools, which provided rudimentary professional training for officers at their assigned posts. He recommended that in addition to written tests, the student-officers should be graded on “practical work” and the “efficiency of their commands.” Lee hoped that the higher grades would go to the “officer of marked efficiency in practical duties [rather] than who is
that could be applied, logically making *theoretical* all that could not be directly applied, and therefore useless. This was the sense used by Swift, when he described his attempt to bridge the “chasm between practice and theory” with the applicatory method. Swift contrasted his map exercises, which were practical, with Wagner’s recitations, which were not. But practicality was in the eye of the beholder. This same criticism would be turned against Swift by George Van Horn Moseley, who derided him as a “saturated solution of Civil War History.” Moseley is an interesting case, as he was the archetype of the young, talented officers who benefitted from Carter’s system of education. A prize pupil at every level of professional schooling, Moseley was selected for the General Staff and gained prominence as a writer on military policy before World War I, when he served with distinction as General John J. Pershing’s supply officer. His intellectual achievements did not diminish Moseley’s self-image of his own soldierly abilities, but he was not so charitable to his friend John M. Palmer, another talented student and prolific writer. According to Moseley, Palmer “wrote well” but was not “a practical soldier.”

The frequent and imprecise use of these labels suggests that they were often as much about personalities and conceit as disagreement over method. Still, it is nonetheless

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100 Eben Swift, “Leavenworth, 1893-7,” 2, Box 7, Swift Papers, USMA.


102 George V.H. Moseley, Typewritten note on back of letter, John M. Palmer to Moseley, 20 August 1916, Box 27, Moseley Papers, LC. By 1918, Moseley attended all three of the Army’s elite schools, served on the General Staff, wrote extensively on military organization, and was the chief supply officer for Pershing’s A.E.F. during World War I. Palmer followed very nearly the exact same path before the war, commanded a brigade in France, and then served as Pershing’s aide following the war. Both were exemplars of what Carter had hoped to achieve with General Order Number 155, having been identified early as promising officers, distinguishing themselves in professional schools, and then serving effectively after war catapulted them to positions of responsibility at a relatively young age.
significant that both the military progressives who created the new education system and those who were its first products should make “theoretical” such a pejorative term.

In creating a system of military education, Carter faced a difficult challenge. In the midst of a significant reorganization and expansion of the Army, Root had a grand vision of how education could reshape the military profession. But the limited infrastructure shared by the disparate collection of existing schools, each reflecting a different conception of the profession, provided Carter with little in the way of physical or conceptual material from which to build. Furthermore, any expansion of professional education would have to contend with the widespread anti-intellectualism and inevitable resistance. Even those who favored education in principle disagreed about what it entailed in practice. Yet for all these obstacles, Carter’s plan suggests an exceedingly narrow conception of the military profession that never grew much beyond that of a competent frontier cavalryman. Perhaps even more damaging, Carter seems to have expected little of education, viewing it merely as a tool to rectify the worst aspects of the deadening system of promotion by seniority. While a perfectly valid goal, this precluded a more robust system that sought to improve the officer corps, rather than simply identifying its most capable members. Certainly, the substance of Carter’s plan was neither sufficiently original nor ambitious to meet Root’s intent. Yet there is no indication that Root believed that Carter was creating a professional education system contrary to his wishes, or at least he did not feel strongly enough about the matter to insist on corrections. In light of their continued personal fondness, it is more likely that the two believed themselves in complete accord, as their differences were masked by a warm relationship, a common belief in the benefits of education in its most abstract sense, and the press of so many other demands on their time and attention. This would

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be a recurring pattern among military progressives, as there would be many more instances of diverging paths among supposedly kindred spirits.

A stage in the existence of our army has now arrived when no officer need expect to achieve any considerable distinction without acquiring the reputation of being a zealous practical student of his profession, and industrious and conscientious in devotion to his duty.

- J. Franklin Bell

In July 1902, the War Department announced that the General Service and Staff College (GSSC) would begin classes that fall with Brigadier General J. Franklin Bell as its first commandant.¹ At the time, Congress was still debating the necessity of a general staff and the Army War College was two years from its opening, making the GSSC the first major initiative of the military progressives to be implemented. This placed Bell in the vanguard of military progressive reform. He gained even greater influence soon after, when he was promoted to the Army’s top position, serving as its first full-term chief of staff. These assignments during the formative periods of two crucial institutions made Bell the most important figure in the translation of military progressive ideas into actual practice following the Root reforms.

When he came to Fort Leavenworth, “Frank” Bell was just forty-six years old, but his career had been characterized by extremes of good and bad fortune. Raised in Shelbyville, Kentucky, Bell was appointed to West Point in 1874, the year after Carter graduated and just as Wagner began his final year. Like Carter and Wagner, Bell’s

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¹ War Department General Order #64, 1 July 1902. For a brief synopsis of Bell’s career, see Appendix.

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academic record was undistinguished; he graduated just thirty-eighth in a class of forty-three. Limited by his lackluster standing to either the infantry or the cavalry, Bell chose the latter.\(^2\) In August 1878, Second Lieutenant Bell was assigned to the Seventh Cavalry, which would remain his regiment for nearly two decades. Promotion in the 1880s was slow for all officers, but it was particularly slow for the junior members of the Seventh Cavalry. After George A. Custer’s defeat at the Little Bighorn in 1876, replacement officers were transferred from other regiments. The battle was grotesque good fortune for those who received early promotions, but created a “bulge” of relatively junior officers who were still decades from retirement in the middle ranks of the regiment. As officers were promoted only as vacancies occurred within their regiment, Bell—who had arrived two years after the influx of replacements—was stuck behind a group of unusually young captains and first lieutenants.\(^3\) In 1890, the Army changed the promotion system so that officers were promoted by seniority within their arm instead of within the regiment, but by that time Bell had already fallen years behind his classmates. Even after the great wave of war promotions in 1898, he was still only a first lieutenant. A West Point classmate who had also gone into the cavalry had been a captain since 1891 and stood a full 167 “files” senior to Bell, who was even junior to several members of the class of 1882—a loss of over four years of seniority.\(^4\)

\(^2\) Register of Graduates, 4-60.

\(^3\) When Congress authorized the change from regimental to lineal (branch) promotion, Bell was still junior to twelve first lieutenants who had all come into the Seventh Cavalry in the summer of 1876 and another three second lieutenants who had arrived after the Little Bighorn but before Bell. Adjutant General’s Office, Official Army Register: 1890 (Washington: GPO, 1890), 74-75.

\(^4\) Adjutant General’s Office, Official Army Register: 1899 (Washington: GPO, 1899), 62, 269-270; Register of Graduates, 4-60 - 4-64. Bell was not promoted to captain until 2 March 1899. “Efficiency Record of J. Franklin Bell,” File 937-ACP-1879, Entry 297, RG 94, NARA I [hereafter “Bell ACP”].
Despite his unusually slow promotion, Bell was energetic, effusive, and efficient, qualities that earned him an excellent professional reputation. In 1895, Captain Hugh L. Scott, who would later become the chief of staff of the U.S. Army, noted that Bell’s affable nature “did much to harmonize and compact the officers” of their unit. Bell retained this admirable trait throughout his career. Years later, one of Bell’s assistants fondly recalled the general’s good nature: “[Bell] had the biggest heart of any man I ever saw in high office.” William Lassiter was similarly impressed by Bell’s kindness. When Lassiter was promoted to major, Bell went to great lengths to assure that Lassiter was satisfied with his assignment. “I have known every chief of staff our Army has had,” Lassiter wrote several decades later, and “not many of them would have shown to a junior officer he barely knew the courtesy and consideration [Bell] showed me.” Perhaps a product of his own early struggles, this generosity of spirit and humility allowed Bell to connect with junior officers; in fact, he was one of the first senior officers to call subordinates by their first names.

Bell’s professional reputation rested on more than personal decency. Although he was not as keen a student of military science as Carter or Wagner during his cadet years, Bell developed a great interest in his profession after joining the Seventh Cavalry on the frontier. In 1890, he reported to the War Department that he had “done much promiscuous reading.” The thirty-four year-old first lieutenant had broad interests: Civil

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5 Hugh L. Scott to Adjutant General, 27 August 1895, Bell ACP.
6 Hagood, "Down the Big Road," 114.
8 Raines, "J. Franklin Bell," 19.
9 Ibid., 7.
War history, physical education, French and German. Bell even qualified as a member of the Illinois bar. With his effusive personality, Bell was also able to transfer his interest to others. “I have never had under my command, or even known, an officer of his grade who possessed so much energy, intelligence and military pride and enthusiasm,” wrote Lieutenant Colonel John M. Bacon in an 1895 letter of recommendation for Bell. “The latter quality he imparts to all with whom he comes in contact, and I have known many a young officer benefited through association with him.”

The commander of the Seventh Cavalry, Colonel James W. Forsyth, also thought highly of Bell. In a letter of recommendation to the secretary of war, Forsyth noted that despite the lieutenant’s “exceptionally hard luck in promotion,” Bell had “retained much zeal and interest in his profession, and is widely known as an able and progressive young officer. He is deservedly popular and highly esteemed by those acquainted with his worth.”

Forsyth’s confidence in Bell was reflected in his appointment as the regimental adjutant. Because Forsyth was also the commandant of the Cavalry and Light Artillery School, Bell served simultaneously as the unit adjutant and the school secretary, making him responsible for the daily operations of both the regiment and the school.

The Fort Riley school differed greatly from its sister at nearby Fort Leavenworth. By the time Forsyth had established the Cavalry and Light Artillery School, Wagner had

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10 “Officer’s individual report,” 1 May 1890, Bell ACP. Bell was inclined to bursts of enthusiasm, which allowed him to embrace novelties such as the machine gun and airplane. In the 1880s, he became interested in “physical culture.” He even took leave to attend a summer fitness workshop at Harvard. Bell then implemented an exercise regimen for his soldiers long before the Army began to emphasize physical training. Nearly two decades later, the majors and colonels of the Army War College were quite surprised to have the chief of staff lead them through calisthenics following a map exercise. Raines, “J. Franklin Bell”, 402-415.

11 John M. Bacon to Adjutant General, 26 June 1895, Bell ACP.

12 James W. Forsyth to Secretary of War Daniel S. Lamont, 22 July 1895, Bell ACP.
already done much to raise the tone of the more classroom-oriented Infantry and Cavalry School. The contrast with the limited academic training at the Fort Riley “model post” school was great, and would only increase as Swift developed the applicatory method.13 Nevertheless, Bell gained valuable experience in professional education. He developed a basic course in cavalry tactics that was soon used by all the other cavalry posts in the same geographic department.14 More importantly, the field maneuvers conducted jointly by the two schools gave Bell the opportunity to work with Wagner and Swift, both of whom he had previously known at West Point.15 In this capacity, Bell helped to create the U.S. Army’s first rules for field maneuvers. Also, Forsyth’s limited intellectual and tactical abilities led him to rely heavily on his young assistant; Bell’s biographer, Edgar Raines, described the school secretary as the “real director of the school.”16 Indeed, Forsyth had come to depend upon the lieutenant, and when he received his promotion to brigadier general, he named Bell as his aide de camp.

Yet Bell was dissatisfied with service in the cavalry. After twenty years, he had advanced no further than the rank of first lieutenant. Throughout the 1890s, Bell made several requests for a transfer to the Judge Advocate’s Department. This persistence was finally rewarded with an assignment as the acting judge advocate for the Department of

13 The Congressional act authorizing the school forbade any “theoretical instruction” at the school. Tasker H. Bliss, Memorandum for Commanding General regarding proposed plan for Cavalry and Light Artillery School, n.d. [1890-1891], Bliss Papers, USMA.

14 J. Franklin Bell, “Officer’s individual service report,” 30 June 1896, Bell ACP.

15 J. Franklin Bell to Eben Swift, 10 December 1893, Box 1, Swift Papers, USMA; Arthur L. Wagner to Bell, 4 July 1895, and Eben Swift to Adjutant General, 30 June 1895, both in Bell ACP.

16 Raines, "J. Franklin Bell," 7-8. The inspector general of the Department of the Missouri made special note of Bell’s performance as the school secretary, calling him “one of the most valuable and efficient officers in the cavalry arm of the service.” Extract from E.M. Heyl report, 16 December 1892, in Joseph C. Breckinridge to J. Franklin Bell, 11 February 1893, Bell ACP.
the Columbia in January 1898. The hard-luck Bell had finally escaped the cavalry mere weeks before war would bring a surge of promotions in the cavalry. But the Philippines would be the exotic background for his reversal of fortune, which was so dramatic that it might have been drawn from one of the Horatio Alger dime novels of the time. Bell began 1898 as a first lieutenant, by the end of 1901 he was a brigadier general, and in 1906 he became chief of staff of the U.S. Army.

The day that Congress declared war on Spain, Bell took leave and traveled to Washington, D.C., in the hopes of assignment to a staff position somewhere in the Cuban invasion force or a commission in a regiment of Kentucky volunteers. Bell was so determined to reach the war that he turned down several general officers who offered him positions on their staffs. Evidently, Bell did not believe their late-forming units would see action, but his selectiveness nearly led to an assignment as the officer handling the administrative work of mustering one of the many volunteer units into federal service. That duty would almost certainly have kept him from the war. Instead, Adjutant General Henry C. Corbin commissioned the surprised Bell as a volunteer major of engineers assigned to the staff of Major General Wesley Merritt, then assembling the Philippine-bound Eighth Army Corps at San Francisco. Upon Bell’s arrival in California, Merritt appointed the new major as chief of the Office of Military Information. In essence, Bell was to serve as the general’s “eyes.” This position was ideal for the enterprising major, as it allowed him nearly free-rein to move nearly anywhere. Bell departed before the rest of the staff to gain information about the Spanish in Manila.

17 J. Franklin Bell to G. Norman Lieber, 4 March 1896, Bell ACP; Raines, “J. Franklin Bell”, 8-9.

18 J. Franklin Bell, “Succinct Account of Services,” n.d. [1900], Bell ACP; Bell to Henry C. Corbin, 17 May 1901, Box 1, Corbin Papers, LC.
Once there, he conducted an important battlefield reconnaissance of the city before the Spanish surrender, and was then appointed as the liaison to Emilio Aguinaldo’s Army of Liberation during the interregnum between the Spanish surrender and the fighting against the Filipino nationalists. Once the Philippine-American War began, Bell came into his own, leading hazardous patrols, taking charge of units in combat, and generally becoming indispensable to Major General Elwell S. Otis, Merritt’s successor. In his history of the conflict, Brian M. Linn noted that “the ubiquitous J. Franklin Bell” was often “aggressive to the point of folly.” In all, Bell earned three recommendations for brevet promotions for gallantry. This bravery was not without cost. In March 1899, Bell was wounded in the side, but continued to direct troops for several more hours until the battle was won. After only a few days of recuperation, Major General Arthur MacArthur asked him to retake the field for an upcoming offensive. Bell gamely carried on for another two weeks until the wound began to suppurate so badly that he was forced to return to the rear. Not one for idle recuperation, he used the time to organize a special unit of native scouts, with which he returned to the field after only two weeks of convalescence. Such services earned the admiration of Otis, MacArthur and other senior military leaders.19

As Bell made his name in the Philippines, the politicians in Washington were at odds over the future of the islands. The state volunteers clamored to come home, as the war that they had enlisted for was complete. To meet the crisis, Congress authorized the temporary force of two-year volunteer regiments for service in the Philippines. Most of

19 J. Franklin Bell, “Succinct Account of Services,” n.d. [1900]; Bell to Adjutant General, 1 May 1901; Irving Hale, 6 March 1899, in “Summary of Report by Commanding Officers”; Report of Inspector General, 2d Division, 8th Army Corps, 15 August 1899, all in Bell ACP. See also, Linn, Philippine War, 23, 57, 96, and 106; Raines, “J. Franklin Bell,” 9-10; Silbey, War of Frontier and Empire, 60.
these units were to be raised in the United States, but two regiments were to be raised in the Philippines, drawing from any of the 1898 enlistees willing to serve under the colors for another two years. In recognition of his outstanding service, Bell was named the colonel of one of these regiments, the 36th United States Volunteers. Colonel Bell was destined to stay with his regiment for only a brief period, but he continued to win laurels. For one action in September 1899, Bell won the Medal of Honor. Well in front of his regiment, Bell suddenly came upon a group of insurgents that he charged with his pistol, capturing three, including an officer. In the recommendation for the award, General Otis wrote, “This feat and many similar ones have been performed by Colonel Bell during this war, and the wonder is that he still lives.” Weeks later, Bell was promoted to brigadier general of volunteers. As a brigade commander in northern Luzon and later as the provost marshal of Manila, Bell demonstrated a capacity for command far greater than simple acts of bravado. A fellow general paid tribute, describing Bell as “the ablest all-around officer of his time in the service. Physically perfect, his capacity for work is apparently unlimited and with such thoroughness in its execution that he accomplishes more than anyone I know.”

20 “Succinct Account of Services,” n.d. [1900], Bell ACP.


22 “Efficiency Record of J. Franklin Bell,” Bell ACP.

23 Thomas H. Barry to Adjutant General, 11 January 1901, Bell ACP. “Courage, good fortune, and skill in minor tactics bordering on genius all played a role in Bell’s success, but he also owed much to the support of a number of senior officers including Merritt, Elwell S. Otis, and Arthur MacArthur.” Raines, “J. Franklin Bell,” 10.
In just two years Bell had amassed an enviable record. Yet he would have reverted to his permanent rank of captain in the regular army with the expiration of the volunteers in 1901, if not for the willingness of President William McKinley and Secretary of War Elihu Root to use general officer promotions—nominations were completely at the discretion of the president—as a means of circumventing the seniority system that governed promotions to the rank of colonel.24 When Root requested recommendations for junior officers suitable for direct promotion to brigadier general, General MacArthur recommended Bell, “who of younger officers has alone been sufficiently trained to demonstrate beyond question fitness for this great reward.” This recommendation was seconded by the civilian governor-general, Judge William H. Taft.25 Bell was promoted to brigadier general in the regular army on 19 February 1901.26 This extraordinary leap more than

24 Traditionally, brigadier generals were selected from among the colonels of the regular army, but legally the president could select any individual he chose—even those from outside the Army. The only restriction on the president’s power was the requirement for Senate confirmation of each appointment.

25 Arthur MacArthur to Elihu Root, 3 February 1901, and William H. Taft to Elihu Root, 6 February 1901, both in Vol. 174, Pt. 2, Root Papers, LC.

26 “Efficiency Record,” Bell ACP. Bell’s humility and endearing enthusiasm were evident in his thank you note to Root. “I have just received my commission as Brigadier General, U.S. Army, which represents a benefit and a blessing greater than I ever expected to receive. This honor was so unexpected I do not know whom to thank, but seeing the name of both yourself and the President on my commission reminded me that there could, at least, be nothing unmilitary in expressing to you, and, through you, to the President, my
compensated for Bell’s earlier bad luck; he was promoted past 584 other captains, all 277 majors, 98 lieutenant colonels, and 77 colonels, or 1036 officers in all.27

The new general was soon put to the test. By the end of 1901, the Americans had defeated most of the Filipino guerilla bands, except for those in Batangas province on Luzon. In late November, Bell was sent to the troublesome area. His strategy of “reconcentration”—forcibly moving the population to several camps—and a relentless military campaign ended organized resistance within months. The anti-imperialist press was very critical of Bell's methods, which were legal but undeniably harsh. While controversial, the campaign quickly yielded victory in one of the most hostile areas in Luzon, making Bell arguably the best American field commander in the Philippines.28

In the midst of this campaign, the War College Board selected Bell as the first commandant of the GSSC.29 Despite his remarkable rise to prominence, Bell was only the third choice for the position. Chief of Staff S.B.M. Young’s first choice for the position, Brigadier General William A. Kobbé, asked for a field command in the Philippines, Texas, or “anywhere rather than Commander of the Leavenworth School.”30

gratitude for the inestimable benefit I have received at your hands. I am exceedingly sorry there was anything in my individuality which should have brought unfavorable comment upon the President’s selection, but, if a faithful effort to meet all my responsibilities will demonstrate that the President’s selection was justifiable, there need be no fear that there will be further unfavorable comment.” Bell to Root, 17 May 1901, Box 15, Root Papers, LC.

27 Raines, "J. Franklin Bell," 11-16.


29 The head of the War College Board, Brigadier General S.B.M. Young knew Bell well. In 1895, Young wrote a letter of recommendation for Bell, calling him “a man among men.” Young to Adjutant General, 25 July 1895, Bell ACP.

30 J. Franklin Bell to Adna R. Chaffee, 18 March 1902, Box 1, Corbin Papers, LC; Samuel. B.M. Young to Elihu Root, 23 December 1901, AGO File #414805, RG 94, NARA I.
Despite the great improvements at Fort Leavenworth in the 1890s, Kobbé’s reaction demonstrated that the school remained something of a backwater. Perhaps if Kobbé had been a simple, anti-intellectual reactionary his emphatic rejection of the post might be dismissed, but he had assisted Wagner in preparing *Organization and Tactics* and was a former instructor at the Artillery School.31 Furthermore, in his 1903 annual report as the commander of the Department of Dakota, Kobbé had warm praise for the new system of professional education.32 Until proven otherwise, however, even officers appreciative of the benefits of professional education would continue to seek field commands, rather than playing headmaster for lieutenants.

In contrast to Kobbé, Bell was enthusiastic about the opportunity. After his promotion to brigadier general, Bell wrote to the adjutant general that he knew of “no way I could contribute more valuably to the good of the service than by devoting myself to the promotion of practical instruction of the army in war duties.” He added that the subject had been of great interest to him even before the war, but “all my experience in the struggle out here has tended to convince me of the very great value of such instruction. I have become so convinced of its value as to look upon it as an indispensable equipment for a regular soldier.”33 Thus, the new Fort Leavenworth commandant was quite passionate about professional education, yet it remained to be seen what he defined as “practical instruction.”

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33 J. Franklin Bell to Henry C. Corbin, 17 May 1901, Box 1, Corbin Papers, LC.
When General Adna R. Chaffee, the commander in the Philippines, sent Bell to Batangas in late 1901, the War College Board’s plans were disrupted. They had intended for the new commandant to assume his duties in 1902 when the school reopened after the wartime hiatus, but the situation in the islands was deemed more important. Thus, Bell’s return to the United States was deferred for a year, and the GSSC opened under a caretaker commandant. Bell might have been glad for the delay. Secretary of War Root directed that the first class come from those lieutenants who were nearing their promotion examinations and were “most in need of instruction” before promotion. This produced probably the worst Fort Leavenworth class ever. Of the 95 student-officers, 72 had been commissioned as part of the 1901 expansion, which had more than doubled the size of the officer corps. No student had more than four years of military experience, and none of the 14 college graduates were from West Point. Despite a simpler curriculum than that used by the pre-war Infantry and Cavalry School, the class had the highest rate of failures of any Fort Leavenworth class prior to World War I.

Part of the difficulty was the challenge of dealing with students from such varied educational backgrounds, which had not been a difficulty in the 1880s and 1890s when nearly all of the officers came from West Point. The head of the Tactics Department, Captain Joseph T. Dickman, complained that even though the examination had been made easier than those given during the 1890s and graded on a “liberal scale,” nearly a

34 War Department General Order #64, 1 July 1902; Nenninger, Leavenworth Schools, 59; Command and General Staff School, Commandants, Staff, Faculty, and Graduates of the Command and General Staff School, Fort Leavenworth, Kansas, 1881-1933 (Ft. Leavenworth, Kan.: The Command and General Staff School Press, 1933), 9.

35 Adjutant General to War College Board, 7 July 1902, Box 4, Entry 288, RG 165, NARA II.

quarter of the class failed three or more of the six tactics examinations. He identified the poor general education of some of the students as a major contributing factor. “The result is not a surprise,” Dickman reported to the school’s faculty board. “The handwriting of many of the papers is so poor as to be scarcely legible, and there is noticeable deficiency in orthography and grammar, while punctuation seems to be practically an unknown art.”

Yet nearly all the students were veterans of field operations in the Philippines, which should have prepared them well for the instruction in tactics, even if they were unprepared for the more academic subjects such as military law or military topography. Part of the problem was that many students simply did not apply themselves. Eight of the thirteen students failing more than one of the four subject examinations were determined to have failed, at least in part, due to a “lack of application.” In contrast, only three of the multiple failures were attributed “to incapacity, pure and simple.”

The problems of the vaunted new institution of military professionalism were so spectacular as to draw comment in the general press. The War Department reacted by sending Brigadier General Tasker H. Bliss to investigate. Root protected the precarious integrity of the fledgling military education system by court-martialed several of the worst students. As if such an action were not sufficient to underscore his resolve, the secretary of war made special note of the incident in his annual report:

37 “Proceedings of the Staff of the General Service and Staff College,” 2 January 1903, Box 4, Entry 288, RG 165, NARA II.

38 Nenninger, Leavenworth Schools, 59-62.

39 Tasker H. Bliss, Memorandum Report, 14 August 1903, Box 8, Entry 288, RG 165, NARA II.

40 Ibid.
Some of the student officers detailed to the Leavenworth college did not appear to understand that they were under obligation to apply themselves to their studies, and I felt bound to enforce respect for that obligation by ordering them before a court-martial for neglect of duty. . . . I think the duty will be more clearly understood hereafter.41

Yet even draconian punishments could only curb the worst abuses. Ultimately, the schools would fail if the officer corps did not believe that education had relevance, if only for the career benefits.

When Bell finally arrived at Fort Leavenworth in early 1903, his first challenge was to determine how to deal with the great gulf between the GSSC’s stated purpose of preparing elite officers for high-level staff positions and the reality of the simplified training appropriate to students with little professional knowledge, and, in some cases, barely capable of written communication. In light of the great disparity between official aspirations for the GSSC and the actual state of affairs, it is not surprising that Bell ignored General Order Number 155 and fell back on the old methods of the Infantry and Cavalry School. In fact, Bell’s situation was reminiscent of William T. Sherman’s dilemma in 1881 when he was faced with a similar infusion of poorly-educated officers commissioned from civilian life.42 Understandably, Bell found inspiration in the methods of the old “Leavenworth kindergarten,” explicitly referencing Sherman’s actions in his own initial suggestions for the school to the War College Board.43 The problem, as described by Eben Swift, was that “while the army is in the Primer we can’t expect [Fort

41 WDAR (1903), Root, 11.

42 Nenninger, Leavenworth Schools, 22-25.

Leavenworth] to get much further than the First and Second reader.” 44  Swift’s formulation lacked the grandeur of Root’s description of a pyramid of intellect and talent with a stronger, wider base allowing for greater heights at the top, but they expressed essentially the same notion.

The victim of this strategy of necessity was the inclusion of officers from all arms at the school. The War Department directed that the GSSC prepare officers for staff work that was applicable to all arms, but the actual course of basic infantry and cavalry skills was of little value to artillery and engineer officers. They already had schools to train the equivalent knowledge relevant to their own arms, and Fort Leavenworth had neither the faculty nor the equipment to teach these technical subjects even if that had been the intention. Despite the stated policy, the War Department seems to have recognized this reality, as it assigned only infantry and cavalry officers to the first two classes of the GSSC. 45 The circumstances that compelled this course soon began to ease, but Bell did not alter his thinking to match the new conditions. Shortly before the first students from the artillery and engineers were to report, Bell wrote to the Army’s chief of staff that Fort Leavenworth was “principally a service-school for infantry and cavalry.” 46

By law and regulation, the General Staff was charged with the supervision of military education and responsible for correcting such a deviation from official policy. This was particularly difficult in the case of Fort Leavenworth, as throughout most of 1904, Arthur L. Wagner was the staff officer responsible for overseeing the schools. Bell

44 Eben Swift to John F. Morrison, 14 May 1906, File 4057, Entry 101, RG 393, NARA I.

45 War Department General Orders Number 89, 1 August 1902; Staff, Faculty, and Graduates, 27-30.

46 J. Franklin Bell to Adna R. Chaffee, 25 March 1904, File 2145, Entry 101, RG 393, NARA I.
and Wagner were friends of long-standing, but their relationship was somewhat complex. Since their time as West Point cadets, Wagner had been superior in rank. While First Lieutenant Bell had been the secretary of the school at Fort Riley, Captain Wagner was the head of the Military Art department at Fort Leavenworth. During this time, Wagner even wrote a letter of recommendation for one of Bell’s applications for the Judge Advocate’s Department. But this senior-subordinate relationship of over two decades was reversed by Bell’s promotion to brigadier general in 1901; Wagner was one of the colonels that Bell “jumped” in rank. While official status can be altered suddenly, personal relationships do not change so quickly or completely. Wagner continued to begin his letters with “Dear Bell,” as if writing to a peer or subordinate. At first, Bell remained deferential to Wagner, even delaying important decisions until he could meet with Wagner personally. Wagner’s influence over Bell reached its height when several weeks into the new commandant’s first full academic year, Wagner was named the assistant commandant. Although he held the post for less than four months, that was more than enough time for the two to thoroughly discuss all the old practices of the Infantry and Cavalry School. Bell accepted many of Wagner’s suggestions and all appeared well, but this ambiguous relationship took another twist when Wagner left Fort Leavenworth to become the chief of the training section of the General Staff. In that capacity, while still subordinate to Bell in rank, Wagner’s organization was responsible for supervising the operations of Bell’s school. This arrangement continued for over a

47 Arthur L. Wagner to J. Franklin Bell, 4 July 1895, Bell ACP.
48 For example, see Arthur L. Wagner to J. Franklin Bell, 28 September 1904, File 1168, Entry 101, RG 393, NARA I.
49 Arthur L. Wagner to J. Franklin Bell, 24 September 1903, File 651, and Bell to Wagner, 28 September 1903, File 1286, both in Entry 101, RG 393, NARA I.
year until Wagner’s death in early 1905. During that time, Bell’s notions of the proper
course for the school began to diverge from Wagner’s.\textsuperscript{50}

Perhaps more accurately, Wagner had left Bell, and most of the officer corps,
behind with a revolutionary conceptual leap that created a true system of education.
Several months after coming to the General Staff, Wagner replaced Carter’s
unsatisfactory system established in General Order Number 155 of 1901. Wagner’s
system was made policy in General Order Number 115 of 1904. This new seventy-eight
page directive was far more detailed than Carter’s order, which was only seven pages
long.\textsuperscript{51} Wagner clearly regarded education as useful for more than separating the elite
from the masses. He tripled the minimum formal training by increasing the duration of
the garrison schools from two to six years. Wagner’s order was also more directive in
tone. He circumscribed the authority of regimental commanders by requiring officers to
have at least four years of service before they could attend the Infantry and Cavalry
School. General Order Number 115 also asserted the principle of General Staff
dominance by giving regimental commanders the authority to only nominate officers,
while reserving final approval for the War Department. In practice, however, Wagner
would experience some frustrations with rogue colonels who insisted on sending only
non-West Point graduates in need of remedial education.\textsuperscript{52}

\textsuperscript{50} Bell to Arthur L. Wagner, 11 February 1904, File 651; Bell to Eben Swift, 4 April 1904, File 2145, both in
Entry 101, RG 393, NARA I. Wagner to Tasker H. Bliss, 27 October 1904, Box 2, Entry 292, RG 165, NARA
II. J. Franklin Bell to Adna R. Chaffee, 9 January 1905, Bell ACP.

\textsuperscript{51} War Department General Order Number 155, 27 November 1901, and Number 115, 27 June 1904.

\textsuperscript{52} In early 1905, one captain wrote directly to Wagner complaining of his regimental commander’s refusal to
send any West Pointers because they were not “especially in need of further education.” Brereton, \textit{Educating
the U.S. Army}, 110.
General Order Number 115 also made it clear that the schools were to comply with the policies of the General Staff, which had “the duty of maintaining through [the schools] a complete system of military education, in which each shall perform its proper part [my emphasis].”\textsuperscript{53} This subordination was made more important than in the past, as Wagner had developed a true system incorporating all of the existing elements and creating several new ones. His order maintained the garrison schools and Army War College as the base and apex of professional education, but made significant changes to the schools in between. Rather than try to salvage the GSSC, which was theoretically a staff school for all arms but in reality an infantry and cavalry service school with token representation from the technical arms, Wagner recognized both functions by splitting the school. The Infantry and Cavalry School would provide those arms with an equivalent to the service schools of the artillery and engineers. Freed of the need for basic instruction applicable to only a portion of the army, the new Army Staff College would be able to provide staff training for the elite officers of all arms preparatory to the Army War College. Both of these schools, along with a new Signal School, would be organized at Fort Leavenworth as the Army Service Schools, which would be commanded by Bell.\textsuperscript{54}

Although Carter had described the GSSC’s purpose in terms very similar to Wagner’s aims for the Staff College, the details reveal very different underlying conceptions of how the school should be structured. Carter’s frequent references to the

\textsuperscript{53} War Department General Order Number 115, 27 June 1904.

\textsuperscript{54} Ibid. The Signal School has been overshadowed in the historiography, but it was a novel idea to group such a technical school with the other two. Even more original was the mixing of specialists from the Signal Corps with the generalists from the Infantry and Cavalry. This innovative thinking was a great contrast to Carter’s General Order Number 155, which contained little that was original and completely ignored technical education.
Fort Leavenworth school of the 1890s suggest that he vaguely envisioned something along the lines of a more advanced service school. In contrast, Wagner had a remarkably clear idea of how to create a staff school, which would be a truly novel institution within the U.S. Army. Wagner intended for all officers to attend the garrison schools and a large proportion to attend the service schools, but the Staff College would be far more exclusive. He limited the school to an annual class of only 14 to 22 officers. Crucially, Wagner reserved several seats for engineers and artillerymen; he did not want the Staff College to be dominated by the infantry and cavalry. Officers from those arms were to be drawn from the top of the previous year’s Infantry and Cavalry School. He further specified that the Staff College faculty was to remain distinct from that of the rest of the school. Wagner also intended for the Staff College to use different methods. In contrast to the competitive service schools, in which the prod of examinations was thought necessary to keep most officers on task, the Staff College would not use grades at all. As the students were all to be “carefully selected officers, in regard to whose zeal, character, and abilities there can be no doubt,” there would be no need for the blunt carrot-and-stick methods of the lower schools. Every element of General Order Number 115 relating to the Army Staff College made it clear than Wagner regarded it as something new that would perform a distinct role within the Army.

Bell ignored nearly all of these provisions. Ironically, this was partly because the commandant wanted to make the school much like the old Infantry and Cavalry School of Wagner’s era. “The more I consider the work done in the past, the more I am

55 This prohibition did not extend to the heads of the departments, who were allowed to teach in any of the three schools. Ibid.

56 Ibid.
impressed with the conviction that the school had attained a high state of efficiency when temporarily suspended in 1898,” he wrote to the War College Board shortly after coming to the school. “Inasmuch as the plans and methods then in vogue were the result of the experience of able men, admirably fitted for the work of instruction, it appears to me advisable that our first effort should be to get back, as soon as possible, to the conditions then existing.” Bell acknowledged the need for “further progress,” but gave no specifics about how the Fort Leavenworth school of the future would differ from that of the previous decade.57 He was, however, very clear that the GSSC should return to a two-year course as soon as possible because a one-year course sacrificed too much “practical” work.58 A year after Bell made these initial recommendations, Wagner issued General Order Number 115. Ignoring Wagner’s intent for the schools to remain distinct, Bell treated the Army Service Schools as a variation on the 1890s Infantry and Cavalry School, with the Staff College as a substitute for the second year of the old course. The chief difference was that the worst students were not retained for the latter half, and many of the middling students were shunted off to the Signal School. For the best students, however, there was little difference from what their predecessors experienced a decade earlier.

Bell remained conceptually rooted in the 1890s, while Wagner’s conception of professional education had dramatically evolved. It is difficult to determine when this gulf opened between the two friends, but the available evidence suggests that the great leap in Wagner’s thinking occurred after he left Fort Leavenworth for Washington in

57 Bell, “Suggestions.”
58 Ibid.
early 1904. If so, Wagner’s new mode of thinking might have been lost on Bell, who could have focused instead on their earlier conversations at Fort Leavenworth when they had been more of like mind.⁵⁹ If Wagner did modify his views in early 1904, it would have been largely due to his new organizational vantage on the General Staff. His new responsibility for all the arms and first-hand knowledge of the growing pains of the months-old General Staff probably gave Wagner a greater appreciation for the need to train an array of skills. Such concerns were foreign to Bell, who had no War Department experience to attune him to the necessities of the General Staff. Bell’s experience was largely confined to regiments on the frontier and command in the Philippines. The prohibition against “theoretical” training at the Fort Riley Cavalry and Light Artillery School of the 1890s had done little to broaden this perspective. Bell’s stewardship of Fort Leavenworth reflected his background; he ran the school much as he might have commanded a brigade, sacrificing efficiency in favor of esprit and morale, emphasizing the tangible and immediate in the curricular content, and closing the school to external influences in favor of greater control. It was these priorities—suitable for a unit but much less so for a school—that led to the divergence of the Army Service Schools from Wagner’s intent.

⁵⁹ In December 1903, Bell traveled to Washington. Shortly thereafter on 1 January 1904, the War Department issued General Order Number 1, which essentially confirmed the GSSC as it then existed, suggesting that Bell concurred in the general concept of the school except for his preference for a two-year curriculum. Yet by the end of January, Wagner left for duty with the General Staff. In an 11 February letter from to Wagner, Bell suggested several minor changes to the existing GSSC structure. These modifications only made sense within the existing framework and would soon be made irrelevant by the school’s reorganization in General Order #115. Thus, Wagner had either not developed his ideas before leaving for Washington or had not shared them with Bell. At the end of February, Wagner returned to Fort Leavenworth for brief consultations. Several weeks later, Bell wrote to General Adna R. Chaffee, referring to impending changes that had originated with the General Staff. This evidence and Bell’s subsequent actions strongly suggest that the new plan for the school was developed independently by Wagner while serving on the General Staff. Adjutant General to J. Franklin Bell, 10 December 1903, Bell ACP; Bell to Arthur L. Wagner, 11 February 1904, File 651, and Bell to Adna R. Chaffee, 24 March 1904, File 2145, Entry 101, RG 393, NARA I War Department General Order Number 1, 1 January 1904, and Number 115, 27 June 1904.
Bell might have lacked the breadth of experience to appreciate the varied roles of officers outside of a cavalry regiment, but he was an exceedingly capable commander who understood how to instill esprit in a unit. When he arrived at Fort Leavenworth, morale was low due to the poor showing of the first class and the court martial of several of its members. Bell’s previous experience and personality had prepared him to correct this problem, which he quickly achieved. Unfortunately, it became a preoccupation that dominated his entire stewardship of the school, literally from his first official correspondence to his parting remarks.\textsuperscript{60} In 1905, the commandant of the School of Application for Cavalry and Field Artillery commended Bell on “the splendid spirit shown by the instructors and student officers.” Bell’s response was characteristic. Establishing the proper “professional spirit” at a school, he wrote was “almost the whole thing, and leads to fine results.”\textsuperscript{61} In an address to the faculty and students the following year, Bell reiterated this theme by emphasizing the importance of group cohesion: “It is unquestionable that the greater the degree of goodwill and cordiality existing between the student body and the staff, the greater will be our success.”\textsuperscript{62}

Few would argue with the desirability of “goodwill and cordiality,” but Bell made the methods, curriculum, and organizational purpose secondary to the aim of comity. The commandant’s chief means of creating this spirit at Fort Leavenworth was the close integration of the Army Staff College students into the Infantry and Cavalry School curriculum; this was in direct opposition to General Order Number 115, which explicitly

\textsuperscript{60} Bell, “Suggestions,” and Bell, \textit{Reflections and Suggestions}.

\textsuperscript{61} James Parker to J. Franklin Bell, 17 September 1905, and Bell to Parker, 3 January 1906, File 685, Entry 101, RG 393, NARA I.

\textsuperscript{62} Bell, \textit{Reflections and Suggestions}. 

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mandated that the two schools were to remain separate. Bell’s policy resulted in the Staff College students spending an inordinate amount of time perfecting the skills taught by the Infantry and Cavalry School. In the first year of the new organization, the 1904-5 academic year, the Staff College students attended all of the lectures given to the Infantry and Cavalry School, as well as assisting in the grading of the tactical exercises given to the lower school. This left little time for the instruction in staff duties appropriate for all arms, which was the school’s official raison d’être. The following year, nearly 60% of the Staff College time allocated to the Department of the Military Art was devoted to the instruction or preparation for instruction of the Infantry and Cavalry School class, or in attending their lectures. The Army Staff College had become an extension of the Infantry and Cavalry School.

Bell’s insistence on integrating the schools created two significant problems. The first was a curricular gap within the Army education system. Instead of providing advanced staff training as decreed by the War Department, the Army Staff College was replicating more basic tactical instruction received elsewhere. The second was the bias

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64 The Army Service Schools allocated time in “half-days.” Of the 412 half-days in the entire course, 188 were given to the Department of Military Art, with the remainder being split between field engineering (106), military law (60), and foreign languages (58). Of the Military Art allocation, 71 were given to preparation and instruction for the lower class and 37 to attending the military history lectures. This left only 80 half-days to original instruction. Army Staff College 1905-6 Course of Instruction, Box 6, Swift Papers, USMA.

65 The popular notion of a general staff was of a central planning body for the entire army, or what the Germans referred to as the Großen Generalstab (Great General Staff). Yet officers with a detailed knowledge of the German Army—which was nearly all of those associated with Fort Leavenworth—knew that the Germans also had a Truppengeneralstab (Troop General Staff). These were not distinct bodies of officers, but were different roles to which individual General Staff officers could be assigned. The American General Staff Corps as stipulated in the 1903 General Staff Act performed both functions. In the U.S. Army, the equivalent to Großen Generalstab was the War Department General Staff. The equivalent to the Truppengeneralstab was duty as a chief of staff for a unit of at least divisional size. During Bell’s tenure at Fort Leavenworth, the Army Staff College provided no training for the Großen Generalstab function and even by a generous accounting less than a third of the time allocated to the Department of Military Art (62
towards the infantry and cavalry in the composition of the student class and faculty.

Bell’s plan made much of the Staff College course irrelevant for artillerymen and engineers, who were primarily concerned with coast defense. The school became even less attractive to officers from the technical arms when Bell insisted that they also attend the Infantry and Cavalry School. His justification for this policy reflected how fully all other considerations were subordinated to his goal of spirit. Because the Staff College students were so closely integrated into the instruction at the Infantry and Cavalry School, Bell argued that the artillerymen and engineers must necessarily attend the first years’ course so that they might master the material. Because the Army did not provide units with a replacement for an officer attending school, the loss of a talented officer for an extra year so that he might master skills irrelevant to his own arm was a nearly intolerable demand for the technical arms. Yet Bell went even further, unilaterally repealing the provision in General Order Number 115 that guaranteed all arms a fixed proportion of seats in the Army Staff College. Instead, Bell wanted all officers to compete for entry into the Staff College in the same manner as the infantry and cavalry officers. Once again, his instincts as a commander blinded Bell to the role of the school

lessons) time prepared officers for the Truppengeneralstab. The Army Staff College clearly failed to live up to its name by any reckoning, but depending on how one interpreted the term “staff” it could be considered either a partial or a complete failure. Ibid.

66 The pressures created by this system of detached duty were one of the primary complaints of senior officers during this time. The overwhelming majority of annual reports from generals commanding departments or districts made at least some reference to this problem. It was even noted by Secretary of War Taft, who highlighted the difficulties associated with nearly a quarter of officers being absent from their units, which reduced the effectiveness of units “below the point of proper efficiency.” The artillery was particularly concerned. Brigadier General Samuel M. Mills, the chief of artillery, also commented on this problem, and identified the shortage of captains—the same grade that constituted the bulk of the Fort Leavenworth students—as the most troublesome. The Artillery Corps had 207 captains that year. This meant that Bell’s demand for artillery to attend the Infantry and Cavalry School equated to the loss of 1-2% of the available officers in that grade. WDAR (1905), William H. Taft, Report of the Secretary of War, 1: 2-3 quotation on 3; WDAR (1905), Samuel M. Mills, Report of the Chief of Artillery, 2: 251; Adjutant General’s Office, Official Army Register: 1905 (Washington: GPO, 1905).
within the greater education system. He justified this open competition for entry to the Staff College on the grounds that student morale would suffer if placement were not determined in an absolutely fair manner. This reasoning ignored the obvious fact that officers from technical arms would be competing in an area largely outside of their professional experience, which could hardly be considered a level-playing field. More importantly, Bell completely missed the importance of ensuring that all arms be represented at the Staff College. When the chiefs of artillery and engineers protested these measures, the chief of staff, cavalryman Adna R. Chaffee, ruled in favor of Bell. In retaliation, the artillery and engineers halved the number of officers they sent to Fort Leavenworth each year.\textsuperscript{67}

Captain Henry B. Clark, one of the first artillerymen to attend the Staff College, predicted that this policy would produce “a one-sided school, an institution which in time will tend to become merely a second year course of the Infantry and Cavalry School instead of a Staff College.”\textsuperscript{68} Unfortunately, his plea to make the Army Staff College a place of “all-around” instruction was ignored. Although Bell certainly played a role in this, he was aided by the technical arms’ own indifference to general—as opposed to technical—military education. Several years after reducing the number of artillerymen at Fort Leavenworth, the Artillery Corps allowed the Cavalry and Field Artillery School at Fort Riley to be transformed into the Mounted Service School, which was devoted to the narrow study of horsemanship rather than anything explicitly dealing with the

\textsuperscript{67} J. Franklin Bell to Military Secretary, 16 March 1905, with endorsement by J.P. Story, 23 May 1905, Document 990754, Entry 25, RG 94, NARA I; Alexander Mackenzie to Bell, 28 April 1905; Mackenzie endorsement, 26 April 1905; Bell to Mackenzie, 2 May 1905, all in File 2327, Entry 101, RG 393, NARA I.

