

The road to Plattsburgh: Progressive-era reform, army preparedness, and officer development,
1886-1918

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B.A., University of Central Arkansas, 2011

A THESIS

Submitted in partial fulfillment of the requirements for the degree

MASTER OF ARTS

Department of History
College of Arts and Sciences

KANSAS STATE UNIVERSITY
Manhattan, Kansas

2021

Approved by:

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Abstract

In 1869 General William Tecumseh Sherman was assigned as the Commanding General of the United States Army. During his tenure, Sherman cultivated a period of reform in the post-Civil War Army that was featured by a movement among the officers to professionalize the corps and the founding the Infantry and Cavalry School at Fort Leavenworth, Kansas in 1881. Although senior officers in the Army resisted the idea that education was necessary after graduating from West Point, the belief persisted that necessary leadership skills and postgraduate training in military art and science was a viable alternative to learning through experience on the battlefield. This period also featured the emergence of progressive reformers such as Frederick Winslow Taylor, whose work on management reform and reducing work to a science marked a turning point in civilian workplace reform during the Industrial Age. Reformers worked to instill order amid the chaos of the Industrial Age, and this work to increase organization and efficiency was influential on the Army's reform effort in the years leading to World War I.

Elihu Root was assigned as the Secretary of War in 1899. Root was charged with reorganizing the Army following its haphazard mobilization for the Spanish-American War. His reform efforts were influenced by the work of civilian reformers such as Taylor, who believed in streamlined organization, intelligent management, and a scientific approach to problem-solving. The civilian and military spheres were combined under the Root reforms, and were further advanced through the work of General Leonard Wood and the Military Training Camps Association (MTCA) in their campaign for preparedness and a systematic approach to training the large number of officers that would be needed in the next war. The Officer Training Camps of 1917-1918 were the culmination of the Army reform movement that began in 1886.

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Acknowledgements

Many thanks are to the individuals who have supported and mentored me during my time at Kansas State University. To my wife Jackie, thank you for being my rock throughout this journey. I will forever be grateful for your understanding during the long nights I spent reading and writing. Your unflagging support greatly enabled me to make the most of this experience. Thank you to Dr. Donald Mrozek, whose mentorship and insight guided me toward this remarkably interesting topic. I greatly enjoyed being in your classes and consider myself extremely fortunate to have had the opportunity to learn from you. To the members of my committee, Dr. Andrew Orr and Dr. Mary Elizabeth Walters, thank you for your efforts and support to my thesis and graduate studies. Your classes were thought-provoking and facilitated wide-ranging and intelligent discussion on a variety of topics. I have learned a great deal during my studies at Kansas State, and I am forever indebted to the instructors and students I have had the pleasure of working with for making this a most enjoyable experience.

To my fellow students in the history department, thank you for welcoming me with open arms and listening to my ideas in class. It has been a privilege to learn from you. Rob, I wish you the greatest success in your Air Force career. Thanks for being a sounding board for my ideas and for the timely suggestions as this project came together. Fly high brother. Rich and Bryant, it was a pleasure to be in class with you. Your wisdom and experience were invaluable to my education and understanding of sometimes difficult concepts. I looked forward every semester to seeing you guys in class.

Finally, my family was the bedrock of my success. They have loved me and supported me every step of the way, and this would not be possible without their constant encouragement.

Dedication

This work is dedicated to my wife, Jackie, and my children. You mean the world to me, and this project would not be possible without your support.

Introduction: The Era of Reform

In 1911, Frederick Winslow Taylor published *Principles of Scientific Management*, which was a primer on how management could seek to achieve ideal results in the workplace. This work was only the latest in a series of works by Taylor, who published his first essay, *A Piece Rate System*, in 1896. By the early 1900s, advances in warfighting technology had caused the United States Army to implement a new approach to military leadership that closely mirrored similar civilian management reform measures, referred to by Carol Reardon as “safe leadership.”¹ Industrial Age progressive reforms were influential during the Army’s reform period that lasted from the 1870s through 1918. Safe leadership was developed by a succession of Army leaders through the early 1900s, who advocated for a systematic approach to postgraduate education, a meritocracy system of promotions, methodical approaches to planning and problem solving that were founded on military science, common language among staff officers and commanders, and the use of written orders that followed a standard format. These reforms were heavily influenced by progressive reformers who sought to instill a particular way of doing things in others that often ran counter to a person’s natural inclinations.² Thus, the generally accepted “right” way of doing things, what Frederick Winslow Taylor referred to as “rule of thumb,” was slowly discarded during the late 1800s and early 1900s, and in the place of a person’s instincts reformers sought to impose an ordered society that was often in contrast to long-standing practices.³ With this in mind, “safe leadership” as the Army viewed it in the years

¹ Carol Reardon, *Soldiers and Scholars: The U.S. Army and the uses of Military History, 1865-1920* (Lawrence: University Press of Kansas, 1990), 33. Safe leadership was a term applied by Reardon to the Army philosophy of responsible command.

² Dr. Donald Mrozek provide a much fuller understanding of the Progressive Era and its distinction from liberal/conservative politics through many enlightening conversations.

³ Frederick Winslow Taylor, “The Principles of Scientific Management” in *Scientific Management* (New York: Harper and Row, 1947), 25.

leading up to World War I can be simply defined as providing a new form of predictability in the approach to a problem, the planning to solve the problem, and in the results achieved. This applies both horizontally and vertically within an organization, as safe leadership requires the concurrence of the owner, the workers, and the managers charged with implementing and supervising the work.⁴

One key illustration of Taylor's principles which highlights the practice of safe leadership involved the relatively simple task of moving a pile of pig iron from the ground to a railroad car. After careful analysis of current practices, Taylor determined that it could be done much more efficiently, resulting in a four-fold increase in the amount of pig iron moved each day. Step one in the scientific management process was to learn about each worker individually, discovering his unique capabilities and weaknesses. By focusing on one worker at a time instead of the entire group, the managers sought to "develop each individual man to his highest state of efficiency and prosperity."⁵ After careful study of each individual, the managers chose a worker named "Schmidt" to carry out their experiment.⁶ One of Schmidt's defining features was his "mental sluggishness," which was an essential element of the ideal worker because it allowed the researchers to focus Schmidt's attention on the possible rewards to be gained by following orders without question while distracting the man from a seemingly impossible task.⁷ After agreeing to

⁴ This concept, although not mentioned by name, was used by Elting Morison in his analysis of Naval gunfire practices in *Men, Machines, and Modern Times* (Cambridge: M.I.T. Press, 1966).

⁵ Frederick Winslow Taylor, "The Principles of Scientific Management" in *Scientific Management* (New York: Harper and Row, 1947), 43.

⁶ Frederick Winslow Taylor, "The Principles of Scientific Management" in *Scientific Management* (New York: Harper and Row, 1947), 44.

⁷ Frederick Winslow Taylor, "The Principles of Scientific Management" in *Scientific Management* (New York: Harper and Row, 1947), 46.

follow a set of rules that he would be given, Schmidt was put to work. For the next three years, he moved pig iron under the close supervision of a scientific manager, handling four times the previous amount while earning 60 percent higher wages. This method was repeated until all the pig iron was being moved at the new rate by a group of workers who were hand-picked for this specific job.⁸ The basic premise that Taylor wished to impart to his readers was that, even for the most mundane tasks, one can develop a scientific approach through careful analysis of the problem and that the workers who carry out the task cannot possibly hope to understand that science or work under its rules without the oversight of specially trained managers.⁹ During the early 1900's, ideas about reform were widespread in both the civilian and military spheres. The Army was undergoing a period of reform which had been initiated by Elihu Root, the Secretary of War from 1899 through 1904. Between the Spanish-American War and World War I, some of the most prominent reform ideas came from non-military persons, a key example is Taylor.

This study examines and traces the road to Plattsburgh from 1886 through 1918.¹⁰ It will trace how the Army approached the development of junior officers, looking at the impetus for certain reforms, such as the recognition that junior officers could be effectively trained during peacetime, and how these reforms were implemented. Of primary importance to this study is examining how civilian ideas about social and workplace reform were adopted by the Army to transform its leadership ideals and train the next generation of Volunteer officers at Plattsburgh. As technology advanced, so too did the Army's concept of battlefield leadership. Following the

⁸ Frederick Winslow Taylor, "The Principles of Scientific Management" in *Scientific Management* (New York: Harper and Row, 1947), 47.

⁹ Frederick Winslow Taylor, "The Principles of Scientific Management" in *Scientific Management* (New York: Harper and Row, 1947), 48.

¹⁰ Although 'Plattsburgh' is the correct spelling, Camp attendees, staff, and authors have used 'Plattsburg' in written material. In this study, 'Plattsburgh' will be used except when referencing material that uses 'Plattsburg.'

Spanish-American War, Army instructors at Fort Leavenworth began teaching the new model of “safe leadership,” which sought to instill a measure of predictability from subordinate commanders and staffs as the scale of warfare grew larger.¹¹

The United States continued to rely on volunteers to fill its enlisted and commissioned ranks during wartime. Because the requirements of battlefield leaders had grown more complex, certain Army officers along with a group of concerned citizens realized that the volunteer officers and enlisted soldiers who would make up the bulk of the Army in the next war must be trained in advance. In 1910 when General Leonard Wood became Chief of Staff of the Army, there were 75,000 soldiers on active duty. Wood, Theodore Roosevelt, Alfred Thayer Mahan, and others who believed in backing up foreign commitments with military force knew that war with another major power was inevitable, if not imminent, and once war broke out there would be no time to train the number of new officers who would be required for large-scale war. The National Guard could presumably be called into federal service to fill out the expanded Army, but by 1912 the United States Attorney General had ruled that the National Guard could not be used in foreign wars.¹² These factors contributed to instituting summer training camps in 1913 (and the push for Universal Military Training) which instilled basic military knowledge in civilian attendees, and the future focus on Volunteer officer training at Plattsburgh, as a way to quickly expand the Army in the event of international war.