\textsuperscript{68} Henry B. Clark to J. Franklin Bell, 4 April 1905, File 3550, Entry 101, RG 393, NARA I.
artillery. Artillerymen even failed to maintain a proportional representation at the prestigious Army War College. The only school to receive full support was the Artillery School at Fort Monroe, which taught virtually nothing but technical subjects, such as ballistics, electrical engineering, and explosives. These arms were as firmly rooted in their traditional modes of education as Bell was in his. Captain Clark traced the artillery’s indifference to the general ignorance of the possibilities of a professional education broader than the narrow branch focus represented by both Fort Leavenworth and Fort Monroe. “The Staff College is a new institution,” he wrote to Bell, “little understood I fear by the service in general and especially is this the case with the Artillery branch.”

Much as Carter misunderstood Root’s intention for education but enthusiastically grasped the need for meritocracy, Bell was also in complete accord as to the desirability of competition. Some tension between development and evaluation might well be

69 WDAR (1907), Godfrey, 272-275.
70 Brigadier General H.A. Greene to Major General Tasker H. Bliss, 9 March 1916, File 10641, Entry 101, RG 393, NARA I.
71 WDAR (1905), Ramsay D. Potts, Report of the Artillery School, 4: 76-81; War Department General Order Number 115, 27 June 1904.
72 Henry B. Clark to J. Franklin Bell, 4 April 1905, File 3550, Entry 101, RG 393, NARA I. The Corps of Engineers also resisted anything other than technical education. In 1908, Chief of Engineers William M. Marshall suggested a school to train engineer officers in combat engineering—as opposed to the civil engineering taught at the Engineer School—but Marshall wanted no responsibility for the curriculum, preferring to leave the school entirely to the discretion of the Army Service Schools commandant. In return, Bell did his best to shame Marshall into taking his rightful responsibility for training the officers of his own arm in their specialized duty. In 1910, the Brigadier General William W. Wotherspoon, president of the Army War College, wrote a letter to the chief of engineers, pleading him to detail at least one officer to the school. Wotherspoon argued that engineers would not be given high command in war, if they had not received the proper professional training. If the head of either branch had realized the future importance of the higher schools as a prerequisite for important positions they would likely have given Bell a much stiffer fight. William M. Marshall to J. Franklin Bell, 13 November 1908, and Bell endorsement, 22 November 1908, File 6227, Entry 101, RG 393, NARA I. Wotherspoon to Charles W. Raymond, 13 June 1910, Box 18, Entry 292, RG 165, NARA II.
73 WDAR (1899), Root, 49-50; WDAR (1904), William H. Carter, Report of the Commander of the Department of the Visayas, 3: 244-245.
inevitable, but this was perversely made worse by Bell’s commendable sense of fairness. Because academic performance was used as a tool to manage selection into the General Staff, the students’ relative standing was a matter of importance. Bell fully realized the implications. In 1904 he wrote, “No mistake can occur at this institution without my feeling a certain sense of responsibility.” To ensure fairness, the school vainly sought the elusive goal of “scientific marking,” as Bell called it in one memorandum to the faculty. Instructors graded Spanish translations using stopwatches. Student grades were calculated to the thousandth of a percentage point. This created a constant pressure among the students to eke out small relative gains in order to secure entry to the Staff College. In this hothouse atmosphere, officers lost sight of the purpose of the experience. “These oral tests only emphasize the absurdity of the competitive marking system in force at this school in which officers have to strive for marks instead of instruction,” one officer complained in his diary. Another wrote Bell, “I firmly believe the system of competition and marking, now in vogue, nullifies to a great extent the splendid objects and possibilities of the Infantry and Cavalry School.” This mania for competition and grading was even noted overseas. The British *Journal of the Royal

74 J. Franklin Bell to Adna R. Chaffee, 25 March 1904, File 2145, Entry 101, RG 393, NARA I.
76 Ibid. For instance, First Lieutenant George C. Marshall had a final standing of 967.751, which was the top score of the class graduating from the Infantry and Cavalry School in 1907. This grade was a compilation of seven different component evaluations, each carried to the thousandths. Infantry and Cavalry School Final Report, Verifax #2034, GCM.
77 Richard H. McMaster diary, 6 April 1909, McMaster Papers, USC.
78 Henry B. Clark to J. Franklin Bell, 4 April 1905, File 3550, Entry 101, RG 393, NARA I.
*United Service Institution* noted the “school-masterly frame of mind among the military instructors of the United States Army, which happily is very rare in our service.”

When forced to choose between quality of instruction and equality of assessment, Bell chose the latter. To ensure that no section of students had an advantage over another, onerous restrictions were placed on what an instructor could say in the classroom. For instance, instructors were prohibited from disagreeing with a text, or, when a text offered several possible solutions to a tactical problem, they were forbidden to offer their own personal preference for one solution over another. Furthermore, all lectures were printed and read verbatim, and school regulations required that if an instructor gave his section any “simple or unimportant information, instruction or warning” that might affect grades, all other sections were required to be provided with a written memorandum providing the same information.

Such absolute standardization—even if desirable—was difficult to achieve in a classroom, but Bell also wanted it applied to the field exercises at the end of the course, when students commanded soldiers from the garrison. Despite the hopelessness of controlling the vagaries of weather, terrain, and the troops involved in these problems, the school maintained the fiction of uniformity rather than concede the inherent subjectivity of evaluation. Bell even went so far as to suggest that the War Department alter the *Field Service Regulations* to correspond with the school’s lectures on the subject, lest students appeal a mistake by citing the official doctrine. This was an issue of “considerable

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80 Infantry and Cavalry School and Staff College, “Memorandum for Instructors and Assistant Instructors,” n.d., Box 6, Swift Papers, USMA.

81 William W. Wotherspoon memorandum on “practical work,” 23 April 1904, Box 6, Swift Papers, USMA.
importance” to the commandant, “because in the desperate struggle for tenths [of points] carried on by the student officers here, and in the exceedingly exacting system of marking required by the necessity for making the competition as fair as possible, student officers will grasp at straws.” At Fort Leavenworth the demands of meritocracy weighed heavier than all other considerations, including education.

The return of Major Eben Swift to Fort Leavenworth further complicated matters. Shortly after Wagner had been assigned to the General Staff, Bell wrote Swift asking him to come to the school to superintend the tactics instruction. General Chaffee, however, opposed the transfer on the grounds that Swift had already spent so many years at the school. The chief of staff preferred to give other capable officers the opportunity to have such a choice duty. Bell persisted, arguing “the art of war is a science so indefinite . . . that the Instructor . . . must be a man of prestige and character, who will never lose his equipoise through lack of knowledge or self-confidence.” Such officers were “as scarce as ‘hen’s teeth.’” Chaffee finally relented. Bell’s efforts on Swift’s behalf indicate his resolve to continue the applicatory system, which nicely matched the commandant’s insistence on a “practical” education. Furthermore, his description of the ideal tactics instructor in the letters to Chaffee demonstrated that Bell understood the unstructured Socratic exchange necessary for the applicatory system to work. But Bell could not

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82 J. Franklin Bell to Joseph T. Dickman, 16 January 1905, File 3990, Entry 101, RG 393, NARA I.
83 Eben Swift, “Fort Leavenworth 1904-6,” 1-2, Box 7, Swift Papers, USMA.
84 J. Franklin Bell to Adna R. Chaffee, 24 March 1904, File 2145, Entry 101, RG 393, NARA I.
85 In a letter to the War College Board regarding the Fort Leavenworth curriculum, the school’s new commandant, J. Franklin Bell, used *practical* or a derivation of that word 25 times in a 20-page typed document. Six of these usages were underlined for emphasis. Bell to President War College Board, “Report Containing Suggestions for Future Development of the General Service and Staff College,” 31 July 1903, AGO File 525015, RG 94, NARA I.
overcome his “keenly” felt obligation to “safeguard impartially the interests of a hundred ambitious young men, solely dependent upon [the commandant’s] watchful care for protection of those interests.”86 Thus, Swift chafed under the school’s restrictions; he particularly disliked Bell’s insistence “that in the interest of fairness a written record must be absolutely made and that every man should have an opportunity to know exactly what questions would be asked and what answers were expected.”87

Despite his dissatisfaction with the system of evaluation, Swift’s role as head of the Department of Military Art, and later as the assistant commandant, gave him considerable influence over the curriculum. In the 1890s, Wagner had held back a fuller implementation of Swift’s applicatory system in favor of “theoretical” training from textbooks on tactics, strategy, and history. With Bell’s support, Swift dispensed with “nearly all of the text book instruction,” which was replaced with map exercises and “lectures prepared by members of the Staff Class and by instructors.”88 Wagner’s textbooks were too much a part of the existing course to be completely eliminated, but Swift had significantly curtailed their use. There was great merit in this change, as the texts were written for use in recitations, which was a deeply flawed method of professional education. But while the books might have been discarded for pedagogical reasons, doing so also replaced the content. This action placed the Uptonian tradition of tactical evolution at risk.

86 J. Franklin Bell to Adna R. Chaffee, 25 March 1904, File 2145, Entry 101, RG 393, NARA I.
87 Eben Swift to Stephen H. Elliot, 24 June 1908, Box 2, Swift Papers, USMA.
88 Eben Swift, “Fort Leavenworth 1904-6,” 4, Box 7, Swift Papers, USMA.
Bell might have deviated from Wagner’s plan and stifled Swift’s teaching, but he was extraordinarily successful in raising the prestige of the school, and by extension of all professional education. This was no accident, as the same values of fairness and esprit that put Bell in conflict with others, were the values of the officer corps. Thus, the faults of the school were accepted, because they were also the faults of the officer corps. The results were striking. In 1903, the year that Bell arrived, Root court-martialed several members of the dismal first class of the GSSC, and the following year an internal report indicated that at least a quarter of regiments were not sending their best-qualified officers. The next year, however, Bell was satisfied that only a few regimental commanders were sending officers who could not pass the course “either by reason of deficient previous education or lack of gray matter.” And by 1906, a graduate boasted that “the real view of progressive officers is that in a few years the officer who is not a graduate of the [Infantry and Cavalry School] will ‘not be in it’.” Some of this success should be attributed to Carter and Wagner, who through their respective plans for education emphasized its importance for future career advancement. But Bell devoted considerable attention to bolstering the Army Service Schools’ prestige. Although he had great sympathy for the officers sent by colonels who persisted in seeing the school as

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89 Nine regiments had not sent the officer with the highest standing in the garrison schools, although two of these had valid reasons for the substitution. An additional eleven officers did not know what selection criteria were used to select students within their regiments, itself an indicator of apathy at best. “Memoranda for Colonel Wagner,” 31 October 1904, File 1286, Entry 101, RG 393, NARA I. This report was prepared for Wagner after the publication of General Order Number 115, in which he made repeated mention of the need for regimental commanders to send their best officers. Although the findings of the report were somewhat ambiguous, it is significant that Wagner felt the need to commission such a study to gauge compliance. Wagner was forced to take action against at least one commander, Colonel William W. Wallace of the 15th Cavalry, who persisted in seeing the school as remedial education for those without West Point degrees. Brereton, Educating the U.S. Army, 110.

90 J. Franklin Bell to William W. Wotherspoon, 6 July 1905, File 4163, Entry 101, RG 393, NARA I.

91 George A. Wieczorek to Milton F. Davis, 20 September 1906, File 5341, Entry 101, RG 393, NARA I.
remedial education for dullards, he refused to simply let them graduate on effort, lest they diminish the school’s reputation. Bell also recruited talented junior officers, and actively encouraged the perception that only graduates would be granted future high command. The youthful general’s dynamic personality was well-suited to the role of salesman with junior officers. Inspector General George Burton described the commandant’s energetic methods: “[Bell] practically lives in the school building. . . . He goes among the students in the lyceum, talks with them, advises with them and inspires them towards higher ideals. He follows them in their field work, encourages them with his industry and perseverance.” It is impossible to gauge the precise effect of Bell’s influence, but many gifted junior officers did attend Fort Leavenworth. Malin Craig, who attended both the Infantry and Cavalry School and Army Staff College, would later become the first Fort Leavenworth graduate to serve as the Army’s Chief of Staff. George C. Marshall, who would succeed Craig as chief of staff, also attended both schools. George Van Horn Moseley, Hugh A. Drum, and Daniel Van Voorhis were other notable graduates of this time. Although the later success of these officers certainly owed a great deal to natural ability, Craig credited the school with sparking an interest in professional study and increasing his tactical expertise. A year after graduation, he declared it “the greatest opportunity that has fallen to me.”

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92 Ibid.
93 Nenninger, *Leavenworth Schools*, 77-79; War Department General Order Number 155, 27 November 1901.
94 “Summary of Reports by Inspectors, &c” 29-31 October 1904, Bell ACP. See also Nenninger, *Leavenworth Schools*, 77-79.
95 *Staff, Faculty, and Graduates*, 28, 31-32.
96 Malin Craig to Milton F. Davis, 24 September 1906, File 5341, Entry 101, RG 393, NARA I.
time as a professional awakening, despite having “learned little I could use.” 97 This extraordinary comment perfectly captured the strengths and limitations of the Bell-era Fort Leavenworth. The school benefited from the smart, ambitious officers brought together for the purpose of professional betterment, but it was their collective talent more than the instruction that made the school special. The spirit of military progressivism was powerful, even when poorly focused. Instilling this professional spirit in future leaders like Craig and Marshall might have ultimately been the school’s greatest contribution, but the full benefits would not be realized for decades. With fewer than fifty students in each class, such a small number of junior officers would have had little immediate influence on the Army if the school had passively relied on individual diffusion.

Bell seized upon field maneuvers as a method to greatly expand the school’s reach, and he sought to make the students and faculty an integral part of summer training. During his work with maneuvers, Arthur L. Wagner came to believe that the umpires controlling the exercises actually benefited more than the participants.98 Perhaps it was for this reason that Bell ensured the top fifteen GSSC graduates assisted Wagner during the 1904 maneuvers.99 Within a few years, nearly all of the students, recent graduates, and faculty were completely engaged during the summers. Even the chief of artillery requested that at least one Fort Leavenworth officer be assigned to each coast artillery department to train the National Guard units training to protect the coast

98 McKenna, “The Forgotten Reform,” 74-75.
99 Ibid., 84.
positions over the summer. The graduates serving at the 1906 Gettysburg camp of instruction greatly impressed the commander, General Frederick D. Grant. The general distributed sample tactical orders drawn up by recent graduates to all units, the effect of this was “most marked . . . and all commanding officers, and those closely associated with them, immediately developed great interest in the matter, and made strenuous efforts to attain perfection in following the correct lines, in issuing their orders for the problems.” Grant also made a special effort to identify recent graduates, who were then placed in positions of responsibilities as adjutants and aides. Officers from Fort Leavenworth performed similar functions at other camps: designing scenarios and training regimens, giving lectures to National Guard officers, and serving in key administrative and logistical positions. Most of all, they were valuable as umpires due to the similarities between the map exercises conducted in the classroom and the maneuvers conducted by the troops. The commander of the 1906 Fort Riley camp ordered that whenever available, officers with Fort Leavenworth experience would be made umpires. Although Bell had taken the Staff College from the path prescribed by Wagner, the Army Schools were clearly fulfilling an important need of the army.

In light of Bell’s single-minded pursuit of esprit at the expense of education, it is likely that he viewed the maneuvers primarily as a means of raising the school’s

100 Captain William G. Haan, the chief of staff of the 1906 American Lake, Washington maneuvers, wrote the school secretary for five Staff College graduates, requesting that they report early if possible. Haan thought that the highly-motivated students would voluntarily forego several days of leave for the opportunity to serve in influential positions. Haan to Milton F. Davis, 12 July 1906, File 3829, Entry 101, RG 393, NARA I. See also, Arthur Murray to the Adjutant General, 24 June 1907, File 5079, Entry 101, RG 393, NARA I.

101 Frederick D. Grant, Report of the Camp of Instruction Held in the Department of the East at Camp Roosevelt, Mount Gretna, Pa., July 27th to September 17th, 1906 [n.p.], Box 13, Swift Papers, USMA.

102 E.K. Massee to Milton F. Davis, 15 March 1906, and R.M. Brambila to Davis, 14 September 1906, File 5341, Entry 101, RG 393, NARA I; Headquarters, Provisional Brigade, Fort Riley Camp of Instruction, Circular No. 3, 26 July 1906, Box 6, Swift Papers, USMA.
reputation. If so, he certainly succeeded. An unintended consequence was the diffusion of what might be termed the “Fort Leavenworth way of war.” The 1904 General Staff manual on maneuvers defined the umpires’ duty, as creating “as far as practicable the impressions and consequences of modern war.” This was primarily achieved through the adjudication of losses from “combat” when the armies maneuvered close to each other, as well as ensuring that both sides followed the exercise rules.\(^{103}\) Despite the boasts of enthusiasts that these exercises exactly simulated war, no one at the time had any grounds for making such a claim. The Army had little experience with the style of warfare replicated in maneuvers since the Civil War, and the interim had witnessed significant progress in the lethality of arms.\(^{104}\) Therefore, the hundreds, perhaps thousands, of determinations of casualties, effects, and outcomes made by umpires over the course of maneuvers were highly speculative. Some effort was made to standardize these judgments. The first manual on the subject provided umpires with five pages of considerations and rules of thumb for computing casualties, but left much to the discretion of the individual umpires.\(^{105}\) This created great frustration in large-scale exercises, which often employed teams of dozens of umpires, each with different ideas of the effects of modern arms. The Germans had developed complex mathematical tables for computing the effects of combat to use in Kriegspiel, and some attempts were made to adopt this system for field use. The card pictured in the figure on the following page was actually one of the simpler examples of this variety, and it accounted for twelve

\(^{103}\) War Department General Staff, *Provisional Instructions for Maneuvers* (Washington: GPO, 1904), 8. See also, Wagner, "The Fort Riley Maneuvers," 73.

\(^{104}\) McAlexander, "Remarks on Maneuvers," 266.

\(^{105}\) *Provisional Instructions for Maneuvers*, 11-16.
different factors when computing casualties. Such methods were generally too unwieldy for practical use in the field. Even if they had been successful, they would have made umpires judgments more uniform, but underneath their mathematical precision these calculations were no less speculative than the looser systems relying on the professional judgment of individual umpires. As Fort Leavenworth graduated more officers every year, their common tactical training gave some cohesion to the maneuver camps’ depiction of modern warfare. As the camps grew, so did the Army Service Schools’ influence. In 1906, over 50,000 soldiers from the regular army and National Guard participated in several regional camps.106 Few of the participants had the theoretical military training necessary to recognize and independently judge the assumptions underlying the umpires’ decisions, and even those capable of doing so were strictly forbidden from questioning an umpire’s ruling during the exercise.107 Thus, the

| Reproduction of reference card for umpires. Imbedded within this card are numerous assumptions about the lethality and vulnerabilities of the different arms, the relative value of fortifications as opposed to morale, and the ability of firepower to win battles. (Source: Anonymous, “Fire Losses,” n.d., Box 12, Swift Papers, USMA) |

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107 Provisional Instructions for Maneuvers, 16.
conception of war embedded in maneuver rules was presented to tens of thousands of soldiers not as one of several competing theories about the interplay of weapons and humanity, but as a true representation of warfare. Maneuvers were a powerful tool of indoctrination.

Such a systematic placement of the brightest young officers in positions of responsibility was precisely the sort of meritocracy that military progressives sought, but the emergence of Fort Leavenworth graduates as elite tacticians led to some resentment, particularly among older officers. Brigadier General Charles G. Morton, commander of the 1908 camp at Fort D.A. Russell, Wyoming, criticized the practice of having “young officers of little or no practical experience passing judgment upon the acts of seniors of greater practical experience. The duties of an umpire are one of practical work and cannot be learned exclusively from books or theories.” Morton’s criticisms followed the familiar pattern of juxtaposing practical and theoretical, although he did add a unique generational component by equating age with practical and youth with theoretical. Furthermore, Morton was among those who preached that “book-learning” was counterproductive to an officer’s usefulness. He asserted that “the very best informed officers of the regular service in theories show a lack of confidence in themselves in the practical handling of troops in these problems, no matter how small the organization or detachment they may command.” Such officers could never be reconciled to the military progressive reforms, but senior officers were not uniformly

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109 Ibid. The assertion that “book knowledge” produces uncertainty in action is an excellent example of the juxtaposition between “Active Man” and “Contemplative Man” noted in Matthews, “Anti-Intellectualism,” 61-92.
reactionary. A 1906 survey of recent Fort Leavenworth graduates indicated a somewhat surprising enthusiasm for the school among senior officers.\textsuperscript{110} Other indications of education’s growing prestige were found in the regular publication of tactical problems developed by the schools in the journals of the infantry and cavalry. In 1908, over 500 officers subscribed to the mailing list of the Army Service Schools Press in 1908, and that group had grown eightfold by 1914. Units attempted to replicate the Fort Leavenworth techniques locally: one regiment developed such an ambitious scheme of classes and map exercises that it became known as the “Little Leavenworth.”\textsuperscript{111} The changes instituted by Bell made the Army Service Schools the intellectual center of the Army, with all of the strengths and weaknesses that entailed.

Bell’s tenure at Fort Leavenworth defies a simple characterization of success or failure. The Staff College clearly failed to fulfill its designated function within the greater education system, but the utility of the Infantry and Cavalry School course was demonstrated in the high demand for graduates. His policies often sacrificed the quality of education, but his emphasis on cohesion was entirely consistent with the values of the officer corps. It also contributed to the formation of the famed “Leavenworth clique” of World War I—itself a mixed blessing.\textsuperscript{112} While Bell’s obsession with fairness was partly a

\textsuperscript{110} A representative example was found in one letter from a recent graduate, who found that even senior officers sought his advice due to his recent education. “I will own, frankly, that I had expected to find slight opposition, especially on the part of those who had not been at Leavenworth, but it has been the opposite, and I have most certainly heard no regrets from those who have taken the course.” E.K. Massee to Milton F. Davis, 10 September 1906, File 5341, Entry 101, RG 393, NARA I.

\textsuperscript{111} Nenninger, \textit{Leavenworth Schools}, 121; Helmick, "From Reveille to Retreat," 181.

reflection of his commendable loyalty to subordinates, a more fundamental problem was the competing demands of development and evaluation that had been inserted into the system by Root, Carter, and, to a lesser extent, Wagner. Ultimately, Bell did a great deal to advance the status of professional education, but little to improve its content or methods.

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As he had with Bell, Root defied convention to promote Brigadier General Tasker H. Bliss from a junior grade to flag rank. Other than their similar good fortune in this regard, Bell and Bliss had little in common. Although Bell was curious and thoughtful, Bliss was a brilliant intellectual. Born into a family of academics, Bliss matriculated for a year at Lewisburg University, where his father taught classical languages, before winning his appointment to West Point. While at Lewisburg, Bliss asked a fellow student who had fought in the Civil War to judge his potential as an officer. “You’d make a good professor at West Point,” answered his friend. For a young man entering the army in 1871, this was at best a backhanded compliment. Yet Bliss’s intellect defined him and his career. His mind was a two-edged sword that allowed him to pursue a highly unusual path to great success, but one that was not without its costs.


113 For a brief synopsis of Bliss’s career, see Appendix.

From the very beginning Bliss was different than his fellows. He came to West Point to join the class of 1875 with his copy of Homer in the original Greek. Although Bliss finished only eighth in the class standings, his classmates voted him the “brain” of the class. His biographer speculated that if Bliss had concentrated solely on his classwork, rather than reading extensively in unrelated military and academic topics, then he would have graduated first in his class.\(^\text{115}\) The Academy’s Academic Board thought enough of Bliss to have him return as an instructor of French and artillery only a year after graduation.\(^\text{116}\) He used this second period at West Point to perfect his Spanish and German, while also teaching himself Russian so that he might write a study of the Russo-Turkish War.\(^\text{117}\) After leaving West Point in 1880, he returned to the First Artillery for nearly two years—the longest period of regimental service of his career. In 1882, Bliss reported to the Artillery School at Fort Monroe, where he was the honor graduate. Following completion of the two-year course, he remained at the school as the adjutant.\(^\text{118}\) A year later, Commodore Stephen B. Luce requested the assignment of an army officer to teach the “art of war” at the Naval War College. Bliss was selected as the Army’s representative on the inaugural Newport faculty, which also included the naval theorist Arthur Thayer Mahan. While at the Naval War College, Bliss was sent on an official ten-month tour of Europe to study foreign military education.\(^\text{119}\)

\(^{115}\) Ibid., 19-22

\(^{116}\) Statement of Service, Bliss ACP.

\(^{117}\) Palmer, Bliss, Peacemaker, 23-28. Bliss became so proficient in Russian that he was later able to translate several technical works on ballistics for the Artillery School. James M. Ingalls to Tasker H. Bliss, 8 and 11 October 1891, 4 June and 6 September 1892, Bliss Papers, USMA.

\(^{118}\) “Summary of Efficiency Reports,” 30 June 1896, Bliss Papers, USMA.

\(^{119}\) Ibid.
following his four-year tour at Newport, Bliss joined the personal staff of Commanding General of the Army John M. Schofield, who had been the superintendent at West Point while Bliss was an instructor. Schofield was also somewhat of an intellectual and enjoyed the companionship of his erudite aide; they would often spend hours in wide-ranging discussions. Bliss also became friends with Arthur L. Wagner and J.P. Sanger, who had been one of Upton’s companions during his trip around the world.\footnote{Brereton, \textit{Educating the U.S. Army}, 24-25.}  Following Schofield’s retirement in 1895, Bliss remained in Washington as an assistant to Secretary of War Daniel Lamont. In 1897, he was dispatched to Madrid as the military attaché to assist Ambassador Stewart L. Woodford during the diplomatic crisis before the Spanish-American War, earning great praise for his diplomatic skill.\footnote{Palmer, \textit{Bliss, Peacemaker}, 30-54.}  Thus by 1898, Bliss, although still just a captain, had acquired considerable experience at the highest levels of military and political affairs, and a reputation as a highly competent advisor.

Bliss, however, had served with his regiment for only three of his twenty-three years of commissioned service.\footnote{“Summary of Efficiency Reports,” 30 June 1896, Bliss Papers, USMA.}  In 1890, General Schofield wrote Bliss’s efficiency report, in which he identified Bliss as “one of those young officers among whom, so far as can be foreseen, the future leaders of the Army in time of war must be found.”  The following year, Colonel L.L. Langdon, the commander of Bliss’s regiment, wrote the lieutenant’s evaluation, which reflected an entirely different view than the general’s.  “I have never seen this officer more than once, and I know absolutely nothing about him,”
Langdon wrote, before adding, "He bears in the regiment a reputation for general ability."\textsuperscript{123}

Returning from Madrid after the declaration of war, Bliss was named the chief of staff of the First Army Corps, which was to be commanded by Upton’s old friend and superior, Major General James H. Wilson. The corps participated in the invasion of Puerto Rico, seeing brief action before the war ended.\textsuperscript{124} Although the war offered Bliss little opportunity for distinguished service, the resulting peace brought him great rewards. In 1899, Bliss was named the collector of customs for Havana. Due to his great energy, integrity, and thoroughness, Bliss reformed the previously corrupt and inefficient customs service, which greatly increased the revenue available for the military government. He also supported the administration’s favored trade policy during Congressional testimony on the proper financial relationships between the two states. There were also influential relationships to be forged in Havana, particularly with Major General Leonard Wood, the military governor of Cuba and close friend of Theodore Roosevelt.\textsuperscript{125} Root rewarded Bliss for his outstanding performance in this civil capacity with promotion from major to brigadier general in 1902.\textsuperscript{126} As with Bell, this dramatic promotion was resented by many. The irritation was even more acute in Bliss’s case due to the political nature of his service and his association with Wood, who was also

\textsuperscript{123} Ibid.

\textsuperscript{124} Bliss was recommended for promotion to brevet colonel of volunteers for gallantry during the brief Puerto Rico campaign. Statement of Service, Bliss ACP.

\textsuperscript{125} Palmer, \textit{Bliss, Peacemaker}, 59-80.

\textsuperscript{126} Bliss had been promoted to brigadier general of volunteers in 1901. Bliss ACP.
resented as an outsider with more political influence than military merit.127 Also, Bliss’s brusque personality and bookish nature did little to create sympathy among his fellow officers.128 Bliss was in many ways the opposite of Bell: capable in elite circles but without common mess-room appeal, a privileged insider with little experience on the frontier or in war. Yet, Bliss, Bell, and Carter, all benefited from controversial promotions to flag rank during the same period of just seventeen months.129 The diversity of those who earned Root’s favor was proof of his ability to recognize many different forms of talent. Yet this same odd assortment reflected the vast range of views that would have to be brought into harmony if military progressives were to create a coherent program of reform. Bliss’s appointment to the War College Board in 1902 and his later designation as the first president of the Army War College in 1903


128 In a 1947 interview, William H. Carter’s secretary alleged that “Bliss was disliked by most people in the [War Department].” Harold D. Cater interview with Grace L. Palmer, 3 December 1947, Office of the Chief of Military History Collection, MHI. After Bliss made a visit to the World War I command of Frank Parker (another Wood protégé), Parker commented that “Mr. Bliss . . . [had] for the first time in his life showed some little warmth.” Parker to wife, 11 February 1918, Folder 17, Parker Papers, UNC. Even his hagiographic biography admits this distance, see Palmer, Bliss, Peacemaker, 101, 124.

129 Bell was promoted to brigadier general in the regular army on 19 February 1901, Carter on 15 July 1902, and Bliss on 21 July 1902. Adjutant General’s Office, Official Army Register: 1903 (Washington: GPO, 1903), 7-8.
made him one of the most influential figures in professional education along with Carter and Bell.\footnote{Although Bliss was named the first president of the War College on 1 August 1903, the first class of students did not report for duty until the following year. War Department General Order Number 64, 1 July 1902; \textit{WDAR} (1903), Tasker H. Bliss, Report of the President, Army War College, 4: 89-90; Ball, \textit{Responsible Command}, 72-94.}

At first glance, it is somewhat surprising that Bliss and Carter, officers with such different backgrounds would have so closely aligned views on professional education. Nevertheless, in his 1903 annual report for the Army War College Bliss provided a lengthy theoretical justification for the education system embodied in Carter’s General Order Number 155. Bliss divided the officer corps into two groups, each with different characteristics and educational needs: “regimental” officers, who constituted the vast majority, and the elite destined for service at higher levels. Bliss’s discussion of regimental officers was extraordinarily condescending for a public document. He determined that the six-months of training provided by the garrison schools was sufficient for all regimental duties from second lieutenant to colonel. Although not explicitly stated, Bliss likely regarded the primary benefit of this rudimentary education as a check on “the unfortunate tendency” of regimental officers to fall into “a process of steady decadence culminating in complete dry rot.”\footnote{\textit{WDAR} (1903), Bliss, 93.} In view of the anti-intellectual propensities of most officers, grades were necessary to “brace up” the unwilling.\footnote{Ibid., 92.} Insulting as these views were, it should be noted that Bliss’s statements were entirely consistent with the system designed by Carter, who had nearly as many decades of regimental service as Bliss had years in similar duty. Bliss did disagree with the current
system on only one minor point. While Carter had been content to rely on grades to
determine which officers advanced to the next school, Bliss thought that additional
subjective measures were necessary to distinguish between those “who are content to
thoroughly know their regimental duties and those who show a zeal and an aptitude to go
further.”133 This comment provides a fascinating glimpse into Bliss’s ideas on the
difference between elite and regimental officers, which was not merely one of intellectual
ability but also of attitude. To achieve this differentiation, Bliss advocated a ruthless
attritional system that spared none. “Each group of officers should be pushed to its limit,
and from those whose limit extends the farthest the selection [for General Staff] should
be made,” Bliss urged. “No one, whether from West Point or elsewhere, should be
excused from any work on the assumption that he already knows.”134

The elitist ideas of Carter and Bliss contrasted with those of Bell. In fact, Bell
regarded the “zeal,” which Bliss thought distinguished the elite from the masses, as
distasteful. When Captain Charles S. Haight, a recent Staff College graduate, wrote Bell
complaining about a poor efficiency report, the commandant chastised him for his
ambition and desire to escape regimental duty. Bell advised him that “the best and the
only way that an officer can fit himself for higher command. . . is to gain a good
reputation, by zealous persevering and faithful and efficient attention to his ordinary
routine duties.”135 Of course, one could easily apply this description to the
commandant’s own early career. Bell accused Haight of faults that Bliss would likely

133 WDAR (1903), Bliss, 92
134 Ibid.
135 J. Franklin Bell to Charles S. Haight, 5 December 1905, File 596, Entry 101, RG 393, NARA I.
have called virtues. Certainly, Bell’s letter might have just as easily been written about a younger Bliss:

Your course in the army has created an almost universal impression on the minds of those who have come in contact with you, that you consider service “in an easy-going army post,” at your legitimate duty as a troop officer, not only a bore, but as an occupation too limited in its requirements, and too humdrum in its opportunities, for a man of your talent, tastes, and requirements. Perhaps it is better known than you imagine, that you have frequently sought assignments or details which would take you away from your legitimate troop duties.136

Thus, while Bliss regarded contentment with regimental duties as a fatal lack of “zeal,” Bell regarded willingness to engage in these “legitimate” duties as not only the best preparation for high command but also as morally superior. The Army Service Schools reflected Bell’s emphasis on the common officer, which was recognized by the students. “It is for the average man as I understand it, that the I. and C. school exists,” wrote one graduate in 1906.137

While it might be surprising that Carter shared Bliss’s elitism, it is mystifying that the learned polymath Bliss would expect so little from professional education. Yet his curriculum for the Army War College was based on the premise that the garrison schools and GSSC “exhaust the useful possibilities of scholastic professional training.”138 While the Fort Leavenworth curriculum would improve considerably over the next few years, this was an extraordinary statement in 1903. Just a few months earlier, Bliss had been sent by Root to investigate the dismal showing of the first GSSC class.139 Even if Bliss

136 Ibid.

137 R.M. Brambilia to Milton F. Davis, 14 September 1906, File 5341, Entry 101, RG 393, NARA I.

138 WDAR (1903), Bliss, 94.

139 Memorandum Report, 14 August 1903, Box 8, Entry 288, RG 165, NARA II.
had assumed that future classes would be more competent, the garrison schools and GSSC amounted to a mere sixteen months of training. Nevertheless, Bliss decreed that there would be no formal instruction at the Army War College: no fixed dates for the academic year, no diplomas, and no classes. Instead, students would “learn things by doing things”: conducting actual general staff work, with some supplemental lectures on specific subjects relevant to the current problem. It was not to be a college in the same manner as Fort Leavenworth, but a collegium of officers loosely bound by a primarily individual pursuit of professional knowledge. This organization was not original to Bliss, as it was derived from the Naval War College course based on a single annual wargame. William H. Carter had visited Newport and described something similar in his 1901 plan, and Wagner later ratified the idea in General Order Number 115, by stating that “the purpose of the War College is to make a practical application of knowledge already acquired, not to impart academic instruction.” Although not without precedent, Bliss’s plan for the Army War College was nevertheless an astonishingly feeble effort to train high-ranking staff officers, particularly from an officer with such extensive experience. Despite his qualifications, Bliss offered nothing better to train the elite for General Staff duty than for them to “learn things by doing things.” The school had no

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140 WDAR (1903), Bliss, 95-97; quotation from Ball, Responsible Command, 85.

141 Ball, Responsible Command, 86.

142 War Department General Order Number 115, 27 June 1904.

143 This plan might have been a means of hedging against the possibility that Congress would dissolve the newly-founded General Staff, in which case the Army War College would be able to assume some of its functions. In fact, Root had used the War College Board in just such a manner in 1902 and 1903. Although there was initial bitter resistance on the part of several members of the board to this practice, particularly Carter, the pragmatic advantages of such a course soon won their grudging support. Although this certainly would have been evident to Bliss, all his statements suggest that he was entirely satisfied with his plan for its own merits. Ball, Responsible Command, 58-64, 85; Machoian, Carter, 115-117.
developmental function, but was merely a tool for incorporating talented junior officers into the General Staff. Evidently for Bliss the purpose of professional education was to identify an officer’s level of innate talent, not foster new capabilities. While it might be argued that Bliss was influenced by his experience at the Naval War College, he had also had spent nearly a year abroad studying foreign military education. Someone of Bliss’s intellect should not have been a helpless prisoner within the bounds of his own personal experiences.

The practical difficulties associated with establishing the school made achieving even Bliss’s low aspirations difficult in the first years of the War College, as the building at Washington Barracks was not ready until 1907. In the meantime, the school rented a small house in Washington, but in 1905 the acting president reported that the accommodations allowed a mere seven students to work in nearly impossibly cramped conditions. Yet it would be far easier to build a physical home for the school than to develop a conceptual framework for its work. Historian Harry Ball has observed that the “War College’s program inevitably would remain ambiguous until experience established an accepted role for the General Staff Corps in its American version.” Unfortunately, the General Staff had difficulty in defining its role. This was partly due to the rapid succession of three chiefs of staff in just three years, and the departure of Root, Bliss, and Carter from Washington in quick succession shortly after the General Staff was created. The appointment of Lieutenant Colonel William W. Wotherspoon as the acting

144 This might also have been in imitation of the German system of probationary General Staff assignments.

145 Samuel Reber to Tasker H. Bliss, 23 January 1904, Box 1, and William W. Wotherspoon to Charles W. Larned, 11 October 1905, Box 4, both in Entry 292, RG 165, NARA II.

146 Ball, Responsible Command, 83.
president of the War College also hindered the school, due to Wotherspoon’s low rank and interim status. Thus, the Army War College drifted along for some time under a caretaker head, without a permanent physical home, tied to an organization lacking an identity, and founded upon the premise that its expertise could not be taught.

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In February 1906, Bell was pleasantly surprised to learn from friends in Washington that he had been named the next Chief of Staff of the U.S. Army. Bell had been something of a dark horse candidate, being junior to all three major generals and one of the other brigadier generals. One of the principal considerations favoring Bell was his youth; President Roosevelt and Secretary of War Taft desired an officer who could serve a full four-year term before mandatory retirement. Still, his selection owed something to the lack of acceptable alternatives.

Bell came to the post convinced that since the end of the Indian Wars, the basic ability of the army to conduct field campaigns had eroded. To correct this deficiency, he was determined to export the Fort Leavenworth methods of “practical” training to the entire army. As seen earlier, this was already underway through the integration of the faculty and students into maneuvers. Also, the common practice of using graduates as

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147 Ibid.; Carter ACP; Bliss ACP.
148 J. Franklin Bell to John C. Bates, 25 February 1906, File 4536, Entry 101, RG 393, NARA I; “Maneuvers, Hobby of Bell,” newspaper clipping in Bell ACP.
149 Raines, “J. Franklin Bell,” 2-5.
150 “Maneuvers,” in Bell ACP.
instructors in the garrison schools helped to further diffuse these techniques.\textsuperscript{151} With his promotion, Bell had the opportunity to greatly expand these efforts. At the time, the Army War College continued to struggle along the lines originally laid down by Bliss, since departed for the Philippines. In 1905, the acting president, William W. Wotherspoon described the listless atmosphere at the school to his friend Eben Swift: “I suppose you know there is no real War College Course . . . No one up top side has tackled the problem in earnest. I of course have my ideas but my influence is small and they will probably not be heard of.”\textsuperscript{152} The situation would soon change, as Bell was far more interested in professional education than any of his predecessors.

To bring the Army War College into accordance with the Fort Leavenworth methods, Bell asked Eben Swift to come to Washington. Swift, however, had no desire for duty in Washington on account of the high cost of living, and perhaps Wotherspoon’s

\textsuperscript{151} Nenninger, Leavenworth Schools, 112-117.

\textsuperscript{152} William W. Wotherspoon to Eben Swift, 12 December 1905, in Swift, “The Army War College, Course of 1906-7,” n.d., Box 7, Swift Papers, USMA.
glum description of the school also dissuaded him. Several weeks later Bell made another plea, promising Swift full control of the curriculum, before concluding, “I can only add that we need you, we want you and we hope you will come.”153 With such pressure from the chief of staff, Swift had little choice but to agree to the transfer. Despite Bell’s mandate to change the school, Swift faced great opposition. Lieutenant Colonel Smith S. Leach was the school’s senior director and a defender of the *collegium* method of free discussion and large map exercises implemented by Bliss. When Swift attempted to implement the didactic applicatory method as Bell had desired, Leach rebuked him, saying that the students were “not to be treated like children.”154 Leach was unwilling to defer to Swift, who was only the junior director. Adding to his frustration, Swift had no recourse, as Bell had left Washington to command the army in Cuba, which had been dispatched to sent to bolster the wavering government there.155 The disagreement was raised to the acting chief of staff and president of the War College, Brigadier General Thomas H. Barry, who supported Leach. When word of the dispute reached Bell in Cuba, he was caught between conflicting loyalties to subordinates. Unwilling to undermine Barry, the best that Bell could do was to offer Swift a position on his staff in Cuba until Leach left the following year. Swift declined and resolved to wait for better times.156

153 Swift, “The Army War College, Course of 1906-7,” n.d., Box 7, Swift Papers, USMA.
154 Eben Swift, “The Army War College, Course of 1906-7,” n.d., Box 7, Swift Papers, USMA.
156 Eben Swift, “The Army War College, Course of 1907-8,” n.d., Box 7, Swift Papers, USMA.
Just as Bell and Bliss disagreed as to what segment of the officer corps should be the focus of professional education, Swift and Leach disagreed on what should be taught. In fact, the disagreement was reminiscent of the situation at Fort Leavenworth in the 1890s, when Swift had disliked Wagner’s emphasis on strategy and policy. Swift’s argument was sensible for a school educating lieutenants for service in a frontier constabulary, but his criticism of the emphasis on “matters of military policy, including plans for national defense and strategical objectives in time of war” made less sense when applied to the Army’s highest school in the early twentieth century. Yet Swift dogmatically maintained that military education had but one purpose: to teach the “art of commanding troops.” Not surprisingly, he proposed a course identical to Fort Leavenworth in form but with more emphasis on units larger than a brigade.157 After Leach’s departure, Swift introduced an ambitious series of fifty-six map exercises and twelve map maneuvers for units ranging in size from regiments to armies, many of which were based on the same German textbook used at Fort Leavenworth.158

157 Eben Swift to President of the Army War College, 5 October 1906, Box 3, Swift Papers, USMA.

158 Map exercises were more limited problems focusing on only a limited aspect of an operation. Map maneuvers included all elements (tactics, movement, supply, communications, etc.) and usually covered longer periods. Eben Swift, “The Army War College, Course of 1907-8,” n.d., Box 7, Swift Papers, USMA. For detailed descriptions of a full year’s worth of exercises see box 3, Swift Papers, USMA.
Despite Swift’s reservations about the relevance of “strategical” war plans, he was obliged to continue the practice. During his time at the War College, however, they gradually became divorced from the actual plans devised by the General Staff, becoming strictly instructional tools. He also continued his obsessive interest with the issuance of orders. Swift’s War College course included six “Exercises in Verbal Orders,” in which students spoke into a phonograph as if giving an order to troops in the field. The entire class would then critique the manner of delivery. Swift claimed that these orders were based on an “appropriate military situation,” but it is difficult to imagine any such scenario for students preparing to be general staff officers. Swift’s curriculum was really training for regimental and brigade commanders rather than education for general staff officers. The curricular wars between Swift and Leach reflected the military progressives’ difficulty in translating general rhetoric into specific programs. Swift’s description of the school’s purpose in 1910 was little different than that of Bliss in 1903.

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159 Swift wrote of the Japanese and Venezuelan problems pursued by the class of 1907-8, “I thought then and I still believe that this took up a lot of time that could have been better employed in systematic work.” Eben Swift, “The Army War College, Course of 1907-8,” n.d., Box 7, Swift Papers, USMA; Ball, Responsible Command, 110-111.

160 Eben Swift, “The Army War College, Course of 1907-8,” n.d., Box 7, Swift Papers, USMA. All of the work done by the War Department General Staff was necessarily conducted in writing, as it consisted almost entirely of plans and policies that would be executed by units stationed elsewhere. Even when serving as the chief of staff for a large unit, general staff officers would rarely give verbal orders. While generals commanding such units might give such orders, the chief of staff was responsible for the details of movement, supply, and coordination among the thousands of soldiers and dozens of subordinate units. This was well understood by nearly all officers, even those lacking experience or education in such matters. Colonel James Regan, who had entered the Army in 1863 as a musician in an infantry regiment and had no formal military education in the subsequent four decades, wrote: “It seems to me the paramount duty of the General Staff will be logistics, or the science of details, to so harmonize them that our future great generals will be able to concentrate their minds upon strategy and grand tactics.” Regan, “Comments on ‘Our Coming General Staff,’” JMSI 33, no. 125, (Sep.-Oct., 1903): 280-281; Heitman, Historical Register, 822.
but the methods pursued were vastly different.\textsuperscript{161} These intellectual disagreements seem to have been compounded by personal animosity, particularly Swift’s irascible nature.\textsuperscript{162}

These many disputes over the proper form of education reveal one of the great weaknesses of military organizations, which are poorly-constructed for intellectual debates. As illustrated by Eben Swift’s career of discord, there is no incentive or mechanism for debate or synthesis. On those occasions when Swift was junior, such as at Fort Leavenworth in the 1890s or the Army War College in 1906, he was overruled. When Swift was in charge or backed by a superior, his ideas were implemented. Methods tend to displace one another as individuals change rather than evolving. Of course, even in the military orders are not always followed, as seen by Bell’s utter disregard of War Department policies. Yet that instance demonstrates the importance of effective authority; the ultimate course of the school owed no more to a reasoned debate on the merits of the differing views than the other examples given. Thus, despite the occasional transfer of methods between organizations, competing ideas tended to remain distinct rather than combining into new forms. Aside from the obvious difficulty of sustaining evolutionary progress, it was this characteristic of military organizations that

\textsuperscript{161} Swift defined the school’s purpose as the preparation of a small elite for general staff work, to include “the tactical and strategical handling of troops” at the division-level and higher, familiarity with the capabilities of all arms, and problems of national policy, was little different than Bliss’s of 1903. Eben Swift, “Outline of Course of Instruction, Army War College, Course of 1909-10,” n.d., Box 7; Swift to President of the Army War College, 17 April 1907, Box 3, Swift Papers, USMA.

\textsuperscript{162} Bliss and Leach were West Point classmates, and Swift graduated with the following year’s class. Both Swift and Leach absolutely refused to compromise, and eventually they brought the situation to the attention of a major general. Not that Swift was prone to sparing his friends in such matters. Just a few years after Wagner’s death, Swift criticized his friend’s reorganization of the professional education system as “not practicable under any conditions likely to arise.” As years passed, Swift’s appraisal of old comrades became even harsher. He dismissed all of the officers in charge of Fort Leavenworth or the Army War College—which included Bell and Wotherspoon—as incompetent, claiming that they “were selected on account of rank and often their interference was for the worse.” Swift, “Outline of Course of Instruction, Army War College, Course of 1909-10,” n.d., Box 7; Swift to President of the Army War College, 17 April 1907, Box 3, Swift Papers, USMA.
hindered the formation of a coherent philosophy of military progressivism. In the case of education, synthesis would have been particularly useful, but only Wagner seems to have realized that the military schools had to prepare officers for many different functions and levels of responsibility. Thus, a number of different methods were needed. This seems to have been lost on most, who either viewed the schools as merely a tool for identifying the elite, like Carter and Bliss, or associated education with a single method, such as Swift. Nevertheless, as Bell’s term as chief of staff came to a close, it was obvious that he had done much to shape officer training. “The work which you have done,” Secretary of War Jacob M. Dickinson wrote to Bell in 1910, “especially in the discipline and education of the Army, will stand as an enduring monument to your worth, and will be a testimony to coming generations of soldiers in your behalf long after you shall have passed from the stage of active life.”163 Although his legacy was somewhat mixed, Bell certainly did more to shape the course of military education more than any other officer.

163 Jacob M. Dickinson to J. Franklin Bell, 22 April 1910, Bell ACP.
6. Military Progressivism Turns on Itself: John F. Morrison, the Army Service Schools, and the 1911 Infantry Drill Regulations, 1906-1911

The art of war is always changing, and one important function of a general staff, which is truly the brain of an army, is to suggest such changes as are demanded by new weapons and new fields of operations.

- Colonel William R. Livermore

Over two-hundred Japanese artillery pieces fired on the Russian defenders of Shoushanpu (Shoushan Hill), in an hours-long barrage beginning before dawn on 31 August 1904. Although some Russian signal troops were huddled near a battered cairn on top of the hill, most of the infantry manned trenches at the base near the railroad that wound along its western side before continuing a few miles north to the Manchurian city of Liaoyang—the forward base for the main Russian field army.¹ The fearsome barrage caused great casualties, but enough defenders survived, particularly those manning the machine guns, to cut down the Japanese ranks so that only a few attackers were able to get within the defenses. The Russian reserves and Japanese supports both rushed forward, but at the end of the fight, the defenders held. This attack would likely have gone unnoticed on the other side of the world, if not for a curious accident of history that placed an American observer with each of the contending armies; this allowed the Americans to literally see this specific action from the other side of the hill. Their observations of the battle were important, because many officers thought of the Russo-Japanese War as a preview of a possible war between the United States and a great


power. The General Staff had been created the year before to take advantage of just such an opportunity for vicarious study of war. Military progressives claimed that the systematic collection and analysis of these experiences would allow the United States to field armies trained and equipped for the demands of modern war when it next took up arms. Accordingly, the General Staff had initially dispatched eight observers to Manchuria and several more would subsequently be accredited. The first great challenge for military progressivism in the post-Root era was to translate the observers’ reports into sound policy.

As an example of twentieth-century war, the Russo-Japanese conflict was certainly sufficient. The artillery was both tactically and technically sophisticated, making use of hydro-pneumatic recoil systems, high explosive shells, wire communications, indirect fire, and guns permanently organized into battalions and regiments. The infantry were armed with breech-loading, magazine-fed rifles and dressed in subdued khaki, a far cry from the muzzleloaders and bright uniforms of just half a century earlier. Machine guns and wire obstacles figured prominently, particularly in the later fighting. The field armies were each well over one hundred thousand strong. The battle of Liaoyang lasted several days and was fought over many miles of front, resulting in over twenty thousand casualties. The spectacle of warfare with modern armaments on this scale must have been astonishing for almost all of the American observers, as they came from an army that had a total strength of only half the size of the Russian army defending Liaoyang. Captain Peyton C. March, who was already known for his icy reserve and discerning intellect, reacted like a giddy schoolboy when he first

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2 Connaughton, Rising Sun and Tumbling Bear, 147-163.
observed modern war at Liaoyang. March paced back and forth across a hill in the Japanese lines, muttering again and again, “This is great! This is great!”

Some of the observers thought that the Manchurian fighting represented something significantly different than seen in previous wars. Captain Carl Reichmann, who witnessed the assault on Shoushanpu from the Russian side, called the preliminary artillery barrage, “probably the severest artillery fire encountered on any battlefield and [it] will become [a] historic instance of the use of artillery.” Both March and Reichmann were veteran officers; they had thirty-six years of commissioned service between them, including combat in the Philippines, where both had been recognized for valor. March was one of the elite chosen for the initial General Staff. Reichmann was a seasoned observer, having written two pamphlets on European annual maneuvers for the Infantry and Cavalry School in the 1890s and observed Britain’s South African War with the Boers.

Yet some of the other Americans found much in the Russo-Japanese War that was familiar. The Japanese soldiers went forward in the standard configuration of skirmishers, assault, and supports, with the soldiers in the main body arrayed in regular lines and separated from their closest comrade by just one or two paces. In the trenches, the Russian infantry fired in volleys on the command of their officers. The sky held

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5 Register of Graduates, 4-69; Record of Adjutant General’s Office Correspondence concerning Peyton C. March, Roll M698, RG 94, NARA I; Carl Reichmann, "Extracts from the Report of Capt. Carl Reichmann on Operations of the Boer Army," in Reports on Military Operations in South Africa and China (Washington: GPO, 1901); Reichmann ACP.
nothing more threatening than a Russian observation balloon, and muscle-power, whether horse or man, provided the only means of moving around the battlefield.6

Captain John F. Morrison, who was also an officer with over two decades of experience and a decorated veteran of both Cuba and the Philippines, was not impressed. Morrison thought little of the artillery barrage that so impressed Reichmann: “I do not believe that the improvements in field artillery will have much, if any, effect on changing present infantry tactics.”7 As for the Japanese infantry, which he greatly admired, Morrison saw “nothing startlingly new” in their methods.8 Instead, he was impressed by the continued relevance of traditional military virtues: disciplined troops, competent officers, and a skilled staff.9 Morrison happened to be the observer with the Japanese army at Shoushanpu, and he, like Reichmann, wrote extensively about that same assault. Thus, two American officers drew mutually inconsistent conclusions from the same case. Aside from illustrating the difficulty of drawing conclusive “lessons learned” from such a chaotic and complex event as a large battle, their disagreement also underscores the importance of understanding the background and experiences that color an observer’s perceptions.

Reichmann and Morrison were infantrymen of nearly identical age and with similar professional education.10 Thus, the most obvious sources of professional bias—

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8 Ibid., 95.

9 Ibid., 83-99.

10 For a brief synopsis of the careers of Reichmann and Morrison, see Appendix.
branch, generation, and expertise—did not directly apply. Yet underneath these broad similarities, the two were very different in personal and professional outlook. In many ways, Morrison was the archetype of an early twentieth-century regimental officer. A native of upstate New York, he attended West Point like nearly all of the officers of his day. He stood in the middle of his class and was commissioned as an infantry lieutenant in 1881.\textsuperscript{11} Reichmann had a far more exotic background. According to his own account, he had emigrated from his native Wurttemberg in 1881—the same year as Morrison’s graduation from West Point—unable to financially support any further advance towards a medical degree after several years of study. Speaking little English, he traveled from Baltimore to Chicago, where penniless, friendless, and with no other prospects, Reichmann “took to military life, a predilection for which I had cherished from boyhood [sic].”\textsuperscript{12} Although Reichmann only rediscovered his avowed childhood dream after great hardship, he made a wonderful soldier. Eighteen months after enlisting, he was a company first sergeant and soon thereafter was recommended for commissioning by an examining board.\textsuperscript{13} The 1880s were the peak of the West Point monopoly on commissions, so Reichmann’s promotion from the ranks in 1884 was quite unusual and indicative of some ability.\textsuperscript{14} After a few years, Reichmann attended the Infantry and

\textsuperscript{11} John F. Morrison, “Vital Statistics Questionnaire,” 17 February 1930, Cullum File 2904, USMA; Register of Graduates, 4-62.

\textsuperscript{12} Carl Reichmann, Appendix “EE” to commissioning application, 1 April 1884, Reichmann ACP.

\textsuperscript{13} “Services rendered as an enlisted man,” 7 August 1884, Reichmann ACP

\textsuperscript{14} Coffman, Old Army, 396.
Cavalry School from which he graduated in 1889. Morrison had graduated from the school with honors just four years earlier.\textsuperscript{15}

Despite these similarities, Reichmann differed from Morrison in not being content with the regimental life. Reichmann’s first extended period of detached duty came in 1893, when he was assigned to the Infantry and Cavalry School faculty in 1893. During this time, he translated several German military treatises and became an expert on central European military developments.\textsuperscript{16} He also became good friends with Wagner, who later in the decade brought Reichmann to Washington to do translations of foreign military works for the Military Information Division.\textsuperscript{17} Reichmann also provided translations and original articles for the \textit{JMSI}. Occasional references to Reichmann in the official and private correspondence of leading military progressives suggests that he was building a reputation as a thoughtful student of the military profession.\textsuperscript{18}

\textsuperscript{15} \textit{Staff, Faculty, and Graduates}, 21, 23. It is difficult to judge the weight that should be given Morrison’s honor graduate status. As part of the second class, the school was still in its “kindergarten” stage at that time.\

\textsuperscript{16} War Department Special Order Number 83, 14 April 1893; Reichmann, \textit{The Austro-Hungarian Manoeuvres}; Carl Reichmann, \textit{Observations on the German Imperial Manoeuvres in 1893} (Fort Leavenworth, Kan.: Infantry and Cavalry School, 1894).\

\textsuperscript{17} Reichmann was among the officers that Wagner thanked for their assistance in preparing the first edition of \textit{Organization and Tactics}. They also collaborated on translating and editing a German study of the siege of Plevna, a notable battle of the Russo-Turkish War. Wagner, \textit{Organization and Tactics}, Preface to First Edition; Thilo von Trotha, \textit{Tactical Studies on the Battles around Plevna}, Arthur L. Wagner ed., Carl Reichmann trans. (Kansas City: Franklin Hudson, 1896); Carl Reichmann to J. Franklin Bell, 30 November 1906, in Reichmann ACP; and J. Franklin Bell to Anne Wagner, 1 July 1905, and Wagner to Bell, 7 July 1905, Entry 101, RG 393, NARA I.\

\textsuperscript{18} For instance, when a War Department official asked Eben Swift for a list of officers of “ability and capacity.” Reichmann was one of the four officers identified by Swift. George B. Davis to Swift, 28 January 1895, Box 1, Swift Papers, USMA. In 1904, Bell identified twenty officers who “by application and industry, have acquired such special qualifications that their services are always in demand, because those who want them really need their assistance and talent.” Reichmann was one of the others on this list, which also included such notables as Wagner, Swift, Joseph T. Dickman, and George Goethals. Bell to Adna R. Chaffee, 25 March 1904, Entry 101, RG 393, NARA I. Reichmann’s assistance in preparing essays for the \textit{JMSI} prize contest was sought by both Swift and another officer, Lieutenant Louis C. Scherer. Reichmann to Swift, 23 October 1896, and Scherer to Swift, 23 March 1896, both in Box 1, Swift Papers, USMA.
This reputation served Reichmann well when war came in 1898. He was initially promoted to the rank of captain of volunteers and assigned as the adjutant general of the Second Army Corps. Late in the year, however, Reichmann was promoted to captain in the regular army, forcing him to give up his position on the Second Army Corps staff.\(^\text{19}\) Colonel Theodore Schwan of the Adjutant General’s Office denied Reichmann’s request to remain in his present duty. In the letter ordering Reichmann back to his regiment, Schwan explained that “there will be a wider field for you in the Philippine Islands.”\(^\text{20}\) Coming from any officer other than Schwan, this note might have seemed to be a sarcastic slight, hinting that hard regimental duty in the Philippines was the proper place for a newly-promoted captain, not a soft staff position in Georgia. But Schwan, although much older, was a fellow German immigrant who had also earned his commission from the ranks.\(^\text{21}\) Furthermore, Reichmann and Schwan had worked together in the Adjutant General’s Office just a few years earlier. Schwan might well have known of his impending assignment as the chief of staff for the army in the Philippines and already planned to have the younger German émigré join his staff, which was what eventually occurred.\(^\text{22}\) Even before joining his regiment on its transport in New York harbor,

\(^{19}\) Carl Reichmann to Adjutant General with endorsements by Edward J. McClernand and Samuel B.M. Young, 20 December 1898, Reichmann ACP.

\(^{20}\) Carl Reichmann to Adjutant General, 20 December 1899, and Theodore Schwan to Reichmann, 4 January 1899, both in Reichmann ACP.

\(^{21}\) Heitman, *Historical Register*, 867.

\(^{22}\) Later that year, as Reichmann left the Eighth Army Corps staff, Schwan wrote a letter of commendation for Reichmann’s personnel file. This relationship, Reichmann’s series of suspiciously desirable assignments, the shared background, interests, and friends of Schwan and Reichmann all suggest that Schwan, who was one of the most influential officers in the Adjutant General’s Office, had helped Reichmann’s career throughout the 1880s. Carl Reichmann to Adjutant General, Department of the Pacific and Eighth Army Corps, 1 November 1899, with 2d Endorsement by Theodore Schwan, 2 November 1899, Reichmann ACP.
Reichmann had already submitted a request for an assignment to the staff in the Philippines.\textsuperscript{23}

Despite these constant attempts to serve away from troops, Reichmann did very well in the several months that he commanded a company of infantry in the Philippines.\textsuperscript{24} Yet he was always ready to pursue other opportunities, many of which entailed the alluring triumvirate of interesting duties, greater influence, and the comforts of the headquarters. Schwan soon brought Reichmann to the staff in Manila for several months until Colonel Jacob H. Smith lured him back to the Seventeenth Infantry with the offer of duty as the regimental adjutant. Yet it was only a matter of weeks before Reichmann was off again, this time bound for Pretoria as attaché to the Boers in their war against the British.\textsuperscript{25} Reichmann was one of the young officers of great intelligence, who were able to repeatedly find their way to interesting and appealing duties once their talents had earned them friends like Wagner and Schwan.

Morrison was quite the opposite, serving more that two decades in the Twentieth Infantry. When promotion to first lieutenant in 1890 threatened to send him to the First Infantry, he petitioned the War Department to stay with his unit.\textsuperscript{26} In contrast, when Reichmann’s time for promotion to first lieutenant approached, he wrote to the War Department to ensure that he would be transferred from his unit, although, in fairness to

\textsuperscript{23} Carl Reichmann to Adjutant General, 6 January 1899, Reichmann ACP.

\textsuperscript{24} Jacob H. Smith to Adjutant General, 29 November 1899, Reichmann ACP.

\textsuperscript{25} Carl Reichmann to Adjutant General, Department of the Pacific and Eighth Army Corps, 1 November 1899, Reichmann ACP. This process would be repeated two years later when Reichmann sought release from recruiting duty to once again serve as regimental adjutant, a position that he had lost when detached as an attaché in South Africa. Reichmann to Colonel James A. Johnston, 10 June 1901, Reichmann ACP.

\textsuperscript{26} John F. Morrison to Adjutant General, 3 December 1890, Morrison ACP.
Reichmann, two years of duty at San Carlos, Arizona Territory, would have tested the regimental loyalty of almost any officer.  

Morrison did have some very practical reasons for remaining with the Twentieth. He had just returned from detached duty in Kansas and did not want to move twice in less than a year. He also had good prospects for a position on the regimental staff and was a favorite of both his company and regimental commanders. 

Still, Morrison’s loyalty to the Twentieth Infantry would continue long after these temporary inducements were no longer operative. In a letter to the Adjutant General, Morrison explained his desire to remain with his regiment: “I think that I can render better service here than among strangers.” This odd but revealing choice of words casts some light on the otherwise puzzling contrast of Morrison’s personality: at times he was reticent, at others a dazzling public speaker. This might have come from a preference for comfortable familiarity rather than any intellectual shortcomings.

Personal considerations might have led to Morrison’s first foray from his regiment, which revealed his hidden talents. In 1887, he applied for duty as the military instructor at the State Agricultural College of Kansas in Manhattan. Although Morrison was from New York, the college’s Board of Regents specifically requested him for the job. This was somewhat unusual, as such positions usually went to a native son. Morrison’s appointment seems to have been due to the intervention of John B. McCleary, the chaplain at the Fort Leavenworth military prison and Morrison’s future father-in-law.

27 Carl Reichmann to Adjutant General, 10 July 1891, Reichmann ACP.

28 John F. Morrison to Adjutant General, 3 December 1890, and William S. McCaskey to “Dear General,” 16 December 1890, both in Morrison ACP.

29 John F. Morrison to Adjutant General, 3 December 1890, Morrison ACP.

30 John F. Morrison to Adjutant General, 7 April 1887, and John B. McCleary to Senator John Ingalls, 11 April 1887, both in Morrison ACP; “Vital Statistics,” Cullum File 2904, USMA.
Regardless of the reason for Morrison’s selection, he was an excellent instructor. When the inspector general for the Department of the Missouri visited the school in the 1888, he made special note of Morrison’s ability to inspire enthusiasm among the “not very well to do agriculturists” of the student body, many of whom volunteered for twice the amount of military training required by the school. The following year, Major J.P. Sanger rated the program as superior to others in the area. Sanger, who had been one of Upton’s two companions on his world tour in the 1870s, attributed the success of the program to “the enterprise and intelligence of Lieut. Morrison, who has sightly divined the secret of success under the existing system, and who has the personal qualities to secure it.” As Morrison’s assignment came to an end in 1890, the school administration unsuccessfully sought to have his detail extended for another year.31

Following this brief foray into the broader world, however, Morrison repeatedly declined detached duty in favor of remaining with his regiment. In 1893, he declined an offer to return to Fort Leavenworth as an instructor so that he might serve as the regimental quartermaster.32 In 1897, Morrison, who was already stationed at Fort Leavenworth, replaced the departing Eben Swift on the Infantry and Cavalry School faculty. The primary justification of Colonel Hamilton S. Hawkins, who commanded both the Twentieth Infantry and the school, was that Morrison’s assignment as an instructor would help relieve the shortage of officer housing. Almost as an afterthought,

31 Morrison’s teaching was not limited to military subjects, he also taught natural philosophy (physics) in the morning. For this the college paid him an extra $450 annually, adding a financial incentive to whatever family considerations brought him to Kansas. George H. Burton “Report of Inspection,” 30 April 1888; J.P. Sanger, “Report of Inspection,” 23-24 October 1889; and, George T. Fairchild to Secretary of War, 31 October 1889, all in Morrison ACP.

32 War Department Special Order Number 83, 14 April 1893; John F. Morrison to Adjutant General, 23 May 1893, Morrison ACP.
Hawkins assured the War Department that Morrison was “eminently fitted for duty in the school.”\textsuperscript{33} Morrison’s tour as an instructor ended less than a year later, when the school closed and the Twentieth Infantry went to Cuba. After being recognized with a brevet for valor at the battles of El Caney and Santiago, Morrison and the Twentieth Infantry were soon bound for the Philippines.\textsuperscript{34} In 1900, he declined to appear before a board selecting officers for the prestigious Adjutant General and Inspector General Departments. At the time, Morrison was the regimental quartermaster and would soon be commanding a battalion, so he had some reason to stay. Yet Morrison had been promoted to captain only two years earlier, and acceptance to either of the staff departments would have brought an immediate promotion to major. By remaining in the infantry, Morrison would wait for another five years to reach that rank.\textsuperscript{35} In 1903, soon after Bell arrived at Fort Leavenworth, Morrison was once again detailed to the school as an instructor, and once again he declined, requesting a staff position with the Inspector General in the Philippines instead.\textsuperscript{36}

\textsuperscript{33} Hamilton S. Hawkins to Adjutant General, 22 February 1897, Morrison ACP.

\textsuperscript{34} AGO correspondence record for John F. Morrison, Roll 813, M698, RG 94, NARA I.


\textsuperscript{36} AGO correspondence record for John F. Morrison, Roll 813, M698, RG 94, NARA I. Morrison might have finally asked for a staff position only because he had exhausted the possibilities of regimental service until his promotion to major, which was still several years away. After his extended command of a battalion, returning to command of a company would hardly have been appealing. Apparently he viewed this interim as an opportunity to broaden his professional horizons; according to several letters of recommendation written a decade later, Morrison informally arranged for extended duty with a cavalry unit for over a year and a field artillery unit for six months. There is no mention of this unusual arrangement in his official file, but he would have had just enough time to do between relinquishing command of the battalion and his assignment to observe the Japanese Army. Senator Knute Nelson to Woodrow Wilson, 13 April 1912, and Robert Alexander to C.D. Hilles, Secretary to the President, 25 April 1912, both in Morrison ACP.
Reichmann and Morrison began their careers at roughly the same time and in the same arm of service, but they pursued as different paths as possible under the circumstances. The two officers provide real cases by which to judge the characterizations of elite and regimental officers that lay at the heart of military education. In 1903, Tasker H. Bliss warned that grades alone were not sufficient “to discriminate between those who are content to thoroughly know their regimental duties and those who show a zeal and an aptitude to go further.”37 Morrison would almost certainly have fallen into the former group. Yet Bliss seems to have equated contentment in regimental duty with apathy; a characterization that does not fit the picture presented by the efficiency reports written by Morrison’s commanders while he was a lieutenant and captain. The two most common adjectives used in the efficiency reports from Morrison’s years as a lieutenant and captain are “zealous” and “energetic.” His many years on the regimental staff demonstrate that this praise was not just efficiency report fluff. Yet Morrison was not merely efficient, he was also inquisitive and intellectually active. While teaching at the Kansas Agricultural College, he taught physics and studied chemistry, the latter so that he might better understand explosives.38 He also read a great deal of history, making the Saratoga and New Orleans campaigns the subject of his lyceum presentations in the late 1890s. Not satisfied with the modest requirements of the lyceum, he formed a weekly military study group with four other officers, discussing a different article at every meeting.39 In 1891, Lieutenant Colonel John C. Bates, who

37 *WDAR* (1903), Bliss, 92.


39 Officer’s Individual Report, 15 December 1891, 30 June 1895, and 30 June 1897, all in Morrison ACP.
would go on to precede Bell as chief of staff of the Army, wrote, “[Morrison] is constantly investigating some military subject.” 40  Morrison demonstrated that regimental officers could also be serious students of their profession.  But Morrison’s adamant desire to stay with the Twentieth Infantry rather than serve with “strangers” elsewhere, raises the possibility that Bliss had perhaps identified some quality of imagination, if not intellect, necessary for a staff officer that was lacking in Morrison.

Reichmann, on the other hand, was certainly not content with merely fulfilling his regimental duties. Yet this trait, as with Morrison’s stolid preference for service with the Twentieth Infantry, could be perceived in different ways. The favorable interpretation was that Reichmann saw little point in being assigned to infantry companies of fewer than one hundred soldiers for the better part of three decades, when his years of professional study and intellect could be put to good use in a broader forum. Yet Reichmann’s ambitions led him to questionable measures. After observing the Russo-Japanese War, Reichmann sought an assignment at Fort Leavenworth, but was instructed instead to return to his regiment. 41  Apparently he then began a campaign for a detail to the General Staff. In May 1906, Representative George E. Waldo sent a letter to Secretary of War William H. Taft, inquiring if such an assignment could be arranged. This clumsy inquiry—Waldo mistakenly referred to a position on Bell’s personal staff—brought a blistering reply from the usually congenial Taft. “I fear that Captain Reichmann has been very unwise in this matter, for I have had applications of this sort on his behalf from other sources. . . . I must confess surprise that, being such a good

41 J. Franklin Bell to Adjutant General, 19 June 1905, File 4274, Entry 101, RG 393 NARA I.
officer, he should permit himself to violate the regulations as he has done.” Waldo’s apologetic reply claimed that he had acted without Reichmann’s knowledge, but the congressman’s ignorance of what he was requesting and the other letters referred to by Taft indicate that Reichmann was behind the scheme.42

Such petitions were by no means rare, but then Reichmann resorted to unorthodox and dangerous tactics. Later that year, the New York Times published an article entitled based on a letter Reichmann sent to a friend in New York, in which the captain alleged that he had learned of a widespread prejudice against him on the General Staff due to his German birth. In a later official statement, he claimed that Wagner, since deceased, and another officer had told him of this bias against him. Reichmann did admit that other consideration might have worked against him, but in those other respects he was a blameless victim as well. In an interesting comment on the intellectual climate of the army, Reichmann speculated that he was at a disadvantage because “he put in all his time in study instead of attempting to shine in society or to secure social advantages.” But, as he also claimed that he was persecuted because of not being an “Anglomaniac,” Reichmann’s statements of persecution must be handled with caution. The Times noted that Reichmann “has friends with potent influence in Washington, and many German-Americans are interested in the reason he gives for the alleged effort to keep him out of the General Staff.” When called to account for the letter, Reichmann denied any role in its release to the press, blaming it on a misguided but well-intentioned friend. According to Reichmann’s official explanation, he had written the accusatory letter sometime in the spring, or about the same time that Waldo and other friends were

42 George E. Waldo to William H. Taft, 11 and 23 May 1906, and Taft to Waldo, 12 May 1906, Reichmann ACP.
petitioning the War Department on his behalf. While it is possible that the letter was released without his knowledge, it is equally plausible that Reichmann thought the German-American lobby to which the *Times* referred might have more influence than the congressman’s letter. When the matter was brought to Bell’s consideration, he admonished Reichmann for his error in judgment, but accepted the captain’s explanation and declined to punish him officially.43

The nineteenth-century army was so small, that even careers as different as those of Reichmann and Morrison often intersected. In the mid-1880s they had both served in the Twentieth Infantry at Fort Leavenworth. Second Lieutenant Morrison and First Sergeant Reichmann certainly knew each other, but they were in different companies and most likely had little interaction. In 1893, both were invited to return to Fort Leavenworth as instructors, but while Reichmann accepted, Morrison declined. The next year, however, the Twentieth Infantry was transferred to Fort Leavenworth and the two once again shared the post for almost a year. In 1896, they met in print as both offered comments on the same *JMSI* article concerning supply administration. That was Morrison’s only contribution to the professional journals prior to 1905, whereas Reichmann contributed five different translations or comments and authored two original pieces of his own.44 Both were in the Philippines, although on different islands, when they were assigned as attachés to the Russian and Japanese armies respectively.45

43 “Says Birth Bars Him from the General Staff,” *New York Times*, 17 November 1906; Carl Reichmann to Military Secretary, 30 November 1906 with J. Franklin Bell endorsement, 17 December 1906, Reichmann ACP.


45 Secretary of War to Secretary of State, 9 February 1904, AGO Document #521192, Entry 25, RG 94, NARA I. Due to the possibility that the war would last only a short time, most of the observers were selected from
Each attaché represented a different organization or arm, with Reichmann and Morrison serving as the infantrymen on either side. The instructions to observers were quite specific, reflecting the particular concerns of the General Staff at that time. Reichmann was told to report on “the marching power of the infantry, its discipline upon the march and in battle; tactics used in battle on defense and offense, and any modifications of the same during course of campaign.” 46 Aside from these obvious concerns, he was also to note many specifics of equipment and logistics:

[the] number of rounds of ammunition carried on person, number of rounds per man carried in train, methods of supplying ammunition to firing line; effect of artillery fire from modern quick fire field pieces upon infantry in attack and defense; the use made of machine guns, character and effectiveness of types used; equipment, general serviceability of same; the kinds of intrenching tools used and methods of transporting same; character of trenches used; effectiveness against infantry and artillery fire. 47

As the war progressed, the General Staff became more concerned about the arms that had obviously changed greatly in effectiveness since the Franco-Prussian War. Instructions to subsequent observers emphasized the tactics and organization of both machine guns and artillery; more specifically, they were to investigate the proportion of casualties inflicted by artillery, small arms, and bayonets respectively. 48 This question clearly pointed to the possibility that the rifle-armed infantryman was being subsumed, the Philippine garrison. Reichmann’s experience in South Africa and in the Military Information Division made him an obvious choice, but the reason for Morrison’s selection remains a mystery. In his thoroughly researched account of the American mission to the Russo-Japanese War, John T. Greenwood is unable to explain the selection process due to the loss of the relevant documents. From the existing evidence, he reasonably concludes that the observers were selected by the War Department before the war started, suggesting that it was at least a deliberate decision. Greenwood, "American Military Observers," 128-130.

46 Captain Harry C. Hale to Carl Reichmann, 26 February 1904, in ibid., 156.

47 Ibid.

48 Ibid., 231.
or at least equaled, by the machine gunner and artilleryman, a notion advanced by Reichmann and dismissed by Morrison.

All of this was precisely what military progressives had meant by rational organization and scientific process. The General Staff selected competent officers and dispatched them to study poorly understood aspects of modern war. With the benefit of hindsight, we know that these concerns did in fact anticipate many of the salient features of America’s next war. It remained, however, for the observers to gather and convey the information and for the War Department to translate that knowledge into policy. Yet the observers faced challenges in collecting information so serious as to possibly compromise the validity of their impressions. In this regard, Reichmann had a far easier time than Morrison. The Russians were fairly accommodating, and Reichmann was lucky to be assigned to the I Siberian Corps of General Stakelberg, whose staff spoke German. No observers on either side were able to witness the first major battle of the war at the Yalu River, but once in Manchuria the Russians were fairly liberal in allowing the foreign attachés to move around their area. Reichmann witnessed much of the fighting as the two main field forces maneuvered in July preparatory to the battle of Liaoyang. He also saw the subsequent battle of the Shaho before being recalled in late 1904. Reichmann, like all the observers, was greatly handicapped by the lack of maps, without which it was nearly impossible to understand the full situation. He was also disadvantaged by President Roosevelt’s initial sympathy for the Japanese, which led to a great deal of Russian hostility towards the Americans. Thus, Reichmann and the other

\[\text{\footnotesize 49 Ibid., 198-199.}\]

\[\text{\footnotesize 50 Ibid. Not all hostility emanated from international relations. A British observer related that a Russian corps commander “banished” one of the French officers who he regarded as too aggressive about trying to}\]

\[\text{\footnotesize \hspace{1cm}}}
three Americans with the Russian army were trying to understand the operations of a force numbering in the hundreds of thousands with which they could barely communicate, in an atmosphere of hostility, while operating on unfamiliar terrain for which they had no maps.\textsuperscript{51} Furthermore, Reichmann had witnessed less than three months of campaigning early in the war. From this slender base, he was to draw general conclusions about the nature of modern war.

Morrison and the others observing the Japanese faced even greater challenges than their counterparts with the Russians. The Japanese were far more secretive than the Russians, delaying all of the foreign observers in Tokyo for several months before finally granting permission to join the field armies. Once in Manchuria, the Japanese kept the foreigners under constant supervision and as far away from important events as possible. Morrison was particularly unlucky in his assignment to the Japanese Second Army, which was not as heavily engaged at Liaoyang as the First Army.\textsuperscript{52} The Americans did not even benefit from President Roosevelt's initial pro-Japanese policy, as mutual racial animosity and the tensions inherent in the host-observer relationship were stronger than any goodwill arising from national policy. Morrison was one of the few Americans who came away from the experience with a high regard for the Japanese. Peyton C. March respected the military prowess of the Japanese Army, but he also

\[\text{get information. W.H.H. Waters, "Secret and Confidential": The Experiences of a Military Attache (New York: Frederick A. Stokes, 1926), 266-267.}\]


\textsuperscript{52} The other officer with the Second Army was Captain Joseph E. Kuhn, an engineer who would go on to command the 79th Division in the First World War. The two officers with the First Army were Captain Peyton C. March, who would be the chief of staff during the war, and Colonel Enoch Crowder, who would head the Selective Service. Ibid., 245-247, 256-260, 297-300. The Japanese were equally reluctant to share information with other foreign observers, even their allies the British. David Jones, "Military Observers, Eurocentrism, and World War Zero," in The Russo-Japanese War in Global Perspective: World War Zero, ed. David Wolff, et al., History of Warfare (Boston: Brill, 2007), 151-152.
developed a deep hostility towards the Japanese people and government. This was reciprocated by the Japanese: soldiers often shouted presumed insults and threats at the observers when they were in the front lines.\textsuperscript{53}

Few American officers seem to have realized the magnitude of the difficulties facing the observers. If they did, the knowledge did not diminish the great interest within the U.S. Army for any sort of news about the Russo-Japanese War. There might have been more skepticism if some better alternative was available, but the Boer, Spanish-American, and Philippine-American wars were even more suspect in the minds of most, on account of the unique terrain, weakness of the opponent, or unconventional tactics used in those wars. Authors writing for professional journals such as the JMSI and Infantry Journal continued to routinely cite examples from the American Civil War and Franco-Prussian War, but there was a growing doubt about their continued relevance. As one officer wrote, “In these days of progress in the mechanical arts, thirty years is a long period for tactics to stand still.”\textsuperscript{54} Many officers were more interested in fragmentary reports from the present than on the well-known past. When Morrison delivered a lecture to the Army War College in February 1905, there was not enough space in the room to accommodate all of the officers from the War Department who wished to attend.\textsuperscript{55} The General Staff translated a pamphlet by a Russian company commander, printing enough copies so that they could distribute one to every officer in the army, but then found the demand so heavy that within days they ordered another


\textsuperscript{54} Charles D. Rhodes, "The Duties of Cavalry Preceding a General Engagement, as Developed by Two Recent Wars," JMSI 38 (May-Jun., 1906): 392.

\textsuperscript{55} Army War College Memorandum, 3 February 1905, AGO Document 972501, Entry 25, RG 94, NARA I.
President Roosevelt had personal interviews with each of the attachés as they returned. He was so taken with March that the captain was invited back for several more visits. The most reliable bellwether of professional interest—the professional journals—saw examples drawn from the Russo-Japanese War become the supporting evidence of choice, replacing the wars of the late nineteenth century. Articles chronicling specific aspects of the war were common throughout the latter part of the decade. Several books on the conflict were published during this same period, but the greatest source of information was the five-volume collection of the reports filed by the official observers, which were printed by the War Department in 1906 and 1907.

On some broad points, the observers, including Reichmann and Morrison, were in agreement. All the attachés attributed the Japanese victory to the disparity between the armies in organization, preparation, and professionalism. "Everything is systemized, every detail is worked out in time of peace, every man's work is laid out for him," wrote Morrison of the Japanese. "But all this system could not be carried out without an army that was thoroughly trained and whose officers knew their profession." War with them

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56 Second Division Notes, 19 September 1906, Entry 303, RG 165, NARA II.
57 Private Secretary of Secretary of War to Military Secretary, 27 December 1904, AGO Document #957348, Entry 25, RG 94, NARA I; Greenwood, "American Military Observers," 359-365.
58 From 1906 to 1909, 39 articles in the JMSI cited the Russo-Japanese War as a relevant example. This was nearly twice as much as the American Civil War, which along with the Anglo-Boer War was the next most popular example. Each of those conflicts was cited 20 times. The Spanish-American War had 15 citations and the Philippine-American War 10. Information from database compiled by the author.
60 Ten individual reports comprised this series, with the reports of both Reichmann and Morrison appearing in the first part published in September 1906. The fifth and final volume was published the following spring.
approaches an exact science.”61 Reichmann agreed, contrasting the “vigor and promptness” of the Japanese with his Russian hosts. Reichmann believed there was “no doubt as to the absolute unpreparedness of Russia for a war in the Far East with a power whose army was organized on modern lines.”62 This same view predominated among the European observers.63 Less than a year after the war concluded with the Treaty of Portsmouth, this had already become the accepted view at Fort Leavenworth. A 1906 lecture on the war, stated that “war was no longer an art dependent upon the genius of leaders and the skill of soldiers in the field.” Instead, the military profession was a “science dependent upon the education and coordination of all kinds of knowledge, and other preparations beforehand, and its complement of all kinds of means in the field.”64 This was precisely the argument made by military progressives since the time of Upton, and had been the basis of the Root reforms. Thus, the Russo-Japanese War was seen as a validation of the work already completed, and a sign that the U.S. Army needed to make further progress along the same lines. Reichmann explicitly argued for further reforms at the end of his report, one of the few observers to make such general recommendations on national policy.65

Yet just as the war confirmed the existing consensus about general principles, it also reinforced the prejudices of both sides in the ongoing tactical debate between the


62 Reichmann, Reports of Military Observers, 180. Even this dismal appraisal might have been too generous. Reichmann mistakenly believed that the Japanese forces outnumbered the Russians in the battles that he witnessed, when the opposite was actually the case.

63 Jones, "Military Observers," 171

64 Matthew F. Steele, “Lecture No. 32 – War between Russian and Japan, Part 1,” 18 May 1906, Box 25, Steele Papers, MHI.

advocates of close- and extended-order tactics. Since the Grant Board's endorsement of Upton's tactics in 1867 through the 1904 *Infantry Drill Regulations*, the official manuals had all espoused progressively greater dispersion of soldiers in recognition of the power of modern weapons to inflict terrible casualties on dense formations. Wagner's textbooks promoted similar tactics, and, although not official publications, their wide use throughout professional education and in promotion examinations made them nearly as important as the regulations. Despite these decades of official dominance, there had always been many officers critical of the extended-order tactics of Upton and Wagner. The return of the first observers from Manchuria happened to coincide with Wagner's death in early 1905 and the eclipse of his texts at Fort Leavenworth. This situation created the opportunity for a new individual to step forward as the army's premier tactician. As Wagner lay dying in North Carolina, Reichmann, Morrison, and several other observers were in Washington writing their eagerly awaited reports.

During Upton's time, many of the arguments for close-order tactics had been simple appeals to tradition. If those methods were good enough to win the Civil War,
they should be continued. But as the number of officers without Civil War experience grew, the arguments in favor of close-order became more sophisticated. This group drew heavily upon the contemporary German military thought, which—like all the European powers—was grappling with the same tactical dilemma. Among this group was John Morrison. “We must go to the Germans to learn tactics,” Morrison would later tell his pupils. “They are the most thorough students of tactics in the world today.” But Morrison, like most officers, could read French but not German. Ironically, many of the German works available in English had been translated by a group of German-

67 A 1901 JMSI article argued for the continued relevance of “shoulder to shoulder” formations. As noted earlier, “close” and “extended” were relative concepts that gradually evolved towards greater dispersion. The author argued for a return to the tactics used at the beginning of the Civil War. Despite his concession that “skirmishers” had been popular for over three decades, he hopefully concluded that the advocates of the early nineteenth-century linear tactics “seem to be having an increasing influence.” John H. Patterson, “Some Points of Tactics,” JMSI 29 (Sep., 1901): 161-162, quotation 162. See also, James A. Chester, “The Great Lesson of the Boer War,” JMSI 32 (Jan.-Feb., 1903): 1-6.

68 The armies of all the major powers, including Germany, had much the same debate as was taking place in America. In Germany, neither faction was able to gain a permanent advantage. Each successive edition of the drill regulations was a compromise weighted slightly toward the temporarily ascendant school of thought, but neither was able to achieve a lasting victory. The Anglo-Boer War (1899-1900) briefly popularized Boertaktik—a variation on extended order—but the Russo-Japanese War reversed this trend. Jacob Meckel, a zealous advocate of close order, had earlier assisted in the modernization of the Japanese Army’s, and their victory was widely regarded in Germany as a vindication of the close-order tactics he favored. It was from this group of conservative German tacticians that American close-order advocates drew upon in forming their own arguments. Eric D. Brose, The Kaiser’s Army: The Politics of Military Technology in Germany During the Machine Age, 1870-1918 (New York: Oxford University Press, 2001), 87-93, 140-154, 181. See also, Antulio J. Echevarria, After Clausewitz: German Military Thinkers before the Great War, Modern War Studies (Lawrence: University Press of Kansas, 2000); Steven D. Jackman, “Shoulder to Shoulder, Close Control, And "Old Prussian Drill" In German Offensive Infantry Tactics, 1871-1914,” Journal of Military History 68 (Jan., 2004): 73-104; Dennis E. Showalter, Railroads and Rifles: Soldiers, Technology, and the Unification of Germany (Hamden, Conn.: Archon Books, 1975). For the relation of this tactical debate to the larger political and social context of Europe, see Michael E. Howard, “Men against Fire: The Doctrine of the Offensive in 1914,” in Makers of Modern Strategy from Machiavelli to the Nuclear Age, ed. Peter Paret (Princeton, N.J.: Princeton University Press, 1986), 510-526. Some of the best works detailing the tactics in the other major European armies are Bruce Menning, Bayonets before Bullets: The Imperial Russian Army, 1861-1914, Indiana-Michigan Series in Russian and East European Studies. (Bloomington: Indiana University Press, 1992); Douglas Porch, The March to the Marne: The French Army, 1871-1914 (New York: Cambridge University Press, 1981); and, Timothy Travers, The Killing Ground: The British Army, the Western Front, and the Emergence of Modern Warfare, 1900-1918 (Boston: Allen & Unwin, 1987).