Although most military history studies of this period focus on either Regular officer development at Fort Leavenworth or Volunteer officer training at Plattsburgh, few have looked

¹¹ Carol Reardon, *Soldiers and Scholars: The U.S. Army and the uses of Military History, 1865-1920* (Lawrence: University Press of Kansas, 1990), 33.

¹² John Garry Clifford, *The Citizen Soldiers; the Plattsburg Training Camp Movement, 1913-1920* (Lexington; The University Press of Kentucky, 1972), 5-9.

at how the civilian management reforms directly influenced that Army's approach to leading soldiers. This study suggests a link between the two, that the Army did not evolve its leadership style in a vacuum but rather borrowed heavily from the civilian management reforms. It was at Plattsburgh where the military and civilian spheres merged to train volunteer soldiers and future officers for service in the next war. Civilian reformers emphasized organization, order, and efficiency as the way to maintain control over burgeoning industries, and these same ideas were applied within the Army to advance a fundamental shift in the way wars would be fought. A professional army is necessarily more educated, trained, and efficient, and these qualities marked a move toward a safe style of leadership which placed more emphasis on management and less on heroic action. Military art would now be balanced with an increased emphasis on learning military science, as officers advanced through successive postgraduate schools to learn the principles of warfighting (science) and how to apply them (art) in various situations.

In this study, "junior officer" includes the ranks of second lieutenant, first lieutenant, and captain. The word "junior" is a bit of a misnomer, as lieutenants routinely served for over ten years before being promoted to captain and might serve another eight to ten years before promotion to field grade rank.¹³ So in a sense they might be considered senior (or at least mid-career) officers with years of experience to separate them from brand new second lieutenants. However much experience an officer might have gained during his time in the junior officer ranks, it still did not often translate into positions of increased responsibility above the regimental level. Officers might spend years moving through a succession of assignments at the

¹³ This is contrasted with modern Army promotion timelines, where promotion to First Lieutenant comes after eighteen months, Captain after four years, and Major after ten years.

company and battalion levels before achieving promotion to a higher rank and a position of greater responsibility.

Following the Civil War, the United States Army began its latest period of reform by studying various European and Asian armies. In 1875, General William T. Sherman ordered Lieutenant Colonel Emory Upton to take a delegation of officers and study how foreign militaries were organized, especially emphasizing the German army and its general staff. Following his return, Upton published his observations in *The Armies of Asia and Europe* in 1878. Upton's next project was *The Military Policy of the United States*, which was originally planned as the final chapter in his report, providing the necessary historical background on American military policy and lending justification to his recommendations.¹⁴ This work went unpublished until 1904 when Secretary of War Elihu Root used them as part of his reform effort following the Spanish-American War.

In his introduction to *The Military Policy of the United States*, Upton wrote that one of the principal causes of weakness in the US Army was “the employment of militia and undisciplined troops commanded by generals and officers utterly ignorant of the military art.”¹⁵ His criticism of the US Army was grounded in his analysis of Civil War commanders, who suffered from the unrealistic expectations the public had of them to be “alone responsible for disasters in time of war” and from the lack of training to lead massive formations of green soldiers.¹⁶ When General George McClellan took command of the Union Army, none of his subordinate commanders down to the brigade level had any experience leading a unit of that size,

¹⁴ David Fitzpatrick, *Emory Upton: Misunderstood Reformer* (Norman; University of Oklahoma Press, 2017), 9.

¹⁵ Emory Upton, *The Military Policy of the United States* (Washington; Government Printing Office, 1907), XIII..

¹⁶ Emory Upton, *The Military Policy of the United States* (Washington; Government Printing Office, 1907), 307.

and, because most of his colonels were commissioned directly from the civilian population, they had no prior experience in training their soldiers or gauging their capabilities.¹⁷

Post-Civil War Army reform highlights the growing distinction between the terms “military art” and “military science.” In *Men, Machines, and Modern Times*, Elting E. Morison studies how changes in machine systems resulted in changes in the social systems managers used to control people under their authority. Part of his analysis concerns workers’ resistance to mechanical change (the introduction of machinery to replace human labor), which was due in part to an underlying psychological explanation rather than a simple concern for their jobs. Morison notes that “men tend to continue the patterns of behavior developed in earlier conditions into the new, often quite different conditions set forth by the introduction of different mechanisms.”¹⁸ He wrote this to describe how mechanical innovation has been received through time, often marked by resistance before wide acceptance. Mechanical innovation is a way to provide predictability within an environment, to control a certain aspect of the process, and gain efficiency while increasing uniformity in production as well as output. Essentially, it is the replacement of art, which is learning through associating with people skilled in that field, with science, which opens the field up to systematically trained workers capable of manipulating machines to produce a finished product. Morison studies the introduction of continuous-aim firing on naval ships to highlight, in part, the difference between an art and a science. Prior to 1898, naval gunners had to time the firing of their deck guns to coincide with the rolling of the ship. Hand cranks were used to position the gun’s elevation based on the gunner’s estimate, but the gun remained fixed in place and parallel to the deck throughout the engagement because

¹⁷ Emory Upton, *The Military Policy of the United States* (Washington; Government Printing Office, 1907), 307.

¹⁸ Elting E. Morison, *Men, Machines, and Modern Times* (Cambridge: M.I.T. Press, 1966), 10.

there was no way to keep the gun on target due to the instability of the ship in rolling seas. As the ship rolled back and forth, the gunner would have to fire the shot when the gunsight rolled back onto the target. However, due to variances in reaction times associated with the eye perceiving the target through the sight, the brain registering this information, and the finger performing the physical act of pressing the fire button, the gunner necessarily had to time his shot based on experience and personal skill with the gun so that the round would fire just as the sight came back on target. Because of this reliance on individual nuances, naval gunnery was relegated to an art. Sailors could not be rapidly trained to be effective and accurate gunners under this system. But geared elevation systems were then introduced that allowed the gun to remain on target while the ship was rolling, and new telescopic sighting systems were mounted as well. Morison states: “These two improvements . . . eliminated the major uncertainties in gunfire at sea and greatly increased the possibilities of both accurate and rapid fire.”¹⁹ These innovations can be seen as the evolution from individual technique to a system of control, and this also applies to the broader idea of military professionalism and leadership as an accessible scientific system in which officers can be trained and which is accessible to most. This differed from the military art that had been practiced formerly with varying results by most officers.

In 1913, Lieutenant Henry T. Bull, a professor of military science at Cornell University, proposed to General Leonard Wood, the Army Chief of Staff, a possible solution to the problem of untrained volunteer officers. His plan was modeled after a Navy program which took college students on a two-month cruise and was intended to recruit and train future officers and seamen.²⁰ Bull’s plan involved a series of summer camps for volunteers to be held at various

¹⁹ Elting E. Morison, *Men, Machines, and Modern Times* (Cambridge: M.I.T. Press, 1966), 22.

²⁰ John Garry Clifford, *The Citizen Soldiers; the Plattsburg Training Camp Movement, 1913-1920* (Lexington; The University Press of Kentucky, 1972), 10.

locations, and recruiting would be aimed at male college students. This was needed because of the lackluster training they were receiving at the various land-grant colleges in the United States. Officers detailed to train students at the colleges viewed the position as a career dead end, and the War Department did not have the authority to set any sort of standards for the training. In a strange twist, the land-grant colleges fell under the supervision of the Department of the Interior, putting them outside the purview of the Army.²¹ With the quality of training dependent on the individual college presidents, the motivation of the Regular officers, and the effort of the students, the overall result was an extremely low level of military training, if any, being provided to these potential reserve officers.

After Wood's staff planned the first volunteer summer camps for the Summer of 1913, he addressed a letter to all of the college presidents in which he specified the object of the camps: "to increase the present inadequate personnel of the trained military reserve of the United States by a class of men from whom, in time of a national emergency, a large proportion of the commissioned officers will probably be drawn, and upon whose military judgment at such time, the lives of many other men will in a measure depend."²³ By devising this plan and putting it into action, Wood was attempting to address an issue that had plagued the Army since its inception. In 1776, General George Washington was appointed commander of the newly formed Continental Army. One of his first acts as commander was to begin transforming the undisciplined, untrained militia into a trained, competent fighting force that could stand up to the

²¹ John Garry Clifford, *The Citizen Soldiers; the Plattsburg Training Camp Movement, 1913-1920* (Lexington; The University Press of Kentucky, 1972), 13.

²³ John Garry Clifford, *The Citizen Soldiers; the Plattsburg Training Camp Movement, 1913-1920* (Lexington; The University Press of Kentucky, 1972), 12.

British.²⁴ He recognized that mere enthusiasm was insufficient to win a war and that the militia officers would waste the lives of many soldiers unless they were trained in military science. By implementing summer camps in peacetime, Wood was attempting to get ahead of the traditional cycle, in which volunteer officers learned the art of war at the expense of their soldiers. If the United States was going to rely on a volunteer army, it needed a way to field a force that stood a reasonable chance of winning the first fight. All of this started with training the officers who would lead the soldiers in combat.

The Spanish-American War highlighted many of the issues the Army had faced since its inception and gave Secretary of War Root an opportunity to reform the education of officers. Calls for reform had been made after every major conflict since the War for American Independence. However, the United States' expedition to Cuba at the outset of the war marked a turning point in the Army's development of its officers and laid the foundation for raising and shaping the armed forces that the U.S. would use in World War I. Previously there had been no systematic approach to officer development. Officers were trained at West Point, and for the rest of their careers they relied on more-senior officers to continue developing them in an ad hoc manner. Where some officers, such as Dwight Eisenhower, had the benefit of learning from the likes of General Fox Conner, others were less fortunate.²⁵ Some commanders at obscure posts paid little attention, if any, to developing their officers, and the result was a haphazard approach to education. The period being studied marked a shift toward a more systematic approach to education which extended through an officer's entire career, starting with West Point, then

²⁴ Marcus Cunliffe, *George Washington: Man and Monument* (Boston: Little, Brown, and Company, 1958), 54.