69 Laurence Halstead, “Morrison,” Folder 4, Box 60, Halstead Collection, GCM, 2.

70 Annual Individual Service Reports, Morrison ACP.
American officers that included Reichmann. For the most part, these officers were
members of the Wagner-circle that favored extended order.71 During a tour of Europe in
the mid-1890s, Reichmann wrote dismissively of the close-order tactics then prevailing
in Germany, “They prefer to lose men [rather] than lose control of the officers over
them.”72

In America, as in Germany and elsewhere, tactics were influenced by a number of
considerations, not all of which were directly related to the battlefield. The Russo-
Japanese War happened to coincide with a period of heightened branch rivalry.
Infantrymen had long resented the belief that they were professionally inferior because
their arm of service did not require any specialized knowledge; an attitude that was a
logical extension of the belief that technical skill defined military professionalism.
Although this attitude was most prevalent in the artillery and engineers, some
cavalrymen shared that view. In 1905, Inspector General George Burton, a cavalryman,

71 Other notable members of this group were Theodore Schwan, Charles H. Barth, and Louis C. Scherer.
Some of the works translated by these German-speakers were Kraft K.A.E.F. prinz zu Hohenlohe-
Infelfingen, Conversations on Cavalry, tr. Carl Reichmann, ed. F.N. Maude (London: J.J. Keliher, 1897);
Department General Staff), 1907; Fritz Hoenig, Inquiries into the Tactics of the Future Developed from
Modern Military History, tr. Carl Reichmann (Kansas City: Hudson-Kimberly, 1898); Otto F.W.T.
Griepenkerl, Letters on Applied Tactics: Problems Dealing with the Operations of Detachments of the Three
Arms, tr. Charles H. Barth (Kansas City: Hudson Press, 1906). Following a trip to Germany, Schwan wrote
an influential study of the German General Staff that served as the basic manual for the initial American
General Staff officers. Scherer corresponded with both Reichmann and Swift, and translated a number of
German works for Wagner and the Fort Leavenworth school. Barth, who happened to be a West Point
classmate of Morrison’s, was an instructor in Wagner’s department at Fort Leavenworth in the early 1890s
and was brought back to Fort Leavenworth after the Spanish-American War when Wagner was the assistant
commandant. Barth and Morrison do not appear to have been close, despite having graduated from West
Point in the same class. In two years of Barth’s cadet diaries, Morrison is only mentioned twice—both
instances of physical injury. The first was to note Morrison’s bruised foot suffered while erecting a pontoon
bridge across the Hudson River. The second instance was more serious. While practicing dismounting a
horse at the gallop, Barth wrote, “Morrison fell as if dead when he was kicked and was unconscious for some
time.” Perhaps not incidentally, both Morrison and Barth, whose diary also chronicles his own numerous
riding mishaps, selected the infantry at graduation. Charles H. Barth, 3 March and 18 August, 1880 diary,
Cullum File 2910, USMA. Louis C. Scherer to Eben Swift, 23 March 1896, and 5 April 1896, Box 1, Swift
Papers, USMA.

wrote in his annual report that “it is recognized by all military men that the thorough training of an infantry company does not demand the continuous zeal, patience, and technical knowledge required for a troop of cavalry or a light battery.” Therefore, he recommended that all cavalry or artillery officers who had spent an extended period of time on detached duty should be transferred to the infantry on the assumption that their skills had atrophied to the point that they were no longer useful except in the presumably simpler infantry.73 As annoying as such slights might have been to infantrymen, the pay system, which allotted extra money to officers of the staff, cavalry, and field artillery to offset the greater personal expenses associated with their service, was a far greater irritant. In 1907, infantry officers were so driven by spite that they lobbied against a much-needed raise for enlisted soldiers unless the disparity in officer pay were reduced. In a meeting to discuss the issue at West Point, one infantry captain threatened that “every man, woman, and child in the Infantry would rather starve to death” than have the bill pass. Although the infantry had been the last arm to form a branch association, it made up for this late appearance by being particularly aggressive in pursuing its interests. By the time of the disputed Pay Bill, it had gained so much power that Bell, then the chief of staff, sent an assistant to negotiate a compromise with the editor of the Infantry Journal—a mere major.74 Militant infantrymen alleged a number of slights, including a pro-cavalry bias at Fort Leavenworth, discrimination in selection for flag-


74 Johnson Hagood to J. Franklin Bell, 30 January 1908, Box 1, Hagood Papers, MHI (quotation from undated note stapled to front of memorandum). On Bell’s unsuccessful attempts to moderate these disputes, Raines, “J. Franklin Bell,” 309-310.
rank, and underrepresentation in the Washington garrison.75 Although service rivalry was by no means unique to the nineteenth-century, the insular army of the 1880s created the perfect conditions for such myopic views to flourish. As most officers stayed on active duty for four decades, attitudes could persist long after the physical conditions that gave rise to them had passed. In his memoirs, John M. Palmer wrote, “In retrospect it is difficult to recall how narrowly partisan were our loyalties in those days before World War I. We looked first to our regiment and then our own branch.”76 Palmer had been an active “Young Turk,” in the Infantry Association, who sought a balanced army with the infantry “seeking no more than its fair share.” According to Palmer, his view did not prevail within the Infantry Association until 1910. Before that time, the group “had operated almost exclusively to promote an increase in the number of Infantry regiments authorized for the Army.”77 Significantly, he attributed the eventual triumph of his more enlightened view to the growing numbers of Fort Leavenworth graduates, who by virtue of their education could see past simple regimental and arm loyalties.78

Against this backdrop of branch parochialism, Reichmann’s assertion that the “artillery has more nearly reached the tactical importance of infantry” was commendably


76 Holley and Palmer, General John M. Palmer, 189.

77 Ibid., 187-188, 194. In an important 1912 General Staff study, Palmer explained how considerations of promotion between arms had dominated the Army’s determination of proper organization. “These questions of relative promotion have affected the proper consideration of all questions organization. If an effort is made to secure an increase deemed necessary in any one arm, officers of the other arms are liable to oppose it unless by other increases, perhaps necessary and perhaps not, a parity of promotion is received.” U.S. War Department, Report on the Organization of the Land Forces of the United States (Washington: GPO, 1912), 46.

78 Holley and Palmer, General John M. Palmer, 194-195.
open-minded, as was his recommendation for a “thorough reorganization and . . . substantial increase” of the field artillery.79  The artillery and cavalry had both long argued that their peacetime strength be increased at the expense of the infantry, which they maintained could be more rapidly raised in time of war. As officer promotion was directly tied to the number of regiments authorized for each arm, this was a matter of personal interest for every officer. In contrast to Reichmann, Morrison’s assertion that artillery had not yet become powerful enough to supplant the infantry as the dominant arm supported branch interests.80  While there is no evidence that Morrison was connected to the group agitating for the interests of the infantry or that he modified his tactical views to suit an infantry agenda, his narrowness of vision likely grew from the same conditions that spawned the parochial activities of the Infantry Association. It is possible that he was an example of a more benign “branch provincialism” that led officers to emphasize the primacy of their own branch as a result of unfamiliarity with the other arms and what they could contribute to the greater cause. Indeed, in 1910, even after several years of large maneuvers, the field artillery instructor at Fort Leavenworth reported “that many of the student officers at the schools have never had an opportunity to examine carefully any of the field guns and some of them have never even seen them.”81  In 1912, Brigadier General Clarence R. Edwards, an infantryman, identified the lack of interaction between the arms as contributing to an inefficient competition, in which “each arm or department of our service, forming no part of any


81 Dwight E. Aultman to the Adjutant General, 13 September 1910, File 6821, Entry 101, RG 393, NARA I.
recognized unity, has been left to develop itself separately and to struggle, not for the whole, but for itself alone.”82 Edwards urged the formation of permanent divisions incorporating elements from all the arms, hoping to “produce [a] realization of interdependence of the parts and respects for the functions of each.”83 In the absence of such divisions, which would compel units to operate together, the next best hope for cooperation was the professional schools, where officers could at least think about and discuss the methods of combined arms in the abstract. As noted by Palmer, Fort Leavenworth served this role, but his comments naturally lead to speculation as to what might have been achieved if not for Bell’s policies and the resulting scarcity of artillerymen and engineers at the school.

Tactical debate was certainly influenced by branch rivalry and bias, but they do not completely explain all disagreements. The same difficult questions that had separated Upton and Wagner from their detractors continued to provide reason for legitimate professional differences. The relatively recent technologies featured in the Russo-Japanese War, such as magazine-fed rifles, machine guns, rapid-fire artillery, high-explosive shells, and smokeless powder, reinvigorated these old debates. As shown by the differing interpretations of Reichmann and Morrison, an officer’s receptivity to technology was not a function of age. A colonel who had received his commission in 1865 attacked those conservatives “willing to admit that conditions are changed, but not able to recognize, still less to realize, the extent of the change.”84 He ridiculed those who

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83 Ibid.
believed that the human will could overcome firepower. “If a new gun will fire twice as far, twice as straight, and twice as quickly as an old one, the tendency is to assume that ten per cent more will in the same time be hit... and this difference must be made up by better discipline and courage.”

Morrison and Reichmann were not the only officers to disagree on the meaning of the recent war. In 1905, the Army’s inspector general noted that the Russo-Japanese War had reaffirmed the importance of the bayonet, but just four years later another inspector general recommended that no targets closer than 200 years be used in marksmanship training, as there would “be little or no firing” under that distance in war. Such disagreements were supposed to have been resolved by the reports from the Russo-Japanese War, but the observers did not even agree upon what they had seen, much less the implications. Morrison maintained that the successful Japanese tactics offered “nothing startlingly new” and had repudiated the “great extension advocated by some.” He maintained that the initial Japanese dispersion of a pace between soldiers, which had been taken from the German regulations—had been vindicated. Lieutenant Colonel Edward J. McClernand, however, maintained that the Japanese had extended their formations as the war progressed, “and to this extent at least broke away from their German teaching.” Captain Peyton March agreed, claiming that the Japanese had

85 Ibid.
86 WDAR (1905), Burton, 444; WDAR (1909), Charles G. Morton, Report of the Commander of the Department of the Missouri, 3: 68. The majority of officers, including Reichmann and Bell, continued to support the bayonet, but there was some disagreement about whether it was the bayonet or the threatened use of it that was more important. Reichmann, Reports of Military Observers, 278; Raines, "J. Franklin Bell," 482.
87 Morrison, Reports of Military Observers, 95.
increased their intervals so that their tactics “were not distinguishable from the American method in any marked degree.” Reichmann—protégé of Wagner—agreed that the Russo-Japanese War validated the current American tactics—in other words, the Wagner-inspired 1904 *Infantry Drill Regulations*. The only commonality seemed to be that individuals selected the evidence that confirmed their existing opinions.

For many officers, those notions had been formed in the Philippines. Intellectually, officers tended to dismiss even the large, conventional operations against the Filipino Army of Liberation in 1899 and 1900 as inapplicable to “civilized warfare.” Yet it cannot be taken for granted that they could so neatly compartmentalize their professional experiences. The Filipinos’ preferred tactics were to use long-range fire from well-constructed trenches. This fire was usually ineffectual, and the native defenders would often withdraw after the Americans charged across the intervening open ground or made a flank attack. Due to the Filipinos’ poor training and equipment, even more resolute defenses rarely inflicted more than a handful of casualties on the Americans, despite the increasingly audacious tactics of the Yankees. The unmistakable tactical lessons of the Philippine-American War were the need to close

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89 March, *Reports of Military Observers*, 43.


92 This pattern was described in Parker, "Fighting in the Philippines," 321-330. Historian Brian Linn described American tactics as “aggressive to the point of foolishness,” noting many instances of frontal assaults against prepared positions. Perry Jamieson largely concurred with Linn, discounting only the generalization of headlong charges. Jamieson argued that in fact frontal attacks were typically conducted in smaller rushes with sub-units providing supporting fire for other as elements as they advanced. Linn, *Philippine War*, 62-64; Jamieson, *Crossing the Deadly Ground*, 146-148; Silbey, *War of Frontier and Empire*, 85-88. With the exception of one terribly ill-conceived attack by forces under Colonel Frank Baldwin early in the occupation of Mindanao, combat in the predominantly-Muslim southern islands was even less likely to instill a respect for firearms. The American soldiers dreaded the Moros’ long *kris* knives far more than their often antiquated muskets and rifles. Hamilton, "Jungle Tactics," 24.
with the enemy to ensure victory, the inability of firepower to stop a determined attack, that field fortifications engendered a fatal passivity among the defenders, and victory went to the side with greater resolve. To what extent officers transferred these beliefs, even if unconsciously, to European-style armies must remain a matter of conjecture, but even at the time senior officers worried that younger officers had developed “erroneous and regrettable ideas” in the Philippines, including a “disdain” for the lethality of modern weapons.⁹³

In the first few years after the Fort Leavenworth school reopened, tactical instruction generally reflected this pervasive confusion about the nature of modern war. During the first year of the GSSC, Captain Joseph T. Dickman, yet another Wagner protégé, was the chief tactics instructor. In a 1902 lecture reviewing recent developments in infantry weapons, Dickman did not even mention bayonets. His comprehensive discussion of weapons, ammunition, and ballistics abounded with technical detail and reasoned analysis. From his discussion, Dickman concluded that modern arms required better training in marksmanship, extended-order tactics to include the use of individuals seeking cover, and specialized tasks requiring great initiative such as reconnaissance, advance guard, and outpost duty.⁹⁴ It would be several years before another instructor was able to articulate such a clear and consistent description of modern war, and then draw tactical conclusions from that vision. The

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⁹⁴ Joseph T. Dickman, Modern Improvements in Fire Arms and Their Tactical Effects (Fort Leavenworth, Kan.: General Service and Staff College Press, 1902), 1-11.
following year, Dickman left the school when he was one of the officers selected for the initial General Staff.95

In 1904, Lieutenant R. Foster Walton delivered a lecture describing the proper methods of conducting an attack that was probably more representative than Dickman’s consistent, cogent analysis. This lecture was one of the many student presentations that Swift used to partially replace Wagner’s texts. Like Dickman, Walton claimed that “the losses, which troops inflict in battle are produced almost entirely by the use of fire arms,” but soon thereafter stated that it was “not possible to shoot an enemy out of a position.”96 The latter was a common close-order assertion based on the belief that victory was not due to physical destruction but the attainment of a psychological dominance over the enemy.97 But then Walton veered back towards the primacy of firepower, cautioning that “by fire action alone will the assailant be able to keep the defenders down, so they will not be able to bring the accurate and intense fire that renders the attack so difficult.”98 He concluded his section on the “Advantage of the Offensive,” with a passage that advocated extended-order tactics but emphasized the psychological focus of close-order tactics. “The degree of dispersion necessary to avoid heavy loss makes control of the skirmish line difficult; hence the great importance of individual intelligence and courage, and of skill in shooting and taking cover. In the final

95 WDAR (1903), Root, 68.

96 R. Foster Walton, The Three Arms Combined in Attack (Fort Leavenworth, Kan.: Staff College Press, 1904), 9, 11.

97 Dickman might have also been guilty of this apparent contradiction. He was the primary author of the 1905 Field Service Regulations, which made precisely the same claim. Office of the Chief of Staff, Field Service Regulations, United States Army, 1905 (Washington: GPO, 1905), 104.

assault great moral stamina is indispensable.” Walton was on the wrong side of the thin line between synthesis and self-contradiction. Rather than offering specific recommendations on how to manage both the physical and psychological problems of the attack, his lecture merely incorporated the platitudes of both sides. The conceptual immaturity of Walton’s lecture highlighted the risks of Swift’s plan to replace Wagner’s books with many small contributions from faculty and Staff College students. Not only did this risk collective incoherence, as the individual efforts were almost certain to contradict each other in some aspects while leaving gaps in others. But with such a difficult intellectual problem, using students, who might have been attempting to articulate their tactical ideas for the first time, was also likely to produce undeveloped ideas, such as Walton’s.

Several years later, Captain Matthew F. Steele presented a two-part lecture on the Russo-Japanese War. During the first part, Steele concluded that no matter how well supported by artillery, frontal assaults in daylight were possible only with “a terrible sacrifice of life.” But then a week later he concluded that a frontal assault “can be made possible by greatly superior artillery.” The Army Service Schools were unable to provide the intellectual leadership necessary to provide a cohesive tactical doctrine; instead, Fort Leavenworth reflected the prevailing uncertainty of the broader officer corps. To be fair, the tactical problems facing any attacker of the time were daunting. The previous decades had seen a great rise in weapons technologies that favored the defense, such as rapid-fire artillery, water-cooled machine guns, and wire

99 Ibid., 11-12.

100 Matthew F. Steele, “Lecture No. 32 – War between Russian and Japan, Parts 1 and 2,” 18 and 25, May 1906, Box 25, Steele Papers, MHI.
communications, without corresponding advances in equipment that aided the offensive, chiefly portable wireless communications, light machine guns, and reliable internal combustion engines. Yet this should not obscure the fact that military progressives had long argued the need for reform precisely because warfare had become so complex; therefore, they worked to create an organizational apparatus for the systematic study and resolution of such difficult problems.

As the chief tactical school and the first to mix officers of all arms, Fort Leavenworth was the most likely origin for any doctrinal solution to these tactical problems, but Bell’s preoccupation with student morale had greatly reduced the number of artillerymen and engineers attending the Army Service Schools. This dearth of technical expertise did not preclude the development of sound doctrine at Fort Leavenworth, but it did make conditions less favorable. The mere existence of schools could not guarantee the spark of insight, but conditions for innovation could be cultivated, a fact that was recognized by Root as early as his 1899 annual report:

Study of the larger problems of military science. . . . is not to be met by the separate study and reflection of single officers not charged with the duty or able to give effect to their conclusions. The responsibility of declared duty, the comparison of different views, the contribution of different minds, the correction and evolution of discussion, the long continued, laborious, and systematic application of a considerable number of minds of a high order, and with a recognized status giving authority to their conclusions, are needed to produce the desired result.”

This was a brilliant articulation of the requirements for systematically stimulating military innovation. Unfortunately, Bell did not see the Army Service Schools as a potential factory for thought, but as a tool for inculcating an esprit-based professionalism.

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101 WDAR (1899), Root, 46-47.
Additionally, the schools’ pedagogical methods were ill-suited to the particular problem of tactical doctrine they faced. The applicatory method introduced by Swift, although far superior to the previous reliance on rote memorization, emphasized the preliminary maneuvers before battle by ending the scenario at the first contact of the opposing main bodies.\(^{102}\) This effectively eliminated combat from Fort Leavenworth tactics; historian Harry Ball has noted that this practice allowed the school to skirt difficult questions about the particulars of modern combat.\(^{103}\) The exultation of maneuver as the epitome of generalship had long roots in the American military profession, but the “black-boxing” of combat might have been as much a product of the on-going uncertainty about modern warfare as a preference for a particular style of warfare.\(^{104}\) In 1904, Swift admitted to the students that “recent improvements in weapons of war and important changes in methods of attack and defense have caused doubt to be felt as to the accuracy of former rules under the latest conditions.”\(^{105}\) For a school devoted to “practical” tactical instruction to be so indifferent to the actualities of fighting is somewhat difficult to explain. Whatever the reason, it was unlikely that an

\(^{102}\) “Army War College Course of 1908-9,” n.d., Box 3, Swift Papers, USMA.

\(^{103}\) Ball, Responsible Command, 141-142.

\(^{104}\) Swift might have been influenced by his extensive study of the Civil War, particularly the generalship of Robert E. Lee. A favorable interpretation of Lee’s movements at Chancellorsville, for instance, would suggest that the epitome of generalship was to maneuver one’s army so that victory was guaranteed and the fighting was merely a necessary step to achieve what had already been guaranteed before the battle. Such an interpretation, of course, would ignore the staggering losses suffered by the Confederates in that battle.

\(^{105}\) Coincidentally, Swift made this concession of ignorance just days after Morrison and Reichmann watched the Shoushanpu assault from opposite lines. As Swift welcomed the students to the school, Reichmann was caught in the Russians’ hasty retreat from Liaoyang. Eben Swift, Remarks, Introductory to the Course in Military Art, at the Infantry and Cavalry School and Staff College, Fort Leavenworth, Kansas (Ft. Leavenworth, Kansas: 1904), 11.
institution that refused to talk in great detail about combat would reconcile difficult tactical dilemmas.

These methodological problems were compounded by the rapid succession of officers heading the tactics department. When the GSSC opened in 1902, Captain Joseph T. Dickman was the head of the Department of Tactics. Dickman was bright, articulate and well-respected, but these traits led to his selection as one of the first General Staff officers the following year. Major William W. Wotherspoon followed Dickman, but after only several months he was burdened with the additional duties of assistant commandant, following Arthur L. Wagner’s appointment to the General Staff in early 1904. But it was only a matter of months before Wotherspoon was also called to Washington. With Wotherspoon’s departure, Swift returned to Fort Leavenworth, initially serving as both assistant commandant and the head tactics instructor. In August 1905, Major Charles H. Barth assumed the latter duty, allowing Swift to focus on the daily operations of the school. Unfortunately after less than two months at Fort Leavenworth, Barth suffered a serious injury during an outdoor tactical exercise. Swift once again performed double duty for several months before Major Daniel H. Boughton was transferred from the law to the tactics department. Despite having the longest tenure of any head of the Department of Military Art to that time—over eighteen

106 Official Army Register: 1903, 87.
108 The available documents do not describe the manner in which Barth was injured, but the most likely cause was a fall from his horse. As a cadet, Barth had been a poor horseman. Coincidentally, he was good friends with Boughton, who he mentioned several times in his diary. Barth diaries, 1879-1880, Cullum File 2910, USMA; ———, Annual Report of the Army Service Schools, "Appendix A: Report of the Army Staff College, Assistant Commandant," (Ft. Leavenworth, Kan.: Staff College Press, 1906), 1.
months—there is no evidence that Boughton had any strong, much less original, ideas on tactics.\textsuperscript{109}

Even before Barth’s injury, Bell was attempting to bring some of the observers recently returned from Manchuria to the Army Service Schools. In the summer of 1905, Eben Swift convinced Bell to request Reichmann as an assistant instructor with the intention of his revising several of the German textbooks used by the school.\textsuperscript{110} At the time, Reichmann was finishing his report on the Russo-Japanese War. Despite Reichmann’s availability, the War Department denied Bell’s request on the grounds that Reichmann had accumulated too much time in service away from his regiment. Bell briefly pressed the point, but Chief of Staff Adna R. Chaffee would only allow Reichmann’s assignment if Bell released another instructor. Evidently, Chaffee regarded the request as a stratagem to increase the size of the faculty. Unwilling to release another instructor, Bell let the matter drop.\textsuperscript{111}

Just weeks later, Barth was injured. A month after that, Bell asked Morrison to come to Kansas as Boughton’s eventual replacement. Bell had read an early draft of Morrison’s report on the Russo-Japanese War, but it is not clear to what extent this influenced his selection.\textsuperscript{112} The nature of their personal relationship and how it might have influenced Bell’s selection is a mystery. Bell’s final year at West Point coincided with Morrison’s first year, but the extent of their dealings as cadets is not known. Their

\textsuperscript{109} Boughton’s tactical ideas will be discussed in greater detail in chapter 7.

\textsuperscript{110} J. Franklin Bell to Military Secretary, 19 June 1905, File 4274, and Eben Swift to Major William D. Beach, 12 September 1905, File 1441, both in Entry 101, RG 393, NARA I.

\textsuperscript{111} Henry P. McCain to J. Franklin Bell, 23 and 28 June 1905, File 4274, Entry 101, RG 393, NARA I.

\textsuperscript{112} John F. Morrison to J. Franklin Bell, 6 December 1905, and Bell to Morrison, 18 December 1905, File 4037, Entry 101, RG 393, NARA I.
first documented encounter was in 1899, when Major Bell lodged a formal complaint with the headquarters in Manila alleging that Captain Morrison had been undermining Bell’s efforts to recruit his regiment from the state volunteer units soon to be returned to the United States. Morrison denied this accusation with an even-handed reply, but his commanding officer was not so restrained; he countered with charges that Bell was interfering with potential recruits for the regulars due to his selfish pursuit of personal glory.113 This affair must have been an unwelcome headache for General Elwell S. Otis, who thought highly of both officers and seems to have simply ignored the feud.114 Yet two years later, within days of Bell assuming command of the 3d Separate Brigade in Batangas, Morrison was appointed a provost marshal within that province. Bell typically assigned his best junior officers to these demanding positions, and Morrison served in that crucial capacity for two months, during which the pacification of Batangas was nearly complete.115 Bell and Morrison might never have been personally friendly, but Bell evidently had great professional respect for Morrison.

Intellectually, Bell’s selections of officers for positions at Fort Leavenworth lacked consistency. Swift, Boughton, Reichmann, and Morrison represented the full spectrum of tactical views, which logically should have been the primary concern when selecting instructors of tactics. Bell, however, was concerned with more general qualities of

113 John F. Morrison, 3rd endorsement, 8 July 1899, and Major James Miller, 4th endorsement, 8 July 1899, (Bell’s original letter not included), Morrison ACP.

114 Otis had commanded the Twentieth Infantry at Fort Assinniboine, Montana while Morrison was a lieutenant. In an 1890 efficiency report, Otis gave Lieutenant Morrison high marks. As noted in the previous chapter, Bell was a great favorite of all the senior officers in the Philippines, including Otis. Otis, Morrison Efficiency Report, 1 May 1890, Morrison ACP; Raines, "J. Franklin Bell," 9.

115 Dan Boughton, Morrison’s West Point classmate and predecessor at Fort Leavenworth, also served Bell during this campaign. “Efficiency Report in Case of John F. Morrison,” 30 June 1902, Morrison ACP; Linn, Philippine War, 301-304; Charles D. Rhodes, Boughton obituary from 1915 Annual Report Association of Graduates, in Boughton Cullum File 2887, USMA.
“practical” officership, and he preferred to rely upon those officers of demonstrated competence and long personal association. Bell supported Wagner’s tactics, but he seems not to have known Reichmann well, and made only a half-hearted effort to bring Wagner’s protégé to Fort Leavenworth. Aside his friendship with Wagner, Reichmann had sterling qualifications and was philosophically aligned with the school’s traditional extended-order tactics, even if that tradition had become a bit frayed by the uncertainty of the previous years. Yet Bell was far more comfortable with Boughton, who had few qualifications to teach tactics, much less head the department, but had a long period of service under Bell, which seems to have counted far more than Reichmann’s qualifications. By virtue of his experience in Manchuria, Morrison was better qualified for the head tactics instructor position than his predecessor Boughton, but Morrison was tactically the opposite of Wagner—Bell’s friend—and the traditional extended-order tactics of Fort Leavenworth. Although Bell was well aware of Morrison’s views, he still sought him for the position. This pattern of assignments suggests that Bell actually cared little about the content of the curriculum. Although he was unsurpassed in his enthusiasm for professional education, the process of education—or perhaps more precisely the process of professional acculturation—seems to have been more important to Bell than the actual knowledge imparted. This explanation is consistent with Bell’s emphasis on student cohesion at the expense of curriculum.

The problem was that Bell did not realize the power of the new military progressive institutions. The work of Wagner and Swift in the 1890s had developed a very effective tool for indoctrinating students in patterns of thought. Root had then

116 J. Franklin Bell to Henry C. Corbin, 18 November 1902, Boughton ACP.
made professional education important, Carter had made Fort Leavenworth the central school, and Bell had solidified this position as well as expanding the means for the school to influence the Army. These cumulative efforts had gradually made Fort Leavenworth the Army’s tactical head. By extension, the chief tactics instructor and his views on warfare mattered a great deal more than Bell apparently realized. Of course, Bell’s selection of trusted former subordinates was entirely in line with the routine of the nineteenth-century army. But this was precisely the old system of “pull,” in which personality and connections counted for more than talent, that the reformers had decried. The professional school system had been created to provide an alternative to such practices, not to provide a new form of the traditional entourage of general officers.

Regardless of the reason for his selection, John F. Morrison had many excellent qualifications as a tactics instructor. In contrast to the uncertainty prevailing at Fort Leavenworth before his arrival, Morrison had very definite opinions about the nature of modern war that emphasized the primacy of moral forces and the validity of close-order tactics.117 The Russo-Japanese War cemented these notions in his mind. Even at the time, he viewed the experience as something extraordinary. While still in Manchuria, the forty-six year-old captain wrote a friend that the opportunity to be an observer was worth two promotions, no small claim during a time of such slow advancement.118 Perhaps more importantly, the experience carried great weight with others. Bell had brought Morrison to the faculty so that the students might learn of modern war and they were not disappointed. One former student recalled that “there was no lesson of the

117 The definitive history of the school described Morrison as the “dominant personality at Leavenworth” during his tenure. Nenninger, Leavenworth Schools, 87.

118 John F. Morrison to Charles Boardman, quoted in ibid., 88.
Russo-Japanese War that was not mentally recorded by him and made the subject of demonstration in the Leavenworth courses in later years.”119 Such fresh news delivered in person made the Wagner textbooks seem stale and obsolete. “Maj. Morrison talks very interestingly of tactics as they applied up to date and not school book blarney,” wrote another student.120 Morrison was also far more appealing as an instructor than Swift, who never overcame his preoccupation with the formatting of orders. In fact, John M. Palmer appropriately described Morrison as Swift’s replacement as the driving force at Fort Leavenworth, and noted that Morrison, like Swift, increased the time allocated to the applicatory method in the school curriculum. Nevertheless, the two were not entirely of like mind. Palmer estimated that Swift had devoted 90-95% of his effort to grading form rather than content, with Morrison reversing the ratio.121 Even allowing for some hyperbole on the part of Palmer—who was an unabashed admirer of Morrison—the reality of this shift in emphasis was corroborated by other Fort Leavenworth graduates.122 Although Swift was similar to Morrison in method, he still held Wagner’s tactical ideas. In an early memorandum, he expressed a view of battle that was antithetical to Morrison’s: “Decisive actions result mostly from superiority of force, better tactics or better ground, and not so often from a higher valor.”123 This hard-bitten view of battle could be traced back through Wagner to Upton. This tradition dismissed

120 Fay Brabson, Diary entry 5 October 1906, quoted in Coffman, Regulars, 179.
122 Helmick, "From Reveille to Retreat," 170; Spaulding, United States Army, 397. Swift’s obsession with format pervades his correspondence, which is maintained as part of the United States Military Academy Library Special Collections.
123 Eben Swift to Hamilton S. Hawkins, 3 September 1896, Box 6, Swift Papers, USMA.
patriotic zeal, American valor, or stern discipline as insufficient solutions to problems that required good weapons, smart leaders, and appropriate tactics. Unfortunately, that view became unfashionable at Fort Leavenworth in the decade before World War I.

Just as Lieutenant Morrison had created enthusiasm among the students of the Agricultural College of Kansas two decades earlier, he had a similar effect at Fort Leavenworth. Many of his students revered him and proudly proclaimed themselves “Morrison Men” in later years. The most famous of these disciples was George C. Marshall, who spent three years with Morrison, one as a student and two as an assistant instructor. Marshall recalled that Morrison “had a tremendous effect, certainly on me, and I think on most of my class.”124 Another adoring pupil wrote years later: “To hear him lecture on tactics was a treat. No man, even though his interest in the subject were [sic] cursory and superficial, could fail to become not only interested but enthused.”125 Major Hunter Liggett, who was assigned to one of the units of the garrison but had no direct connection with the school, arranged for Morrison to lead a weekly tactical seminar for officers of the garrison.126 The remarkable teaching success of this “chunky infantry major” was largely due to the coherence of his vision.127 A lecture given by Morrison, remembered one officer, “was always simple and clear and served to emphasize some important military principle.”128 Perhaps the highest compliment came

124 Pogue, Education of a General, 101.
125 Halstead, "Morrison," 3.
126 Nenninger, Leavenworth Schools, 121; Holley and Palmer, General John M. Palmer, 186.
127 Physical description from Coffman, Regulars, 179.
128 Helmick, "From Reveille to Retreat," 170.
from Marshall, who credited Morrison with “[having] taught me all I have ever known of tactics.”

If the charisma and clarity of Morrison were the fire, then Bell had arranged the kindling. The school’s personnel policies—in place long before Morrison arrived—could scarcely have been better suited for the creation of a cult-like institution dominated by a dynamic individual. The practice of retaining instructors from the Staff College for a third year as instructors created an intellectually insular and submissive faculty. These junior instructors lacked the personal experiences that might have enabled them to develop independent views. In any event, their short tenure as instructors—only one year in most cases—gave them little time to develop their own theories. With only a few exceptions, the assistant instructors were junior to Morrison by ten to fifteen years.

Historian Forrest Pogue described Morrison as “a prickly original” who “was happiest in the master-student relationship and made his greatest appeal to young uncommitted minds.” Such a didactic relationship did not lend itself to a diversity of thought, which was evidently what Morrison preferred. By 1910, seven of the eight assistant instructors were recent graduates.

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130 Most of the tactics grades were given on the basis of the instructor’s subjective appraisals of what constituted proper tactics. It is doubtful that a student who did not show proper respect for the power of infantry would have received high grades from Morrison and his staff. A classmate of George C. Marshall who was not selected for the Staff College claimed that the instructors “took reprievals [sic] against me because they said I didn’t take the course seriously.” It should be noted, however, that he thought the instructors deemed his work habits unworthy, not his tactical views. Forrest Pogue interview of Charles D. Herron, 28 May 1958, GCM.


132 In 1910, Captain Stephen H. Elliott, an 1893 Honor Graduate of the Infantry & Cavalry School, was the only assistant instructor who had graduated from the school earlier than 1906. This practice had precedents in the early years of West Point and the Infantry and Cavalry School, when personnel shortages made the use of recent graduates or students necessary for specialized courses such law or languages. The nature of the
This practice had been deliberately cultivated by Bell, who sought high esprit, whatever the intellectual cost. Bell urged the system on his successor, noting that the school became “almost autonomous if you educate and control your own assistant instructors.”\(^{133}\) This allowed the commandant to avoid the headaches of getting officers from the War Department bureaucracy, as had been necessary in the case of Swift. Even more important for Bell, this policy was a logical extension of his use of Army Staff College students in the instruction of the Infantry and Cavalry School. In effect, the assistant instructors served as a third-year cohort comprised of an even more talented and enthusiastic cadre. That practice had increased morale and cohesion at the expense of curriculum; he made the same trade with the assistant instructors. Before Morrison arrived at Fort Leavenworth this was not a problem, as the school lacked a dominant intellect around which a dogma could coalesce. After 1906, however, Fort Leavenworth became a center of closed-order tactics that emphasized the infantry to the exclusion of all other arms.

This trend was certainly aided by Bell’s insistence that artillermen and engineers attend the Infantry and Cavalry School and compete for their positions in the Army Staff College. The resulting underrepresentation of the artillery in the student body was reflected in the faculty. A balanced body of instructors with relatively senior members from each arm might have encouraged some sort of dialectic. Instead, the artillery was

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Leavenworth curriculum, particularly the portion taught by Morrison’s Department of Military Art, was not of this specialized nature. The Army possessed an abundance of officers with sufficient experience to teach a general course in military tactics. Adjutant General’s Office, *Official Army Register: 1910* (Washington: GPO, 1910), 111; Nenninger, *Leavenworth Schools*, 89-90.

\(^{133}\) J. Franklin Bell to Charles B. Hall, 21 August 1906, File 4051, Entry 101, RG 393, NARA I.
represented by only a single junior officer who was a recent graduate from the school.\textsuperscript{134} When Morrison became the department head, he forbade the field artilleryman from teaching general tactics courses as had been the previous practice.\textsuperscript{135} Several years later, when Morrison was allowed to choose his own artillery representative, he selected a former student, Captain Richard H. McMaster, for the post. This necessitated canceling McMaster's selection for a detail to the Quartermaster Department, but Morrison insisted that McMaster was the only field artilleryman in the entire Army who would be satisfactory.\textsuperscript{136} Morrison wanted his assistant from the artillery to be of like mind.

A healthy clash of ideas would have likely benefited both arms. In 1905, the chief of artillery, Brigadier General Samuel M. Mills, offered his own interpretation of the Russo-Japanese War: “The importance of the Field Artillery has been demonstrated . . . and the testimony of our attachés with both the Russian and Japanese armies is practically unanimous not only as to its importance but as to its increased efficiency.”\textsuperscript{137} This was utter nonsense, as Morrison’s report was one of the first to be completed and said nothing of the sort. Yet Mills was not concerned with defending the power of artillery vis-à-vis the infantry, and probably would not have considered his statement a lie. Instead, his comment was directed toward an on-going discussion within the field artillery regarding the proper organization for an artillery regiment. Field artillerymen were grappling with the technical-organizational problems posed by the new rapid-fire

\textsuperscript{134} Adjutant General's Office, \textit{Official Army Register: 1908} (Washington: GPO, 1908), 94.

\textsuperscript{135} John F. Morrison to Milton F. Davis, 1 May 1908, File 5635, Entry 101, RG 393, NARA I.

\textsuperscript{136} John F. Morrison to Secretary, Army Service Schools, 29 January 1908, File 5240, and Albert E. Saxton to Charles D. Rhodes, 20 April 1911, File 2094, Entry 101, RG 393, NARA I.

\textsuperscript{137} \textit{WDAR} (1905), Mills, 260.
gun, which required a shift from batteries of six guns firing at visible targets to regiments of dozens of guns operating in concert to destroy targets that were hidden from their direct sight.\footnote{During the nineteenth century, the limitations of guns, communications, and maps effectively limited artillery to firing at only those targets that could be observed from the gun—a technique known as direct fire. Although guns could be arranged in massed batteries of dozens or even hundreds of guns under certain circumstances, there was little incentive to organize artillery into large permanent units when limited to direct fire only. With the advent of indirect fire—the practice of having guns fire at targets that were outside of visual distance—it was possible to mass the fire of hundreds of guns on a single target. To do this, however, was far more technically difficult and required a degree of centralized control that could only be achieved with larger, more elaborate permanent organization.} Mills’s remarks were not directed at Morrison or the infantry, but were meant to support his favored regimental configuration.\footnote{WDAR (1905), Mills, 260-261.} Reflecting this inward focus, when a new school dedicated exclusively to field artillery opened at Fort Sill in 1911—the marvelously named School of Fire—it dealt primarily with the development of the technical methods of control within field artillery units, not fighting for the field artillery’s rightful place among the hierarchy of the different arms.\footnote{Steven A. Stebbins, "Indirect Fire: The Challenge and Response in the U.S. Army, 1907-1917," (M.A. Thesis, University of North Carolina-Chapel Hill, 1993), 49, 57-58.} The chiefs of artillery were also indifferent, as they were primarily concerned with coast defense. Both Mills and his predecessor wanted the field artillery, which had long been considered the less prestigious component, to be split from the Artillery Corps completely.\footnote{WDAR (1905), Mills, 259.} This inward, technical focus of artillerymen left the doctrinal field to others.

With little resistance from artillerymen, Morrison used the power of his pulpit to extend his influence beyond the Army Service Schools. One of the most important means of this diffusion was the use of faculty and students at the summer camps of instruction with the National Guard—a joint legacy of Root’s Dick Act and Bell’s activism.
as commandant. The school had also become the recognized source of materials for
tactics instruction. One benefit of the applicatory system was that the problems used at
the school could be easily modified for local use by units. The common practice of using
recent Fort Leavenworth graduates as instructors at garrison schools for junior officers
accelerated this trend, as they naturally tended to use the methods with which they were
familiar. Several hundred officers, including John J. Pershing, subscribed to the school’s
mailing list offering such materials.¹⁴² Eventually, several compilations of Morrison’s
lectures and tactical problems were published.¹⁴³ By 1914, when the Cavalry Association
published yet another collection of his tactical problems, the Army and Navy Journal
noted that “while many of the problems are already widely known, it is safe to say that
the high reputation of [Morrison] will lend to this book an interest greater than has
greeted any American military publication of recent years.”¹⁴⁴

Yet Morrison’s greatest influence on the Army was the 1911 Infantry Drill
Regulations. In April 1911, the War Department formed a special board of officers to
revise the 1908 Infantry Drill Regulations, which were only an updated version of the
1904 edition developed under Wagner’s supervision. Lieutenant Colonel Morrison
chaired the board, which also consisted of Captains Alfred W. Bjornstad and Merch B.

¹⁴² Nenninger, Leavenworth Schools, 121.


¹⁴⁴ Army and Navy Journal, 26 September 1914.
Stewart. Bjornstad was a star pupil of Morrison’s from the previous year’s Army Staff College class. Bjornstad had graduated from the first year’s course—which had been renamed the School of the Line in 1908—with the highest cumulative score ever earned by a student. In addition to his brilliance, he was also known for his abrasive personality, a trait that he shared with Morrison. This seems not to have bothered Morrison, as he was almost certainly behind Bjornstad’s selection for the revision committee. The two were later reunited in 1917, when Bjornstad was Morrison’s chief of staff while training the 30th Division for France.

In contrast, Merch B. Stewart had no connection to Fort Leavenworth, but he had been a West Point tactics instructor. Nevertheless, he was very interested in doctrine, having made several suggestions for infantry organization during the preparation of the 1910 Field Service Regulations. More importantly, Stewart was a prolific writer, who had written several handbooks for a specialty publisher in Kansas City that did frequent work for the Army Service Schools. Morrison hated writing, and he might have influenced Stewart’s assignment as a means of escaping the drudgery of drafting official prose. Aside from his prolific pen, Stewart’s selection might have also been influenced by his energetic role in the Infantry Association’s battles against the other arms.

145 War Department Special Order #76, 1 April 1911. Coincidentally, during World War I John J. Pershing recommended both Stewart and Bjornstad for promotion to brigadier general on the same day. Pershing to Peyton C. March, 16 May 1918, AEF Confidential Cables Sent, James G. Harbord Papers, LC.


147 J.D. Leitch to Daniel H. Boughton, 19 July 1910, Box 14, Entry 292, RG 165, NARA II.

148 Stewart likely had mercenary reasons for most of his writing. While stationed in Cuba, Stewart chided a friend for giving the War Department free rights to a pocket guide for officers that Stewart thought he could have published for profit. Charles Gerhardt, “Summary of Military Career,” MHI, 27-28.

149 Johnson Hagood to J. Franklin Bell, 30 January 1908, Box 1, Hagood Papers, MHI.
The 1911 IDR differed from the earlier 1904 version in a number of ways, but perhaps the most profound was its scope. Whereas Wagner had resisted placing broad statements of tactical principles in manuals because he did not want to limit the intellectual freedom of officers, the writers of the 1911 IDR embraced this modern concept of doctrine. In a supplementary article written to explain the new manual, Bjornstad rejected the nineteenth-century view of manuals represented by Wagner, which preserved individual professional autonomy by limiting the army’s official statements on matters of tactics. “Drill Regulations cannot stop with the invention of certain forms, movements, and commands,” Bjornstad wrote. Instead, “they must set forth a sound theory of combat and must show the practical application of everything that is prescribed.”150 Accordingly, the 1904 and 1911 regulations were very different in form. As with earlier manuals, the 1904 IDR gave descriptions of a “normal attack,” that were intended to serve as a template to be modified in accordance with individual circumstances. In practice, these forms often led to absurdities when applied dogmatically as they made little reference to either the enemy or terrain. The 1904 IDR provided the following instructions for company commanders in the attack: “At the first four halts one squad in each platoon fires one round; during the next four, two squads in each platoon fire two rounds; during the next four, one platoon fires at will; during the next four, the entire company fires at will.”151 The geometric formulation was the extension of nineteenth-century drill to twentieth-century tactics, and was of as little use. Terrain and a reacting enemy were both entirely absent. Moreover, the manual failed to

151 Office of the Chief of Staff, Infantry Drill Regulations, United States Army, 1904 (Washington: GPO, 1904), 88-89.
provide officers with any constructive principles on which to base modifications to these forms. They, like their soldiers, were automatons in such a system.

Morrison’s dislike for this emphasis on form led to a great change at Fort Leavenworth. Completing the process begun by Swift, Morrison drove such templates from the school. “Wagner’s books were not held in good repute,” remembered Eli Helmick, who was one of Morrison’s students. “They were thought to tend too strongly toward rule of thumb. According to the policy then in vogue anything like a rule or a diagram was taboo.” Instead, Morrison taught his students to act in accordance with “accepted principles, and with those in mind, to evolve . . . plans and measures uninfluenced by any such formal aids as illustrative sketches or rules. This idea and the revised Infantry Drill Regulation of 1911, which grew out of it,” Helmick concluded, “were shown by the World War to be defective.”

Yet it was not so much Morrison’s emphasis on principles that was shown lacking by World War I, as his personal philosophy of war, which emphasized the simplicity and power of the infantry assault. George C. Marshall recalled that his mentor gave low marks to complex solutions and “smart tricks.” The manual echoed Morrison by

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152 Helmick, "From Reveille to Retreat," 169.

153 For one definition of professionalism as the application of theoretical knowledge to individual cases see Huntington, Soldier and the State, 8-16.
cautioning, “Complicated maneuvers are not likely to succeed in war.” Yet even more than simplicity, Morrison believed in the power of the rifleman to overcome firepower, and this faith was the conceptual basis of the 1911 IDR. In his comments on a draft of the 1910 Field Service Regulations, Morrison had noted that while the manual identified superiority of fire as a precondition for success, it failed to define the term. Despite his suggestion, the final version of the 1910 FSR retained the original ambiguous passage.

The following year, Morrison built the tactical philosophy of the 1911 IDR from an explicit definition of fire superiority as the result of a “heavy volume of accurate fire,” dependent upon five variables: the number of rifles employed [my emphasis], the rate of fire, the size and density of the target, the training and discipline of the troops, the effectiveness of control. Despite the inclusion of machine guns as integral components of infantry and cavalry regiments since 1906—an addition authorized by Bell, who was a machine gun enthusiast—Morrison denied their value in gaining fire superiority, claiming that they could only “be considered as weapons of emergency.” Because fire superiority was solely a function of the number of rifles arrayed against the enemy, it could be achieved only by massing the soldiers as closely as possible. Accordingly, the 1911 IDR set the official distance between infantrymen in the attack at a scant two feet

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154 Pogue, Education of a General, 99; Halstead, "Morrison,” 4; 1911 IDR, Office of the Chief of Staff, Infantry Drill Regulations, United States Army, 1911 (Washington: GPO, 1911), 93.

155 “In fire combats the commander endeavors to secure a superiority of fire over that of the enemy. The efficacy of fire depends mainly upon its accuracy, its direction with reference to the objective... and its volume.” Office of the Chief of Staff, Field Service Regulations, United States Army, 1910 (Washington: GPO, 1910), 159; “Changes in Proposed Field Service Regulations, Recommended by Instructors in Military Art Department,” n.d. [1909], File 1607, Entry 101, RG 393, NARA I.

156 1911 IDR, 100-101.

apart, which was determined to be the minimum distance that would not interfere with a soldier firing his rifle. 158 This was nearly half of the dispersion of the 1904 IDR: the frontage of a squad was reduced from 15 to 8.5 yards. 159 In fact, the new spacing was closer to the interval used by Civil War armies than that of the 1904 IDR. In many respects, the 1911 IDR was actually more conservative than Upton’s tactics of 1866. While Upton had embraced the use of skirmishers as the most effective means for employing firepower in preparation for an assault, Bjornstad cautioned that the skirmish line was “a very poor maneuver of march formation, and the Regulations repeatedly caution against using it too soon or after the necessity for its use is past.” 160 Further separating the new manual from those of Upton, Bjornstad dismissed the use of a single rank—the distinguishing characteristic of Upton’s tactics—as unnecessary and advocated the use of two ranks as the standard for infantry. 161

The role of artillery in the attack was not even mentioned until the fifth page of the section on fire superiority. As might be expected in light of Morrison’s observations of the Russo-Japanese War, the IDR claimed that artillery would be of little use in aiding infantry past engaging in a duel with the opposing gunners. Against the defending infantry, the manual stated that artillery would be ineffective until the attackers had advanced to within 200 yards of the enemy positions, when they would be forced to expose themselves to the artillery to ward off the approaching infantry. 162

158 1911 IDR, 106-107.
159 Bjornstad, “Infantry Drill Regulations, (Pt. 1),” 228.
161 Ibid., 398-399.
162 1911 IDR, 103.
Morrison saw artillery as useful only when used in conjunction with the bayonet. Even this small concession was of little practical use as artillery fire in such close proximity to friendly troops was at best a difficult proposition. Yet there was no discussion in the manual of the means to coordinate infantry and artillery at such close distances, or even how artillery might be used at all. Thus, the manual described artillery as impotent unless supported by infantry, and even then only under conditions that effectively precluded its use.

This was the fatal flaw of Morrison’s view of warfare. His definition of battle as purely an infantry affair missed what Reichmann had correctly perceived as a devastating new factor: the incredible growth of artillery’s power due to high-explosive shells, rapid-fire guns, and the common use of “indirect fire”—the practice of guns firing at targets that they were outside of visual range. These developments greatly increased the amount of firepower that could be brought to bear on any point of the defender’s lines far out of proportion with the incremental improvement of infantry firepower represented by magazine-fed rifles. Unfortunately, Morrison continued to see the battlefield in the old terms, when the constraints of direct fire limited the amount of artillery that could be directed against any segment of the enemy’s line, despite having personally seen in Manchuria this was no longer the case. Within Morrison’s understanding of firepower defined solely in terms of rifles, there was considerable logic in massing attacking infantry in the hopes of overwhelming the defender. Yet the capabilities of the new artillery had rendered this massing of assaulting troops not only

163 The 1910 Field Service Regulations, which was the definitive manual on combined arms tactics, gave 300 yards as the distance at which artillery should cease firing at the enemy on the infantry’s objective and shift to potential avenues of counterattack for the enemy reserve. Thus, the only situation in which the 1911 IDR said that artillery would be effective in an attack was deemed infeasible by the 1910 FSR. 1910 FSR, 165.
unnecessary to achieve victory, but assured heavy casualties from enemy infantry, machine guns, and artillery, which could hardly miss such inviting targets. This new reality would be evident in both the week-long preparation for the Allied Somme offensive in 1916 and the brief thirty-minute precision bombardments of the German offensives in 1918, which demonstrated in different ways a capacity for massing violence in a manner unachievable by riflemen.\textsuperscript{164}

The water-cooled machine gun had a similar effect. These weapons, their necessary accoutrements, and sufficient ammunition weighed well over a hundred pounds, which made them difficult to use effectively in any sustained attack. In the defense, however, a single Maxim-type machine gun could easily sustain a rate of fire of several hundred rounds per minute. Thus, even the low proportion of one machine gun for every 200-300 rifle-armed infantrymen in both of the contending armies at the beginning of the Russo-Japanese War (approximately the same ratio used in the contemporary U.S. Army) had already significantly reduced the proportion of fire produced by infantry rifles. Due to his recall after only a few months in Manchuria, Morrison did not see the great increase in the number of machine guns that characterized the later stages of the war.\textsuperscript{165} Yet just as the ability of the Japanese to mass the fire of over two-hundred artillery pieces on a single point of the line was evident at Shoushanpu, so was the effectiveness of machine guns, which inflicted most of the


\textsuperscript{165} Greenwood, "American Military Observers," 446. The first truly automatic practical weapon had been invented by American expatriate Hiram Maxim in 1884. Armstrong, \textit{Bullets and Bureaucrats}, 75-77.
casualties on the assaulting Japanese. Thus, the physical rationale for Morrison’s tactics—that infantry had to be closely packed to produce a sufficient volume of fire—had already been shown to be simply no longer true on the twentieth-century battlefield. Within just a few years of the publication of the 1911 IDR, the battles of World War I would make it clear that artillery and machine guns had far outstripped the rifle in the volume and intensity of fire.

Morrison and his collaborators on the 1911 IDR, however, thought that such physical effects were ultimately of only secondary importance to the “moral” dimension of battle, which was paramount. “The infantry fire problem concerns the human elements as much as the mechanical,” Bjornstad wrote in his explanation of the 1911 IDR. Bjornstad and Morrison both believed that battle was a contest of will with the physical destruction inflicted by weapons important only as a method of reducing the enemy’s determination to win rather than an end in itself. This was correct in the sense that battles are rarely fought to the complete physical destruction of one side, but Morrison went far beyond a balanced recognition of battle as a contest with related physical and psychological dimensions. The 1911 IDR teetered on the edge of the absurd contention that physical destruction was a result of loss of will with the admonition that “the infantry must have . . . the individual and collective discipline and skill needed to master the enemy’s fire.” Although it did not specify precisely what was meant by

166 Connaughton, Rising Sun and Tumbling Bear, 152-153.

167 It should be noted that Morrison and the Infantry Drill Regulations were concerned with conventional conflict with a well-armed, European-style army, not the constabulary operations of the frontier or the Philippines, where artillery was rarely effective and the enemy poorly armed.

168 Bjornstad, "Infantry Drill Regulations (Pt. 1)," 226.

169 1911 IDR, 91.
mastering the enemy’s fire, it was clear that the only means to assure this discipline was through the iron control made possible by the orderly lines of close-order formations. Such measures were particularly important as Morrison, Bjornstad, and other close-order advocates believed the greatest danger was not enemy firepower but the inherent untrustworthiness of their own soldiers. Bjornstad claimed that more losses came from a lack of “discipline and morale than upon the number of men shot, for every fold in the ground traversed by attack will conceal its quota of skulkers.”\textsuperscript{170} He estimated that an attack in extended-order would lose a full quarter of its strength to soldiers hiding behind whatever cover could be found.\textsuperscript{171} Thus, tactics that mitigated enemy firepower but weakened discipline were simply out of the question.

Although Upton and Wagner would have been as horrified by these notions in the 1911 IDR as they were by similar ideas in their own time, Morrison was the unintended culmination of their own efforts and military progressivism in general. Wagner had built the Leavenworth school, Carter had placed it in a position of prominence, and Bell had greatly increased its prestige and broadened its influence throughout the army. Tactics disseminated through professional schools and maneuvers opened a new and more powerful means of indoctrination than had previously existed in the U.S. Army. That Morrison was the beneficiary of these developments was all the more amazing for his continued unwillingness to write in the manner of Wagner or to seek duty outside of his regiment. In the nineteenth-century army these traits would have limited his influence to the handful of officers who happened to serve at his same post. Yet the Root reforms

\textsuperscript{170} \textsuperscript{———}, "Infantry Drill Regulations (Pt. 1),” 230.

\textsuperscript{171} Ibid.
had created an institution that brought him the Army’s best young minds, provided him the resources and time to indoctrinate them into his view of warfare, then returned them to the Army with the expressed intention of their further disseminating these lessons. It was a magnificent achievement, but its full implications do not seem to have been realized at the time. At least not by Bell, who was indifferent to the type of tactics being taught within his school. Through it all, Morrison remained the same grumpy regimental officer that he had always been. In 1910, he complained to a friend that Bell wanted him to remain at the Army Service Schools for another year, but Morrison would have preferred to “go back to my regiment.” An unenthusiastic intellectual, Morrison had mixed feelings about his place at Fort Leavenworth. “If I must stay away another year then this is as good a place as any, in fact better for it certainly is interesting work but confining and sometimes a good sized burden.”

172 John F. Morrison to Matthew F. Steele, 20 January 1910, Box 13, Steele Papers, MHI.
7. The Test of Military Progressivism: The General Staff and Tactical Doctrine, 1905-1911

The bulwark of strength in this country in time of war is the volunteer Army, but the Regular Army must be depended upon to devise and perfect the means of carrying on war and to establish the system of administration, discipline, and drill, so that at the outbreak of war no time will be lost in the discussion of such subjects. The tendency of modern times has been to shorten materially the length of wars and the nation whose system is thoroughly prepared in peace has a marked advantage at the outbreak of war over one that has drifted without careful preparation.

- William H. Carter

In the passage above, William H. Carter neatly captured the premise of military progressivism and the Root reforms. The “careful preparation” he spoke of had many forms: efficient organization, mobilization plans, competent officers, and effective tactics. Although Emory Upton’s greatest successes during his own lifetime had come in the last of these areas, the Army of his era had few means to provide him or other aspiring tacticians any official aid or encouragement.¹ Upton and his followers believed that a general staff would remedy these deficiencies by providing a permanent body with the resources and time to study developments in other armies, consider the effects of new weapons, and make the necessary changes to American tactics. Aside from the obvious advantage of having a group of officers dedicated full-time to such pursuits, the military progressives placed great faith in the “scientific” method of systematic study and the organizational remove of a general staff. It was hoped that this organizational

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isolation would provide an elevated vantage allowing it to see beyond the distractions and petty parochial concerns that plagued the rest of the army.

The military progressives’ faith in process and, to a lesser extent, their belief in organization were both informed by the prevailing understanding of the profession as a science with governing principles that could be revealed and codified. This was strikingly reflected in Eben Swift’s concept of “safe leadership,” which he incorporated into the curriculum at Fort Leavenworth and the War College. Swift believed that when presented with a tactical problem, the majority of officers would tend towards solutions that stressed the “correct ideas.” Extending this concept, he concluded that repetition of many problems would naturally produce “a consistent and reasonable habit of looking upon military questions, and that it will build up a system which, like the common law in jurisprudence, will guide our officers to those principles of leadership which should govern our armies.”² Swift saw himself not so much as imparting tactical knowledge but as a facilitator helping to reveal the truth already resident in the collective officer corps. This inductive method of developing doctrine was feasible only if generalship was indeed a “science” governed by principles; otherwise, the results of the numerous cases that he put to his students could not logically be considered cumulative steps towards a system of tactics. The use of Baconian methods to arrive at Platonic tactical truth was a fascinating notion, but might not have been representative of the American officer corps or even most military progressives. Yet even if Swift’s understanding of the profession was unique to him, these views were nonetheless significant because of his place within the military progressive ranks. Swift modeled his methods on those he learned from

² Eben Swift, “Outline of Course of Instruction, Army War College, Course of 1909-10,” n.d. [1909], Box 3, Swift Papers, USMA.
Emory Upton while Swift was a cadet. He developed his ideas under the direct supervision of Arthur L. Wagner; and was later asked to implement them at both Fort Leavenworth and the Army War College by J. Franklin Bell, who held Swift’s teaching expertise in high regard. Thus, Swift’s faith in method to determine “correct” tactics was by no means an outlandish proposition among the chief military progressives.

If Swift’s ideas were correct, then the use of numerous tactical case studies at Fort Leavenworth should have corrected the dangerous ideas of Morrison. The writings of two Fort Leavenworth instructors, Captain Charles Crawford and Lieutenant Henry Eames, demonstrate that the military progressive faith in method was misplaced. Although Crawford and Eames used radically different approaches in developing their ideas, they came to essentially the same conclusions as Morrison. In 1907, Morrison was only in his first year at the school and not yet the head of the Department of Military Art, but his influence over Crawford was readily apparent. Not only was Crawford’s printed lecture philosophically akin to Morrison’s beliefs, but he explicitly referenced Morrison’s report on the Russo-Japanese War several times throughout his lecture, using it as the basis for his findings. Foremost among these claims were that artillery and machine guns were of “comparative unimportance” when compared to the rifle and bayonet. Crawford went so far as to argue that the primary benefit of an infantryman firing his rifle was to boost his own morale, rather than the supposedly negligible harm it inflicted on the enemy. He supported this claim by referencing Morrison’s observation that in Manchuria the defenders’ rifle fire seemed to be less effective when the attackers had closed to within 800 yards. From this, Crawford concluded that the fear of the

3 Charles Crawford, Weapons and Munitions of War, Part I: Infantry Weapons (Fort Leavenworth, Kan.: Staff College Press, 1907), 8.
approaching bayonets completely unnerved the defending soldiers, even though the enemy was still nearly half a mile away. In accepting this counterintuitive statement so uncritically, Crawford ignored the reports of several other observers that either contradicted Morrison, or at the very least, cast doubt on the general applicability of the Russo-Japanese War. For instance, the report of Lieutenant Colonel Walter Schuyler—which was published in the same volume as Morrison’s—noted that many of the Russians were second-line reservists who had only fired five rounds of ammunition in training before being shipped to the front. Yet Crawford did not address the poor quality of the initial Russian reinforcements to Manchuria, nor did he defend his apparent assumption that the lessons of the war would be universally applicable.

Instead, Crawford used Morrison’s account of the war to support his claim of the primacy of the bayonet in combat. The captain cautioned that the idea of firepower being able to defeat an enemy without the bayonet was “fatal to any army.” While Crawford believed that this idea was lethal, he was more skeptical of the danger posed by the smaller bullets used by the new smokeless powder ammunition. He asserted they would be unable to stop a soldier whose “blood was up in the bayonet charge.” World War I would soon disprove this absurd contention. It would be unfair to condemn Crawford based solely on the benefit of hindsight, but there was substantial evidence at

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4 Ibid., 10, 33, 36.
6 Crawford, Infantry Weapons, 11.
7 Ibid., 47. The war also led to Crawford’s professional end. General John J. Pershing relieved Crawford from command of an infantry brigade for a “demonstrated incapacity to command.” Pershing to Peyton C. March, 19 July 1918, No. 1484-S, Vol. 13, AEF Confidential Cables Sent, Harbord Papers, LC.
the time to suggest that the weapons such as the Mauser and Lee-Enfield rifles were quite adequate. In a Fort Leavenworth lecture given five years before Crawford’s, Joseph T. Dickman had observed that the higher velocities produced by smokeless powder would produce weapons with sufficient striking power, greater accuracy, and a higher rate of fire.8

In accepting Morrison’s version of the Russo-Japanese War, Crawford was driven to refute Reichmann’s conflicting interpretation. In phrasing that mirrored Reichmann’s report, Crawford attacked “some observers of the Russo-Japanese conflict [who] were much impressed with the power of artillery.” Significantly, Crawford based his critique on Reichmann’s lack of quantifiable, empirical evidence, reflecting the prevailing preference for scientific rigor. “None of these observers,” Crawford wrote, “gave statements showing the actual casualties made by different arms, their reports apparently reflecting their impressions only.”9 Yet Morrison’s report was also almost entirely anecdotal with the one exception of a Japanese staff officer’s estimate of the relative proportion of casualties caused by each type of weapon.10 Based upon this single estimate during a single battle—information that was not verified by any other source—Crawford claimed an empirical grounding for his beliefs. Yet Crawford’s polemic, although reflecting poorly on the Army Service Schools, was less a failure of scientific process than the absence of it. He drew selectively from a limited base of evidence and ignored conflicting examples.

8 Ibid., 8-11. Dickman did not mention the bayonet once in his twelve pages. Dickman, Modern Improvements, 3-6.

9 Crawford, Infantry Weapons, 8-11.

10 Ibid., 8.
The case of Captain Henry E. Eames, who was also an assistant instructor in Morrison’s department, demonstrates that even more detailed and systematic study could produce results similar to Crawford’s. Eames had risen through the ranks to earn his commission in the infantry in 1897. After a few years of service, including the invasion of Puerto Rico in 1898 and several years in the Philippines, Eames attended the Infantry and Cavalry School. As a distinguished graduate, he earned a place in the Army Staff College class of 1907. The following year, which was Morrison’s first as head of the Department of Military Art, Eames served as an assistant instructor of both tactics and engineering. Although J. Franklin Bell apparently thought highly of Eames, he was also very eager to increase the proportion of infantry officers in the faculty. During his tenure as commandant, some of the more militant infantry officers had accused Bell of tilting the school in favor of cavalrymen. Bell suggested to his successor, that Eames be retained after his completion of the Army Staff College, but concluded, “You can select whom you please, but for Lord’s sake please select some infantrymen.” After two years as an instructor, Eames returned to his regiment for several years before attending the Army War College. Just before the American entry into World War I, Eames was the assistant commandant of the School of Musketry at Fort Sill, and by the end of the war

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11 The Infantry and Cavalry School Academic Board recommended Eames as an instructor following his first year, and Bell concurred with their finding that he had “exhibited qualities which would appear to fit him especially well for the duty of assistant instructor.” Yet Eames was initially considered most promising as an instructor of field engineering rather than tactics, and Bell apparently had some reservations about Eames’s temperament. Bell had told the captain that he would be retained as an instructor only if he kept “up his amiability and helpfulness to the end.” Bell to Charles B. Hall, 21 August 1906, File 4051, Entry 101, RG 393, NARA I.

12 Ibid. Hall was far less patient with the demands of his fellow infantrymen. “I know the impression has prevailed among many that the infantry arm of the service is not getting its proper representation on the staff of the college, but I have taken very little stock in the matter. . . . If the infantry officers cannot get to the front and hold up their end with the other branches of the service, they deserve to fall behind.” Hall to Bell, 24 August 1906, File 4051, Entry 101, RG 393, NARA I.
was the first commandant of the Infantry School of Fire at Fort Benning. Thus, in just over two decades of commissioned service, Eames would spend over a third of his time at army schools in some capacity.

In 1908, Eames put forth his ideas on tactics in *The Rifle in War*, an instructional manual published by the Army Service Schools and later published by the Cavalry Association in an expanded form. In the preface to the enlarged edition, Eames expressed his appreciation for Morrison’s encouragement and criticisms, but the influence of Morrison was not as evident as in Crawford’s lecture. Instead, Eames drew on his extensive knowledge of contemporary European military technical literature. Thus, *The Rifle in War* was a true product of the military progressives’ “scientific method.” The first fifty pages were a detailed comparison of the latest in French, German, and Russian technical literature on ballistics; it included discussions of the use of artillery fire control methods to rifle fire and the application of mathematical probability theory to the dispersion of bullets fired by soldiers operating as a unit. While the Bell-era Army Service Schools might have suffered from an excessive focus on the infantry and cavalry, the depth and breadth of Eames’s technical discussion suggests that at least within that narrow scope some officers were doing far better than Crawford in treating the subject in a comprehensive, sophisticated manner.

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13 As a colonel in 1918, Eames chaired the committee that selected the site of the new fort outside of Columbus, Georgia, which was founded for the purpose of providing a “home” for the infantry. Heitman, *Historical Register*, 393; Adjutant General’s Office, *Official Army Register: 1916* (Washington: GPO, 1916), 134; U.S. Army Infantry School, *Student Handout 21-10* (Ft. Benning, Ga.: Infantry School, 2006), 3.


15 ———, *The Rifle in War* (Fort Leavenworth: Staff College Press, 1908), 2-52.
Evident throughout the 108-pages of the first edition was Eames’s unshakeable conviction that officers should exercise absolute control in a manner akin to the “scientific management” of industrial production devised by Frederick Taylor. Eames compared the “cone of fire” produced by a unit of soldiers to water from a hose that could be easily shifted from place to place. Discretion by soldiers on the firing line was considered as disruptive as that of workers on Taylor’s assembly line. Eames even used the non-military term “director” to describe the role played by the infantry company commander. “Any attempt on the part of an individual to improve upon the judgment of the director,” wrote Eames, “will result in depriving the cone [of fire] of one rifle and nullify to that extent the efforts of the director.”16 Such an idea went against the basic philosophy of Uptonian tactics. When confronted with a similar problem, Upton had urged officers to cultivate the “individuality” of soldiers.17 J. Franklin Bell was also adamantly opposed to demanding unthinking obedience. Although his policies at Fort Leavenworth did great damage to the intellectual tradition of Upton and Wagner, this had been an unintended consequence, for Bell was himself in accord with their tactical ideas. He was one of the first general officers to support the greater use of machine guns, and adamant that soldiers could not be reduced to automatons. In 1906, Bell told the staff and faculty, which included Eames, that “I earnestly pray that the idea, so tenaciously clung to in our old army, that a soldier was not expected to think, his sole duty to obey, has had its day and will forever be left to repose upon the scrap-heap of

16 Ibid., 62.

17 Upton, Infantry Tactics, 117.
other discarded military notions.” Eames, however, ignored this admonishment, preferring instead to think of the infantry company as a machine-like instrument of precise violence.

Attractive in theory, in practice achieving such control in the din and confusion of combat could only be achieved by using highly restrictive tactics. For an infantry company, this meant that the soldiers could deploy only within the area that could be effectively controlled by the commander-director and his two assisting lieutenants. Even using the standard pace interval of Morrison, each of the lieutenants would have to control a platoon covering a frontage of approximately 180 feet when fully deployed in a single line. Eames’s system of control required the lieutenants to designate for over forty soldiers a single target, which might be one of several camouflaged positions, usually hundreds of yards away. They would also have to specify the range and number of rounds to be fired, and be ready at any moment to have all their soldiers cease fire, designate a new target, range, and rate of fire, and so on. All of this in the smoke, dust, and noise of battle with some of the soldiers up to 90 feet or more away from the lieutenant. While exercising control over their units, the lieutenants would also have

18 Bell, Reflections and Suggestions, 3.

19 For purposes of comparison, a Russian officer who had commanded an infantry company in Manchuria recommended that any movement within two kilometers (1.24 miles) of strong defenses should be done at a run with 10 pace intervals between soldiers. This pamphlet was translated by the American General Staff with the intention that every officer in the U.S. Army would receive a copy. Eames had read the article and cited it in The Rifle in War, but only to illustrate what he felt was the poor fire discipline of the Russian infantry. L.Z. Soloviev, Actual Experiences in War: Battles Action of the Infantry; Impressions of a Company Commander, trans. Military Information Division (Washington: 1906), 9-10; Eames, Rifle in War, 36.

20 Shortly after Eames wrote his pamphlet, the School of Musketry conducted experiments to determine the maximum number of soldiers that could be controlled by a single leader. These tests determined that using the standard dispersion of the 1904 IDR—about twice the distance advocated by Morrison—an individual could control only twenty soldiers by using voice commands. Thus, in terms of distance, Eames’s system was at the very limit of feasibility; such a simple calculation, however, ignores the fact that this would produce
to be positioned so that the commander-director could communicate his orders to them. This would be a difficult proposition if the noise of the ninety-plus rifles were the only consideration, but with the additional challenges of uneven terrain, smoke, casualties, and fear, one might well wonder whether Eames’s “ideal fire . . . which is immediately and completely responsive to the will of the commander” was feasible at all.\(^\text{21}\) Upton had been dismissive such notions. In 1875, he described a tactics demonstration put on by the British army in India. “We witnessed a supposed attack of a village. . . . The skirmishers went forward in successive lines, rushing from position to position, as if thus, under the fire of an enemy, they could be made to obey every impulse of their leaders.”\(^\text{22}\) Upton, one of the most careful and methodical commanders of the Civil War, understood the limitations of control on the battlefield.

Yet Eames agreed with the authors of the 1911 *IDR* that there was no alternative, since enlisted soldiers—to include non-commissioned officers—were incapable of exercising any independent role on the battlefield. “In the heat of the battle,” Eames wrote, “the average man fires on in almost cataleptic state, his mind incapable of ordinary obedience.”\(^\text{23}\) As a remedy, Eames advocated instilling obedience so complete that soldiers did not even have to think to obey, but reacted instinctively without

\(\text{twice the density of rifles firing and producing noise in the same distance. With the aid of whistles and methods of relaying commands this could certainly be mitigated, but the essential difficulty of the absolute control envisioned by Eames should be evident. For the School of Musketry tests, see Bjornstad, “Infantry Drill Regulations (Pt. 1),” 226.}\)

\(^\text{21}\) Eames, *Rifle in War*, 85.

\(^\text{22}\) Emory Upton, 17 December 1875, in Michie, *Letters of Emory Upton*, 332.

\(^\text{23}\) Eames, *Rifle in War*, 57-58.
requiring—or even allowing—their assent. 24 In strikingly similar language as that used by Alfred W. Bjornstad when explaining the reasoning behind the 1911 *IDR*, Eames asserted that “the greatest source of losses in battle is not the killed and wounded, but the skulkers who are hugging the ground in every conceivable sheltered spot.” 25 The corollary was that victory resulted from the destruction of the enemy’s discipline and will while maintaining your own. 26 This belief was the basis of the continued devotion to the bayonet, which many, including Eames, regarded as the psychological weapon *par excellence*. “One cannot shoot a defender out of his position,” he wrote. “It requires the steady and irresistible advance, and the threatened if not actual shock with the bayonet to dislodge a stubborn and intrenched [sic] enemy.” 27

This emphasis on the psychological dimension of battle, however, placed Eames in a conceptual dilemma. The contention that the physical effects of rifle fire were, at best, only secondary made his entire discussion of ballistics, dispersion, and methods of control largely irrelevant and his hard-won technical expertise of doubtful utility. Yet to admit that physical destruction could overcome psychological resolve would introduce the unthinkable possibility that defensive lethality would reach such a point that it would

24 “Obedience to a command may be the result either of a mental or of a physical process, usually the former; the mind receives the impression imparted by the order and by a mental process compels the muscles to obey. Such is the obedience which results from ordinary discipline, but, on the other hand, without any conscious mental activity the very muscles may instinctively obey the word of command and such is the obedience resulting from proper fire discipline.” Several pages after this passage, Eames claimed that he did not think it “desirable to convert thinking men into machines,” but then once again reiterated the need for “instinctive obedience.” Eames was apparently oblivious to the contradiction in his thought, as his repeated demands for instinctive, involuntary obedience were incompatible with his few claims that he also desired thinking soldiers capable of exercising individual initiative. Ibid., 57, 62.

25 Ibid., 64.

26 This belief was not unique to Eames. If anything, it was the dominant understanding of battle throughout the Western world. For examples of similar thinking in European armies, see Brose, *Kaiser’s Army*, 89-93, 181, and Travers, *Killing Ground*, 53-55.

27 Eames, *Rifle in War*, 78.
be impossible to attack. He escaped this conundrum through linguistic evasion: “It has been stated that victory is impossible without fire superiority, but it should also be observed that fire superiority per se will not assure victory.” This artful dodge allowed Eames to avoid coming to grips with the implications of his own beliefs, particularly his contention that the only means to achieve the requisite moral superiority was the threat of a bayonet assault. This ignored the obvious possibility that the enemy might withdraw from a position when faced with losses that were not worth its retention as a result of rational calculation rather than moral inferiority. Even more perplexing, Eames clung to the notion that the threat of death by rifle, machine gun, or artillery fire was of such a completely different nature than that produced by the bayonet as to be insufficient to defeat an enemy.

For all of the intellectual trappings of The Rifle in War, the internal contradictions made Eames’s understanding of warfare a conceptual dead end. This was

28 When faced with the similar dilemma posed by breech-loading rifles in the mid-nineteenth century, Helmuth von Moltke, chief of the Prussian General Staff, espoused the use of either flank attacks or a counterattack following a successful defense to solve this tactical problem. By the early twentieth century, this solution had been superseded by the incredible size of European armies, which threatened to erase the open spaces needed for such maneuvers. Thus, many of Eames’s European contemporaries were once again struggling with the tactical problem of the frontal assault. Eames might have been led astray by his extensive reading in European military thought, which was dominated by the concerns of continental conflict, which was very different than the potential conflicts in the western hemisphere or Far East that Americans considered most likely. Indeed, American extended-order tacticians like Wagner, blessed with the likelihood of small armies fighting in big places, had long emphasized flanking maneuvers to avoid frontal assaults, much like Moltke had earlier advocated. Showalter, Railroads and Rifles: Soldiers, Technology, and the Unification of Germany, 110-116; Echevarria, After Clausewitz, 13-17.

29 This splitting of hairs upon the bayonet was not confined to America. In 1910, the British Field Service Regulations replaced the statement that “The decision [in battle] is obtained by superiority of fire,” which was found in the previous edition, with “A superiority of fire makes the decision possible.” Travers, Killing Ground, 67.

30 Eames, Rifle in War, 78.

31 The British army of the time subscribed to a rigid, schematic understanding of battle, which also culminated in a bayonet assault. Tim Travers has argued that during World War I Staff College graduates such as Douglas Haig crafted their strategic and operational plans in an effort to produce the decisive battle, which they believed was the inevitable conclusion of a campaign. Travers, Killing Ground, 86-88.
reflected in his ultimate conclusion that victory went to the army capable of instilling sufficient “grit” in soldiers so that they would “stand punishment in order to give it.” Because training soldiers to take cover was antithetical to this aim, he urged that it be made secondary to “moral training.” To this end, Eames could offer no better recommendation than exhaustive close-order drill and summary execution on the battlefield.32 For an instructor of the Army’s premier tactical school to draw so little from an exhaustive survey of the latest military theory was an abject failure of the application of scientific process to the study of war.33

Tellingly, when the extended edition of Eames’s work was published, the Infantry Journal offered a favorable review. “The author, plainly, has had the courage of his convictions, and has not hesitated to advocate many things that are at variance with principles which have been accepted for years by those who have been regarded by the Army as authorities on rifle shooting and fire effect.”34 Despite Eames’s divergence from the prevailing ideas, the reviewer noted approvingly that he “proves his statements by mathematics and quotations from published opinions of the world’s thinkers and instructors, in modern military art.”35 Thus, the rigor of Eames’s methods, which combined both the certainty of calculation and the appeal of foreign works, had made

32 “The control of the firing line is no half-hearted matter, but one of iron firmness enforced, if need be, by the leader’s weapon, for the slightest defection upon the part of a single man spreads like wild fire and all order and discipline is at an end.” Eames, Rifle in War, 63.

33 Eames seems to have struggled with the same dilemma that Tim Travers has described within the British army. “The central problem faced by senior officers and staff seems to have been the severe mental difficulty of integrating or ‘linking’ together, what were really two different entities or images of war. On the one had there were morale and human qualities, in fact the cult of the offensive and the psychological battlefield; and on the other hand, fire-power and new weapons, in fact the technological battlefield.” Travers, Killing Ground, 62.


35 Ibid.
reactionary tactics seem not only cutting-edge but also intellectually unassailable. That Morrison, Crawford, and Eames used such different methods to come to the same conclusions demonstrated that method was in itself insufficient to produce quality doctrine.

Yet even if the faculty of a school dominated by the infantry could use reputedly scientific method to justify tactics that favored their own arm, the General Staff—theoretically removed from branch parochialism—was intended as a bulwark that could effectively correct such behaviors and restore rogue institutions to harmony with other elements of the Army. The need for such direction was particularly acute in tactics, for while Fort Leavenworth and the infantry were retreating into a satisfied isolationism, the field artillery was suffering a crisis of identity resulting from the dramatic equipment and organizational changes introduced since its poor performance during the Spanish-American War. Technically, the adoption of the new M1902 3-inch cannon brought the U.S. Army into the modern era of artillery by providing a rapid-fire gun capable of effectively firing high explosive shells at targets outside of visual range. The potential of such a sophisticated weapon, however, could not be immediately realized without the development of a corpus of practical expertise and the necessary supporting equipment such as communications, ammunition, and optics. Past the mechanical challenges of

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36 This gun was technically as good as the famed French 75mm gun, which provided much of the Allied artillery in World War I. Weigley, *History*, 318. The field gun was also supplemented by the M1904 4.7-inch gun, the M1905 3.8-inch howitzer, the 1906 6-inch howitzer, and M1907 4.7-inch howitzer, which as a suite provided a wide range of capabilities. Stebbins, "Indirect Fire: The Challenge and Response in the U.S. Army, 1907-1917," 20.

37 The capability of the M1902 to use “indirect fire”—engaging targets not visible from the gun—was a revolutionary step forward in the use of artillery within the U.S. Army that required far more from officers, who had to integrate all components in a complex system. It was not that individual weapons had grown more difficult. Earlier cannon had required a great deal of expertise. The great change was that the artillery crew was now part of a much greater system of multiple guns firing on the same target, observers, supported commanders, and a more sophisticated logistics structure. This change also required a greatly expanded
engaging distant targets were the organizational problems of how to make such fire tactically useful by massing the efforts of a sufficient number of guns on the proper targets at the right time. This required more sophisticated artillery organizations than had previously been necessary, as the number of guns that could be brought to bear on the enemy was no longer limited by the number of suitable firing positions within visual sight of a target.38 Throughout the nineteenth century, the basis of American artillery organization had been the battery of four to six guns under the command of a captain. Larger organizations were created as needed, but they were temporary affairs without a fixed organization.39 The ability to fire at unseen targets—indirect fire—made the creation of larger units both necessary and desirable, but the determination of the proper size, composition, roles, and methods of command and control for the new battalions and regiments further complicated the task of assimilating the new equipment.

Captain William Lassiter played a significant role in the early years of this process. He was the commander of one of the first batteries to receive the new equipment, a co-author of the Field Artillery Drill Regulations, and a member of the permanent Field Artillery Board responsible for advising the War Department on all array of supporting equipment, such as standardized maps, wire communications, and optics. Nesmith, “Quiet Paradigm Change,” chap 1-2. For a discussion of technological systems see Thomas P. Hughes, Networks of Power: Electrification in Western Society, 1880-1930 (Baltimore: Johns Hopkins University Press, 1983).

38 For instance, in 1864 General Ulysses S. Grant relinquished more than a hundred guns assigned to the Army of the Potomac as the battlefields of Virginia offered few opportunities for the employment of a large number of cannon. Ulysses S. Grant, Personal Memoirs of Ulysses S. Grant (New York: Smithmark, 1994; reprint, Two Volumes in One), 482.

39 During the Civil War, artillery organization was largely left to the generals commanding each army, who would generally assign some batteries to subordinate headquarters while keeping a portion under their direct control through a chief of artillery. Following the war and continuing until Elihu Root’s 1901 Army Reorganization Act, the artillery was organized into regiments. These regiments, however, were only administrative and incapable of operating as a tactical entity. Spaulding, United States Army, 393-394.
branch-specific matters. Following Lassiter’s promotion to major, Chief of Staff J. Franklin Bell personally offered him a detail to the Inspector General’s Office with the intention of Lassiter conducting detailed inspections of the Army’s field artillery units to ascertain their progress in mastering the new equipment and techniques. Bell, Inspector General Ernest A. Garlington, and Colonel Montgomery Macomb, the senior field artillerymen on the War Department General Staff, also probably expected for Lassiter to expose some “dead wood of the field artillery,” although this was not an explicit part of his instructions.40 Throughout 1909—the year after Eames first published *The Rifle in War*—Lassiter visited six different posts and one of the summer maneuver camps, observing the ability of each battery to engage targets with live ammunition. Following these preliminaries, Lassiter would then give a more elaborate problem to the commanders of the larger units that entailed a march of several miles, selection and occupation of firing positions at night, and engaging unseen targets with live ammunition.41

Lassiter’s previous commander had commented favorably on “his reasonable and sane” reports, but the young major found little in his tour to reassure him that American artillerymen had mastered their trade.42 “I have had the opportunity to observe nine out of our twelve battalions,” he wrote to Garlington, but not a single battery “could be relied upon to deliver effective fire; while even if they could be thus relied upon, the chances are that their value would be rendered nugatory, or at least not fully utilized, due to

40 J. Franklin Bell to William Lassiter, 30 December 1907 and 15 January 1908, Lassiter to Bell, 2 January 1908, and Lassiter, “Memoirs,” Vol. 2 (quotation 32), all in box 1, Lassiter Papers, USMA.
41 William Lassiter to Inspector General, 21 June 1909, Box 1, Lassiter Papers, USMA.
42 Thomas H. Barry to Inspector General, 15 March 1909, Box 1, Lassiter Papers, USMA.
ineffective handling from above.”43 He identified the deficiencies as both “technical and tactical.”44 Technically, battery commanders could not adequately apply the principles of indirect fire, officers in general were so unfamiliar with their equipment that they could not identify the causes of mechanical malfunctions, and the communications equipment had not been fully developed or issued in necessary quantities. Tactically, commanders at all levels were “unskilled in posting and employing artillery to meet definite tactical situations.”45 To remedy this situation, Lassiter made a number of specific recommendations for altering equipment, correcting organizational deficiencies, and modifying the existing training regimen. He also recommended the creation of a School of Fire to be closely integrated with the Field Artillery Board. This organization would be capable of conducting the focused experimental work to advance both artillery equipment and technique.46

Aside from these internal technical-organizational problems, the artillery suffered from a more general conceptual problem plaguing the entire Army. According to Lassiter, “The special trouble that is ailing the field artillery is that is has been provided with a new set of guns and equipments but has not been given a clear and

43 William Lassiter to Inspector General, 3 August 1909, Box 1 Lassiter Papers, USMA.

44 William Lassiter to Inspector General, 21 June 1909, Box 1, Lassiter Papers, USMA.

45 Ibid. Lassiter later wrote that he regretted not recognizing the progress made by some units, particularly his former regiment. In hindsight, he thought that his expectations for “complete perfection, all at once,” had been unreasonably high for the majority of artillery officers, who had not had the benefit of his work with the experimental battery and the Field Artillery Board. Nevertheless, this admission was not a retraction of his earlier assessment of the basic inability of the field artillery to effectively use the new techniques, but a realization in hindsight of the magnitude of the difficulties associated with adopting indirect fire. Lassiter, “Memoirs,” II:34.

46 William Lassiter to Inspector General, 21 June 1909, Box 1, Lassiter Papers, USMA. A School of Fire was created at Fort Sill, Oklahoma, in 1911. Coffman, Regulars, 152.
comprehensive idea as to how they are to be used.”47 Although Lassiter was commendably willing to find fault with his own branch, he understood that the solution to this particular problem was beyond the capability of a single arm to develop. “The directing impulse must come from the War Department. . . . [it] must clearly indicate the desired line of progress and must see that this line is followed.”48 This lack of direction had allowed the different branches to work in isolation, leading to the relationship between the artillery and the other arms being “much too weak.” Even if artillerymen mastered their internal problems, they would still suffer from an inadequate integration with the other branches. “Until the different arms acquire the habit of working together, and the higher commanders acquire, by actual experience, the habit of handling all the different arms including artillery,” Lassiter cautioned, “effective combined work is not to be hoped for.”49

Such integration might have been one of the casualties of J. Franklin Bell’s deviation from Arthur Wagner’s original intention for the Army Staff College to operate independently of the Infantry and Cavalry School. While Wagner’s plan might not have produced any better military thought than Bell’s Leavenworth, a school drawing the best

47 William Lassiter to Inspector General, 21 June 1909, Box 1, Lassiter Papers, USMA. A similar problem would beset the fledgling Army Air Services during World War I. In the midst of the turmoil of a crash mobilization for war, the evolving demands of the forces overseas, the problems of production at home, the conceptual difficulty of determining the capabilities and proper uses of such a novel weapon, and the incredibly rapid advance of aircraft technology, which constantly rendered decisions based on old assumptions obsolete, the Army had enormous difficulty in harmonizing the competing demands, as there was no effective guiding vision of how aircraft were to be used. Thus, when faced with the thousands of technical, procurement, training, and organizational decisions necessary to organize such a force, aims that should properly have been secondary concerns, took on an undue importance. I. B. Holley, Ideas and Weapons: Exploitation of the Aerial Weapon by the United States During World War I, a Study in the Relationship of Technological Advance, Military Doctrine, and the Development of Weapons (Washington, D.C.: Office of Air Force History, 1983).

48 Ibid.

49 Ibid.
officers from all arms in representative proportion as Wagner intended, would have been a more conducive environment for solving the problems identified by Lassiter. Indeed, the school’s focus on training future chiefs of staff for brigades and divisions—the tactical levels of command where the different arms were brought together—and the integration of the school into the army’s annual maneuvers would have made it the most likely location for the development of effective combined arms doctrine. This potential went unfulfilled for several reasons. Bell’s insistence on treating the Staff College as an auxiliary to the Infantry and Cavalry School and the artillery’s indifference to general education led to the artillery being underrepresented. The teaching methods of Eben Swift, which ended tactical exercises with the first contact of the opposing forces’ main elements, cut off discussion at that point in the battle when cooperation between the artillery and infantry was most difficult and critical. Most damaging, however, was the view of war taught by John F. Morrison and espoused by Crawford and Eames that denied the usefulness of the artillery. This doctrine offered little chance for constructive dialogue between the two arms. The costs of this would soon become apparent. In early 1917, Lassiter was the American attaché in London. On a visit to the front, he recorded in his diary a discussion with the artillery commander of the British 51st Division, who put the “utmost stress on liaison + camaraderie between artillery + infantry.” Lassiter was deeply impressed with the elaborate organizational and technical methods that the British had developed to achieve this cooperation, which was far ahead of the American capacity. “Lessons for our people: both our young and our older officers must get to know their game vastly better than they know it now.”

Military progressives had vowed to make such regrets on the verge of war a thing of the past.

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50 Lassiter, Diary entry 2 February 1917, Vol 10, Lassiter Papers, USMA.
The General Staff had clear responsibility to ensure that all components of the professional education system worked in harmony, but in practice had never been able to do so. Wagner had stressed this obligation in his 1904 education directive, but as already discussed, Bell repeatedly ignored such directives and deliberately worked to gain greater autonomy from the War Department. Once he had been promoted to chief of staff, Bell’s perspective changed and he made some efforts to reverse his own work; in doing so, he freely, if somewhat sheepishly admitted, that he was reversing trends that he had begun. Yet even in exerting central control, Bell undermined the General Staff. His detailed knowledge of the school and definite preferences led him to interfere directly in even minor matters. Eventually, he completely excluded the General Staff by having all actions concerning Fort Leavenworth that came to the War Department referred to him personally.

This practice did nothing to develop the General Staff’s capability to oversee professional education, but the responsible section might not have been any more active, even if allowed. The ubiquitous Eben Swift, who was assigned to that part of the General Staff, noted in his memoirs that despite a memorandum signed by the President of the Army War College in June 1909 directing the section to “take charge of all matters

51 J. Franklin Bell to Charles B. Hall, 21 August 1906, File 4051, Entry 101, RG 393, NARA I.

52 After learning that Fort Leavenworth had adopted a new textbook without War Department approval, Bell reminded the school faculty that they had to seek approval before making curricular changes. “Tho I recognize that the school is still in its formative period, and anticipate that many changes must necessarily take place in textbooks and methods of instruction, it cannot be denied that constant and continual change in textbooks is pernicious in any educational system. . . . I feel the freer in writing upon this subject because I recognize that this informal method of adopting textbooks arose under my own administration as Commandant of the schools for I recall that we changed several textbooks, more or less by development or absorption, and so far as I know no authority was ever obtained from the War Department for doing so.” “Proceedings of the Academic Board of the Infantry and Cavalry School,” 2 October 1907, Reel 254, Pogue Microfilm, GCM.

53 J. Franklin Bell to Eben Swift, 17 January 1908, Box 2, Swift Papers, USMA.
pertaining to instruction in the Army War College,” nothing of the sort was ever attempted. Swift was very critical of the lack of General Staff oversight of both the War College and Fort Leavenworth. “The result in the case of the latter was bad. The two institutions were in a position of rivalry and not of coordination.”54 Thus, the General Staff’s inability to control its subordinate institutions precluded it from forcing the schools to play their proper role in developing doctrine. But one final method of providing the required direction to integrate all the arms into a sound tactical doctrine still existed—the Field Service Regulations.

In 1905, the first American Field Service Regulations (FSR) was published. The 217-page manual was the first true doctrine produced by the U.S. Army, as it sought to integrate tactical principles that would govern all of the different arms with the organization of units into a single, coherent whole. The 1905 FSR also set forth guidelines for reconnaissance, security, command, and logistics. The separate drill regulations of the different arms were supposed to fit within the framework established by the FSR, which would be the Army’s ultimate expression of how it would fight. Although a common feature of European armies, the Americans previously had possessed no equivalent to the FSR.55 Not only were drill regulations limited to a single arm unable to coordinate operations between the arms, but in the nineteenth century they were also limited to narrow discussions of methods for a commander to control his unit, giving little guidance as to how that unit should be employed in relation to the enemy, other friendly forces, and the terrain—tactics as it is thought of today. Emory

54 Eben Swift, “The Army War College: Course of 1908-1909,” n.d., Box 3, Swift Papers, USMA.

55 The 1892 manual Troops in Campaign offered guidelines for conducting operations in the field, but was not meant as a definitive document that would supplement rather than supersede the drill regulations.
Upton realized that this vital component needed official expression. “You are well aware that thus far in our history tactics in all arms of the service have been simply a collection of rules for passing from one formation to another,” he wrote to William T. Sherman. “How to fight has been left to the actual experience of war.” According to Upton, tactics in all arms of the service have been simply a collection of rules for passing from one formation to another, and “How to fight has been left to the actual experience of war.”