²⁵ Dwight D. Eisenhower, *At Ease: Stories I Tell to Friends* (Garden City: Doubleday and Company, Inc, 1967), 178.

continuing with the Leavenworth Schools, and culminating in the War College. These schools also gradually became part of the career timeline, albeit in an uneven manner as some older officers who had not attended the schools continued to resist the push for reform of the officer development system. This focus on officer education was a reflection of management reform in the civilian world. The Plattsburgh movement was an outgrowth of this focus, a way for the Army to ensure some level of competence, training, and discipline in the future officers who would be training and leading soldiers in the next war.

After taking over as the Secretary of War in 1899, Elihu Root began studying how best to reform the army after its poor showing during the mobilization for war in the Philippines. One of the primary issues he identified was the compartmentalization of the Army's administrative functions into bureaus, each directed by one staff officer who was appointed to hold the position until he retired. It was a haphazard system where one officer might run the bureau for years until he retired, while his successor might be in the position for only a matter of months. Until 1903, the bureaus exercised autonomous control of the Inspector-General, Judge-Advocate, Quartermaster, Subsistence, Medical, Pay, and Ordnance functions for the Army, and they did not answer to the Commanding General of the Army.²⁸ This type of organization resulted in a stovepipe effect, where each bureau's officers worked within their assigned function without an understanding of the bigger picture. The system was adequate, but as General Hugh Scott later recalled, "our army was organized for peace and not war."²⁹ Root proposed that the United States adopt the concept of the General Staff to address this problem, which would streamline the

²⁸ An Act to Increase the Efficiency of the Army, No. 57-553, at 830-831. 1903.

²⁹ Allan Reed Millett, *The General: Robert L. Bullard and Officership in the United States Army, 1881-1925* (Westport: Greenwood Press, 1975), 91. See also Brian Linn, *The Philippine War 1899-1902* (Lawrence; University Press of Kansas, 2000), 10-11, and Millett, *The General*, 92-93 for further information on the mobilization effort for the Spanish-American War.

bureaus under the control of the new office of Chief of Staff. The officers on the General Staff would integrate the bureaus' efforts with the overall policy objectives for the Army set by Congress so that all work was done toward a common goal.³⁰ Russell Weigley, in a presentation at the 1968 Second Military History Symposium at the United States Air Force Academy, discussed the civilian influence on Root's decision to establish the General Staff. Primarily conceived to "think," the Staff was to "plan and propose American military policy, so that the United States would never again find itself . . . without a military policy appropriate to the execution of its foreign policy."³¹ The major issue that the Staff would resolve was "how to manage the army in such a way that the bureaus and the scattered detachments would function harmoniously."³²

Although many histories of the American General Staff focus on the influence of the Prussian model, it is worth noting that Root had no prior military service when he became the Secretary of War. His initial approach towards military reform would have been based on his experience in the civilian world, where as a lawyer he would have been exposed to many different business practices. Weigley notes that "Root described the application of business principles to military management and command as one of the principal purposes of his reforms."³³ Although Root was undoubtedly influenced by the Prussian command system, it was not his only source of inspiration. In describing the role of the General Staff, Root used words

³⁰ Elihu Root, "The General Staff," in *The Colonial and Military Policy of the United States*, ed. Robert Bacon and James Brown Scott (Cambridge; Harvard University Press, 1916), 429.

³¹ Russell F. Weigley, "The Elihu Root Reforms and the Progressive Era," in *Command and Commanders in Modern Warfare*, ed. William Geffen (United States Air Force Academy, 1971), 20.

³² Russell F. Weigley, "The Elihu Root Reforms and the Progressive Era," in *Command and Commanders in Modern Warfare*, ed. William Geffen (United States Air Force Academy, 1971), 19.

³³ Russell F. Weigley, "The Elihu Root Reforms and the Progressive Era," in *Command and Commanders in Modern Warfare*, ed. William Geffen (United States Air Force Academy, 1971), 13.

such as “control,” “supervision,” “manage,” and “direct.”³⁴ Even though Weigley stops short of pointing to specific civilian influences (leaving that analysis open for future historians), one can see in Root’s choice of words similarities with how Frederick Winslow Taylor discussed the workplace.

Taylor published his essay “Shop Management” in 1903. Drawing on years of experience as a laborer, manager, and researcher, he described how to plan, organize, and train the workers so that maximum output could be achieved while ensuring that both managers and laborers were satisfied. As part of his study, he recommended that businesses establish planning departments. These planning departments acted as the brains of the organization, concentrating “the planning and much other brainwork in a few men especially fitted for their task and trained in their especial lines”³⁵ These planners would then pass the results of their scientific analysis of work to the managers, who would then train the workers accordingly and supervise the work. Especially striking is Taylor’s further description of the planning department’s role: “a managing department in which each operation is carefully planned, with its many written orders and its apparent red tape”³⁶

Comparing Taylor’s planning department and Root’s General Staff highlights the ways in which military reform was influenced by earlier civilian reform. The General Staff, by streamlining the planning process and translating military policy into actionable orders, acted in much the same way as the civilian planning department, which planned the workplace operation

³⁴ Russell F. Weigley, “The Elihu Root Reforms and the Progressive Era,” in *Command and Commanders in Modern Warfare*, ed. William Geffen (United States Air Force Academy, 1971), 20.

³⁵ Frederick Winslow Taylor, “Shop Management,” in *Scientific Management* (New York: Harper and Row, 1947), 66.

³⁶ Frederick Winslow Taylor, “Shop Management,” in *Scientific Management* (New York: Harper and Row, 1947), 66.

in detail before handing the order to the managers to execute. What this suggests is that Root may have borrowed liberally from the work of reformers such as Taylor to implement the American version of the General Staff. Weigley mentions that the German system “was neither well enough understood nor sufficiently relevant to be of much use in deciding how to coordinate the parts of the army.”³⁷ What this implies is that there was ample room for civilian management reforms to find a way into Root’s conception of the General Staff.

In devising this plan for a general staff, Root also associated the issues facing the Army in 1899 with another problem: a lack of trained officers. At the time, the Army relied on being “expandable,” a concept which called for a skeleton of regulars to maintain the ongoing functions of the force and, in time of war, to serve as the model for training the mass of civilian volunteers who would fill out the units. Although it was an imperfect system, it emerged as the best way to rapidly field a large army while maintaining an adequate staff of officers. William Jennings Bryan summed up the prevailing civilian thought on the matter in 1914 when he stated: “The President knows that if this country needed a million men, and needed them in a day, the call would go out at sunrise and the sun would go down on a million men in arms.”³⁸ This ideal of the patriotic civilian leaping to arms in defense of the nation did not take into account the fact that new soldiers needed a certain level of training to make them at all fit for combat.

Root had addressed this issue fifteen years earlier in his *Report of the Secretary of War for 1899*. Although he firmly believed in relying on newly recruited civilians to expand the army in time of war, he also recognized that many of the officers “must necessarily come from civil

³⁷ Russell F. Weigley, “The Elihu Root Reforms and the Progressive Era,” in *Command and Commanders in Modern Warfare*, ed. William Geffen (United States Air Force Academy, 1971), 19.

³⁸ John Garry Clifford, *The Citizen Soldiers; the Plattsburg Training Camp Movement, 1913-1920* (Lexington; The University Press of Kentucky, 1972), 33.

life and have but a small degree of the knowledge, experience, and training necessary to prevent great and needless loss of life and efficiency at the outset of any campaign.”³⁹ Root understood that developing an officer, whether regular or volunteer, required intensive training on a variety of subjects. He made this clear in his *Report*:

The problems of subsistence, clothing, equipment, transportation, sanitation, the vast and complicated business of supplying and transporting an army, of caring for the health and strength of the men, as well as the actual command of troops in battle, require long and active and devoted thought, study, and training. To send volunteers into camp or field under inexperienced officers is simply to educate the officers at the expense of the lives and the efficiency of their men.⁴⁰

Although Root recommended that trained Regular officers serve in volunteer and National Guard units to ensure some measure of effectiveness, he also acknowledged the shortage of officers available to meet the need. Root called for increasing the number of regular officers, which in 1900 was reduced to 2,447, and argued for a systematic approach to officer development.⁴¹ His goal was to train “as many officers as possible in the variety of experiences which will fit them for the duties of the staff and of general command in the combined force of regulars and volunteers.”⁴² Essentially, Root understood that an officer was only as good as he was trained to

³⁹ Elihu Root, “Reorganization of the Army,” in *The Colonial and Military Policy of the United States*, ed. Robert Bacon and James Brown Scott (Cambridge; Harvard University Press, 1916), 371.

⁴⁰ Elihu Root, “Reorganization of the Army,” in *The Colonial and Military Policy of the United States*, ed. Robert Bacon and James Brown Scott (Cambridge; Harvard University Press, 1916), 370-371.

⁴¹ Elihu Root, “Reorganization of the Army,” in *The Colonial and Military Policy of the United States*, ed. Robert Bacon and James Brown Scott (Cambridge; Harvard University Press, 1916), 365.

⁴² Elihu Root, “Reorganization of the Army,” in *The Colonial and Military Policy of the United States*, ed. Robert Bacon and James Brown Scott (Cambridge; Harvard University Press, 1916), 372.

be and that the process of developing officers capable of leading soldiers in combat must become a priority.

Management styles in the civilian sector had also been changing. Frederick Winslow Taylor published his groundbreaking study on scientific management in 1911, but as noted earlier his first work had been published in 1896. His basic premise was that the needs of the employer and employee were not competing demands but complementary desires. The employer wants low labor costs to maximize profits, and the employee wants the highest wage possible.⁴³ Where most people found these demands antagonistic, Taylor believed that through scientific management they could be made complementary. His underlying premise was that managers could be trained to produce efficient results from their employees. He stated: “in the future it will be appreciated that our leaders must be trained right . . . and that no great man can (with the old system of personal management) hope to compete with a number of ordinary men who have been properly organized so as efficiently to cooperate.”⁴⁴ Other reformers such as Henry R. Towne and Frederick A. Halsey had produced works on incentivization of the workers, advocating for plans to consistently increase production through higher wages while keeping both owners and workers happy.⁴⁵ Although not as wide-ranging as Taylor’s proposed reforms, these wage systems were part of the broader progressive effort to reform the workplace. As junior officers remained trapped in a promotion system based on seniority rather than merit, systems such as these described how to reward workers and managers who efficiently increased

⁴³ Frederick Winslow Taylor, “The Principles of Scientific Management,” in *Scientific Management* (New York: Harper and Row, 1947), 10.