Accordingly, Upton planned to include what he termed as “applied tactics” in his unfinished revision of the tactics manual. In the decades after Upton’s suicide, regulations confined themselves to the limited scope of earlier versions, leaving “applied tactics” to textbooks.

As head of the General Staff section responsible for overseeing the preparation of drill regulations, Arthur L. Wagner was successful in maintaining this split in the 1904 IDR, but this would be the last time that the War Department would exhibit such restraint. The following year, the 1905 FSR included tactical principles that had previously been reserved for semi-official works like Wagner’s Organization and Tactics. This was a crossing of the Rubicon for American military professionalism, as it removed a significant component of the professional craft from the discretion of individuals to the official purview. The small but earnest debate surrounding this decision illustrates the degree to which even the most forward-thinking military progressives did not fully understand the implications of their own works.

The ailing Wagner had brought one of his protégés, Captain Joseph T. Dickman, from Fort Leavenworth to write the new FSR. A committee chaired by Wagner designed the organizational structure for an infantry division, and then Dickman prepared the rest.

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56 Emory Upton to William T. Sherman, 30 January 1880, quoted in Fitzpatrick, "Emory Upton," 401-402.
57 Ibid., 401-405.
58 See previous chapter for a discussion of the 1904 IDR.
of the manual, which was based on the German *Field Service Regulations* altered to fit the new American organization.\(^5^9\) Following the German model, Dickman included a discussion of tactical principles. This placed Wagner in an awkward position. He opposed this addition to the regulations on the grounds that it would “stifle tactical endeavor on the part of our officers.”\(^6^0\) According to Wagner, if such matters were left in textbooks, which despite their official recognition by the War Department were not considered legally binding, officers could continue to develop and use their own tactical ideas. Thus, Wagner was able to truthfully argue that including tactical principles in the *FSR* might require an officer to conform to tactics that were “contrary to his own judgment.”\(^6^1\) Yet more was at stake than intellectual freedom, as such an expansion of the regulations also potentially threatened Wagner’s royalties from his textbooks.

Whether motivated by a commitment to the nineteenth-century professional ethos that treasured a commander’s autonomy or simple self interest, Wagner appealed to Bell to intercede so that the new manual would contain only “the briefest mention of essential principles.”\(^6^2\) At the time, Bell was still the commandant at Fort Leavenworth, and thus had no official role in the matter, but he obliged his friend and wrote to Dickman. “I am very much in doubt as to the advisability of embodying tactics in any manual.” Bell echoed Wagner’s letter to him in justifying this view. “Tactics are too liable to be modified by the rapid progress and advancement in munitions and implements of war, and if tactical formations and movements are to be prescribed by the


\(^{60}\) Arthur L. Wagner to J. Franklin Bell, 28 September 1904, File 3790, Entry 101, RG 393, NARA I.

\(^{61}\) Ibid.

\(^{62}\) Arthur L. Wagner to J. Franklin Bell, 28 September 1904, File 3790, Entry 101, RG 393, NARA I.
hard and fast rules of manuals, it would discourage discussion and originality in tactical manuals.”63 Dickman, however, was not to be deterred. He pointed out that the General Staff would almost certainly be more able to stay abreast and react to changes in equipment and conditions than an individual operating outside of official channels.64 Wagner’s death in the same year as the publication of the 1905 FSR was thus not only symbolic of the passing of the older generation of military progressives, but also removed a powerful advocate of the old system of individualist, and in some ways amateurish, military theory. Despite the important implications of this expansion of the War Department’s role in defining professional standards, there was actually little in the FSR’s discussion of tactics that Wagner would have found objectionable. Wagner had hand selected Dickman, who despite his headstrong views on the scope of doctrine, was still of the same tactical school as his mentor. Furthermore, the scope of the project and limited time allowed only a brief discussion of combat in general terms.

The 1905 FSR was intended primarily as an aid to mobilization planning rather than an expression of official tactical thought. In 1902, a year before the creation of the General Staff, Root asked the War College Board to compute the amount of arms, equipment, and supplies that would be necessary to equip expeditionary forces of anywhere from 25,000 to 250,000 soldiers.65 The members of the board soon realized that they could make no definitive reply until the Army established standard tables of organization for units larger than regiments (approximately 1,000 soldiers). By early

63 J. Franklin Bell to Joseph T. Dickman, 11 November 1904, File 1168, Entry 101, RG 393, NARA I.
64 Joseph T. Dickman to J. Franklin Bell, 17 November 1904, File 1168, Entry 101, RG 393, NARA I.
65 Elihu Root to War College Board, 18 October 1902, File AWC 300, Entry 288, RG 165, NARA II.
1903, the War College Board provided Root with a remarkably detailed answer to his question; their report identified the necessary quantities of everything from artillery pieces to uniforms for sergeants major, even differentiating between normal and khaki.\footnote{War College Board to Elihu Root, 17 March 1903, File AWC 300, Entry 288, RG 165, NARA II.} Despite the precision of the response, there was clearly a need for a more systematic attempt to merge tactics and organization. It was for this reason that Wagner’s committee set the table of organization before turning the rest of the manual over to Dickman.\footnote{Joseph T. Dickman to J. Franklin Bell, 16 September 1904, File 1168, Entry 101, RG 393, NARA I; Raines, “J. Franklin Bell,” 471.} Theoretically the first step should have been to devise an \textit{a priori} understanding of modern warfare from which both organization and tactics could be derived, but in the rush of creating new documents, institutions, and forms there was no time for such niceties. Thus, the 1905 \textit{FSR} placed the organizational cart in front of the tactical horse. Indicative of its perceived importance, most of the general officers did not even bother to reply to Dickman’s request for comments on a draft circulated late in 1904.\footnote{Joseph T. Dickman to J. Franklin Bell, 2 November 1904, File 1168, Entry 101, RG 393, NARA I.} One of those who did take an interest was Bell, who praised Dickman for the achievement, but somewhat ominously noted, “There is no question but that it is impossible to produce a book so comprehensive, in its first edition, which will not require revision after experience in its use.”\footnote{J. Franklin Bell to Joseph T. Dickman, 18 May 1905, File 1168, Entry 101, RG 393, NARA I.} Even as he congratulated Dickman on the 1905 \textit{FSR}, Bell might have been contemplating the project that would eventually replace Dickman’s work.

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\footnote{War College Board to Elihu Root, 17 March 1903, File AWC 300, Entry 288, RG 165, NARA II.}
\footnote{Joseph T. Dickman to J. Franklin Bell, 16 September 1904, File 1168, Entry 101, RG 393, NARA I; Raines, “J. Franklin Bell,” 471.}
\footnote{Joseph T. Dickman to J. Franklin Bell, 2 November 1904, File 1168, Entry 101, RG 393, NARA I.}
\footnote{J. Franklin Bell to Joseph T. Dickman, 18 May 1905, File 1168, Entry 101, RG 393, NARA I.}
Bell entrusted this task to Major Daniel H. Boughton. The bloody frontal assaults in Cuba, the Philippines, and China suggest that the average American officer at the close of the twentieth century lacked tactical finesse, but was brave and ready to lead an assault when the time came. Boughton—a West Point classmate of both Morrison and Dickman—could be used to support this characterization.70 Yet his case would also disprove the notion that the mass of officers were dull, drunk, and lazy; intelligent and energetic officers were not necessarily military progressives in the mold of Wagner, Carter, or Bliss. From the very beginning of his career, Boughton demonstrated independence when pursuing personal goals. His final standing of ninth in a class of fifty-three was several “files” too low for commissioning into the corps of engineers, but would have easily qualified him for the Artillery Corps. Every other classmate who was eligible for the artillery chose the branch, perhaps due to the greater prestige of the arm or perhaps due to the opportunity for better postings to coastal cities such as New York, Newport, or Baltimore. Yet Boughton opted for service with the Third Cavalry instead, believing that it offered better opportunities for promotion. He later stated that if he had not received that assignment, he would have selected any of the artillery regiments over the remaining cavalry regiments.71 His willingness to break convention had not been due to any particular dedication to the mounted branch.

Boughton then spent the majority of the next seventeen years avoiding, usually successfully, duty with his regiment. Boughton had been stationed with the Third Cavalry in Wyoming and the Arizona Territory for nearly three years before making his

70 For a synopsis of Boughton’s career, see Appendix.

71 Register of Graduates, 4-62; Undated clipping on 1908 bill to readjust rank, Boughton Cullum File, USMA.
first bid for detached duty—assignment as a military tactics instructor at a civilian college.\textsuperscript{72} The request was denied, but several months later Boughton was detailed as a student to the Infantry and Cavalry School in 1885; two years later he graduated in the top five of his class of thirty-two.\textsuperscript{73} Even before leaving Fort Leavenworth, Boughton made another request for college duty, stating in his application that he wished to study law in addition to his instructional duties. Once again the War Department denied the request, but two years later Boughton tried again with similar results.\textsuperscript{74} Despite these repeated failures, Boughton was with his regiment in Texas for only a little more than a year after graduation before his assignment to the cavalry depot near St. Louis for another two years of detached duty. From that assignment he went directly to another detached detail, a four-year assignment as a quartermaster at West Point. Thus, in his first thirteen years as a cavalryman, Boughton had spent less than five years actually with his regiment, a fact pointed out by his regimental commander, Colonel Anson L. Mills, in a letter to the Army’s adjutant general. Boughton was within several years of promotion, and Mills wanted Boughton’s assignment cut short so that he might “enjoy the advantages of sufficient contact with enlisted men to make him an efficient captain.”\textsuperscript{75} Despite Mills’s sardonic request, Boughton remained at West Point until 1894 as

\textsuperscript{72} Daniel H. Boughton to Adjutant General, 7 February 1885, 1258-ACP-1885, RG 94, NARA I, [hereafter “Boughton ACP”].

\textsuperscript{73} Staff, Faculty, and Graduates, 22.

\textsuperscript{74} Daniel H. Boughton to Adjutant General, 5 February 1886 and 14 June 1888, Boughton ACP.

\textsuperscript{75} Anson L. Mills to Adjutant General, 19 May 1893, Boughton ACP.
scheduled. Before returning to his regiment, Boughton requested several months leave to tour Europe. The request was denied.\textsuperscript{76}

Duty at West Point was generally regarded as easy duty—a “soft snap” as described by another instructor\textsuperscript{77}—but Boughton did not pass the time in idleness. Initially assigned to the Academy as an assistant quartermaster, he was soon transferred to the Department of Law and History. A man of “unbounded energy,” Boughton travelled fifty miles by rail to New York so that he could take law classes in the morning, then returned to the Academy by the afternoon to teach history. In this way, he was finally able to pursue his legal studies and eventually gained admittance to the New York bar.\textsuperscript{78} Following this hectic routine, Boughton returned to his unit, then stationed at Fort Reno, Indian Territory. Following promotion to captain in 1896, he was given command of a cavalry troop at Jefferson Barracks, near St. Louis. This was fortunate for Boughton, as most cavalry posts were far too remote to allow him to continue his legal studies. In 1897, he completed his law degree at Washington College.\textsuperscript{79}

\textsuperscript{76} Daniel H. Boughton to Adjutant General and endorsements, 26 March 1896, Boughton ACP.

\textsuperscript{77} Hagood, "Down the Big Road," 92-93.

\textsuperscript{78} Charles D. Rhodes, Boughton obituary in \textit{Annual Report of the Association of Graduates, 1915}, Boughton Cullum File, USMA.

\textsuperscript{79} Ibid. and “Succinct Account of Services” in Boughton ACP.
Despite his intelligence, energy, and work ethic, Boughton had earned only a limited and somewhat ambiguous professional reputation. Because he had not written for the professional journals, Boughton had no reputation among the military intelligentsia—like Wagner or Bliss. His commanders’ evaluations of him were not as laudative as one might expect for such an industrious officer. In 1897, Major H. W. Wessell rated Boughton as only “good” (as opposed to the common “excellent”) on his efficiency report. The summary was similarly lukewarm: “Can be trusted with important duties. Is qualified for his position. No peculiar fitness.”\(^8^0\) Two years earlier, his commander at Fort Reno had been slightly more enthusiastic: Colonel E.P. Pearson noted that the lieutenant was “studious, industrious, of good habits and of much practical good sense.” Yet in a revealing comment, Pearson added, “I have reason to know that he has a very good knowledge of the law, his services being often in demand by those wanting legal assistance.”\(^8^1\) Boughton’s knowledge of the law, not military theory, was his defining characteristic. Despite his usefulness as a legal expert in a remote post, the limits of such skills were evident in Pearson’s rating of Boughton as only a “good” officer.\(^8^2\)

Just as the Spanish-American War was a turning point for the Army, it was also a watershed for Boughton’s career. His regiment was among those with General William R. Shafter’s army in Cuba, where Boughton led his troop of cavalrymen up the slopes at San Juan Hill and in the trenches around Santiago. Both his brigade and division

\(^8^0\) H.W. Wessell, Commander’s Report for 1897, Boughton ACP. Boughton’s first efficiency report, written in 1890 by A.G. Brackett, was very similar. Both reports in “Efficiency Record,” Boughton ACP.

\(^8^1\) E.P. Pearson, Commander’s Report for 1895, in ibid.

\(^8^2\) Ibid.
commanders recommended him for brevet promotion to major for gallantry, and Lieutenant Colonel Theodore Roosevelt was also much impressed by the “gallantry and soldierly conduct of Capt. D.H. Boughton,” who was one of the “towers of strength to the line” at San Juan Hill.83 By September 1898, Boughton had returned with his regiment to the United States a hero.84 The following year, he added to his reputation for personal courage by walking unarmed into a building at Fort Myers from which a “crazed” soldier had briefly terrorized the post with his service carbine. The New York Herald noted Boughton’s “coolness” during the affair.85 Boughton had repeatedly demonstrated his physical courage in addition to his vigor when pursuing a personal goal.

In 1900, assignment to the Philippines allowed Boughton to display professional competence of an altogether different sort. In the first few months in Luzon, Boughton commanded his troops in several fights, but the following summer he was made the adjutant general of the First District, Department of Northern Luzon, which was commanded by Brigadier General J. Franklin Bell.86 When Bell was reassigned to the Third Separate Brigade responsible for the troublesome province of Batangas, he brought Boughton with him. The captain’s legal background, energy, and competence made him uniquely well qualified for his new role as Brigade Provost Marshal, Commissary of General Prisoners, Superintendent of Provisional Courts, and chief of


84 Boughton was feted along with Admiral William Scott Schley by the Empire State Society of the Sons of the American Revolution at a posh New York hotel shortly after the war. His father in law, General Thomas Wilson, was a prominent member of the society and was likely the reason for the unlikely pairing of an army captain with a navy rear admiral. “War Heroes Their Guests,” New York Times, 15 January 1899.


86 J. Franklin Bell, Commander’s Report for 1902, “Efficiency Record,” Boughton ACP.
Civil Affairs. These were critical functions in Bell’s campaign against the forces of Miguel Malvar, one of the few remaining guerilla commanders in the islands. As the campaign began, Bell approvingly reported to his superior on Boughton’s work in Bauan—one of the first villages to be occupied. “This was the first town on which Captain Boughton laid his heavy hand as brigade provost-marshal and provost court. We expect to have every town in these provinces in the same attitude shortly.” Partly due to Boughton’s talents in gathering intelligence and asserting forceful control, Bell’s campaign soon succeeded in isolating Malvar’s band from the towns and villages. At that point, Boughton operated as “Bell’s representative” in orchestrating the forces hunting down the beleaguered guerillas, in effect commanding a force of two thousand soldiers. Following Malvar’s surrender, Boughton was given the task of administering the War Emergency Rice Fund, a complex scheme of buying Chinese rice and distributing it throughout the war-torn and famine-ridden province. Just as Bell was preparing to depart for Fort Leavenworth in 1902, the War Department called for Boughton’s return to his regiment. Bell immediately wrote directly to Adjutant General Henry C. Corbin to have the order rescinded: “Aside from myself, Captain Boughton is the only man I know who has a sufficient knowledge of the necessities of the situation to be able to tide the people over until their next crop.” This was particularly important at a time when both

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87 Ibid.


89 Rhodes, Obituary, Boughton Cullum File, USMA.

90 “Efficiency Record,” Boughton ACP; J. Franklin Bell to Henry C. Corbin, 18 November 1902, Boughton ACP.
Bell and Major General Adna R. Chaffee, the overall commander in the Philippines, were receiving great criticism from the American press for the methods.\(^91\) Corbin granted the request, and Boughton remained in charge of the rice fund until the following summer.\(^92\)

Boughton had served Bell capably in diverse ways, and in the process earned the general’s admiration. Bell described Boughton as “one of the ablest and most valuable officers in the service. I know of no other better equipped to perform any kind of duty that can be assigned to him than he is.” He also arranged for Boughton to come to Fort Leavenworth as the head of the Department of Law, a position for which the captain was certainly qualified. Yet soon thereafter, events would lead Boughton into other positions for which his previous experiences had not prepared him quite so well. These tasks would put Bell’s judgment that Boughton was “invariably successful in anything he undertakes” to the test.\(^93\)

Following the injury of Major Charles H. Barth in the fall of 1904, the Department of Military Art was temporarily without a head. Major Eben Swift, recently promoted to assistant commandant, performed both jobs for the remainder of the fall term, but this temporary solution was untenable for a sustained period, so Boughton was transferred to head the tactics department. Swift later claimed that Boughton was “new

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\(^91\) Bell was sensitive to the charges that his tactics had led to the outbreak of rinderpest (a bovine infectious disease) which was largely to blame for the famine. “Though this hunger could not justly have been attributed to the reconcentration policy it would have been so attributed injuriously. Therefore, wishing to vindicate the wisdom of this policy, I am interested in seeing that no hunger shall come to these people. . . . Then, not even a vicious fool could possibly attribute any hunger that might ensue to the recontration [sic] policy.” Ibid.

\(^92\) Henry C. Corbin to J. Franklin Bell, 26 December 1902, and “Efficiency Record,” both in Boughton ACP.

\(^93\) Ibid.
to the subject” of tactics, and required significant help from Swift in his new duties.94 Bell’s faith in Boughton remained unbounded, and he soon entrusted revision of the Field Service Regulations to the recently-promoted Major Boughton. This massive undertaking subsumed Boughton’s other duties at Fort Leavenworth, and he was finally transferred to the General Staff in 1908 to complete the project.95

In contrast to the 1905 FSR, which was largely a result of the General Staff’s need for the tables of organization necessary for mobilization planning, the 1910 FSR was a product of the needs of professional military education, particularly the Army Service Schools. As early as 1897, Swift had noted that the lack of a definitive field service manual made it difficult to conduct map exercises at the school, because the necessary information was found in a variety of sources: Wagner’s textbooks, the drill regulations, and the manual Troops in Campaign.96 Not only was this unwieldy, but it also created the potential for contradictions between the different sources on important, but contested, points. What was a mere annoyance in the 1890s became intolerable during Bell’s time as commandant due to his great emphasis on absolute fairness and “scientific marking.” Without a definitive source, students could appeal poor grades by claiming justification in any one of the several official texts used by the school.97 Such relativism

94 Eben Swift, “Fort Leavenworth, 1904-06. Infantry and Cavalry School and Staff College,” n.d., Box 3, Swift Papers, USMA. Swift also was likely referring to Boughton in his memoirs when he criticized the practice of assigning senior tactics instructors who “knew nothing of what had gone before.” Swift, “The Army War College, Course of 1909-10,” n.d., Box 3, Swift Papers, USMA.

95 “Succinct Account of Services,” Boughton ACP; William W. Wotherspoon to J. Franklin Bell, 16 January 1908, AWC 1283, Entry 292, RG 165; War Department Special Order Number 122, 23 May 1908.

96 Swift, “Fort Agawam,” 240.

97 Raines, “J. Franklin Bell,” 470-471. One example of such confusion can be found in the school correspondence, when First Lieutenant John B. Sanford requested a reevaluation of a test, claiming that the lecture printed by the school contradicted the relevant passage from the IDR. In a telling reply, Swift rejected Sanford’s claim in part by citing Wagner’s Organization and Tactics, which not only introduced yet
threatened the basic assumption of absolute fairness that governed Bell’s administration. To fill this need, Bell initiated an effort independent of Dickman and the General Staff, even before the 1905 FSR was published. The result was the 1910 FSR—described by Bell as the “military bible.”

Boughton stayed at Fort Leavenworth and continued to work on the project after Bell was promoted to chief of staff in 1906. For the first year, he continued as the head of the Department of Military Art with Morrison spending a year as his understudy. When Bell called for Swift to revamp the Army War College curriculum, Boughton was promoted to assistant commandant and Morrison became the department head. A year later the familiar pattern of migration from Kansas to the capital continued, when Boughton was brought to the General Staff to finish the FSR there. Within the General Staff the Second Section was charged with overseeing training, professional education, and doctrine. In October 1907, Lieutenant Colonel Robert K. Evans replaced the recently promoted William W. Wotherspoon as the ranking field grade officer in the

another potential source, but indicated that these texts were regarded as even superseding the official regulations. Several years later while John F. Morrison was still serving as an assistant instructor, his response to a similar student complaint suggests that Morrison was somewhat skeptical of the whole idea of Bell’s “close marking”: “To criticize a tactical problem is much easier than to give a value in tenths to the errors. No two people will probably represent an error in the same number of hundredths, these points appeal differently to different persons, our own pet sins do not look as bad as our neighbors.” Sanford to Secretary, Infantry and Cavalry School, 26 December 1904, and Swift endorsement, 28 December 1904, both in file 3954, and Morrison endorsement to William D. Chitty to Secretary, 13 November 1907, file 5003, all in entry 101, RG 393, NARA I.

98 J. Franklin Bell to Leonard Wood, 1 January 1914, quoted in Raines, “J. Franklin Bell”, 470.

99 In addition to Boughton, Swift, and Bell, Arthur Wagner had made the same move twice (once in 1896 and then again in 1904), Joseph T. Dickman in 1903, and William W. Wotherspoon in 1904.

100 At the time of Evans’s appointment, the staff section was actually known as the Third Division, but in May 1908 it was renamed the Second Section as part of J. Franklin Bell’s reorganization of the General Staff. Under the next chief of staff, Leonard Wood, yet another reorganization occurred, in which the Second Section was redesignated the War College Division. Ball, Responsible Command, 108, 128.
Second Section. Although he would be replaced shortly before the publication of the 1910 FSR, Evans would be Boughton’s immediate supervisor for most of the time that the manual was in preparation by the General Staff.

In background, Evans had much in common with other military progressives. As a cadet in the 1870s, he too had been introduced to the military profession by Upton. Less auspiciously, Evans was one of only three members of the class of 1875 who graduated with a lower class standing than Arthur Wagner. Commissioned in the infantry, Evans had served in the standard assignments—the frontier, Cuba, and the Philippines—but he had also been the military attaché in Berlin during the 1890s and taught in Wagner’s department at the Infantry and Cavalry School. Evans also wrote several pieces for the JMSI, and Eben Swift had consulted Evans when developing the rules for his American version of Kriegspiel. Thus, Evans was both professionally and personally connected with the military progressive circle of Wagner, Swift, and Carl Reichmann.

Despite these associations, Evans’s tactical views were much closer to Morrison’s than Wagner’s. In 1909, Evans delivered a lecture entitled “Infantry Fire in Battle” to the Army War College that drew on many of the same sources cited by Eames in The Rifle in War. Indeed, the two works were so similar as to suggest that Evans based much of

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102 For a synopsis of Evans’s career, see Appendix.


his technical discussion on Eames’s pamphlet of the previous year. Yet in contrast to the vague exhortations for greater discipline and “grit” of Eames, Evans offered a number of specific, reasonable recommendations. Somewhat surprising in view of his infantry-centric tactics, his most ambitious suggestion was the construction of several large ranges capable of realistic live-fire training combing the infantry and artillery in order to develop methods for better coordination. As might be expected of a senior general staff officer, the plan included detailed suggestions at to which existing installations might be most suitable, and methods for bidding on privately-owned land if that became necessary. The lecture received favorable attention at the highest levels; Assistant Secretary of War Robert Shaw Oliver directed Bell to disseminate it throughout the Army. Bell did so through the novel expedient of seeking the nearly simultaneous publication of the article in a number of journals and periodicals. “Infantry Fire in Battle” was published in the late spring of 1909 by three different publications, including the *Infantry Journal*.

The publication of Evans’s lecture happened to coincide with Major Lassiter’s inspection of field artillery units. Working independently, both Evans and Lassiter had concluded that the infantry and artillery were incapable of effective coordination. They also offered very similar solutions based on realistic training specifically designed to develop the numerous details of technique, equipment, and organization necessary for such cooperation. This congruence was all the more notable as the two officers came at

105 Ibid., 847-850.

106 Robert Shaw Oliver to J. Franklin Bell, 10 March 1909, and Bell to William W. Wotherspoon, 13 March 1909, both in Army War College File 1506, Entry 292, RG 165, NARA II.

107 The article also appeared in *Arms and the Man* in April and *National Guard Magazine* in May.
the problem from very different directions. Evans subscribed to a vision of warfare that did not emphasize the importance of artillery, while Lassiter was primarily concerned with the technical ability of artillerymen to use their equipment. But Lassiter realized that effective combined arms integration required more than just the practical details of coordination, but also an overarching concept to guide the efforts at lower levels. The FSR was supposed to articulate such a vision for the entire army.

Boughton would be the officer primarily responsible for this effort, with Evans providing input during the most critical phase of its preparation. While still at Fort Leavenworth, Boughton began by soliciting critiques, comments, and suggestions for improvement on the 1905 FSR from the Staff College students and the faculty of the school’s six academic departments. This led to the incorporation of passages from instructional materials already in use at the school. The second article (each article was equivalent to a chapter) was drawn almost entirely from a pamphlet on orders written by Swift, which also furnished portions of two other articles.108 Boughton also sought

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108 Ewing E. Booth to Department Heads, 26 August 1907, File 4564, Entry 101, RG 393, NARA I.
comments from officers throughout the army on the section governing field
maneuvers.109 Because of this early work, the president of the Army War College could
report to Bell that Boughton had “made very considerable progress” even before his
transfer to the General Staff.110

Once in Washington, the circle of contributors became even wider, so that
hundreds of officers had been consulted before the project was finished. Generally, the
preparation of each of the eleven articles followed the same pattern. Boughton would
consult with representatives of relevant staff departments; for instance, the Surgeon
General’s Office was consulted on the article on medical and sanitary operations. The
draft then went to the other members of the Second Section before approval by the
president of the Army War College and eventually Bell. Yet the chief of staff’s approval
was not the final step. The articles were then sent to Fort Leavenworth for further
comment before they were reviewed by the general officers of the army. Boughton then
conducted one final edit of the article before its final inclusion in the manual.111

The proper scope and tone of the manual was a contentious issue that drew
considerable comment, particularly from other members of the General Staff,
throughout the development of the 1910 FSR. It seems to have never really been
resolved so much as the publication of the manual ended the matter, its final form

109 This article was later deleted from the FSR and published as a separate manual. Ewing E. Booth to
Adjutants General, Pine Plains Camp of Instruction, 26 June 1908, and Fort Riley Camp of Instruction, 11
August 1908, File 5079, and Boughton to Booth, 7 October 1908, 3 and 11 February, 13 March, 11 December
1909 and Booth to Boughton, 1 October 1908, 2 and 11 January, 2 February, 17 and 28 April, 13 November,
and 16 December 1909, File 1215, Entry 101, RG 393, NARA I.

110 William W. Wotherspoon to J. Franklin Bell, 16 January 1908, File AWC 1283, Entry 292, RG 165, NARA
II.

111 Ibid. William W. Wotherspoon to “Members of War College Division,” 9 October 1908, and D.A.
Frederick, “Revision of the Field Service Regulations,” 21 February 1910, File AWC 1283, Entry 292, RG 165,
NARA II.
reflecting an aggregate of hundreds of minor compromises. These battles reveal a General Staff struggling to determine the practical methods necessary to achieve the general tenets of military progressivism. In much the same manner as the different notions of professionalism that separated military progressives bedeviled the development of a coherent education system, competing notions of what doctrine should be and the nature of modern war plagued the 1910 *FSR*.

Even Bell and Boughton differed slightly on what consideration was paramount. Boughton’s initial instructions from Bell were to keep the manual at about the same size as the 1905 edition.\(^{112}\) Boughton strove for simplicity in the manual; he was concerned that warfare had grown so complex “that it will only be a short time until our officers have more to learn than they can possibly study.”\(^{113}\) Bell’s desire for brevity and Boughton’s for simplicity created a constant tension between conciseness and clarity that was reflected in the comments from the other general staff officers. In his review of the article pertaining to orders, Major C.J. Bailey commented that “this revision is too voluminous.” In contrast to Boughton’s understanding of the manual as a starting point for study, Bailey argued that “a military education should be assumed in each officer, even for the volunteers, to the extent that he can understand and apply general military principles.”\(^{114}\) Due to the standardized system of education and promotion examinations, the War Department could expect with far greater precision than previously possible the amount and nature of professional knowledge that officers of any

\(^{112}\) Ibid.

\(^{113}\) Daniel H. Boughton to William W. Wotherspoon, 27 May 1908, File AWC 1283, Entry 292, RG 165, NARA II.

\(^{114}\) C.J. Bailey to William W. Wotherspoon, 22 April 1908, File AWC 1283, Entry 292, RG 165, NARA II.
particular grade might possess, but Bailey’s comment touched on a difficult issue. Was doctrine intended for the peacetime army of regulars or the wartime army made up of volunteers? Upton, Root, and Carter had all repeatedly asserted that the purpose of an army was to prepare for war, and the American reliance on volunteers during war required that doctrine be accessible to them. Yet translating this principle into useful form required an accurate assessment of the proficiency of both the regular officer corps and the wartime volunteer officers—a group of indeterminate size, nature, and background. The difficulty of this reckoning was evident in the diverging opinions about what should be included in the FSR. Boughton wrote for regulars who he assumed to have less knowledge than the average volunteer officer, in Bailey’s estimation.

Further complicating matters was the last gasp of nineteenth-century professional ethos that preferred to leave such questions almost entirely to the discretion of individual officers. Representing this view, one member of the Second Section criticized a draft of the FSR for including too much that was of “an explanatory, apologetic, or advisory character.” Instead, the unidentified officer argued, regulations should have only statements that were “mandatory in character.” This was much the same argument that Wagner had made about the 1905 FSR and, in fact, the reviewer cited Wagner’s opinions on doctrine and advocated a return to the limited scope of the 1904 IDR. At the same time, the president of the Army War College—Brigadier General William W. Wotherspoon—chastised Boughton for being too specific in his

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115 “A Review of Field Orders and the Service of Information,” n.d. [April or May 1908], File AWC 1283, Entry 292, RG 165, NARA II. This document does not appear to have been submitted anonymously, but as a working document with the authorship presumably known to Boughton and other members of the staff section. Eben Swift was likely the author of this memorandum.

116 Ibid.
article on orders. Wotherspoon thought that the manual did not allow enough flexibility; he suspected that Bell’s original intent for the manual to provide a definitive source for the exact grading at Fort Leavenworth made it unnecessarily rigid.117

This barrage of conflicting opinions about the proper scope, tone, and purpose wore away at the FSR; the demands for brevity, simplicity, and professional discretion could all be accommodated only through the reduction of the discussion to broad generalities. The whittling away of substance was reinforced by the practice of waiting until each article was nearly completed in draft before seeking comments. By that point, only a fraction of the recommendations could actually be incorporated into the manual. Within the dozens of pages of comments provided by Boughton’s comrades in the Second Section, there were few suggestions that could be easily incorporated. Instead, comments tended to be either so broad as to alter the character of the article in question, or called for deleting elements that the reviewer found objectionable from the draft.118 Although many recommendations were simply ignored, consultations as a whole tended to reduce rather than build.119

Because of this continual reduction of new elements, a large portion of the final manual was drawn from the 1905 edition. Much of the remainder was taken from Fort

117 William W. Wotherspoon to Daniel H. Boughton, 8 May 1908, File AWC 1283, Entry 292, RG 165, NARA II.

118 Over two hundred pages of revisions, suggestions, and proofs produced by the Second Section survive in File AWC 1283, Entry 292, RG 165, NARA II. The students and faculty of the Army Service Schools provided far more specific suggestions, often referring to specific pages and lines, totaling over 50 pages of typed notes. They are contained in File 1607, Entry 101, RG 393, NARA I.

119 An example of this tendency was the objection made by both Evans and Captain Fox Conner to the inclusion of “flying machines” as a means of carrying messages. Evans thought that the passage “might be considered as touching on the province of prophecy, and would certainly subject the manual to ridicule.” Evans, “Field Orders and the Service of Information,” 16 April 1908, and Conner to William W. Wotherspoon, 17 April 1908, both in file AWC 1283, Entry 292, RG 165, NARA II.
Leavenworth publications and some of the more useful comments. In fact, very little of the 1910 FSR cannot be traced to other documents, suggesting that Boughton functioned more as a compiler than an author. The internal correspondence of the General Staff provides evidence of only two instances when Boughton played an active role in shaping the content of the manual. Both were relatively minor questions of terminology:

Boughton preferred the terms *advance cavalry* and *outguard* rather than *vanguard* and *picket*. The correspondence concerning these two minor details reveals something of Boughton’s thinking, which seems to have been largely confined to matters of detail.120

More significantly, it also indicates how little control Boughton had over the content of the FSR. In committee discussions, the remainder of the Second Section voted against Boughton’s proposal to replace the term *picket*. This led to a minority report by Boughton. The matter went to Bell, who ruled in favor of his major. If Boughton had enjoyed considerable authorial license it is unlikely that he would have had to go to such lengths.121

Whether due to lack of a clear concept of warfare or the inability to force his views, the lack of a firm conceptual direction was particularly evident in the ninth article, “Combat,” which one might have assumed would have been the focus of a former head of

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120 Daniel H. Boughton to William W. Wotherspoon, 27 May 1908 and 4 November 1908, File AWC 1283, Entry 292, RG 165, NARA II. During Boughton’s earlier work at Fort Leavenworth he demonstrated the same predisposition to nomenclature. Charles Barth wrote to Eben Swift that Boughton had made no substantive modifications, but wanted “a number of minor changes,” such as substituting *advance* for *movement to the front* and *plan of commander* for *objectives of the movement*. Barth to Swift, 31 May 1907, Box 2, Swift Papers, USMA.

121 The case of Captain Joseph T. Dickman and the 1905 FSR provides an interesting contrast. In his correspondence with Bell, Dickman forcefully argued his views, many of which were subsequently incorporated into the manual. Of course, Dickman might have simply been claiming ownership of ideas that had been forced upon him. In light of Wagner’s appeal to Bell this seems unlikely. Wagner was the army’s foremost tactician and Dickman’s superior; he would not have needed Bell’s support in the matter if Dickman had no power in shaping the content of the manual.
the Fort Leavenworth Department of Military Art. Instead much of the wording from the 1905 *FSR* was retained, but only after a significant reordering, including some lengthy modifications and deletions. On the whole, these changes inserted inconsistencies and contradictions rather than improving the coherency of the manual.

In accordance with the conventional assumption that it was “impossible to shoot an enemy out of a position,” the 1905 *FSR* claimed that “a resolute and simultaneous advance on the front and flank of a position, made after thorough preparation by and with the effective accompaniment of artillery and infantry fire, will generally be successful.”122 This blueprint for victory balanced both the psychological and physical battlefields, and while reserving ultimate primacy for the infantry, provided a sufficiently prominent role for the artillery in order to logically make effective coordination between the artillery and infantry—particularly if the latter were to be conducting complex attacks from both front and flank—an important goal. The 1910 *FSR* retained the same passage virtually unchanged except for minor modifications to wording.123

Despite this clear, if somewhat general, statement of preference for combined arms maneuver, the 1905 and 1910 manuals differed in explaining how this might be achieved. The 1905 *FSR* made the artillery’s primary function the defeat of the enemy gunners—the standard late nineteenth-century concept known as the “artillery duel.”124 This idea belonged to the obsolete conception of war as a series of compartmentalized battles between like units. The inadequacy of this role was reflected in Lassiter’s reports

122 1905 *FSR*, 104.
123 1910 *FSR*, 158.
124 1905 *FSR*, 106.
on the field artillery, which identified the lack of a “line of progress” as limiting the
development of the field artillery. The 1910 FSR dispensed with the concept of the
artillery duel, stating that the artillery should concentrate on those elements posing the
Greatest threat to the attacking infantry. This was in accord with the latest trends in
both European and American military thought and a great conceptual improvement, as it
provided a useful principle to guide the actions of commanders: when faced with a
dilemma, the artillery should support the infantry assault and accept risk to the guns
from enemy artillery fire. This principle, regardless of its merits relative to other
possible uses of artillery, could be translated into a useful doctrine because it could
logically be extended into organization and equipment. For instance, it implied that the
infantry commander should be the ultimate arbiter of what constituted the greatest
threat. This, in turn, would require an official declaration giving the infantry
commander authority over the artillery commander, regardless of their relative seniority.
It also logically required that artillery guns have a combination of mobility, range, and
firepower capable of engaging defending infantry as well as enemy artillery. Finally,
artillery regiments would need an internal organization flexible enough to accommodate
the infantry’s demands, whether massing all the guns on a single target or to have the six
batteries firing at different targets.

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125 William Lassiter to Inspector General, 21 June 1909, Box 1, Lassiter Papers, USMA.
126 1910 FSR, 162.
127 For instance, the German 1907 Field Artillery Drill Regulations discarded the concept of the artillery
duel. In 1908, a British officer declared that the Russo-Japanese War had demonstrated the concept
obsolete. Brose, Kaiser’s Army, 145-149; Ashley W. Barrett, “Lessons to be Learned by Regimental Officers
The 1910 FSR reflected some progress in linking these elements. In the discussion of the attack, the FSR declared that “to keep artillery commanders informed of the progress and needs of the advancing infantry . . . artillery officers of scouts generally accompany the commanders of the attacking line. They communicate with the artillery commanders by wire or signals.”128 Accordingly, the tables of organization found in the first article, “Organization,” authorized a small contingent of “artillery scouts,” and each field artillery battery was provided with an additional lieutenant even though the number of guns in a battery had actually decreased since the 1905 FSR. Yet the changes in personnel were not matched with corresponding increases in equipment; the provision for only a single cart for laying communications wire was insufficient for supporting the types of attacks envisioned by the manual.129 The identification and correction of such small but crucial problems was precisely the anticipated benefit of the practical exercises advocated by both Lassiter and Evans.

However modest it was, the redefinition of the artillery’s mission and the provision for artillery scouts were both tangible steps towards the better integration of the artillery with the infantry. Yet these changes were not part of a consistent shift in emphasis, but part of a series of isolated modifications to the 1905 FSR. The extensive consultations and the organization of the manual into 390 distinct numbered “paragraphs” led to a conceptual compartmentalization that produced both contradictions and gaps between paragraphs throughout the 1910 FSR. In the case of

128 1910 FSR, 162.

129 1905 FSR, 24–25; 1910 FSR, 20. One of the numerous deficiencies identified by William Lassiter in his 1911 inspection of the First Artillery Brigade was the lack of sufficient communications equipment. William Lassiter to Adjutant, Maneuver Division, 4 May 1911, Box 1, Lassiter Papers, USMA.
artillery-infantry coordination, the general description of the attack taken from the 1905 
FSR worked surprisingly well with the more flexible mission statement and new 
regimental organization. But the 1910 manual stopped short, failing to provide the 
necessary details supporting these changes. For instance, the passage describing the use 
of artillery scouts was silent about such key considerations as to what level of infantry 
commander they were to be assigned and whether the artillery or infantry commander 
was the ultimate authority in selecting the target for the artillery. 130 Obviously, such 
questions were influenced by concerns that had little to do with tactics; in 1907 
Wotherspoon wrote to Boughton that cavalrymen were more concerned with developing 
an organization that alleviated promotion inequalities between the different arms than 
tactical efficiency. 131 If the 1910 FSR had definitively declared whether a colonel of 
infantry could order a colonel of field artillery to employ his guns in a certain manner, it 
would have surely raised a great deal of controversy, regardless of what was declared. 
Yet it was precisely because such issues were so sensitive that they needed to be 
addressed with more than generalities so that they did not become a source of continual 
distraction in war.

Just as the paragraphs relating to the artillery reflected an imperfect synthesis of 
old and new passages, so did the changes primarily concerning the infantry. But rather 

130 1910 FSR, 160. Although such questions were not new, the new artillery equipment and organizations 
greatly increased the potential for dispute over this matter. Not only did the capability for long-range 
indirect fire exponentially increase the options of a commander for how to allocate the fires of a greatly 
increased number of guns against a greatly increased range of possible targets, but now both infantry and 
artillery had several layers of command. At each of these layers—company and battery, battalion, and 
regiment—existed the potential for disagreement between equivalent elements of the other arm, plus 
conflicting orders coming from superior headquarters.

131 William W. Wotherspoon to Daniel H. Boughton, 16 June 1908, File AWC1283, Entry 292, RG 165, NARA II.
than supporting greater coordination between the arms, the new descriptions of the
infantry’s role were reminiscent of the tactics being taught at Fort Leavenworth, likely
reflecting the influence of Evans.132 The 1905 manual asserted that the defenders had
the advantage in terms of morale, as they were “subject to less strain, for they can make
effective use of their weapons for a long time before the enemy’s superior forces can
come near enough to imperil withdrawal from the position.” This was deleted from the
1910 manual, despite the retention of the passages immediately preceding and following
it in the 1905 edition. A paragraph on the importance of skirmishers advancing in open
order was also deleted.133 The paragraph entitled “Fire” was largely rewritten, with an
emphasis on fire discipline that was reminiscent of the writings of Eames and Evans.134
This discussion did not go far enough for the reviewers at Fort Leavenworth, who
recommended a new definition that clearly differentiated between the effects of artillery
and infantry fire.135 Anticipating the trend in infantry tactics towards close order, the
1910 edition emphasized a statement that had been buried in the middle of a paragraph
in the 1905 manual: “Concentration of superior forces at decisive points within effective
range is the first requisite to securing a superiority of fire.”136 Just as Morrison would do
with the 1911 IDR, the 1910 FSR followed this principle to its logical extension by nearly
halving the distance between soldiers from the standard dispersion of the 1904 IDR.

132 In his comments on the draft article, Evans urged such a change, but it cannot be conclusively stated that
his influence was decisive in the matter. Robert K. Evans to Secretary, General Staff Corps, 6 February 1909,
File AWC 1283, Entry 292, RG 393, NARA II.

133 1905 FSR, 103-104; 1910 FSR, 158-159.

134 1910 FSR, 159.

135 “Proposed Field Service Regulations, Recommended by Instructors in Military Art Department,” 8
January 1910, File 1607, Entry 101, RG 393, NARA I.

136 1905 FSR, 102; 1910 FSR, 159.
This was a conscious break from the Wagner-dominated past. In surprisingly strong language, Evans criticized the 1904 IDR for “[inculcating] erroneous principles.” His suggestion that it should therefore be changed might have been the origins of the 1911 IDR written by Morrison.137

Looking solely at these changes, one might easily conclude that the 1910 FSR was a clear victory for the infantry-centered tactics of Fort Leavenworth through the intervention of Evans. Yet this was not the case. The sections relating to artillery slightly expanded its roles in preparing the attack, and the description of the “Decisive Action” was ambiguous about whether artillery, infantry, or the two combined were the most important form of fire support for the assault.138 Elsewhere, the manual weakly supported branch cooperation with the observation that “combats of any magnitude generally involve the different arms,” therefore, “all officers . . . should have not only a knowledge of the effect of rifle and artillery fire and of cover, but of the general principles governing the tactical employment of the several arms.”139 Such platitudes had little chance of influencing military education curricula in the absence of General Staff control over the various professional schools. This passage, however, was representative of much of the “Combat” article. With so much retained from the 1905 edition and the incorporation of numerous revisions based upon the comments of hundreds of officers—not all of which were philosophically consistent—the result was reminiscent of a large boulder being slowly broken down by water seeping into fissures and freezing. Still

137 Robert K. Evans to Secretary, General Staff Corps, 6 February 1909, File AWC 1283, Entry 292, RG 393, NARA II. Bell approved this memorandum two days later. 1910 FSR, 165;

138 Ibid., 10, 162-165.

139 Ibid., 160.
much the same in overall mass and texture, the coherence of the whole was steadily reduced.

The same was true of the 1910 FSR as a whole. As the “Combat” article wavered towards the tight infantry formations of Fort Leavenworth, the “Organization” article went in the other direction. Significantly, this article was the only one not initially developed at Fort Leavenworth by Boughton.\textsuperscript{140} It was also one of the most coherent sections and contained the most original material; only six of its thirty-three subsections came from the 1905 FSR. The most important elements were the authorizations of soldiers and equipment—tables of organization—for companies, battalions, and regiments of each arm. These tables of organization provided all the elements needed for extended-order infantry tactics within a broader combined-arms effort. The number of enlisted soldiers in the infantry company was lowered, while the number of non-commissioned officers (NCOs) was raised.\textsuperscript{141} The new infantry company with its higher ratio of NCOs to soldiers allowed for greater dispersion, but due to its smaller size was less capable of the massed assaults that were thought necessary at Fort Leavenworth to break the enemy’s will. The new tables of organization supported dispersion at higher levels as well by doubling the number of communications troops allocated to a division. While the number of riflemen was reduced, supporting arms were increased with each infantry and cavalry regiment receiving a machine gun company, and each field army receiving more heavy artillery and a battalion of airplanes.\textsuperscript{142} Additionally, the artillery

\textsuperscript{140} Ewing E. Booth to William W. Wotherspoon, 31 August 1908, and Wotherspoon to Booth, 2 September 1908, File AWC 1283, Entry 292, RG 165, NARA II.

\textsuperscript{141} The NCO to soldier ratio went from 1:7 in 1905 to 1:4.9 in 1910. 1905 FSR, 19; 1910 FSR, 20.

\textsuperscript{142} 1910 FSR, 11-45.
was increased proportionally to the infantry, from 2.5 guns for every thousand infantrymen to 3.4 guns for the same number of infantryman. With the inclusion of the corps artillery which would likely have accompanied any field army, the proportion would have been still higher, making it comparable to the other leading armies of the day.  

As might be expected, the comments made by the instructors of Morrison’s department were critical of this article. They recommended fewer signal, engineer, logistics, and medical troops in each infantry division and a reduction of the heavy artillery given to field armies. The most pointed comments, however, were reserved for the modifications to the infantry company. The instructors believed that the fundamental principle of organization should be the “greatest fighting efficiency, with the least impediments.” While a sound concept in the abstract, the Fort Leavenworth definition of fighting efficiency was narrowly defined as a function of sheer numbers of riflemen with all supporting arms falling into the category of “impediments.” The students of the Staff College—originally intended as the melting pot for the best officers of all arms—urged modifications similar to those of their teachers. Collectively, the students urged reductions in signal and engineer troops, as well as surgeons and medical orderlies. The students exceeded even the zeal of the faculty in infantry organization; they doubled the increase in privates proposed by the tactics instructors while decreasing the number of NCOs.  

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143 Raines, "J. Franklin Bell," 477; 1910 FSR, 12, 20-25

144 “Proposed Field Service Regulations, Recommended by Instructors in Military Art Department,” 8 January 1910, File 1607, Entry 101, RG 393, NARA I.

145 The students’ memorandum stated that they had reached consensus through majority vote. Army Staff College class recommendations, 14 June 1909, File 1607, Entry 101, RG 393, NARA I.
the limits of control would force infantrymen to mass in dense ranks. Nearly all of the suggestions made by the faculty and students were rejected.

In early 1910, Lieutenant Colonel D.A. Frederick, Evans’s successor as the head of the Second Section, forwarded the completed 1910 FSR to Bell for his approval. With the exception of the Chief of Ordnance, all the staff bureaus endorsed the new regulations.146 The cost of this official concurrence had been a manual filled with inconsistencies, contradictions, and platitudes. Yet Bell seems to have been pleased. In congratulating Boughton on the achievement, which Bell aptly described as “hard grinding work,” he called it the “best type of field service regulations existing in any service.” Bell fully realized “the immense amount of labor, involving the coordination of the views of the Leavenworth schools, the War College and the bureau chiefs in compiling the new Field Service Regulations.” Bell, seemingly ignoring his own description of the drafting, credited Boughton with “the entire text [being] practically your own composition.” Yet even this overstatement paled in comparison with Bell’s concluding praise for Boughton: “It is my honest judgment that there are few whom the Creator has endowed with ability equal to that bestowed upon you.”147 Despite Bell’s praise, military progressives had failed to achieve their goal of producing a sound policy that efficiently coordinated the various branches. Tactically, the various arms continued to pursue doctrines. Theoretically, the FSR was supposed to provide a single vision from which all others flowed, but instead it was a mirror reflecting the unreconciled jumble of ideas that

146 D.A. Frederick to Secretary, General Staff, 21 February 1910, File AWC 1283, Entry 292, RG 393, NARA II. The Chief of Ordnance objected to what he thought was an overly generous standard allotment of artillery ammunition.

147 J. Franklin Bell to Daniel H. Boughton, 30 March 1911, Boughton ACP.
continued to plague the Army. Furthermore, organization was meant to operate in concert with tactics, but the two had diverged on more points than they had been harmonized.

Several factors contributed to this failure. The role of Dan Boughton demonstrated that even an intelligent and energetic officer competent in most duties was not necessarily qualified to undertake such a task. The inevitable differences of opinion and organizational struggles were bound to lead the manual towards compromise and equivocation in the absence of a clear vision of warfare, which could have only come from the very top. But J. Franklin Bell either did not have such a vision or, at the very least, did not want to exert the tremendous energy that would have been required to force its adoption. This was compounded by the weakness of the General Staff, which still seemed unsure of its role, as evidenced by the uncertainty about what should be contained in the manual. The notion of doctrine was still new, and there seems to have been little systematic thought given as to what must be mandated and the most effective means of doing so.
8. The End of Uptonian Military Progressivism: Leonard Wood and the External Focus, 1910-1916

While there has been some advance in the army yet it is much the same makeshift and run in the same haphazard way. . . . All the time foolish things are being done—officers ordered somewhere + then back again and so on. So many schemes are attempted that nothing is well done. Innovations are started before old systems are tried out. Various systems are not coordinated.

- Herman Hall

In July 1910, Captain Johnson Hagood, assistant to the former Chief of Staff J. Franklin Bell, was surprised when the new chief of staff, Major General Leonard Wood, suddenly appeared in the War Department fresh from an official trip to Latin America. Unannounced and in civilian clothes, he wasted no time with the astonished Hagood: “I am General Wood. You may remain where you are for the present.”¹ Like many bright, ambitious officers of his generation, Hagood soon fell under the spell of Wood; this devotion was all the more incredible for the general disdain for Wood felt by other officers who did not know him personally. Many in the army regarded him with suspicion, and, according to Hagood, few on the General Staff in 1910 had faith in his capabilities. “Most of us had never seen Wood but there was little doubt in our minds that he was going to get things mixed up.”² This was partly due to the general’s unusual background.³ Wood was a graduate of Harvard rather than West Point, and had spent his first thirteen years in the army as a surgeon. Despite Wood’s reputation as an

Epigraph. Herman Hall to James G. Harbord, 22 January 1913, Vol. 5, Harbord Papers, LC.

¹ Hagood, "Down the Big Road," 124-126.
² Ibid., 125.
³ For a synopsis of Wood’s career, see Appendix.
“outlander,” Hagood was taken by his extraordinary presence. “Everything was the opposite of what I had expected. . . . I expected a doctor. I saw a soldier. I expected a thin, nervous, intellectual type. He was robust, composed and vigorous, in mind and body.”4 Wood’s extraordinary energy, distinctive ideas, and great charisma made him a focal point for younger officers, allowing them to coalesce as a distinct generation. Perhaps without Wood, military progressivism might have undergone a blurred evolution from the original ideas of Upton. Instead, the unlikely general emerged as the leader of this second generation of military progressives. Although Wood never equaled the sustained influence of Upton, he did end the reign of Uptonian military progressivism.

Wood was independent-minded by nature, but his background certainly helped him to see things differently than other generals. Even as a boy, he had always been fascinated by the military profession, and had only reluctantly gone into medicine to satisfy the wishes of his physician father. After that uncharacteristic obedience, Wood’s willful nature appeared. He was quickly expelled from Boston City Hospital for repeatedly performing unauthorized advanced procedures without the assistance of a more experienced surgeon. This effectively ended his opportunities in civilian practice, so in 1885 he joined the Army’s Medical Department in the hopes of later transferring to the line, having failed in his first profession due to an unwillingness to submit to authority.5

4 Hagood, "Down the Big Road," 125.
Doctor Wood was a most unusual surgeon. He had refined his naturally imposing physique with a strenuous regime of running, calisthenics, and weight training, giving him extraordinary physical endurance and strength. These characteristics were crucial when he reported to Fort Huachuca, Arizona Territory, for his initial assignment. When the Apache leader Geronimo led his band off the reservation, Wood convinced the department commander, Brigadier General Nelson A. Miles, to allow him to accompany one of the several parties sent to track down Geronimo. The doctor went with the main column of Captain Henry Lawton, a towering Civil War volunteer with no formal military training, coarse habits, and an inability to control his drinking, but extraordinary presence, bravery, and determination. Eventually, every soldier and officer of Lawton’s original party had been forced to leave the column except for Lawton and Wood, who was effectively Lawton’s second-in-command. Only Wood’s determination and great physical capability allowed him to continue the epic four-month pursuit, which covered over 3,000 miles of rugged desert in temperatures that often reached 120 degrees. Wood nearly died during the pursuit from a tarantula bite, but somehow recovered without medical assistance.⁶

This expedition had two important outcomes for Wood’s career. First, Wood had greatly impressed Miles, who was in many ways similar to the young surgeon. Both men prided themselves on their physical vigor, had great ambitions, and were shameless in using connections to advance their careers.⁷ Wood even became the general’s sparring partner. Miles liked the brash doctor so much that he sought to have Wood assigned to

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⁶ Ibid., 6-15. See also, James Parker, “The Geronimo Outbreak,” Box 1, Parker Papers, USMA.

⁷ For a description of Miles, see Wooster, Nelson A. Miles and the Twilight of the Frontier Army.
his staff in all subsequent assignments. This was how Wood came to Washington in 1895, when Miles was the Army’s commanding general. In the capital, Wood served as the physician for several cabinet members and the invalid wife of President William McKinley. He also became the regular hiking partner of Assistant Secretary of the Navy Theodore Roosevelt. The other significant outcome was that Wood was eventually awarded the Medal of Honor in 1898. This seemingly good fortune was a mixed blessing, as many officers resented that the politically well-connected surgeon received the sole award for the campaign rather than Lawton or Lieutenant Charles Gatewood, who had played a crucial role as a negotiator.

That same year, Wood came much closer to achieving his ambition of a line commission. Congress authorized several specialist volunteer units to be raised directly by the federal government for the Spanish-American War. With their unmatched political connections, Wood and Roosevelt easily won commissions as the colonel and lieutenant colonel of the First United States Volunteer Cavalry—the famed “Rough Riders.” As a commander, Wood was vigorous and conspicuously brave, but his lack of experience was evident. Soon after the landing in Cuba, Wood refused to take cover despite heavy Spanish fire during a skirmish at Las Guasimas. The brigade commander, Samuel B.M. Young, called Wood’s conduct during the battle “an act of unmistakable

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8 Lane, Armed Progressive, 17-28.

9 Wood’s citation read: “Voluntarily carried dispatches through a region infested with hostile Indians, making a journey of 70 miles in one night and walking 30 miles the next day. Also for several weeks, while in close pursuit of Geronimo’s band and constantly expecting an encounter, commanded a detachment of Infantry, which was then without an officer, and to the command of which he was assigned upon his own request.” The medal was awarded on 8 April 1898, a month before Wood was named colonel of the Rough Riders. This suspicious timing led many to wonder whether the medal was primarily meant to burnish Wood’s professional credibility. [http://www.history.army.mil/html/moh/indianwars.html](http://www.history.army.mil/html/moh/indianwars.html) Accessed 8 September 2008.

10 Lane, Armed Progressive, 14-15.
bravery—but quite unnecessary.”¹¹ The Rough Riders had suffered disproportionately higher casualties than the other units engaged, and their colonel had actually done little to control the fight, despite his valor. Nevertheless, when Young fell ill with malaria several days later, Wood was made the brigade commander. During the attack at San Juan, he once again demonstrated great bravery but was ineffective as a commander.¹²

Whatever his failings as a tactician, Wood was a masterful administrator, a skill that he demonstrated over three years in the civil government of Cuba. First named governor of the city of Santiago immediately following its capitulation to the Americans, as the occupying government expanded, so did Wood’s authority until he was ruling the entire island. Wood’s government was thoroughly progressive. He oversaw large public works projects, emphasized sanitation and education, and implemented economic, political, and legal reforms. The authoritarian Wood had no compunctions about the use of power; he used police to force compliance with sanitary measures and had some miscreants horsewhipped in the streets.¹³ The general sought and received considerable publicity for his work, which one historian has argued inspired a number of municipal reforms in the United States.¹⁴ By 1901, replacing Wood as the governor of Cuba was unthinkable, particularly when one compared the great success he had achieved there with the ongoing rebellion in the Philippines. Despite his rank as major general of volunteers, he was only a captain in the regular army, and even then only in the Medical

¹¹ Samuel B.M. Young quoted in ibid., 44.
¹² Ibid., 28-54.
¹³ Ibid., 55-116.
Department. Rather than replace Wood, who would soon revert to his permanent rank with the expiration of the two-year authorization for the United States Volunteers, the Senate confirmed his commission as a brigadier general in the regular army in 1901. Wood was at last a full member of the profession of arms.15

Aside from his unquestioned ability, Wood aided his astonishing rise by continually undermining superiors and potential rivals with numerous backbiting letters to his influential friends. William R. Shafter, Joseph Wheeler, John R. Brooke, James H. Wilson, and William Ludlow were the most notable officers that he attacked. Wood's imperialist convictions and personal ambitions were perfectly aligned in his efforts to have Brooke removed as the governor of Cuba, as the old regular’s administration was not active enough to suit those, like Roosevelt, who wanted the island to be annexed by the United States. When the War Department recalled Brooke, Wood hired a Washington publicist to make his case for the position rather than Wilson or Ludlow. He also developed his skills as a publicist in building support for his policies. As Wood's desires generally matched those of the administration, the War Department was happy to allow him to organize businessmen into political pressure groups, publish articles in popular magazines, and write extensively to congressmen.16 Wood would continue to use these methods throughout his career, even when his ideas were not in concert with those of his superiors. In the meantime, Wood enjoyed his privileged position. After the end of American government of the island in 1902, Wood returned to Washington. While waiting for an assignment, the new general enjoyed high society and spent a great

15 Lane, Armed Progressive, 115-116.
16 Ibid., 54-110.
deal of his time with his friend President Roosevelt. The two enjoyed hikes around Rock Creek Park and practicing “singlesticks”—a violent combative exercise with broadsword-like implements. After nine months in the United States, Wood finally left for a command in the Philippines; he would not return until 1908.\(^{17}\)

With such a tempestuous early career, it is clear why Russell Weigley has described Wood as a “natural storm center.”\(^{18}\) Many officers hated Wood for the obvious role political influence played in his success. While Wood governed Cuba, his rival General James H. Wilson contemptuously referred to him as “Doctor” Wood. Wilson and many other officers resented the manner in which the “Rough Riders” had overshadowed the contributions of the regular units in the Santiago campaign; many thought that Wood’s promotion to brigade command was only part of a ploy to elevate Roosevelt to command of the regiment.\(^{19}\) Indeed, his performance as a field commander in Cuba and the

\(^{17}\) Ibid., 118.

\(^{18}\) Weigley, History, 328.

\(^{19}\) Helmick, "From Reveille to Retreat," 80-81, 99.
Philippines was at best mediocre. Neither was Wood a particularly adept observer of military developments; a year into the First World War, he continued to advocate the continued role of the saber and mounted cavalry combat. This contrasted unfavorably with Bell’s enthusiasm for the machine gun and airplane the previous decade. Wood also liked John F. Morrison’s conservative tactics. While recommending the infantryman for promotion to brigadier general, Wood wrote that Morrison was “progressive, and sound in his military ideas.” Although it is difficult to quantify, most of Wood’s detractors seem to have disliked him more for personal than professional reasons. His nearly insatiable desire for publicity managed to offend both, as it crossed into insubordination several times throughout his career. In his biography of Wood, Jack Lane suggested that Wood was the most political American soldier since Winfield Scott. Douglas MacArthur, himself a strong contender for the dubious honor, admired Wood greatly. One needs look no further than Wood’s two attempts to win the Republican nomination

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20 After being named commander of the Department of Mindanao, Wood undertook a grand expedition around Lake Lanao. Major Robert L. Bullard, the local commander, thought it was badly managed and counterproductive. He recorded in his diary, “The general manifested no disposition to use guides but preferred to stagger around in the mud, marshes and brush and find his own way.” Wood’s biographer has speculated that one of his primary reasons for undertaking the expedition was to burnish his weak credentials as a commander. Millett, *The General*, 175-176; Lane, *Armed Progressive*, 123-125.

21 Leonard Wood to James G. Harbord, 19 April 1915, Vol. 5, Harbord Papers, LC.

22 Leonard Wood to Henry L. Stimson, 23 April 1912, Morrison ACP.

23 The first instance was the “round robin” petition demanding an immediate withdrawal of American troops from Cuba before they suffered catastrophic losses to disease, which was signed by a number of commanders in Cuba shortly after the Spanish surrender. This letter, which originated with Wood and Roosevelt, was leaked to the press in what amounted to a clever mutiny. Over a decade later, Wood conducted a publicity campaign urging universal military service, which was in direct opposition to the policy of President Woodrow Wilson. Wood then ignored several direct orders from the administration to obtain approval before making public statements. Wilson took his revenge by denying Wood a field command in World War I; Secretary of War Newton Baker called Wood his most insubordinate subordinate. Lane, *Armed Progressive*; Cosmas, *Army for Empire*, 260-261; Weigley, *History*, 340-341.
to oppose his commander-in-chief for evidence supporting Lane’s assertion. Bell—always the loyal subordinate—despised Wood for his relentless publicity-seeking. The ill will was reciprocated by Wood, who thought that Bell was a failure as chief of staff.

The relationship between Wood and William H. Carter was even worse. Wood desired to have the brainy Tasker H. Bliss as his assistant chief of staff in Washington, but Elihu Root intervened with President William H. Taft to have Carter get the job, while the unhappy Bliss was sent off to watch the troublesome Mexican border in California. During their first interview, Wood informed Carter that he had never desired his appointment, and would seek his dismissal if he ever tried to bypass or contradict Wood in any matter. Although the two would almost surely have clashed due to their different views on national military policy—Carter continued to hold to Uptonian orthodoxy—this personal vendetta prevented cooperation even on their points of agreement. The two engaged in continual sniping until August 1912, when Wood was finally able to have Carter banished to Chicago and command of the Central Department.

Few men with such bright prospects remain friendless for long, and Wood began to attract a small circle of supporters in Cuba. As he rose in the army, this inner circle also expanded, bringing in a number of talented junior officers. Several of them, most notably Hagood, Frank R. McCoy, John G. Harbord, John M. Palmer, and George Van Horn Moseley, would go on to successful careers. In fact, it is striking how many became

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25 Raines, "J. Franklin Bell," 156.
a part of John J. Pershing’s staff during World War I. This probably owed something to Harbord, who was Pershing’s first chief of staff, and thus responsible for assembling the initial General Headquarters staff. But it was more than Harbord simply drawing on old comrades; Wood was the acknowledged leader and animating spirit of this group. In 1919 Harbord, then commanding the rear areas of the American Expeditionary Forces (AEF) in France, reported to Wood that “the crowd of us for whose training and esprit and general outlook on military matters you are principally responsible, have hung together fairly well over here.” He then named McCoy, Moseley, Hagood, Sherwood A. Cheney, and William D. Connor—all prominent members of the AEF—as part of Wood’s circle.27 Wood’s competence earned the respect of senior officers as well. Bliss was one of the first senior officers to join the Wood clique, having been a member of the military governor’s private mess while serving as the collector of customs in Havana.28 Upon reporting to Manila as Wood’s chief of staff, Colonel Stephen C. Mills reported his favorable impressions back to a friend, “All the staff officers like Wood as a chief, and it is easy to see why.” The seasoned colonel was impressed with Wood’s competence and style of command. “He is quick, active and positive. He knows the work of his division thoroughly; deals directly with the head of each staff department; and does not change his mind after he has once given instructions.”29 Even Adjutant General Henry C. Corbin, who had opposed Wood’s initial promotion to brigadier general, came to respect him as a general officer.30

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27 James G. Harbord to Leonard Wood, 4 February 1919, Vol. 8, Harbord Papers, LC.
28 Palmer, Bliss, Peacemaker, 73.
29 Stephen C. Mills to James G.C. Lee, 9 October 1907, Mills Papers, MHI.
30 Henry C. Corbin to Grenville M. Dodge, 15 March 1906, Box 1, Corbin Papers, LC.
Despite these older admirers of the doctor turned general, he had his greatest appeal with younger officers. This was by no means universal across the generation. Major William Lassiter worked closely with Wood on the General Staff, was certainly a reform-minded progressive officer, and was relatively young having graduated from West Point in 1889, but Lassiter was ambivalent about the chief of staff:

I always recognized his ability and his substantial achievements, but he never fully had my trust and confidence. There was something lacking in him both as a soldier and as a man. I felt that he was shifty, I doubted his judgment, I doubted his loyalty both to his superiors and to his associates. . . . One cannot be great either as a soldier or as a man who lacks loyalty and who fails to exercise restraint over his tongue. . . . On the whole I should say that he was far above average, that he was indeed an outstanding personage of his times, but that his weaknesses prevented him from making the topmost grade.31

It would be an overstatement to claim that the changes in military progressivism emanated solely from Leonard Wood or that he defined the younger generation of military progressives. Instead, the new reformers were formed by their environment, just as their predecessors were products of Upton’s West Point of the 1870s and the conditions of the army of the 1880s. Many of this younger generation had gone to postgraduate professional schools, participated in the early maneuvers, and had experienced only the waning days of the frontier constabulary. With the exception of the last condition, these changes owed much to the efforts of early military progressives. Yet young officers showed little patience with those who had done so much to create their high professional expectations. When George Van Horn Moseley learned that Eben Swift was to be his new regimental commander, rather than feeling some sort of intellectual kinship with the recent director of the Army War College, Moseley wrote a

friend in Washington in the hopes that Swift would be sent to another unit. “As you know colonel [sic] Swift is a saturated solution of Civil War History and while that is a fine thing in its place I am sure we need a very different kind of colonel here. Please give us a live one.”

John M. Palmer described William H. Carter as well-intentioned but knowing “little or nothing” about a General Staff. George C. Marshall was more circumspect in identifying individual shortcomings, but when commenting on the pre-World War I staff he remarked that “Old men, as a rule, cannot successfully take up new activities, but they can continue to perform functions that they have become intimately familiar with in younger days.”

There was some merit to these criticisms. In 1911, Carter took command of the Maneuver Division, which had formed in Texas in response to political instability in Mexico. Two years later, Carter would once again command a similar unit on the border, that time designated the Second Division. John M. Palmer called the first mobilization “a rather sorry affair,” and pointed out that Carter had never commanded a force of all three arms. Rather than taking advantage of this splendid opportunity, it was squandered in routine. According to Palmer, “the principle characteristic of the Maneuver Division was that it never maneuvered. . . . Every morning our troops would turn out for a session of close order drill just as they had been doing for years past at their little home stations all over the country.” William Lassiter gave a similar account of the 1913 mobilization of the Second Division at Texas City. “We had every possible

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33 George C. Marshall lecture to Army War College, 19 September 1922, Xerox #3251, GCM; Moseley, "One Soldier’s Journey," 92; Harold D. Cater notes of telephone interview with John M. Palmer, 15 October 1947, Office of the Chief of Military History Collection, MHI.

34 George C. Marshall lecture to Army War College, 19 September 1922, Xerox #3251, GCM.
opportunity for the combined training of the several arms, but there was practically no
combined training.” He attributed this fault to the senior officers. “It never seemed to
occur to our General Officers that if they expected to have the various parts of their
command work together effortlessly as a team in war, they ought to occupy themselves in
peace time in developing the said team work.”\textsuperscript{35} To be fair to Carter, his training plan
did feature some large maneuvers, but following these exercises he greatly relaxed the
pace of work in the Second Division. As Carter’s biographer has noted, “Because of this
move, and perhaps also due to his increasing age and growing reputation as a sort of
intellectual warrior, some observers—both in Washington and in Texas—questioned
whether Carter’s drive or energy was up to the challenge.”\textsuperscript{36} Carter was then replaced by
Frederick Funston, who was in turn replaced by J. Franklin Bell. Bell had one more
burst of vigor remaining despite nearly a decade of health problems; he led the division
through what at least one officer considered to be the best peacetime training ever
conducted by the U.S. Army.\textsuperscript{37} Texas, however, was to be Bell’s last hurrah. In January
1918, a regimental commander preparing his command for the trenches described a visit
by J. Franklin Bell in a letter to his wife: “[Bell] came puffing along the trenches. Poor
old fellow, he looks as tho’ he were stepping out of a Civil War setting.”\textsuperscript{38} Yet there were
deeper divides between the generations than just age and vigor. In 1909, just four years
after he had returned from Manchuria, Carl Reichmann felt that the currents of army

\textsuperscript{35} Lassiter, “Memoirs,” IX:35.
\textsuperscript{36} Machoian, \textit{Carter}, 257-258.
\textsuperscript{38} Frank Parker to “Sweetheart,” 30 January 1918, Folder 17, Parker Papers, UNC. John J. Pershing was to
reject both Bell and Morrison as too old for service in the American Expeditionary Forces. Pershing to
Newton Baker, 10 November 1917, No. 280-S, AEF Confidential Cables Sent, Vol. 13, Harbord Papers, LC.
thought were passing him by. The previous winter he had been in charge of his regimental school for advanced company-grade officers, many of whom were graduates of the Morrison-era Army Service Schools. The experience was a rude shock for Reichmann. “I found myself put to a severe test and often in doubt whether my acquirements in this direction were sufficient and whether my views and teachings were in harmony with those held by our authorities,” he confessed.\textsuperscript{39} The reformers found themselves strangely out of place in the midst of their own creation. On the other side of this generational divide, the younger officers were dissatisfied with what they perceived as the incomplete nature of the reforms. The full implications of the Root reforms were still not clear, as the army had not yet fully transitioned from the old ways to the still indistinct new patterns.

This was particularly evident in the malaise plaguing the General Staff. One officer serving in the War Department at this time noted that it is “one thing to have a General Staff and another to get it to function properly.”\textsuperscript{40} Officers assigned to the War College Division—which should have been the most prestigious due to its war planning functions—derisively referred to it as the “Water Closet Division.”\textsuperscript{41} In 1909, Harbord reported to Wood that several General Staff officers who had recently arrived in the Philippines shared a “pessimism regarding the General Staff and its future.” His analysis of the problem reflected the general weariness of proposals and counterproposals for an effective central staff: “It seems to me that the line of the Army which so long wanted to

\textsuperscript{39} Carl Reichmann to Adjutant General, 9 July 1909, Reichmann ACP.
\textsuperscript{40} Lassiter, "Memoirs," IX:2.
\textsuperscript{41} John M. Palmer to Harold D. Cater, 28 April 1948, Office of the Chief of Military History Collection, MHI.
see the management of things in its hands is actually talking the General Staff and the whole detail system to death."\(^{42}\) Shortly after World War I, George C. Marshall identified the problem of these early years as a fundamental ignorance about the proper functions of a General Staff. George Van Horn Moseley, William Lassiter, and John M. Palmer—contemporaries of Marshall who would both go on to distinguished careers in the staff—all agreed with this assessment.\(^{43}\) Bell had made some minor changes, but was not ready for sweeping reform until two years into his term. Among the opponents who stymied his most radical changes was William H. Carter, who thought that it would create too powerful a General Staff. Carter warned President Taft that this power would lead it to stray from the limited war planning function originally envisioned by Carter and Root. Not surprisingly, Root agreed with Carter. In fact, Root did not express satisfaction with his creation until Peyton C. March became chief of staff in the midst of World War I.\(^{44}\) Opposition also came from within. Eben Swift believed that Bell devoted too much time to the political concerns of the president and secretary of war, and not enough time in supervising the General Staff.\(^{45}\)

When Wood came to the War Department in 1910, he reorganized the General Staff yet again.\(^{46}\) While Bell had been hobbled by his lukewarm personal relationships with the presidents and the secretaries of war that he served, Wood gained a great ally


\(^{43}\) Moseley, "One Soldier's Journey," 92; Lassiter, "Memoirs," IX:3-5; John M. Palmer to Harold D. Cater, 28 April 1948, Office of the Chief of Military History Collection, MHI.

\(^{44}\) Raines, "J. Franklin Bell," 245-262; Harold D. Cater notes of interview with Peyton C. March, 7 November 1947, Office of the Chief of Military History Collection, MHI; Machoian, Carter, 225-228, 269.

\(^{45}\) J. Franklin Bell to Eben Swift, 25 April 1910, Box 2, Swift Papers, USMA. Swift was no more satisfied with Wood's later reorganization. He still advocated a complete reorientation of the staff along German lines as late as 1915, Swift to Hugh L. Scott, 29 December 1915, Box 2, Swift Papers, USMA.

\(^{46}\) Ball, Responsible Command, 128.
with the appointment of Henry L. Stimson as secretary of war in 1911. Stimson had been a partner in the same law firm as Root, and had similarly reformist tendencies. Yet Stimson lacked the fine sense of political feasibility and compromise that allowed Root to accept partial victories when they were the best that could be achieved. Wood and Stimson got along well with each other, but could be self-righteous in their dealings with others. In the words of historian Jack Lane, “Stimson and Wood tended to see problems in black and white—a struggle between good and evil, ignorance and enlightenment, progressives and reactionaries.”47 This partnership would soon prove to be toxic to the War Department’s relations with Congress. Neither was President William H. Taft as ardent a reformer as Theodore Roosevelt. He admitted that Wood’s selection as chief of staff was primarily meant to placate Roosevelt.48

One of Wood’s first tasks as chief of staff would be to complete the Root reforms by consolidating the General Staff’s power over the staff bureaus. The most influential of these staff departments was the Adjutant General’s Office, which was responsible for correspondence between the War Department and the remainder of the army.49 Few adjutants general, however, had used their position as the nexus of official communication as effectively as Fred C. Ainsworth. Like Wood, Ainsworth had begun his career as a contract surgeon, but had then gone into the Records and Pension Office, which administered the pensions of Civil War veterans. Ainsworth was a highly competent administrator, and he made the previously inept records office into one of the

47 Lane, Armed Progressive, 158.

48 Ibid., 147.

49 During the Spanish-American War, Henry C. Corbin functioned as a de facto chief of staff for President William McKinley, who increasingly bypassed the ineffectual Secretary of War Russell Alger and the erratic Commanding General Nelson A. Miles. Cosmas, Army for Empire, 193-194, 287-288.
most efficient organizations in Washington. This duty also brought Ainsworth into frequent contact with Congressmen seeking aid for their constituents, and he cultivated these contacts into an impressive network of political friends. In 1904, Adjutant General Henry C. Corbin was promoted to lieutenant general. Seizing the opportunity, Ainsworth convinced Roosevelt and Root to consolidate his office with the adjutant general’s, creating a new position of Military Secretary, despite Carter’s warning to Root that the former doctor was not to be trusted with so much power. In making his argument, Ainsworth adeptly played on the fascination with efficiency and corporate practices that marked the Progressive Era to justify his own advancement and consolidation of the two offices.\textsuperscript{50} Ainsworth’s influence grew still greater with the 1910 mid-term elections, which made his friend James Hay the chairman of the House Military Affairs Committee. Ainsworth and Hay were bound by their mutual hatred for Wood and the General Staff.\textsuperscript{51}

Ainsworth, whom one officer described as the only completely evil man he had ever known, ruthlessly maintained his power as the Military Secretary, which after a few years reverted to the traditional title of Adjutant General.\textsuperscript{52} All visitors seeking information from his clerks had to pass through Ainsworth’s personal office. He came to treat the army’s records as personal patronage given to friends and denied to enemies. Several times Ainsworth turned away General Staff officers seeking information on unit strength needed for mobilization plans, as he regarded the General Staff as “the

\textsuperscript{50} Beaver, Modernizing the War Department, 71; Barr, Progressive Army, 137-142.
\textsuperscript{51} Ball, Responsible Command, 128.
\textsuperscript{52} Raines, “J. Franklin Bell,” 202.
enemy. While chief of staff, Bell had tolerated such slights, but the cost of this forbearance was the curtailment of the General Staff’s power.

Wood was too ambitious, uncompromising, and abrasive for this state of affairs to continue during his tenure as chief of staff, even though he and Ainsworth had previously been personally friendly. Wood deliberately provoked Ainsworth by directing the General Staff to make several forays into the bureaucratic turf of the adjutant general. Ainsworth retaliated by having Hay sponsor a bill to consolidate the offices of the Adjutant General, Inspector General, and the General Staff—naturally with Ainsworth as the first head of this super-bureau. President Taft vetoed the bill, but the battle had become one of bureaucratic survival. Finally, a general staff report on matters of routine administration within the Adjutant General’s Office pushed Ainsworth over the edge. “Life is too short,” Ainsworth wrote to Wood, “to permit of wasting any portion of it in discussion with, or for the benefit of, any one whose conception of the underlying principles of military administration is so hazy that he can advocate such a proposition seriously.”

Several days later Ainsworth retired rather than face a court martial for insubordination. This confirmed the preeminence of the Chief of Staff and, by extension, the General Staff. Certainly members of Wood’s circle saw it that way. From Manila, one junior officer exulted to Wood: “The change of monsoon in the War Department . . . ought to give permanently better weather and smoother sailing. . . . With the single exception of one man for years a close friend of General Ainsworth, the opinions are all

53 Moseley, “One Soldier’s Journey,” 100; Beaver, Modernizing the War Department, 35.
54 Raines, “J. Franklin Bell,” 201.
55 Weigley, History, 329-332; Lane, Armed Progressive, 160-165.

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adverse to him.”56 Wood’s victory, however, was pyrrhic. In the words of historian Daniel Beaver: “The struggle for supremacy between the adjutant general and the chief of staff left nothing but wreckage behind.”57 Aside from creating yet more enemies for Wood, the action did nothing to fix the deficiencies within the General Staff.

Following his forced retirement, Ainsworth retreated to his posh apartment in Washington and began exacting his revenge.58 There was fertile ground for mischief, as the Root reforms had created resentment among a variety of different groups. The General Staff had weakened the staff bureau chiefs; the Republican Root had outmaneuvered Democrats like Hay; and a number of regimental officers felt that they had been left out of the spoils given to the lucky few in the General Staff or advanced schools. These combined resentments led to the 1912 “Manchu Law.” Just like the Manchu dynasty had been thrown out of power in China a few months earlier, this law forced the Army’s “aristocracy” from the capital by requiring that all company grade officers on detached duty to have spent at least two of the previous six years with troops.59 One senior officer attributed the law to the tensions created by relatively youthful General Staff officers supervising older counterparts in the line army.60 The “Manchus” blamed it on the petty envy of common regimental officers. Wood’s assistant, Johnson Hagood, described it as a congressional reaction to “the pressure of the proletariat who were determined to unseat the intelligentsia and to take their places

57 Beaver, Modernizing the War Department, 35.
58 Ibid., 36.
59 Ball, Responsible Command, 130.
60 Machoian, Carter, 227.
on the Staff.” 61 According to Hagood, Wood blamed the law on the “Great Un-washed,” who had grown “tired of the taste and smell of the barracks” and who desired to displace competent officers from important jobs simply to satisfy their desire for easy duty. 62 James G. Harbord, another Wood protégé, saw the situation in much the same way: “The applause from army officers to Congress on the Manchu legislation is, of course, from the lads who for one reason or another have not had what they consider their share of detached service in the past, and think they now see a chance to get it.” 63 John M. Palmer thought that the anger of common officers was particularly directed against the “Leavenworth crowd,” who were “regarded as the most pernicious of all the Manchus.” The law resulted in Palmer’s reassignment—ironically to China—which he regarded as an injustice. “In effect, I was dismissed from the General Staff because I had taken the trouble to qualify for staff duty during my two years of hard work at Fort Leavenworth.” 64

The Manchu Law, whether an act of justice or envy, revealed that the egalitarian spirit of the nineteenth-century army had not disappeared. Many officers continued to view detached duty as a spoil to be shared equitably. For some this was likely due to the persistent conviction that schools or duty in the capital were nothing more than a “soft snap.” Others, however, recognized the value and importance of such assignments, but harbored doubts as to whether the army as an institution had the capability to differentiate between degrees of professional merit in peacetime. One former Army

61 Hagood, "Down the Big Road," 141.
62 Ibid., 141-142.
63 James G. Harbord to Brigadier General Frank McIntyre, 16 April 1913, Vol. 5, Harbord Papers, LC.
64 Holley and Palmer, General John M. Palmer, 212.
Service Schools instructor wrote in 1913, “Under the present system hard work and efficiency count for little in the army, and it is an oft-repeated axiom among us that for preferment in the military service ‘a Senatorial father-in-law is worth more that the genius of Napoleon.’” These attitudes, while certainly reflecting some truth, were antithetical to the military progressive goal of efficiency through rational organization, centralization, and scientific method. These aims required a ruthless institutional assessment of professional merit, corresponding allocations of talent, and the subordination of individual desires to group efficiency that simply would not be tolerated by officers of the time.

The discord over detached duty reflected the much deeper conflict between the nineteenth-century professional ethos and military progressivism, which pitted equality and fairness against efficiency and effectiveness. Much as regimental officers viewed extended detached duty as the pampering of those with influence or luck, the more elitist reformers saw promotion by seniority as the coddling of the dull and lazy. At the beginning of his tenure as Secretary of War, Root had identified the implementation of some “adequate process of selection according to merit and effectiveness among the officers of the Army, so that the men of superior ability and power may be known and placed in positions involving responsibility and authority.” Yet the mention of such a system created such a “serious spirit of unrest” that even Root’s erstwhile assistant Carter had to admit that “however desirable may be the measures designed to bring about the selection of the best qualified for advancement . . . the Army is certainly

65 Matthew F. Steele to Congressman William Richardson, 1 March 1908, Box 2, Steele Papers, MHI.
66 WDAR (1899), Root, 48.
against their enactment.” In 1909, Congress considered a proposal to make it easier to eliminate professionally unfit officers from active duty. Captain Ernest Gose, then serving with a regiment at Madison Barracks, New York, wrote home to his parents: “We officers are all worked up over the elimination bill now before Congress. . . . It would “bust” the army wide open. Nobody in the army would be secure in his position. We are all ‘agin’ it.” Military progressives had little patience for such arguments. William Lassiter dismissed the concern of potential injustices as a “red herring” advanced by those who failed to understand “that it is better to have a few individuals suffer than for the whole body to languish from slow poison and from the lack of incentive to struggle to live. Any officer who is worth his salt ought to be willing to take his chances in a scheme of elimination.” Lassiter thought some form of elimination necessary to destroy the belief among officers “that they have a vested right to be supported by the Government so long as they manage to keep out of the gutter and avoid flagrant crimes and misdemeanors.” Just as military progressives hoped to eliminate those at the bottom of the profession, they also sought to elevate those at the top. In this, they also met opposition from the bulk of officers. James G. Harbord, who was part of Wood’s coterie, railed against the “military socialism” that stymied any moves towards meritocracy:

There is as strong feeling in the Army against the officer who does anything beyond his routine, or to “acquire merit”, to signalize himself above his fellows, as there is in the Bricklayers’ Union against the wretch who would lay more than the 750 bricks or whatever the number is that the Union thinks is a day’s work. This is the real basis of the opposition to promotion by selection, not that promotions might be made on “pull” but

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67 WDAR (1906), Carter, 93
68 Ernest Gose to “My Dear Folks,” 12 December 1909, Gose Papers, MHI.
that they might quite generally be made on merit, which would quicken the pace, “bust” up the routine, disturb siestas, and result generally in nullifying the Army’s 750 brick attitude.\(^{\text{70}}\)

Wood fully agreed, but like Root, he lacked the ability to overcome seniority promotion. Military progressives had failed to convince their brother officers to forego the individual security of seniority in favor of an elusive—and perhaps unattainable—meritocracy.

Although military progressives were unable to implement promotion systems based upon merit, Wood was able to make examples of individuals. In his own words, he “tried very hard to get rid of a number of the Colonels who are unfit for field service, but it is a mighty hard thing to get support in this from those who are approaching the retiring age.”\(^{\text{71}}\) Nevertheless, there were some successes in this area during Wood’s tenure as chief of staff. Major Eli Helmick conducted an inspection of a cavalry regiment that resulted in the relief of the colonel, who had repeatedly refused to follow War Department training directives. Helmick contrasted this action to the nineteenth-century army. “Now, the efficiency of colonels as administrators and their ability and willing to carry out the policy of the War Department in the instruction of their units, was being enquired into, and their personal habits, if injurious, were subject to investigation.”\(^{\text{72}}\)

In 1911, Major William Lassiter was sent to make an official inspection of Colonel Lotus Niles, then commanding a regiment in Carter’s Maneuver Division. When asked to move his regiment twenty miles and then have all the guns fire on several appointed targets, Niles proved himself, in the words of Lassiter’s official report, “totally

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\(^{\text{70}}\) James G. Harbord to Frank McIntyre, 16 April 1913, Vol 5, Harbord Papers, LC. In his memoirs, George Van Horn Moseley agreed: “The Army of 1912 was not devoid of fine officers who knew what was needed, but they were held back by the lethargy of the majority.” Moseley, "One Soldier’s Journey," 115.

\(^{\text{71}}\) Leonard Wood to James G. Harbord, 9 June 1914, Vol. 5, Harbord Papers, LC.

\(^{\text{72}}\) Helmick, "From Reveille to Retreat," 190-191 (quotation on 191).
unfitted to occupy his present position, for the reason that he has not prepared himself to perform the duties of his office and persists in being unprepared, though reported for the same neglect at an inspection made by me two years ago.”73 After the unit arrived late at the firing position, Niles gave orders that placed the guns perpendicular to the intended direction of fire, which would have fired along the line of friendly troops if the situation had been real. Even after Lassiter informed Niles of his error in calculations, the old colonel could not determine the solution and eventually confessed that he was completely unable to do so.74 After reporting the incident to Carter, Lassiter felt that the general had no intention of taking any action against Niles—a West Point classmate of Bliss, Evans, and Wagner. When Lassiter expressed the intention to press charges for neglect of duty, Niles chose to retire instead.75 There were few successful cases like these, and Carter’s recalcitrance in the Niles case was an example of the refusal of senior officers to enforce standards among themselves to which Wood alluded to. Yet the occasional relief of a senior officer for incompetence, however rare, was an important assertion of the War Department’s right to determine standards and a blow to the persistent nineteenth-century professional ethos.

Although the systems of maintaining competence were still imperfect, the General Staff under Wood began to look outside of the profession for a new field of reform. In 1912, Stimson commissioned a General Staff study, The Organization of the...
Based on an appraisal of the country’s foreign policy, potential enemies, and strategic interests, the study recommended the size and composition of the Army to the company level. This comprehensive attempt to match organization with strategic context was the epitome of rational organization, and precisely what had been expected of the General Staff. Despite the report’s admission that “the problem of military organization has two aspects, a dynamic aspect and a political aspect,” the conclusions failed to take the latter into account, and neither Stimson nor Wood exerted a moderating influence. One of the most important recommendations of the study was the need for a drastic reduction in the number of army installations, many of which were hopelessly inefficient due to their small size. Neither did they offer any military advantages, as the small garrisons and limited training areas often precluded any training in advanced tactics. Also, the disappearance of the frontier had eliminated the original justification for many of the numerous posts scattered throughout the interior of the country. Furthermore, for a General Staff obsessed with mobilization, the dispersion of the Army into nearly a hundred small pieces, many inconveniently far from adequate transportation facilities, was a continual affront to professional sensibilities. Thus, cost, training, and mobilization all demanded consolidation into a handful of well-chosen “strategic groups.”

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76 Weigley, History, 339-340. John M. Palmer, the report’s lead author, claimed that it actually originated with Wood. One of the other three committee members, however, said that the idea was Stimson’s. Holley and Palmer, General John M. Palmer, 202; Lassiter, "Memoirs," IX:9.