⁴⁴ Frederick Winslow Taylor, “The Principles of Scientific Management,” in *Scientific Management* (New York: Harper and Row, 1947), 6-7.

⁴⁵ For further reading on these incentivization proposals see “The Adjustment of Wages to Efficiency,” *Economic Studies* 1, no. 2 (June, 1896).

production. For the Army, these rewards might come through merit-based promotions, which might incentivize officers and soldiers through quicker advancement.

Originally intended for private business owners seeking to maximize profit, Taylor's ideas could also be applied to the Army's emerging officer development system, which was intended to institute a peacetime training plan rather than wait until the next war to develop officers on the battlefield. The goal which Taylor espoused was that both managers and employees must be trained and developed "so that [each] can do . . . the highest class of work for which his natural abilities fit him."⁴⁶ Leaders were not necessarily born, but with the right training they could achieve the highest results possible for their organization. This emphasis on leaders needing to be trained marked a shift in thinking: the individual workers and managers were now subordinate to the organization. There was little room for individual genius because of its unpredictability. The hallmark of management reform as envisioned by Taylor was the creation of a predictable system with repeatable results, which leads to increased efficiency and maximum profits. This type of thinking was directly evident in the Root reforms of the early twentieth century and contributed to the transformation of the ideal army officer. The Army was moving away from inherent genius toward a new model of safe leadership, reflective of the same civilian management principles being espoused by Taylor and others.

This approach to developing leaders was incorporated into the officer training camps during the Plattsburgh Movement. In *The Plattsburg Manual*, a book to be read ahead of arrival by civilians planning to attend one of the military training camps, the authors, who were Regular Army officers, advised that, "since success in battle is the thing at which we are driving in all

⁴⁶ Frederick Winslow Taylor, "The Principles of Scientific Management," in *Scientific Management* (New York: Harper and Row, 1947), 12.

military training, it is common sense to prepare a machine that will do the business.”⁴⁷ They also believed that “young managers of industrial concerns would be the most valuable material from which to select and train successful military leaders.”⁴⁸ These Regular officers, while not citing Taylor directly, echoed his approach by advocating for an emphasis on training the leaders, who would in turn train the soldiers in a scientific manner, which would produce the desired results in the first battle. By developing a managerial mindset in the junior leaders, the Army could achieve efficiency in its actions, which was a clear departure from the Philippine battlefields.

Many excellent scholarly works examine aspects of the reform period being discussed in this study. Carol Reardon analyzes the intersection of Army officer professionalization and the study of military history in her book *Soldiers and Scholars: The U.S. Army and the Uses of Military History, 1865-1920*. Timothy K. Nenninger studies the role of Leavenworth in educating junior officers in *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918*. The effect of World War I on the Leavenworth curriculum is examined in *America's School for War: Fort Leavenworth, Officer Education, and Victory in World War II* by Peter J. Schifferle. These authors focus on Regular Army officers and the Leavenworth schools, which lends itself more to an analysis of senior captains and field grade officers working on Battalion staffs and above. Looking at the concept of junior officer training and development, John Garry Clifford published an outstanding work on the Plattsburgh Movement, which includes an analysis of the way in which the Regular Army (specifically Major General Leonard Wood) viewed the development of the volunteer junior officers who would fight in World War I. Published in 1972, *The Citizen*

⁴⁷ O. O. Ellis and E. B. Garey, *The Plattsburg Manual* (New York; The Century Co. 1918), 200.

⁴⁸ O. O. Ellis and E. B. Garey, *The Plattsburg Manual* (New York; The Century Co. 1918), 199.

Soldiers: The Plattsburg Training Camp Movement, 1913-1920 is also the most recent book written about Plattsburgh.

In 2017, the first scholarly biography of Emory Upton published since 1967 appeared. In *Emory Upton: Misunderstood Reformer*, David Fitzpatrick challenges the work of Russell Weigley and Stephen Ambrose, presenting Upton as an advocate of volunteer soldiers, a small, efficient regular army, and maintaining the proper relationship between the Army and civilian politicians. Upton provided practical recommendations for incorporating civilian progressive reform into the post-Civil War Army, using his analysis of foreign militaries to present an argument ahead of its time, but that would influence future Army reform efforts. The preparedness movement in the early 1900s began in response to the perceived threat of German aggression. It was used by progressive reformers who wanted to prepare for the possibility of war, to include training in advance the multitude of volunteers that would constitute the Army in wartime. In *Teddy Roosevelt and Leonard Wood: Partners in Command*, John D. Eisenhower notes the personal and ideological friendship of the politician and general. Roosevelt and Elihu Root laid the foundation for progressive reform, but Eisenhower argues that it was Wood, as chief of staff of the Army, who implemented many of the measures through his preparedness movement. The present study seeks to unite these topics by examining the early 20th century Army reform period and how it affected ideas regarding the development of junior officers. It will tie in progressive civilian reform ideas, many of which were advanced by Frederick Winslow Taylor, providing both an example and theoretical background for Army leaders to present a holistic look at the way the U.S. Army prepared its combat leaders for the next war.

This study is divided into three chapters: Chapter One provides an overview of the system for developing officers in the U.S. Army as it existed in the 1890s, an examination of the

issues with the officer education system that were identified during the Spanish-American War, and an assessment of the resulting period of reform initiated by Elihu Root. Chapter Two analyzes the changes in the system of officer education that occurred with the implementation of the Root reforms, and it considers West Point, the Leavenworth schools, post lyceums, professional journals, and the National Guard Summer maneuvers, all under the umbrella of the Army career management system. Chapter Three gives an overview of civilian ideas during this period about how to reform management, and it delves into the Plattsburgh Movement, culminating with an analysis of the performance of junior officers during World War I.

With the entry of the United States into the first great war, the Army officer corps was prepared to test the efficacy of the reforms in the education of officers which had unfolded over the previous eighteen years. Continuous revision of the curriculum at the Leavenworth schools, integrating civilian management principles into military officer training, revamping the career management system, and many other measures served to provide junior officers with the educational opportunities to train and lead enlisted soldiers effectively in combat. The only remaining requirement was to test these reform measures in the crucible of combat on the battlefields of Europe.

Chapter 1: Officer Development and Army Reform

In July 1898, Captain Robert Bullard, a regular Army officer and West Point graduate who had served for thirteen years, was appointed as a Colonel of Volunteers in command of the Third Alabama Volunteer Infantry. Prior to this appointment, he had served as the Battalion Commander of the Regiment's First Battalion with the rank of major. His previous experience included duty at various posts in the West, serving as a platoon leader, post quartermaster, commissary, and range officer, and as acting company commander for a brief period. He also served as the professor of military science at North Georgia Agricultural College, where his primary duty was, as historian Allan Millett put it, to "drill the male students into some semblance of military proficiency."⁴⁹ His only previous command experience had occurred in 1892 when he was assigned temporarily to command a company of 38 soldiers . Six years later, he secured a colonelcy and regimental command.⁵⁰ The primary questions that arise are how the Army had developed this ordinary junior officer in preparation for his future assignment as a senior field grade officer and to what extent the wartime experiences of these newly minted senior officers drove future Army efforts to reform education.

The post-Civil War Army officer management system was marked by a deference to seniority. Accomplishments, education, and ability notwithstanding, promotions were slow and based on an officer's date of commission. General John Pershing later reminisced about his feelings regarding the Army's slow promotion rate while he was still a cadet at West Point and contemplating a career in the Army: "The Army is no place for me in peace time. I'd start in as a

⁴⁹ Allan Reed Millett, *The General: Robert L. Bullard and Officership in the United States Army, 1881-1925* (Westport: Greenwood Press, 1975), 79.

⁵⁰ For further details on Bullard's early Army service, see Millett, *The General*, ch. 3 & 4.

second lieutenant and I'd get to be a first lieutenant only when the first lieutenant died."⁵² These thoughts were fairly prescient, as Pershing did not earn the rank of First Lieutenant until 1892, six years after his commission. He also remembered thinking as a young lieutenant that "the future outlook for advancement for a young officer was not encouraging and it looked as though I would not even reach the grade of captain for about fifteen years more and would probably retire with the rank of major."⁵³ Within this system, opportunities for further development at institutions such as the School of Application at Fort Leavenworth were rare. Also, because they were not tied to promotions nor made mandatory, they were also not seen as a desirable assignment. Frank E. Vandiver noted in his work *Black Jack: The Life and Times of John J. Pershing*: "A good soldier faced rigid limitations on ways to enhance his career. Line promotions within the combat arms of the service . . . were scheduled years ahead. Pressure, pleading, even clearly proved merit, would have no effect."⁵⁴ One of the shortest paths to promotion lay in application to one of the staff bureaus, which came with an automatic advance to captain. However, the slots were few and the pool of applicants large, and many lieutenants remained on the line waiting and hoping for a promotion that was slow to come.

For many officers, the path to quick promotions and consequently higher levels of recognition, which might result in better assignments later, came in wartime. The United States used the "expansible army" concept in wartime to provide a force capable of meeting the enemy threat. First proposed in 1821 by John C. Calhoun, the basic premise was that in peacetime, the

⁵² Frank E. Vandiver, *Black Jack: The Life and Times of John J. Pershing* (College Station: Texas A&M University Press, 1977), 38.

⁵³ Frank E. Vandiver, *Black Jack: The Life and Times of John J. Pershing* (College Station: Texas A&M University Press, 1977), 125.

⁵⁴ Frank E. Vandiver, *Black Jack: The Life and Times of John J. Pershing* (College Station: Texas A&M University Press, 1977), 133.

number of enlisted men authorized by Congress to serve in the Regular Army would be drastically reduced while most of the officers would be retained. When war was declared, the officers would already be in position to receive and train the mass of newly enlisted soldiers, who would serve during the war and then be discharged.⁵⁵ For career officers who felt their careers had stagnated during peacetime, rapid expansion provided a way to quick promotions and command. As the United States prepared for war with Spain in 1898, regular officers vied to obtain volunteer commissions, which brought a temporary higher rank and the opportunity to serve as a battalion or regimental commander or on a general staff. During this frenzy of preparation, lieutenants and captains in the regular Army became lieutenant colonels and colonels in the Volunteer Army.⁵⁶

Many junior officers, such as Bullard, believed themselves fit for an immediate jump to a much higher rank due to the variety of experiences they had received as lieutenants at their first assignments. Bullard's career up to the eve of the Spanish-American War was typical of the way the Army developed its junior leaders. As historian Allan Millett observes, his duties included responsibility for "supply, communications, engineering, ordnance, training, and personnel administration" in addition to his time directly leading soldiers.⁵⁷ Millett captures the general theory underlying this approach in his biography of Bullard:

Ten men or a thousand men – they still had to be drilled, trained, taught to shoot, fed clothed, counted, medically treated, and inspired. Simply understanding how the army

⁵⁵ Richard W. Stewart, ed., *American Military History, Vol. 1: The United States Army and the Forging of A Nation, 1775-1917* (Washington D.C.: Center of Military History, 2005), 164.

⁵⁶ Allan Reed Millett, *The General: Robert L. Bullard and Officership in the United States Army, 1881-1925* (Westport: Greenwood Press, 1975), 93-94.

⁵⁷ Allan Reed Millett, *The General: Robert L. Bullard and Officership in the United States Army, 1881-1925* (Westport: Greenwood Press, 1975), 84.

worked, being accepted by other officers as an experienced peer, instinctively knowing which regulations to follow and which to bend – these were things acquired in the long apprenticeship.⁵⁸

Although there might not have been a systematic approach to institutional education at this point, the Army had figured out how to provide the maximum amount of on-the-job training to its junior officers, expanding on the West Point foundation to put the lessons these lieutenants had learned at the storied Academy into practical use.

West Point and Post-Civil War Officer Development

Founded in 1802, West Point was the Regular Army's primary source for commissioned officers. Throughout the 1890s, Congress capped Army manpower at right around 27,000 and limited the number of incoming cadets to West Point to 371.⁵⁹ Despite the small annual allotment of plebes (cadets in their first year at West Point), the Academy's high standards for admittance (both physical and mental) kept close to half of the applicants from being admitted each year, and ongoing academic rigor meant that a large number of the remaining cadets did not make it to graduation. Superintendents repeatedly recommended an increase in the number of cadets to be admitted, using the *Annual Report of the Superintendent* to plead their case.⁶⁰ Despite these challenges and the lack of interest in Congress to raise the annual authorization, West Point maintained its focus on developing well-rounded officers who could serve anywhere in the

⁵⁸ Allan Reed Millett, *The General: Robert L. Bullard and Officership in the United States Army, 1881-1925* (Westport: Greenwood Press, 1975), 84.

⁵⁹ "U.S. Military Manpower 1789 to 1997," last modified February 9, 2013. http://alternatewars.com/BBOW/Stats/US_Mil_Manpower_1789-1997.htm.

⁶⁰ Between 1892 and 1898, the Superintendent included a recommendation to raise the authorization above 371 through various plans such as appointing two at-large cadets from each state who could replace primary candidates that failed the entrance exam or physical test. <http://digital-library.usma.edu/cdm/search/collection/superep/order/date/ad/asc>.

Army. This focus derived from the prevailing attitude among the senior post-Civil War officers who believed that “a West Point education was sufficient professional training.”⁶¹ In a sense the Army was applying a scientific approach to junior officer development, using a standard curriculum and training program to provide both a liberal arts education and a thorough knowledge of all the Army branches. But to a much larger extent the focus was on transforming a civilian into the Army’s idealization of what an officer should be: an educated, well-rounded individual that could model heroic bravery for the un-educated enlisted soldiers, capable of turning defeat into victory by force of will and personal example.

The Army was undergoing a period of reform following the Civil War, which included Lieutenant Colonel Emory Upton’s proposals for advanced military schooling, officers’ contributions on the matter to military journals, and the efforts of General William Sherman to professionalize the officer corps, but these measures had only modest impact until after the Spanish-American War.⁶² Meanwhile, the Army during the Indian War years was characterized as being in a “period of stagnation,” as Timothy K. Nenninger put it, during which officers assigned to small posts on the frontier needed to “possess little more than common sense and the most basic understanding of weapons and tactics.”⁶³ With no trans-Atlantic threats and the Indian Wars coming to an end, there was little incentive to introduce any major overhauls of the officer development system. The system which existed in the Army produced junior officers who were generally capable of performing in a variety of assignments. However, their long-term efficacy

⁶¹ Timothy K. Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport: Greenwood Press, 1978), 7.

⁶² Timothy K. Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport: Greenwood Press, 1978), 17.

⁶³ Timothy K. Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport: Greenwood Press, 1978), 16.

as staff officers and senior commanders remained in doubt because of the lack of systematic development and post-graduate education. The Army was hoping that a heroic leader would emerge from the crowd in wartime who was naturally gifted in the art of leadership.

The mission of West Point during the 1890s had remained essentially unchanged since its founding in 1802 and the subsequent revival in 1817 led by Major Sylvanus Thayer, long considered the “Father of the Military Academy.”⁶⁴ Thayer’s goal was to produce “an honorable, educated man and a fearless fighter . . . thoroughly versed in the scientific knowledge of his profession.”⁶⁵ The makeup of the West Point curriculum consisted of “liberal, military, and technical education, with the technical component predominating.”⁶⁷ The primary emphasis was on engineering, both civil and mechanical, with an eye towards using this knowledge in the civilian realm to “teach and practice their specialty.”⁶⁸ Charged with turning ordinary civilians into educated, cultured, and well-rounded officers, the Academy accomplished this mission by enforcing high academic standards in classroom work, placing cadets in increasing positions of leadership responsibility as they progressed through the program, and training the future officers to “become proficient in every branch of military service . . . [such that] the infantry officer who is a graduate of West Point is at home in the work of the cavalry, the artillery, the engineers, or the ordnance department.”⁶⁹ This approach to developing officers provided the experience

⁶⁴ H. Irving Hancock, *Life at West Point: The Making of the American Army Officer: His Studies, Discipline, and Amusements* (New York: The Knickerbocker Press, 1906), 8.

⁶⁵ H. Irving Hancock, *Life at West Point: The Making of the American Army Officer: His Studies, Discipline, and Amusements* (New York: The Knickerbocker Press, 1906), 9.

⁶⁷ Samuel P. Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations* (Cambridge: The Belknap Press of Harvard University Press, 1967), 237.

⁶⁸ Samuel P. Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations* (Cambridge: The Belknap Press of Harvard University Press, 1967), 238.

⁶⁹ H. Irving Hancock, *Life at West Point: The Making of the American Army Officer: His Studies, Discipline, and Amusements* (New York: The Knickerbocker Press, 1906), 8.

necessary to immediately begin training the raw enlisted men who made up the bulk of the Army and also formed the foundation for further development of the junior officer. The soldier who arrived at a post had no formal military training, and the requirement to instill discipline and teach the rudiments of soldiering fell to the lieutenants and captains who led the platoons and companies.

This ability to teach was inculcated at West Point by placing the third, second, and first year cadets (which correspond to sophomore, junior, and senior students at civilian colleges) in leadership positions which required them to train the incoming fourth year (freshman) cadets in basic military discipline. The troop-leading skills these cadets learned were directly applicable to the challenges they would face as junior officers in the Army and enabled them to rapidly transition from the Academy to frontier duty. Although the Army in the late 1800s was intent on preparing its junior officers for combat against the Indians, it did little, if anything, to train them for frontier police duty. Officers were frequently called on to police the settlers who moved West, enforcing the Government's domestic policy towards Indians and preventing white settlers from encroaching on Indian land. This duty dated back to the Antebellum era of western expansion. Samuel J. Watson notes in his essay "The Uncertain Road to Manifest Destiny" that officers viewed their roles as "the nation's policemen, whose duties involved preserving law and order among unruly whites as much as facilitating the westward movement."⁷⁰ Even after the Civil War, officers found themselves policing white settlers. When gold was found in the Black Hills in 1873, Lieutenant Colonel George Custer and the 7th Cavalry were forced to try to prevent

⁷⁰ Samuel J. Watson, "The Uncertain Road to Manifest Destiny: Army Officers and the Course of American Territorial Expansionism, 1815-1846," in *Manifest Destiny and Empire: American Antebellum Expansionism*, ed. Sam W. Haynes and Christopher Morris (College Station: Texas A&M Press, 2008), 79.

white prospectors from moving into Indian territory.⁷¹ Officers on the frontier learned by experience how to navigate this environment for which there was little prior preparation. Ironically, similar issues would face the officer corps in the Philippines, as junior officers found themselves governing small towns in remote locations, with decidedly mixed results that spoke more to the officer's innate abilities and prior experience than to any training he had received from the Army.

In addition to the primary responsibility of leading soldiers, the Army expected its officers to be proficient at the various administrative tasks associated with assignment to an isolated post. During the Indian Wars, the Army had constructed forts in remote locations to guard the frontier and place soldiers in a position to interdict the local Indian tribes and keep good order among the settlers. In practice, this meant that the few officers assigned to that post had to know the many organizational requirements which kept the Army bureaucracy running. In 1899, West Point Superintendent Colonel A.L. Mills approved a series of lectures which taught cadets how to recruit soldiers, perform duty as post adjutant, treasurer, and quartermaster, prepare company returns, reports, and records, conduct property accountability, sustain the soldiers, and various other topics.⁷² Because the Army strictly adhered to the seniority system, an officer might remain a second lieutenant for six to seven years before getting promoted to first lieutenant, and an indeterminate amount of time waiting for a vacancy to open at the rank of captain.⁷³ What this meant in practice was that lieutenants followed no fixed timeline in their

⁷¹ Richard W. Stewart, ed., *American Military History, Volume I: The United States Army and the Forging of a Nation, 1775-1917* (Washington D.C.: Center of Military History, 1989), 315.