77 Organization of the Land Forces, 12.

Despite these military considerations, even a small post of several hundred soldiers was a valuable source of contracts, jobs, and customers for local communities, and their congressmen were willing to fight for their retention. Stimson blamed the army’s numerous earlier failures to consolidate its installations on the “selfish opposition of the localities.”\(^7^9\) Against such political resistance, the pre-Root War Department had made only limited progress in consolidating posts. Stimson and Wood, however, had the advantage of the General Staff, which could go beyond simple appeals to cost efficiency, and also claim tangible benefits for training, organization, and mobilization, all of which were related to actual war plans. This effort began even before Stimson initiated the organization study. The reformers hoped to bring their rational argument to the public with a series of articles given the provocative title “What is the Matter with Our Army?” Each article was written by a prominent officer and examined one favorable aspect of the General Staff’s plan, with Stimson personally writing the series’ summation. The article by Brigadier General Clarence R. Edwards, another favorite of Wood, was typical. “In these days of ‘scientific management,’” he wrote, “every system [depends] for results upon combination of the muscles or minds of many men . . . and constant watchfulness is exercised to keep the “overhead charges” at the lowest possible point.”\(^8^0\) Edwards found justification for the plan in the worlds of both science and business, which had long been a method used by military progressives attempting to convince civilians of the need for reform. The campaign of Stimson and Wood, however, was successful only in


\(^8^0\) Edwards, *What Is the Matter with Our Army?*, 16.
creating political enemies. Wood encouraged General Staff officers to lobby on behalf of the measure, which raised congressional suspicions.\textsuperscript{81} The House, with Ainsworth’s friend James Hay as the chair of the Military Affairs Committee, was particularly antagonistic. Stimson and Wood agreed upon an aggressive strategy, reasoning that even a failure would end the expansion of undesirable posts. Their unwillingness to compromise was particularly evident in their insistent demand to close Fort D.A. Russell, Wyoming, a large post in the state of Senator Francis E. Warren, chairman of the Senate Military Affairs Committee. These efforts created such enmity that not only did Congress refuse to follow the General Staff’s plan, but the Democrat Hay and Republican Warren proposed an amendment to the 1912 appropriations bill that would have forced Wood’s reassignment. The politically ham-fisted general had created bipartisan resistance in both houses. Only a concerted effort by Root and Stimson convinced President Taft to save Wood’s job by threatening a veto.\textsuperscript{82} Later that year, Stimson was forced to conclude that “even in the moderate reforms we have been working at we have been too radical and have bitten off rather more than we can chew in the present state of opinion.”\textsuperscript{83} Despite this admission, Wood and the General Staff remained oblivious to political realities. Several months after meeting defeat in the 1912 appropriations bill, the \textit{Report on the Organization of the Land Forces} advocated many of the same ideas. Not surprisingly, the chief of staff’s fortunes continued to decline, particularly after the November election of Woodrow Wilson led to Stimson’s departure from the War

\textsuperscript{81} Lassiter, "Memoirs," IX:10-11.

\textsuperscript{82} Ball, \textit{Responsible Command}, 129-130; Lane, \textit{Armed Progressive}, 171-173.

Department. Wood’s four-year term as chief of staff would not end until 1914, but as a staunch Republican in a Democratic administration he was politically isolated during his final year.

In addition to consolidation, Organization of the Land Forces also suggested the creation of a large reserve, an idea that Wood and many others had long thought a necessity to meet growing security threats. In the first decade of the twentieth century, Americans experienced growing international tensions through the Venezuelan diplomatic crisis with Germany and war scares with Japan. During Wood’s tenure as chief of staff, the situation overseas became even darker, finally culminating in the eruption of World War I several months after he completed his term in the War Department. The initial public response was mixed and somewhat muted, but the sinking of the Lusitania in May 1915 brought the slowly growing fears to a head. These developments gave reformers what historian James Abrahamson has described as the “golden opportunity” to remake American military policy. The attempt to seize this opportunity would largely define the younger generation of military progressives and separate them from their Uptonian predecessors, who had never been so ambitious.

Wood was well-placed to play an important role in leading the “Preparedness” movement of the early 1910s. As chief of staff, he obviously had great clout. Following that assignment in 1914, many expected him to seek a field command along the troublesome southern border, but instead Wood asked to command the Department of

85 Finnegan, Specter of a Dragon, 38-39; Abrahamson, America Arms, 161-167.
the East, which was headquartered at Governors Island, New York. Moreover, Wood’s background and contacts made him a natural ally for a movement that was overwhelmingly rooted in the upper classes and the East. In fact, the sons of Elihu Root and Theodore Roosevelt played leading roles in organizing some of the most prominent preparedness organizations. Wood eagerly provided official support for the “Plattsburgh camps,” which were perhaps the most visible manifestation of preparedness. The chief of staff hand-selected the officers running these camps, which trained hundreds of interested students and businessmen in basic military skills beginning in 1913. Yet such volunteer enthusiasm could achieve only so much. Wood’s effort to create a formal reserve resulted in a greatly modified provision in the 1912 Army Appropriations Act that was so unworkable as to yield only sixteen enlistments in the years 1912-1914.

Wood’s appraisal of American military policy was not significantly different from Upton’s. In 1916, he echoed Upton when writing that “our wars have been hideously wasteful of life because we have sent the youth of our country into war untrained and undisciplined. . . . We have thrown away their lives with reckless, brutal prodigality.” In fact, Wood’s Our Military History drew heavily on Upton’s Military Policy in both facts and form. Much like Upton, Wood chronicled American military history from the Revolution to show the “shortcomings and cost” of the existing military organization,

86 Lane, Armed Progressive, 182-183.
87 Finnegan, Specter of a Dragon, 64-65, 92-93.
88 Ibid., 61-68; Abrahamson, America Arms, 132-134.
89 Weigley, History, 340.
particularly the failings of the state militia, which Wood despised as much as Upton had in his time. It was “utter folly,” Wood wrote, to rely on “any system which leaves the control of any portion of the military establishment upon which the nation must depend in war, in the hands of the governor of a state, or of anyone else other than the federal authority.”\(^91\) Accordingly, he argued that “the entire military force upon which the nation is to depend in war must be under the control of the federal government absolutely and completely, and be trained, disciplined and organized by it.”\(^92\) Wood even criticized the “curious Anglo-Saxon prejudice against a large standing army and the feeling that it is always a menace to liberty.”\(^93\)

Despite his similar prognosis, Doctor Wood had a far more radical remedy than Upton had ever proposed—universal military service. While Upton would likely have welcomed some form of peace conscription, he had never expected such a development.\(^94\) Instead, he developed the National Volunteers as an expedient to curb the worst excesses of politicians and ensure a role for the War Department in organizing the war volunteers. Wood, however, wished to do away with the whole volunteer system, which he claimed “has always failed and will always fail.”\(^95\) This was a far cry from Upton’s assurance to James Garfield that “like all of our people I believe in the future we shall have to look to the volunteers whenever great emergencies arise.”\(^96\) In Wood’s

\(^91\) Ibid., 153.
\(^92\) Ibid., 153-154.
\(^95\) Wood, *Our Military History*, 158.
\(^96\) Emory Upton to James A. Garfield, 14 October 1878, quoted in Fitzpatrick, ”Emory Upton,” 305.
opinion, modern technology had made an already inadequate system dangerously obsolete. “We cannot depend upon volunteers in future wars,” he warned in 1915, “for the simple reason that the onrush of modern war is so sudden and all our possible antagonists . . . are so thoroughly prepared that there will be no time to train volunteers, and certainly no time to train officers.” 97 Moreover, Wood believed that the individualistic premise of the volunteer system was socially corrosive, leading to a “debauchery of public morals on the subject of each and every man’s obligation to service in times of war.” 98 Thus, for Wood the problem was as much a product of an improper relationship between the individual and the state as a defect of military organization.

To correct this, Wood proposed a compulsory period of three months military training for every able-bodied male, which he estimated would include 500,000 conscripts annually. Following this training, each citizen would be liable for military service for seven years, creating a trained reserve of 3.5 million. In addition, Wood proposed maintaining a regular army of well over 100,000 to defend the overseas possessions, provide an adequate ready expeditionary force, and serve as a training cadre for the conscripts. 99 Realizing that three months would be inadequate preparation, Wood proposed that schools make military instruction an integral part of the curriculum from an early age; this program would advance from simple calisthenics for the younger

97 Wood, Military Obligation, 57.
99 Although Wood outlined the “highly efficient regular army” he contemplated only in general terms, he seems to have envisioned something similar to the force described in the 1912 Organization of the Land Forces, which recommended an authorized strength of 112,000. Wood’s proposal would have required an even larger force, as that report made no provision for a cadre of regulars to train the massive yearly levies that were the cornerstone of Wood’s plan. Wood, Our Military History, 197-198; Organization of the Land Forces, 63.
boys to firearms training and basic military formations for those nearing graduation.\textsuperscript{100} When compared to Upton’s proposal for a force of approximately 25,000 regulars supplemented by 125,000 National Volunteers—even taking into account the new commitments of garrisoning Alaska, Hawaii, the Philippines, and Puerto Rico—Wood’s plan was astonishingly ambitious.

Despite Wood’s dire predictions of the dangers of modern warfare, there was no military need for an army and navy nearly 4 million strong to defend America. Indeed, mobilization of such a force would be counterproductive, as Wood’s plan made no allowance for balancing military structure with agricultural or industrial needs or exempting those with specialized skills, such as munitions workers or scientists. This was understood by some of the more perceptive officers on the General Staff. Many more officers, even those favoring peacetime conscription, doubted that the short period of training would be sufficient.\textsuperscript{101} Neither did Wood explain how he would pay for the equipment to outfit his reserve, the massive training program, or the preliminary instruction in schools. In short, universal military service was an extraordinarily costly plan that far exceeded the demands of military necessity, even at the height of the Great War.

Yet Wood’s primary concern was not military but social. He hoped to manufacture “national unity” by having “all the men of a certain age doing something in common for the nation at the same time.”\textsuperscript{102} Wood promised that his plan “will result in

\textsuperscript{100} Wood, \textit{Military Obligation}, 65-66.

\textsuperscript{101} Finnegan, \textit{Specter of a Dragon}, 180.

\textsuperscript{102} Wood, \textit{Our Military History}, 188.
better citizens, better men physically, men better morally and more efficient from the
economic standpoint, men more tolerant and more observant of the rights of others.”
In essence, the Army would be a school for Americanism that would produce “all-around
better citizens.” Many civilian progressives saw universal military service in much the
same way. Wood’s friend Roosevelt admitted that it would have a greater social than
military benefit. The president of the United Press claimed that military training
would be justified “if it only served for a time to lift this nation out of the sordid pot-
bellied, fat joweled state into which it is getting as result of money-making.” Those
concerned with public health were particularly enthusiastic. In 1916, ninety-eight heads
of state or national medical organizations, ten chairmen of divisions of the American
Medical Association, and representatives of ninety-five medical schools endorsed
universal military training. In the words of historian John P. Finnegan, “preparedness
had changed from a movement to reform the Army into a device to make over American
society.” Indeed of all the proposed military reforms between the Civil War and World
War I, none was more clearly a product of civilian trends than universal military service.
Historian Michael McGerr has described the social reforms of the Progressive Era as a
product of middle-class efforts to reshape adult behavior with the intention of “nothing
less than to transform other Americans, to remake the nation’s feuding, polygot

103 Ibid., 189-190.
104 Ibid., 191.
105 Finnegan, Specter of a Dragon, 110.
106 Quoted in ibid., 107.
107 Michael Pearlman, ”Leonard Wood, William Muldoon, and the Medical Profession: Public Health and
108 Finnegan, Specter of a Dragon, 3.
population in their own middle-class image.”109 The goals of universal military service clearly fell within this movement.

Wood’s background made him unusually attuned to these trends. Aside from his atypical early career, Wood’s service as a general officer had been limited to either large eastern cities—the heart of progressivism—or colonial government. In both Cuba and the Philippines, Wood had been purposefully engaged in the process of social engineering through government.110 Although a radical departure from past American practices, it was a logical extension of the general’s previous work. Wood claimed that universal military service would “build up a truer national spirit, to fuse the various elements into a homogenous mass which, with us, would be one of real Americanism.” Far exceeding simple patriotism, this “real Americanism” required a radical elimination of existing social divides. The three months of military training would help to “obliterate the sharp distinctions between the rich and the poor, the distinctions of race and creed, and to make us one homogenous mass fused by common patriotic impulses.”111 Wood’s repeated emphasis on an “equality of service, [for] rich and poor alike” reflected a departure from the traditional military solidarity with the upper class.112 Perhaps not

109 McGerr, Fierce Discontent, xiv.


111 Wood, Our Military History, 189.

112 Leonard Wood, “What the War Means to America,” in The Story of the Great War, [1917], quoted in Lane, Armed Progressive, 176. In the late nineteenth century, the Army had been drawn several times into labor difficulties such as the strikes of 1877 and the Pullman strike of 1894. Typically, officers tended to side with management, seeing the workers as “foreigners” and “anarchists.” In 1894, Major General Nelson A. Miles suspected that the striking workers were plotting armed rebellion and requested permission to fire on crowds of strikers. Wooster, Nelson A. Miles and the Twilight of the Frontier Army, 198-200. For a general history of the Army’s role in these matters, see Jerry M. Cooper, The Army and Civil Disorder: Federal Military Intervention in Labor Disputes, 1877-1900 (Westport, Conn.: Greenwood Press, 1980).
coincidentally, Roosevelt also believed that his own patrician class had sunk into individualistic decadence. Wood’s emphatic demand that the rich contribute was novel for the officer corps, but it was entirely consistent with the middle-class progressives’ campaign against the self-indulgent individualism of the “upper ten.”

Universal military service was far more than a mere update of the traditional “citizen-soldier” of the old militia, which Wood found contemptible. Because his plan was such a radical departure from the past, Wood foresaw that its acceptance would “require to a certain extent the moral organization of the people, the building up of that sense of individual obligation for service to the nation which is the basis of true patriotism, the teaching of our people to think in terms of the antion rather in those of a locality or of personal interst.” Therefore, the general applied his considerable energy to a publicity campaign meant to convince Americans of this “fundamental principle.”

During the first year of World War I, he gave more than sixty major speeches on the subject. As the war went on, Wood increased his pace. During a seven-month period in 1915 and 1916, he gave over 156 talks to an aggregate audience of over 137,000 people. He also dictated over thirty letters a day to editors or other influential figures, urging them to support universal military service, and wrote several books and articles himself. As part of his campaign, Wood urged several of his most ardent followers among the younger generation of military progressives to lobby Congress, give lectures,

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113 McGerr, Fierce Discontent, 94-99.
114 Wood, Our Military History, 195.
115 Lane, Armed Progressive, 189, 205; Finnegan, Specter of a Dragon, 58.
and write books and articles in support of the idea of universal military service.116 John M. Palmer, a member of the War Department General Staff and one of the three authors of the Organization of the Land Forces, wrote his own study of American military policy, An Army of the People: The Constitution of an Effective Force of Trained Citizens in 1916.117 Although in that work Palmer still advocated a volunteer system, within months of its publication he had come to the conclusion that the only viable means of creating an army of citizen soldiers was through some system of compulsory service. In this he was far behind Wood, who had been conducting an aggressive campaign for universal military service for several years.

Palmer was also the origin of the historiographic mischaracterization of Upton as a foreign-inspired militarist who sought to overthrow the American tradition of the citizen-soldier, when it was, in fact, the universal military service of Wood and Palmer that was the radical break with the past.118 State and local governments had resorted to conscription to meet wartime quotas in several instances, but the only notable exception for the federal government had been the disastrous Civil War draft implemented in 1863. Even this exception proved the rule as it indicated both the reluctance of the federal government to institute such measures and the public's resistance to requiring military service.119 Palmer urged only a few months of compulsory training, but in principle this

116 Abrahamson, America Arms, 149.


118 Fitzpatrick, "Upton and the Citizen Soldier," 356.

was an enormous extension of government’s power over the individual and a significant redefinition of citizenship. Not only did Palmer’s characterization of Upton as un-American lack a basis in fact, it was also a fallacious appeal to emotion. After all, the vast differences between colonial America and the United States in the early twentieth century in terms of size, demographics, politics, economics, culture, and foreign policy meant that any authentic American military policy would likely be hopelessly antiquated.

Wood and Palmer, however, were not so much looking to the colonial past as to the contemporary Swiss military organization for his inspiration, which made Palmer’s charge of Upton’s “foreign” ideas being inconsistent with American values hypocritical.120 There was even greater irony in portraying Upton as a hopeless admirer of the Prussians, as the short-term compulsory training plan favored by Wood and Palmer most closely approximated the German system. In fact, the Prussians regarded the army’s social mission in instilling desired ideals of citizenship in nearly the same way as Wood and his progressive supporters.121 Ironically, Upton found this aspect of Germany distasteful; in 1876, he wrote to his family from Berlin, “How completely the nation is given over to warlike preparation is shown by the boys, who wear military caps, and by both boys and girls, who carry their books to and from school in knapsacks. This strain can not last long.”122 Furthermore, Upton’s supposed hatred for citizen-soldiers was derived from his opposition to the militia, but Palmer and Wood shared his disdain for state troops. Palmer’s Organization of the Land Forces claimed that “Our


121 For the German use of military service to instill desired values in society, see Ute Frevert, A Nation in Barracks: Modern Germany, Military Conscription and Civil Society, trans. Andrew Boreham with Daniel Brückenhau (New York: Berg, 2004).

122 Emory Upton to family, 8 October 1876, in Michie, Letters of Emory Upton, 386.
Constitution and our history alike confirm the dictum that citizen soldiers may be employed successfully for general military purposes, but that organized as militia they may not." For his part, Wood testified to the Senate Military Affairs Committee in 1916 that state troops were a “fifth wheel” and that all militia should be placed under federal control. Thus, in terms of the relationship between the individual and military service, and by extension with the state, Upton was the traditional conservative and Wood was the radical. It is somewhat surprising that such a revolutionary proposal as universal military service received any significant support at all, but it ultimately fell victim to competing military, political, and social aims of the disparate constituencies supporting the idea. As Palmer later admitted, the idea had “very little support” among politicians, which “probably reflected the attitudes of their constituents on this subject more or less accurately, since there was a deep-seated public prejudice against universal military training.” Thus, Wood had spent his time as chief of staff engaged in a quixotic crusade that yielded little but controversy. More importantly, the energies of the youngest generation of military progressives had been directed against the external goal of making the Army a school for citizenship, rather than the internal goal of continuing to improve professionalism and preparing for war.

Wood’s persistence did succeed in igniting a debate on military policy, but in the end it nearly immolated the military progressives’ gains. The great agitation for preparedness resulted in several proposals for military organization, but the eventual compromise embodied in the 1916 National Defense Act (NDA) was primarily the work

123 Organization of the Land Forces, 56.
124 Lane, Armed Progressive, 199.
125 Finnegan, Specter of a Dragon, 181-183; Holley and Palmer, General John M. Palmer, 243.
of Congressman James Hay of Virginia, friend of the deposed but still scheming Ainsworth. Officers found much to cheer in the provisions for a gradual build-up of the regular army over five years to an unprecedented 220,000 officers and soldiers. The most important provision, however, allowed for a “federalized” National Guard. This ensured the role of state troops as the second line of defense, ending hopes for a federally-controlled alternative. Accordingly, the National Guard also benefited from a substantial increase to an authorized strength of 450,000. Also, at some point during the late committee work, the bill was amended with a provision limiting the War Department General Staff to only nineteen officers. John M. Palmer suspected that Hay introduced that stipulation on behalf of his friend Ainsworth.126 Reflecting on the 1916 NDA, historian Daniel Beaver has described it as “a new balance between the center and the periphery in the debate over American military policy.”127 The shift was not in favor of the centralizing military progressives. The 1916 NDA was known within army circles as the “Magna Carta” of the bureau chiefs because it restored their independence.128 Events would save the General Staff, as the American entry into World War I the following year made such a miniscule General Staff impossible. By the end of the war the War Department General Staff had grown to a monstrous 1,073 officers.129

126 Spaulding, United States Army, 407-408; Finnegan, Specter of a Dragon, 140-156; Holley and Palmer, General John M. Palmer, 246.

127 Beaver, Modernizing the War Department, 74.


129 The size of the American staff was laughable in comparison to its counterparts on the European continent before World War I: France had 645 officers assigned to the general staff and the Germans had 537. Even the British, who were so leery of general staffs that they had established their own after the Americans, had 171 general staff officers before the war. Abrahamson, America Arms, 167; Edward M. Coffman, The War to
Thus military progressivism had largely run its course by 1916. By that time professional education was an expected component of every officer’s career, and had been used by the talented elite to separate themselves from their peers. The General Staff was also established as an important and prestigious body, despite its many flaws. More importantly, its dominant position had been confirmed in 1911 with the forced retirement of Ainsworth. Yet these developments had met opposition, and even led to some counterattacks. In 1912, much of the Army had cheered Congress as it forced the autocratic “Manchus” out of Washington. That same year, Stimson and Wood failed to win congressional approval for a redistribution of the army with the force of their arguments. By 1916, the General Staff was nearly reduced to irrelevance by the accrued backlash of political and personal resentment. The effectiveness and permanence of the Root reforms were both in doubt in 1916. At the same time, the reform agenda had shifted from professional improvement to an unsuccessful bid for a new societal function with universal military service.

Conclusion

The rise and fall of Uptonian military progressivism spanned more than four decades. The initial impulse of reform drew its inspiration and focus from the Civil War. Although such notable figures as Ulysses S. Grant, William T. Sherman, and John M. Schofield recognized the need for change, the most influential conduit for the lessons of the war to a younger generation was Emory Upton. His ideas on tactics, organization, and professionalism were popular with many officers, but were far less appealing to civilians of the Gilded Age. Americans were ready for military reform only after the Spanish-American War made the inadequacy of their military institutions painfully obvious. Even then, one might wonder whether any significant reforms would have occurred without the political acumen and personal commitment of Elihu Root. Despite his many talents, Root had no military experience, so he drew upon the existing body of military progressive thought—particularly that of Upton—to provide the specific details of his reforms. Coincidentally, at that same time the generation of officers that had begun their careers under Upton’s personal supervision at West Point came of professional age. Dedicated to his goals of sound tactics and organization, their generation bore most of the burden of turning military progressive ideas into reality—an effort that continued long after Root left the War Department.

Contrary to the claim of Russell Weigley that Upton and his disciples had failed to understand that “any attempt by the army to imitate foreign military systems would fail,” they had produced a politically acceptable mixture of old American military ideas with
contemporary civilian and European methods to craft an ambitious series of reforms.\textsuperscript{1} Close study reveals that whatever problems the Army experienced in adopting such European techniques as central staffs, war colleges, and maneuvers was not because these methods contained some fatal foreign quality hopelessly incompatible with the American context, but that these methods were too easily adapted to a number of existing professional views that were never fully reconciled. Furthermore, Weigley’s claim that “Uptonian pessimism” prevented officers from accepting civilian control does not accord with the record of civil-military relations of the time, as the generation that developed under Upton’s tutelage at West Point had an untarnished record in that arena. J. Franklin Bell, Hugh Scott, and Tasker Bliss, the three chiefs of staff who graduated from West Point during his tenure, were all faultless in their deference to civilian control.\textsuperscript{2} The outstanding examples of military disobedience of civilian control during the Progressive Era were Nelson A. Miles and Leonard Wood, neither of whom were West Point graduates. Extending Weigley’s notion, Jack Lane has argued that “most regular army officers, influenced by Upton and his disciples, had despaired of creating an effective army as long as Congress remained apathetic to military affairs. But neither Wood nor Stimson could wallow in Uptonian despair.”\textsuperscript{3} In studying the careers of Upton, Wagner, Carter, Bell, Bliss, Swift, Reichmann, Morrison, Boughton, and Evans, it is difficult to discern any trace of a paralyzing despair that prohibited these officers from pursuing an effective army. With the benefit of Root’s support and the acquiescence of a

\textsuperscript{1} Weigley, \textit{Towards an American Army}, 160-161.

\textsuperscript{2} Ibid., 160.

\textsuperscript{3} Lane, \textit{Armed Progressive}, 173.
society that recognized the value of professionalization, they were allowed to implement their ideas.

The West Point Class of 1875: 1) Arthur L. Wagner 2) Robert K. Evans 3) Smith S. Leach 4) Tasker H. Bliss. As cadets, they learned the military profession from Commandant Emory Upton. They also came to know William H. Carter (Class of 1873), Eben Swift (1876), and J. Franklin Bell (1878). These associations and many others forged in the small nineteenth-century army were the human background of military progressivism. Like their professional opinions, these personal relationships could either unite or divide, but they were almost always present. (Class of 1875 20-Year Book, Swift Papers, USMA)

But by 1910, this generation and their reforms had culminated. A younger generation with new priorities came to the fore. These newcomers espoused the same methods of education, rational organization, scientific management, and centralization, but had quite different aims. Thus, while they were still military progressives in method, they were no longer defined by the original Uptonian agenda. The primary goal of this second impulse of military progressivism was to redefine the Army’s relationship with
society. Rather than focusing inward on reforms to enhance professionalism, they looked outward to redefine the relationship of the Army with society.

The demise of Uptonian military progressivism was the result of several factors. Military progressives of both generations suffered from the backlash against reform led by the bureau chiefs and Congressional adversaries of the regular army, who regained some ground they had earlier lost to Root. Among the officer corps, there was also a more general rejection of the elitist and intellectual tendencies of the military progressives. Within the ranks of military progressives there was also generational discord, some of which was nothing more than a matter of clashing personalities and cliques. Yet there were also deeper philosophical differences between the two groups. The generation that had personally known and took its orientation from Upton grew gray and left the service, while the younger officers, who had developed their aspirations in a different context, pursued a diverging path.

Most of all, however, Uptonian military progressivism had simply exhausted itself. After the passage of the Dick and General Staff Acts in 1903, the most obvious aims had been achieved. That year, Root concluded that nothing remained to be done in the near future. “Very great and radical changes have been made in many respects during the past six years, and the Army should have time to put the new laws into operation and work out the new methods under the direction of the General Staff without further disturbance.” The professional education system in particular garnered nearly unanimous praise. In 1913, Chief of Staff Leonard Wood boasted, “It is difficult for one who has not seen the effect of [the professional] schools upon the officers who

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4 WDAR (1903), Root, 36.
have studied there to appreciate their tremendous value to the service.” Wood believed that education had not only made individuals more capable, but had helped to bind the army together. “They are teaching a sound doctrine and our officers are commencing to speak a common language in a military sense and to understand the interdependence of the different arms.” Reform had not gone as far as some might have hoped nor were the new institutions perfect. Nonetheless, the Army was significantly different in 1912 than it had been just twelve years earlier, and on the balance the changes had made it a more capable, efficient, and professional organization. During World War I, Secretary of War Newton Baker said that the Root reforms were the basis for the successful American mobilization for the Great War. While the American effort in 1917 was certainly not without fault, when compared to the 1898 mobilization for the Spanish-American War, few would argue that the War Department had not made great strides in the intervening nineteen years. Similarly, the mobilization and deployment of nearly 160,000 National Guardsmen in response to the Mexican border crisis in 1916 also contrasted favorably with the debacle of 1898. The mobilization owed much to the General Staff and Dick Acts of 1903. More generally, these successes were also made possible by improvements in professional education. Although the Army schools reflected the conflicting notions of war and military professionalism within the reformers’ ranks, they had nonetheless fixed the idea that postgraduate training was a critical component of officership. Despite the

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5 WDAR (1913), Leonard Wood, Report of the Chief of Staff, 1: 177.
6 Weigley, History, 322.
8 Weigley, History, 350.
unfortunate tendency in officer education towards those tasks that were most easily conceived and presented rather than to develop more elusive qualities of mind, there was nothing to be gained in ignorance.

This qualified success in organization was not matched in tactics, which had been the one area in which Upton had achieved success during his own lifetime. His legacy of gradual accommodation to the increasing lethality of weapons had been continued by Wagner in his textbooks and the 1904 *Infantry Drill Regulations (IDR)*, but came to an abrupt end with the publication of the 1911 *IDR*. Morrison's manual was completely antithetical to the spirit of Upton's tactics. Rather than adjust to modern firepower through tangible changes in organization, tactics, and equipment, the 1911 *IDR* resorted to empty exhortations for greater will. The irony of this conservative turn in American tactics was the origin of the manual in the Army Service Schools. Upton had believed that the lack of institutions for the systematic study and development of tactics had been largely to blame for the obsolete tactics of the Civil War. Yet in the absence of such institutions throughout the late nineteenth century, American tactics had consistently adapted to new technology. It was only after the creation of the General Staff and a comprehensive system of professional education that this progress was checked. That such tactics were justified by recourse to the latest in European military thought and detailed analysis of contemporary wars demonstrated that education and scientific process were not in themselves sufficient to guarantee the desired results.

The great problem of the military progressives was that they sought to impose central control over the remainder of the Army, but they were unable to do so among themselves because there really was no military progressivism at all. Certainly, there was no single belief that defined the philosophy. Without a fixed center, there could be
no orthodoxy to enforce. Yet the self-identified military progressives were members of an army which was well-defined and admirably suited to imposing order. Thus, Upton, Wagner, Carter, Bliss, Bell, Swift, Morrison, and Wood were all able to apply their concept of military progressivism within their own purview. It was this use of the formal military channels that provided whatever cohesion military progressivism did attain. This was most evident in Bell’s direction of Fort Leavenworth, then again when he later became the chief of staff. Yet the problem with such reform by fiat was that the changes were limited by the consistency of the individual and the length of their tenure in power. Thus, the course of military progressivism was continually altered by the vagaries of personnel assignments. Historian Allen Millett has observed that successful military reform requires a group of officers dispersed across the ranks who are able to sustain the implementation over time and throughout the organization; this “coalition” must be able to survive the turbulence created by the constant shuffling of officers through key assignments. The differing understandings of the profession separating military progressives precluded the formation of such a coalition.

Within the generation of officers raised by Emory Upton, there was a broad consensus about what should be done, but not one that was specific enough to give full coherence to the dry, but ultimately vital, details found in curricular schedules, regulations, and memoranda. In 1903, Wagner was hard at work developing the techniques of the large maneuvers that would later allow Morrison to so effectively disseminate his ideas throughout the army; tactics that were fundamentally opposed to

those that Wagner had developed in the previous decade. At that same time, Bell was just beginning to remake the Fort Leavenworth school. Wagner wrote wistfully to Bell:

I have often felt that it would be most desirable if one could be in two or three places at the same time. I have felt that especially of late. I am much interested in the maneuvers and am very glad to be here; but on the other hand I should have liked very much to be at Fort Leavenworth at the opening of the school year. I am very busy . . . but if there is any matter in regard to which you wish information based upon the experiences of the old Infantry and Cavalry School, I hope you will drop me a line, and I can assure you that I shall not be too busy, under any circumstances, to find time to answer it.10

But, of course, Wagner could not be in several places at once. Even with advice from afar, Bell, Swift, and Morrison would each in their own manner and sphere take the school in a very different direction than Wagner had envisioned. Whatever unity existed only grew weaker as a new generation reacting to new circumstances diverged from the old Uptonian vision.

Ultimately, the most profound change wrought by military progressives was unexpected. None had stressed the need for the War Department to formally develop, instill, and regulate professional standards, even if in hindsight this was clearly implicit in many of their schemes. The nineteenth-century army had regulated little but ethical and administrative standards of conduct for officers. This autonomy was greatly aided through promotion by seniority, which provided no impetus for the formation of any measures of professional proficiency. The slow process of change began with the introduction of commanders’ efficiency reports and promotion examinations for junior officers in 1890, and mandatory professional education in 1901. Less directly, the increasingly directive drill regulations and manuals, the deliberate use of field

10 Arthur L. Wagner to J. Franklin Bell, 24 September 1903, File 651, Entry 101, RG 393, NARA I.
maneuvers to judge the proficiency of commanders and their units, and the use of competitive schools to identify elite officers for special consideration were all developments that required more precise definitions of professional standards.

Arthur L. Wagner had done more in this line than any other officer: he wrote the textbooks used by the entire Army for over a decade, he greatly raised the standard of professional education, and he pioneered the techniques for umpiring maneuvers, which was a more subtle means of imparting tactical thought but with a far wider audience. Despite his role in all of these developments, Wagner still valued the intellectual freedom of the nineteenth-century army, and in one of his final acts, kept the 1904 Infantry Drill Regulations from detailing tactical principles, lest officers be forced to use tactics with which they disagreed. Wagner was unable or unwilling to concede that his life’s work had been the development of tools for professional indoctrination. He found the intellectual coercion implicit in such a process offensive, but by 1922 Colonel George C. Marshall lectured Army War College students about the positive aspects of such standardization of thought. Marshall identified professional schools, field maneuvers, and doctrinal manuals as the three elements that “contribute in the most important manner to the fighting efficiency of our forces.” According to Marshall, “The power and duty are vested here to indoctrinate the army, which should mean that in the event of a future war all of our commanders will have the same general conception of tactics.”

The previous year, Brigadier General William Lassiter had identified essentially the same elements as the fundamental “agencies” for preparing the Army for war. At the time,

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11 George C. Marshall, Lecture to the Army War College, 19 September 1922, Xerox #3251, GCM.

12 William Lassiter, “Organization and Functions of the Operations and Training Division, War Department General Staff,” 13 November 1922, Box 3, Lassiter Papers, USMA.
Lassiter was the General Staff officer responsible for all operations and training. The comments of Marshall and Lassiter reveal the extent to which the systematic indoctrination of the officer corps with a centrally-determined vision of war had become organizational second nature, but such a goal had been unthinkable just a few decades earlier. What Wagner, an officer of the nineteenth-century army saw as an invasion of the individual’s intellectual freedom, Marshall, an officer of the twentieth-century army, saw as a necessity for the Army to achieve its purpose. This reflected the new nature of the military profession, which was defined by formal institutional processes. As indistinct as the normative standard by which professional qualifications were judged and as imperfect as the organizations that were their arbiters might have been, the Army had wrested the definition of professional standards from the collective officer corps, which had previously developed and enforced them in a largely informal manner. I think that Upton would have approved.
Appendix: Professional Biographies of Selected Individuals

J. Franklin Bell
Tasker H. Bliss
Daniel H. Boughton
William H. Carter
Robert K. Evans
John F. Morrison
Carl Reichmann
Eben Swift
Emory Upton
Arthur L. Wagner
Leonard Wood

J. Franklin Bell

1856  Born in Kentucky
1874  Appointed to United States Military Academy
1878  Commissioned as second lieutenant (Cavalry)
1886-9 Professor of Military Science and Tactics, Southern Illinois University
1890  Promoted to first lieutenant
1891-4 Adjutant, Seventh Cavalry
1893-4 Secretary, Cavalry and Light Artillery School
1894-7 Aide to Commanding General, Department of California
1898  Appointed Acting Judge Advocate, Department of the Columbia
       Commissioned as major, United States Volunteers (USV)
       Arrived in Philippine Islands as member of Eighth Army Corps Staff
1899  Promoted to captain
       Promoted to colonel, USV
       Awarded Medal of Honor for action near Porac, Philippine Islands
       Promoted to brigadier general, USV
1901  Promoted to brigadier general
1903-6 Commandant, General Service and Staff College (later Army Service
       Schools)
1906-1910 Chief of Staff, United States Army
1907  Promoted to major general
1917  Commanding General, 77th Division and Camp Upton, New York
1918-9 Commanding General, Eastern Department
1919  Died
Tasker H. Bliss

1853 Born in Pennsylvania
1871 Appointed to United States Military Academy (USMA)
1875 Commissioned as second lieutenant (Artillery)
1876-80 Assistant Professor of French and Assistant Instructor of Artillery, USMA
1880 Promoted to first lieutenant
1882-4 Student, Artillery School
1884-5 Adjutant, Artillery School
1885-8 Instructor, Naval War College
1888-95 Inspector of Artillery and Small Arms Practice and Aide to Commanding General, U.S. Army
1892 Promoted to captain (Subsistence Department)
1895-7 On special duty in the office of the Secretary of War
1897-8 Military Attaché to Spain
1898 Promoted to major
Commissioned as lieutenant colonel, United States Volunteers (USV)
1898-9 Collector of Customs for the Port of Havana
1901 Promoted to brigadier general, USV
1902 Promoted to brigadier general
1902-3 Member of War College Board
1903-5 General Staff and President, Army War College
1909-10 General Staff and President, Army War College
1915 Promoted to major general
1917-8 Chief of Staff, U.S. Army
1918-9 Delegate to Paris Peace Conference
Daniel H. Boughton

1858  Born in Minnesota
1877  Appointed to United States Military Academy (USMA)
1881  Commissioned as second lieutenant (Cavalry)
1885  Promoted to first lieutenant
1885-7  Student, Infantry and Cavalry School
1888-90  Detached duty at Cavalry Depot, Jefferson Barracks, Missouri
1890-6  Quartermaster and Instructor of History and Law, USMA
1896  Promoted to captain
1897  Honor Graduate, St. Louis Law School of Washington University
1898  Participated in Santiago de Cuba campaign
1900-3  Served in the Philippine Islands
1903  Promoted to major
1904-5  Head of Department of Law, Army Service Schools
1905-7  Head of Department of Military Art, Army Service Schools
1907-8  Assistant Commandant, Army Service Schools
1908-9  Assigned to General Staff (revising FSR at Fort Leavenworth)
1909-12  Assigned to War Department General Staff
1911  Promoted to lieutenant colonel
1912-3  With regiment in Philippine Islands, invalided to United States
1914  Promoted to colonel
Died of cerebral hemorrhage
William H. Carter

1851 Born in Tennessee
1868 Appointed to United States Military Academy
1873 Commissioned as second lieutenant (Infantry)
1874 Transferred to Cavalry
1875-6 Commanded company of Indian Scouts in Apache campaign
1879 Promoted to first lieutenant
1879-1887 Regimental Quartermaster, Sixth Cavalry
1889 Promoted to captain
1891 Awarded Medal of Honor for actions at Cibicu Creek, Arizona Territory in 1881
1893-1897 Troop Commander and Instructor, Fort Leavenworth, Kansas
1897 Promoted to major (Adjutant General’s Department)
1898 Promoted to lieutenant colonel
1902 Promoted to colonel
   Promoted to brigadier general
1902-3 Member, War College Board
1903 Assigned to War Department General Staff
1909 Promoted to major general
1910-2 Assistant Chief of Staff, U.S. Army
1915 Retired
1917-8 Recalled to active duty, Commanding General of Central Department
Robert K. Evans

1852 Born in Mississippi
1871 Appointed to United States Military Academy
1875 Commissioned as second lieutenant (Infantry)
1882 Promoted to first lieutenant
1892-6 Military Attaché to Germany
1893 Promoted to captain
1898 Participated in Santiago de Cuba campaign
1899-1901 Served in the Philippine Islands
1901 Promoted to major
Detailed to Adjutant General’s Department
1905 Promoted to lieutenant colonel
1907-9 Assigned to General Staff
1909 Promoted to colonel
1911 Promoted to brigadier general
1911-2 Assigned to General Staff
1916 Retired
1917-8 Recalled to active duty, Commanding General Philippine Islands Department
John F. Morrison

1857  Born in New York
1877  Appointed to United States Military Academy
1881  Commissioned as second lieutenant (Infantry)
1883-5 Student, Infantry and Cavalry School
1887-90 Professor of Military Science and Tactics, Kansas Agricultural College
1890  Promoted to first lieutenant
1893-7 Regimental Quartermaster, Twentieth Infantry
1897-8 Assistant Instructor, Infantry and Cavalry School
1898  Promoted to captain
       Participated in Santiago de Cuba campaign
1899-1901 Served in the Philippine Islands
1904  Attaché observing Japanese Army in Russo-Japanese War
1905  Promoted to major
1906-7 Instructor, Army Service Schools
1907-8 Head of Department of Military Art, Army Service Schools
1908-12 Assistant Commandant, Army Service Schools
1907-11 Assigned to General Staff (duty at Fort Leavenworth, Kansas)
1911  Promoted to lieutenant colonel
1914  Promoted to colonel
1915  Promoted to brigadier general
1917  Promoted to major general
       Commanding General, 30th Division
1918-9 Commanding General, Western Department
1921  Retired

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Carl Reichmann

1859  Born in Germany
1881  Enlisted in U.S. Army
1884  Commissioned as second lieutenant (Infantry)
1887-9 Student, Infantry and Cavalry School
1891  Promoted to first lieutenant
1893-5 Assistant Instructor, Infantry and Cavalry School
1895-8 Detailed to Military Information Division, Adjutant General's Office
1898  Commissioned as captain, United States Volunteers (USV)
      Served on Second Army Corps staff
      Promoted to captain
1899  Regimental Adjutant, Seventeenth Infantry, and Eighth Army Corps staff
      in the Philippine Islands
1900  Military attaché observing Boer Army in South Africa
1901  Recruiting duty in Wheeling, West Virginia
1901-3 Regimental Adjutant, Seventeenth Infantry
1903-4 District Governor, Moro Province, Philippine Islands
1904  Military attaché observing Russian Army in Manchuria
1906-8 District Intelligence Officer, Army of Cuban Pacification
1907  Promoted to major
1909-10 Student, Army War College
1911  Assigned to General Staff
1916  Promoted to colonel
1917  Selection for brigadier general, National Army, not confirmed by Senate
1923  Retired
Eben Swift

1854 Born in Texas
1872 Appointed to United States Military Academy
1876 Commissioned as second lieutenant (Cavalry)
1878-1887 Regimental Adjutant, Fifth Cavalry
1884 Promoted to first lieutenant
1887-93 Aide de Camp to Major General Wesley Merritt
1893 Promoted to captain
1893-6 Assistant Instructor, Infantry and Cavalry School
1896-8 Advisor to Illinois National Guard
1898 Commissioned as major, United States Volunteers (USV)
  Promoted to lieutenant colonel, USV
  Promoted to colonel, USV
1899 Commissioned major, Puerto Rico Regiment
1903 Promoted to major
1904-6 Instructor and Assistant Commandant, Army Service Schools
1906-11 Director, Army War College
1911 Promoted to lieutenant colonel
1912 Promoted to colonel
1914-6 Assigned to War Department General Staff
1916 Commandant, Army Service Schools
  Promoted to brigadier general
1917 Commissioned as major general, National Army
  Commanding General, 88th Division
  Commander, American Military Mission to Italy
1918 Promoted to brigadier general
  Retired

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Emory Upton

1839 Born in New York
1856 Appointed to United States Military Academy (USMA)
1861 Commissioned as second lieutenant (Artillery)
       Promoted to first lieutenant
1862 Commissioned as colonel, Volunteers
1863 Promoted to brevet major for action at Rappahannock Station
1864 Promoted to brigadier general, volunteers
       Promoted to brevet lieutenant colonel for action as Spottsylvania Courthouse
       Promoted to brevet colonel and brevet major general, Volunteers, for action at Opequon Creek
1865 Promoted to captain
       Promoted to brevet brigadier general for action at Selma
       Promoted to brevet major general for actions during the war
1866 Promoted to lieutenant colonel
1867 War Department adopts A New System of Infantry Tactics, Double and Single Rank
1870-5 Commandant of Cadets, USMA
1873-4 War Department adopts assimilated drill regulations for all three arms
1875-6 Tour of Asian and European armies
1877 Superintendent of Theoretical Instruction in Mathematics, Artillery, Engineering, History, Law, and Infantry at Artillery School
1878 Publication of The Armies of Asia and Europe
1880 Promoted to colonel
1881 Committed suicide
1884 Publication of The Military Policy of the United States
Arthur L. Wagner

1853 Born in Illinois
1870 Appointed to United States Military Academy
1875 Commissioned as second lieutenant (Infantry)
1881-5 Professor of Military Science and Tactics, East Florida Seminary
1882 Promoted to first lieutenant
1886-94 Assistant Instructor, Infantry and Cavalry School
1892 Promoted to captain
1893 Publication of The Service of Security and Information
1894 Publication of Organization and Tactics
1894-7 Assistant Instructor, Infantry and Cavalry School
1896 Promoted to major (Adjutant General’s Department)
1898 Promoted to lieutenant colonel
  Participated in Santiago de Cuba campaign
1899-1902 Served in the Philippine Islands
1901 Promoted to colonel
1903-4 Assistant Commandant, General Service and Staff College
1904-5 Assigned to War Department General Staff
1905 Promoted to brigadier general
  Died
Leonard Wood

1860 Born in New Hampshire
1885 Received interim appointment as Contract Surgeon
1886 Appointed as Assistant Surgeon
1891 Promoted to captain (Medical Department)
1895-8 Assistant Attending Surgeon, Headquarters, U.S. Army
1898 Awarded Medal of Honor for actions during Geronimo campaign, 1886
Commissioned as colonel, United States Volunteers (USV)
Promoted to brigadier general, USV
Promoted to major general, USV
1901 Commissioned as brigadier general
1903-6 Governor, Moro Province, Philippine Islands
1906-8 Commanding General, Philippine Division
1908-10 Commanding General, Department of the East
1910-1914 Chief of Staff, U.S. Army
1914-7 Commanding General, Department of the East
1917 Commanding General, 89th Division and Camp Funston, Kansas
Commanding General, Southern Department
1917-8 Commanding General, 10th Division, Camp Funston, Kansas
1918 Unsuccessful candidate for Republican nomination for President
1921 Retired
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Laurence Halstead Collection.
Forrest Pogue interview notes.
George C. Marshall Microfilm Collection.

Library of Congress, Manuscript Division
Washington, D.C.

Robert L. Bullard Papers.

Henry C. Corbin Papers.

James G. Harbord Papers.

George Van Horn Moseley Papers.

Elihu Root Papers.
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Record Group 393, Records of the Continental Army Command.

Record Group 165, Records of the War Department General and Special Staffs.

Frank Parker Papers.

Office of the Chief of Military History Collection, Harold D. Cater Interview Notes.
Charles Gerhardt, “Summary of Military Career.”
Ernest Gose Papers.
Johnston Hagood Papers.
Guy V. Henry, Jr. Papers.
Eli A. Helmick, “From Reveille to Retreat.”
Nelson A. Miles Papers.
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Matthew F. Steele Papers.
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Biography

J.P. Clark was born in 1975 in Fort Collins, Colorado. He graduated from the United States Military Academy at West Point in 1997 with a Bachelor of Science degree in Russian and German. He earned a Master of Arts degree in history from Duke University in 2006. Since 1997, he has served as an officer in the United States Army. He is currently an assistant professor of history at the United States Military Academy.