⁷² A. L. Mills, "Annual Report of the Superintendent United States Military Academy," in *Annual Report of the Superintendent of the United States Military Academy: 1899* (Washington: Government Printing Office, 1899), 22.

⁷³ Lieutenant General Robert Lee Bullard's career was typical of the way the seniority system worked. He was promoted to 1LT after six years, and after another seven years decided to apply for a position in one of the staff bureaus in Washington to obtain a higher rank.

development and promotion. Post commanders had ample time to move lieutenants through a variety of assignments, rounding out the development of junior officers by exposing them to all facets of Army administration. By the late 1890s, West Point had incorporated an emphasis on these requirements into the curriculum. Prior to this the goal was, according to the Board of Visitors report in 1884, “the proper technical education of officers and their preparation in all mental, moral, and physical qualities they are about to perform”⁷⁴ However, as Millett states, “the Board expected West Point to be the leaven of the officer corps in any future war, the leaders and organizers of a volunteer army. It found, however, precious little instruction in the skills such officers would need: American history, supply matters, sanitation, leadership, and troop training.”⁷⁵ While the expectation may have been that officers from West Point would organize, train, and manage the Volunteer Army in wartime, the reality was that the Academy focused more on individual skills and enforcing strict discipline.

Toward a Professional Officer Corps

In the interval between the Civil War and the Spanish-American War, the Army found itself at a crossroads: the public appetite for a large standing Army was non-existent, there were no external threats, and the only real mission that the Army was given was quelling the Indian uprisings. Promotion was abysmally slow, and junior officers continued carrying out the duties they had mastered years ago while waiting for promotion and a position of greater responsibility.⁷⁶ It was a time ripe for reform as senior Army officers such as Major General

⁷⁴ Allan Reed Millett, *The General: Robert L. Bullard and Officership in the United States Army, 1881-1925* (Westport: Greenwood Press, 1975), 40.

⁷⁵ Allan Reed Millett, *The General: Robert L. Bullard and Officership in the United States Army, 1881-1925* (Westport: Greenwood Press, 1975), 40.

⁷⁶ James L. Abrahamson, *America Arms for a New Century: The Making of a Great Military Power* (New York: Free Press, 1981), 48-49.

John M. Schofield argued for a new era of war readiness. By the 1890s, Schofield in his capacity as General of the Army had analyzed America's preparedness and noted that "the sea-coasts of the United States are many thousand miles in extent, and an attack may be made at any one or several of the many important seaports in these long lines of coast. No one can anticipate where the blow or blows may fall. Hence it is necessary to be prepared to resist"77 Army leaders did not know where, when, or from whom this blow might come, but they knew that war could happen at any time and that the nation must be ready for it. Reform-minded officers advocated to modernize and prepare for future war. Part of this reform included professionalizing the officer corps, modeled on the ongoing civilian professionalization efforts which had been occurring since the Civil War. Professionalization required "technical education and systematic training in the skill of the profession" which enabled "claims to the prestige, autonomy, and authority associated with status as a professional."⁷⁸ James L. Abrahamson analyzes the similarities between civilian and military professionalization efforts in the late 19th century in his book *America Arms for a New Century*. In particular, he looked at the way managerial structures were changing in response to advances in technology and in the creation of an integrated national economy. These changes required a greater degree of control on the part of the manager and a regimented organization of the workers. Control gradually moved higher in the chain as the perception that there was a need to keep close supervision of one's subordinates increased.⁷⁹ As the role of the manager increased (which eventually led to Frederick Winslow Taylor and his scientific approach to management), so too did the understanding that claiming professional

⁷⁷ John M. Schofield, *Forty-Six Years in the Army* (New York: The Century Company, 1897), 526.

⁷⁸ James L. Abrahamson, *America Arms for a New Century: The Making of a Great Military Power* (New York: Free Press, 1981), 34-35.

⁷⁹ James L. Abrahamson, *America Arms for a New Century: The Making of a Great Military Power* (New York: Free Press, 1981), 34-35.

status required a corresponding level of education which had been vetted by the governing organization.

Samuel P. Huntington notes that the post-Civil War period has been called “The Army’s Dark Ages” by various historians.⁸⁰ Notably, he concludes that although the Army was isolated both socially and politically, this was not an era of professional stagnation. Indeed, these years featured Army leaders such as General William T. Sherman and Lieutenant Colonel Emory Upton advancing the concept of the professional officer and reforming the internal standards of excellence in the officer profession as the Army became separated from American society. Part of this transformation involved moving away from technicism at the military academy, replacing the emphasis on engineering with a broader education including the liberal arts. Huntington notes the significant differences between a technical education and one that trains officers to be “manage[rs] of violence.”⁸¹ The professional military officer must specialize in directing and controlling the application of violence within an organization of soldiers. In Huntington's analysis, technicians such as engineers are “auxiliary vocations” which contribute to the overall mission but are not capable of actually managing the violence.⁸² A broad liberal arts education, as opposed to a narrowly focused emphasis on technical skills, is a foundational component for becoming a professional officer. Military skill, according to Huntington, borders many other disciplines which the officer must learn to understand his profession. General education provides the military professional with analytical tools, “abilities, and habits of mind” that are essential for

⁸⁰ Samuel P. Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations* (Cambridge: The Belknap Press of Harvard University Press, 1967), 229.

⁸¹ Samuel P. Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations* (Cambridge: The Belknap Press of Harvard University Press, 1967), 11. Huntington borrows the phrase from Harold Lasswell.

⁸² Samuel P. Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations* (Cambridge: The Belknap Press of Harvard University Press, 1967), 12.

“deeper understanding of human attitudes, motivations, and behavior.”⁸³ Because the professional officer manages people in the art and science of violence, knowing how to motivate, inspire, and lead them is a critical component obtained through a liberal education.

Recognizing that military art and science were fluid concepts, many officers advocated for a focus on advanced education as the way to keep their profession alive and current.⁸⁴ Some officers instituted discussion groups, designed to stimulate discussion and keep group members abreast of recent changes. However, these groups were informal, and they were most effective when the post commander put his full energy into supporting them and developing his junior officers. A lieutenant might also be assigned to a post where the commander was more interested in drinking and carousing than in educating his subordinates.⁸⁵ In 1891, General John M. Schofield, Commanding General of the US Army, formalized these discussion groups by ordering each post to institute lyceums. Ostensibly these groups were designed to provide a sort of advanced education to the officers, who would research topics and then present them for discussion. They mainly succeeded in highlighting the continued need for a systematic and centralized approach to continued officer development past West Point. This need was due in part to the intransigence of many officers towards peacetime education. In his biography of General Robert Bullard, Allan R. Millett notes: “the only serious students were usually junior officers who were self-motivated and who wanted to attend Leavenworth. The idea that officership meant continuing education in professional matters was not a concept that seized the

⁸³ Samuel P. Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations* (Cambridge: The Belknap Press of Harvard University Press, 1967), 14.

⁸⁴ Carol Reardon, *Soldiers and Scholars: The U.S. Army and the uses of Military History, 1865-1920* (Lawrence: University Press of Kansas, 1990), 13.

⁸⁵ Carol Reardon, *Soldiers and Scholars: The U.S. Army and the uses of Military History, 1865-1920* (Lawrence: University Press of Kansas, 1990), 13.

officer corps.”⁸⁶ This suggests that interest in further education varied according to how long one had served. This might have been due to a transformation in the realm of knowledge, which was growing at an exponential rate at the time. Previous generations had seen slow advancements which took years to develop, giving time for people to gradually adjust and learn. By the Reconstruction era, knowledge was rapidly advancing and changing, and to keep up one would need to periodically attend advanced education courses. For the generals who had who had grown up in the pre-Civil War years, advanced education was simply not an in-demand requirement. For the latest generation of junior officers, however, it had become a necessity. General Schofield’s attempt to implement some type of officer development, while causing many officers to further entrench themselves against education, did serve to motivate some junior officers to develop themselves and show their potential to succeed at Leavenworth. So, while the lyceums may have been a short-lived experiment, the residual effect lay in advancing the concept that an officer’s development could occur despite the absence of war.⁸⁷

The Infantry and Cavalry School

The haphazard and informal approach to developing junior officers began to change when General William T. Sherman opened the Infantry and Cavalry School at Fort Leavenworth. The school was modeled after the Artillery School at Fort Monroe, which had made vast improvements in its curriculum under the direction of Lieutenant Colonel Emory Upton, who

⁸⁶ Allan Reed Millett, *The General: Robert L. Bullard and Officership in the United States Army, 1881-1925* (Westport: Greenwood Press, 1975), 74.

⁸⁷ Thomas Kuhn describes this process in *The Structure of Scientific Revolutions* (Chicago: The University of Chicago Press, 2012), first published in 1964 and reprinted for the fourth time in 2012. Newer members in the world of professional science are the readiest for breakthroughs, and the older members are the most resistant to change. Kuhn states: “That is why new theory, however special its range of application, is seldom or never just an increment to what is already known. Its assimilation requires the reconstruction of prior theory and the re-evaluation of prior fact” (7). In essence, acceptance of a new paradigm often requires setting aside long-standing methods, which can be a difficult transition for many.

emphasized instruction in both modern artillery and in the practical use of cannons as part of a combined arms approach.⁸⁸ Sherman decided to apply the idea of graduate-level education to the rest of the Army officers, and in doing so sparked the beginning of a formal, systematic approach to developing junior officers in their profession.

The Infantry and Cavalry School was founded in 1881 with the purpose of providing “broad military and educational experience” to every officer, “particularly those aspiring to high command and staff.”⁸⁹ Sherman stated that “in war, as in science, art, and literature, for the higher branches we must look to books – the recorded knowledge of the past.”⁹⁰ Although he still believed that “war is the only real school for war,” the next best alternative for educating junior officers was through advanced schooling.⁹¹ Throughout the 1880s Sherman’s vision for the school, which was to “provide both practical training and a sound theoretical education in the art of war,” did not fully materialize.⁹² One of the primary issues facing the school was a lack of focus as the Army struggled to define the scope of the curriculum and how best to teach it and to determine who the audience should be. Sherman wanted the school to prepare officers for future high command and staff positions, yet the initial students were brand-new second lieutenants with varying levels of military competence and educational backgrounds. Nennering notes that “the officers assigned there were junior lieutenants whose greatest need was to develop

⁸⁸ Carol Reardon, *Soldiers and Scholars: The U.S. Army and the uses of Military History, 1865-1920* (Lawrence: University Press of Kansas, 1990), 14.

⁸⁹ Timothy K. Nennering, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport: Greenwood Press, 1978), 23.

⁹⁰ Timothy K. Nennering, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport: Greenwood Press, 1978), 23.

⁹¹ Timothy K. Nennering, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport: Greenwood Press, 1978), 22.

⁹² Carol Reardon, *Soldiers and Scholars: The U.S. Army and the uses of Military History, 1865-1920* (Lawrence: University Press of Kansas, 1990), 14.

competence in tactics, not strategy. Sherman's stress on broad education detracted from the effort to correct obvious military shortcomings among many officers."⁹³ Not only were the officers deficient in tactical training (because many of them had been commissioned directly from civilian life), but many lacked even the education needed to understand the military concepts being taught. Sherman and the staff at the school assumed that all officers attending the Leavenworth school had received an education at the level of West Point. In reality many were unable to meet that standard. These disparities in educational backgrounds required the staff to teach rudimentary subjects such as "writing, grammar, arithmetic, geography, history, algebra, geometry, and trigonometry."⁹⁴ In essence, the school quickly went from being an advanced course for experienced lieutenants to a basic academy for inexperienced, recently commissioned officers.

Carol Reardon and Timothy K. Nenninger also highlight another issue with the officers selected to attend the school: the lack of criteria for appointment. Because of the lack of support for advanced officer education among many of the senior Army officers, the quality of lieutenants appointed to attend the School of Infantry and Cavalry was inconsistent. Some regimental commanders sent their worst lieutenant in an effort to be rid of the problem for two years, while others (who most likely recognized the value that the school offered) sent their top-performing Lieutenant who might actually benefit from the instruction.⁹⁵ The problem this created was that, rather than being able to design a standard curriculum which would challenge

⁹³ Timothy K. Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport: Greenwood Press, 1978), 23.

⁹⁴ Timothy K. Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport: Greenwood Press, 1978), 24.

⁹⁵ Timothy K. Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport: Greenwood Press, 1978), 24.

students with similar backgrounds and experience, instructors had to sort students into separate categories and teach everything from the basics to more advanced topics. Although these early issues may have been frustrating at the time, they did serve to illuminate an important developmental gap within the Army's body of junior officers. As evidenced in the disparities in education and experience, the difference between a West Point-trained officer and an officer commissioned directly from civilian life could be drastic. Perhaps partly heralding the passage of the National Defense Act of 1916, which established the Reserve Officers Training Corps, these problems also contributed to the eventual realization that, if the Army was going to rely on a volunteer force in wartime, then perhaps some type of standardized training program and common set of methods should be instituted to provide a measure of military and leadership training. The byproduct of this military training would be a list of known and able performers who had satisfactorily completed the training and who could be called on during a mass mobilization to officer the newly formed units and train the enlistees. Although this did not come to fruition until after the Spanish-American War, the ideas were formed for the future Plattsburgh Movement, which advocated Universal Military Training (UMT) and would eventually transform into an officer training camp which provided many of the junior line officers who served in World War I.

Chapter 2: The Leavenworth School: 1886-1906

The Infantry and Cavalry School (later known as the General Service and Staff College) had a limited impact on the Army until World War I in which many of the graduates served with distinction in vital roles as senior staff officers and commanders. One of the more notable was George C. Marshall, who credited his time at the College with preparing him for the complexities of large-scale war. World War I also served to validate the Army's assimilation of civilian principles of management, which were seen most prominently in the way that new soldiers were rapidly trained and deployed and in the methodical way that staffs planned operations.

In July 1918, Marshall, then a captain, was transferred from the 1st Division staff to the Operations Section of General Headquarters (GHQ), Allied Expeditionary Force (AEF), at the outset of the Allied counterattack against the Germans on the Western Front. Despite his requesting troop duty in an attempt to move off the staff and lead a combat command, Marshall's keen planning abilities had been recognized by senior officers in the AEF, who decided that these skills would be better used on the GHQ staff.⁹⁶ Assigned to plan the movement of fifteen divisions to the front for the Meuse-Argonne drive, Marshall also had to figure out how to move more than 200,000 Italian soldiers off the line, re-position artillery pieces from the St. Mihiel sector, and move massive amounts of ammunition forward in preparation for the attack. He had three roads on which to coordinate the forward and rearward movements of these disparate elements, and he only had ten days to do it.⁹⁷ His accomplishment of this feat earned him the

⁹⁶ Forrest C. Pogue, *George C. Marshall: Education of a General, 1880-1939* (New York: Penguin Books, 1993), 168.

⁹⁷ Forrest C. Pogue, *George C. Marshall: Education of a General, 1880-1939* (New York: Penguin Books, 1993), 175-176.

nickname “the wizard” and the praise of General Pershing for the “stupendous task” he had completed.⁹⁸

One of the earliest turning points in Marshall’s career was his appointment to the General Service and Staff College as a student in 1906. It was a stroke of good fortune that he was finally able to land this assignment after trying for three years to obtain it, because that was the final year that the College accepted lieutenants. Thereafter slots were reserved for captains and majors as ordered by the Commandant, General J. Franklin Bell, who was instituting a series of reforms at the College. Marshall valued his time at Leavenworth for preparing him in several ways for the tremendous problems he would face as a staff officer on division and GHQ staffs later in World War I. The common-sense approach to solving operational problems (as opposed to tactical problems, which are typically below the division level), the development of good study habits, intensive work in figuring out the solution to a series of practical dilemmas, and the College’s use of German textbooks and maps to train the young officers all contributed towards his development as an officer and his performance in future positions.⁹⁹ Of utmost importance, however, were the lasting relationships he formed with his classmates, with many of whom he served in various capacities during World War I.¹⁰⁰ These relationships were important because all of the officers who attended the Leavenworth school were able to speak the same language, approach problems in a similar fashion, and apply a similar mindset to leadership.

⁹⁸ Mark A. Stoler, *George C. Marshall: Soldier-Statesman of the American Century* (Farmington Hills: Twayne Publishers, 1989), 41.

⁹⁹ Larry I. Bland, Joellen K. Bland, Sharon Ritenour Stevens, ed., *George C. Marshall: Interviews and Reminiscences for Forrest C. Pogue* (Lexington: George C. Marshall Research Foundation, 1991), 152-154.

¹⁰⁰ Larry I. Bland, Joellen K. Bland, Sharon Ritenour Stevens, ed., *George C. Marshall: Interviews and Reminiscences for Forrest C. Pogue* (Lexington: George C. Marshall Research Foundation, 1991), 153-154.

Aside from the usual issues which attend the activation of a new organization, one of the primary issues facing Colonel E.S. Otis, first superintendent of the School of Infantry and Cavalry, was how to build a curriculum that was both challenging and appropriate for the mix of students he received for the first class in 1882. In the first annual report for the School, published in 1882, he addressed this issue by noting the wide range of educational and military experiences which the students possessed. He stated:

The proper classification of officers for purpose of instruction is attended with difficulty. Some have been recently appointed from civil life, have liberal educations, but slight knowledge of military affairs; others come from civil life, with moderate educational attainments, of whom a proportion have experienced considerable active service in the field, and others are almost without military experience. Again, another class has passed the course of instruction at the United States Military Academy, and some of this class have actively participated with troops in severe campaigns. Both these and a number of appointments from civil life might be denominated practiced soldiers.¹⁰¹

This assortment of inexperienced and experienced officers made curriculum design challenging and led the instructors to design a tiered system capable of developing officers across the spectrum. The lower tier “had some military instruction but concentrated on improving their inadequate educational background,” while the upper tier “studied basic military subjects – organization, tactics, and drill.”¹⁰²

¹⁰¹ E.S. Otis, *Post of Fort Leavenworth, Kansas: October 11, 1882* (Fort Leavenworth: US Infantry and Cavalry School, 1882), 7.

¹⁰² Timothy K. Nenner, *Brief Account of the Evolution of the Regular Course at the U.S. Army Command and General Staff College* (Fort Leavenworth History Collection), 2.

Despite these issues, the school continued to provide some form of advanced education to the young officers who attended. By 1887, Colonel Alexander McCook, the Commandant of the school, recommended to the War Department that the curriculum be updated to focus on tactics, that the remedial courses be dropped, and that all students be consolidated into one class.¹⁰³ This marked a turning point in the school's brief history, as, according to Elvid Hunt and Walter Earnest Lorence, "the foundation was laid for the gradual building up of a school for the comprehensive training of officers of the Army in the field duties connected with higher command and staff functions."¹⁰⁴ It was within this atmosphere of reform that Lieutenant Arthur Wagner began imparting his theories to the students at the Leavenworth School. After arriving at the school in 1886, he departed for Europe to begin an intensive study of the German Army and research various campaigns, which resulted in the publishing of his first work, *The Campaign of Königgrätz*, in 1889. Wagner's primary contribution to the school and the development of junior officers was in the textbooks he wrote and published while an instructor at the school. He realized that the Army depended too much on foreign works, and that the young officers who attended the school required doctrine that was based on US Army tactics. To further the professionalization of the officer corps, he wrote *Service of Security and Information* (1893) and *Organization and Tactics* (1895).¹⁰⁵ He also included *Kriegspiel* (war gaming) in the curriculum, which gave the students the opportunity to work through various tactical problems on the map and proved useful for instruction in "map reading, correct estimations of the designs of an

¹⁰³ Elvid Hunt and Walter Earnest Lorence, *History of Fort Leavenworth, 1827-1937* (Fort Leavenworth: Fort Leavenworth Historical Society, 1981), 140-142.

¹⁰⁴ Elvid Hunt and Walter Earnest Lorence, *History of Fort Leavenworth, 1827-1937* (Fort Leavenworth: Fort Leavenworth Historical Society, 1981), 144.

¹⁰⁵ Timothy K. Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport: Greenwood Press, 1978), 36-37.

adversary, and the rapid accommodation of the player to the changing tactical conditions presented in the course of the game – but also instructions in the issuing of orders.”¹⁰⁶ Although the Army had used war gaming in various forms since the mid-1850s, it was Wagner who institutionalized the idea and began applying it in a systematic way based on the theoretical instruction his students received from his textbooks. Many senior officers still believed that the only way to educate an officer was on the battlefield. Wagner took important steps towards professionalizing the peacetime junior officer corps and stimulated the educational atmosphere for Captain Eben Swift and Major John F. Morrison to advance other important reforms.

The Analytical Method

Michael Howard published an essay entitled “The Use and Abuse of Military History” in which he stated: “If there are no wars in the present in which the professional soldier can learn his trade, he is almost compelled to study the wars of the past.”¹⁰⁷ However, he cautioned professional soldiers not to apply present circumstances to past actions, but to study historical battles in depth and across time to see changes in warfare within the context of social and political analysis.¹⁰⁸ Howard warned against using historical wars as a benchmark for preparing for future wars, but also against neglecting the study of history which may lead to repeating common errors. Ultimately, he advised that “. . . it must never be forgotten that the true use of history, military or civil, is, as Jacob Burckhardt once said, not to make men clever for next time;

¹⁰⁶ Elvid Hunt and Walter Earnest Lorence, *History of Fort Leavenworth, 1827-1937* (Fort Leavenworth: Fort Leavenworth Historical Society, 1981), 148.

¹⁰⁷ Michael Howard, “The Use and Abuse of Military History,” in *The Causes of War and Other Essays* (London: Temple Smith, 1983), 194.

¹⁰⁸ Michael Howard, “The Use and Abuse of Military History,” in *The Causes of War and Other Essays* (London: Temple Smith, 1983), 196-197.

it is to make them wise forever.”¹⁰⁹ The key skill which professional soldiers can obtain from the study of military history is learning how to think critically in the midst of chaos.¹¹⁰ Although written 90 years after the first reform period at the School of Infantry and Cavalry, this late-20th century discussion of the proper use of military history somewhat mirrors the earlier approach to educating professional officers.

Junior officers attending the Leavenworth school during the 1890s were exposed to the applicatory method of studying their profession under the instruction of Captain Eben Swift. This technique had a two-part approach: after a careful study of historical battles focused primarily on the Civil War, students would then apply their analysis to “map problems, map maneuvers (also called war games), and tactical rides (terrain exercises).”¹¹¹ One of the hallmarks of this approach was the systematic issuance of clear, concise orders to subordinate units. Swift developed the first incarnation of the modern five-paragraph operations order in 1894. After analyzing the changes in warfare during the 19th century, he realized that modern technology had removed the commander further from the front line and placed him in a position where he was forced to rely on his subordinates. To ensure that the operation was conducted according to plan, Swift developed the operations order, requiring his students to include “information on the enemy and the general situation of friendly troops, the objective of the movement, the disposition of the troops, the necessary orders for supply trains and auxiliary troops, and the location where

¹⁰⁹ Michael Howard, “The Use and Abuse of Military History,” in *The Causes of War and Other Essays* (London: Temple Smith, 1983), 197.

¹¹⁰ Synopsis of Howard’s essay from class discussion in HIST 983 at Kansas State University (8/17/2020). Rich Myrick provided this insightful analysis in response to the discussion question posed by Dr. Mary Elizabeth Walters.

¹¹¹ Timothy K. Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport: Greenwood Press, 1978), 39.

the commander would be found.”¹¹² The purpose of these orders was to prevent “doubt or confusion in the minds of the recipients.”¹¹³ Gone were the days of officers at all levels directing operations on the front lines; officers must be able to clearly communicate their orders across long distances and synchronize events in time, all through the written order.

The Morrison Men

Major John F. Morrison reported to Fort Leavenworth to begin his teaching assignment in 1906 following duty in the Philippines and Japan. His immediate contribution towards developing the junior officers assigned to the course (including George C. Marshall) came from his approach to solving military problems. Rather than apply a standard approach drawn from a textbook, invoking regulations to arrive at an approved course of action, Morrison advocated the common-sense approach to solving military problems. Understanding that war is chaos, as Howard mentioned later in the century, and that there is no single correct answer to the problems posed when two forces attempt to impose their will upon each other, he wanted “the language of thought applied to military problems in place of the traditional language of regulations.”¹¹⁴ Morrison taught in terms of principles which, if applied correctly given the unique situation, would give the student commander the best chance of defeating the enemy force. Failing to remember a key principle would result in the enemy exploiting the lapse in common sense and applied thought to seize the day. His teaching method moved beyond rote memorization of techniques into the realm of tactics, using the fundamental principles to devise a unique solution

¹¹² Carol Reardon, *Soldiers and Scholars: The U.S. Army and the uses of Military History, 1865-1920* (Lawrence: University Press of Kansas, 1990), 41.

¹¹³ Carol Reardon, *Soldiers and Scholars: The U.S. Army and the uses of Military History, 1865-1920* (Lawrence: University Press of Kansas, 1990), 41.

¹¹⁴ Forrest C. Pogue, *George C. Marshall: Education of a General, 1880-1939* (New York: Penguin Books, 1993), 99.

to the problem, all based on common sense and simplicity.¹¹⁵ With World War I only a decade away, Morrison's methodology took great strides in preparing junior officers for future roles as senior commanders and staff officers on the Western Front.

The work of Wagner, Swift, Morrison, and many others was instrumental in reforming the officer corps of the late-19th and early-20th century Army. Their approaches fully embraced the idea that junior officers required further development beyond the initial education received at West Point and that, to be truly professional, officers must continually educate themselves to stay abreast of the latest advances in their field. Within the larger context of Army reforms, this approach served to train junior officers in the new form of "safe leadership" toward which the military was moving and began laying the foundation for the eventual Plattsburgh Movement and success in the Great War.

Safe Leadership and the Movement Away from Heroic Leaders

The Army can be compared to a massive civilian corporation because of its size, wide geographical dispersion, and the diffusion of responsibility across its breadth which provides some measure of control over the parts. Control can be illusory, however, because of the distance between the highest and lowest levels of command. As the U.S. Army spread out across the West in the late 1800s, centralized control inevitably disintegrated as junior officers at remote posts had to lead and make decisions sometimes completely divorced from updated higher guidance. Robert H. Wiebe, in his book *The Search for Order, 1877-1920*, describes these issues in relation to the massive growth of American industries. As railroads, banks, and other business sectors expanded, leaders still clung to the traditional methods of control to which they were

¹¹⁵ Forrest C. Pogue, *George C. Marshall: Education of a General, 1880-1939* (New York: Penguin Books, 1993), 98-99.

accustomed. Paternalism, personal supervision of all the workings within the company, and a feeling that far-flung concerns could be centrally controlled using outdated managerial techniques hallmarked the approach to business during this transitional era. Factory owners, who still believed they had direct control, found that the foremen were the actual powerbrokers, making decisions and controlling production on the shop floor according to personal whim rather than in concert with the owner.¹¹⁶ Wiebe cites the 1913 labor strikes in Ludlow, Colorado as an example of the disparity between owners' understanding of what the conditions were and the reality of what conditions were as the workers experienced them. John D. Rockefeller, Jr., despite owning the Colorado Coal and Iron Company, had little knowledge of the situation even though the strikers were fired upon by agents working for his company.¹¹⁷ Clearly a new system of control was warranted, one that aligned the needs of the owners with the actions of subordinates. Predictability of action is a key component of the effective diffusion of control, and it was in this vein that the Army began moving away from its reliance on heroic (and unpredictable) leadership towards a new model of safe leadership. Before this could occur, however, the Army had to cultivate a sense of professionalism in the officer corps.

Samuel P. Huntington defines the concept of professionalism as having three parts. Expertise is born out of "specialized knowledge and skill" gained through "prolonged education and experience."¹¹⁸ It forms the basis of "objective standards of professional competence for separating the profession from laymen and measuring the relative competence of members in the

¹¹⁶ Robert H. Wiebe, *The Search for Order, 1877-1920* (New York: Hill and Wang, 1967), 20-21.

¹¹⁷ Robert H. Wiebe, *The Search for Order, 1877-1920* (New York: Hill and Wang, 1967), 38.

¹¹⁸ Samuel P. Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations* (Cambridge: The Belknap Press of Harvard University Press, 1967), 8.

profession.”¹¹⁹ History is an essential component of expertise because knowledge of the profession’s past guides present competence. Responsibility is the second component, and Huntington makes clear that this is not a form of hierarchical control, but rather a realization of the professional’s role in the functioning of society. Corporateness is the final piece, and it is embodied in a sense of unity with a larger group that “manifests itself in a professional organization which formalizes and applies the standards of professional competence and establishes and enforces the standards of professional responsibility.”¹²⁰ The professional military officer is skilled in the “management of violence,” and it is this particular skill which separates the professional officer from an officer who is skilled in a technical field such as engineering.¹²¹ As new weapons of war proliferated during the Industrial Age and the size of battlefields grew in proportion to the massive armies that fought on them, so did the requirement for professional officers capable of managing violence in a predictable manner.

Education is a vital function of professionalism, and Huntington argues that continuous learning is an integral component of the military profession, consuming close to one third of the officer’s career. Following the Civil War, senior officers such as Sherman and Schofield recognized that war had grown far too complex for amateur officers to effectively manage the violence and carry out their duties. War now required officers who were professional, governed by set standards and ethics, and educated in a similar fashion so that the will of the commander

¹¹⁹ Samuel P. Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations* (Cambridge: The Belknap Press of Harvard University Press, 1967), 8.

¹²⁰ Samuel P. Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations* (Cambridge: The Belknap Press of Harvard University Press, 1967), 10.

¹²¹ Samuel P. Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations* (Cambridge: The Belknap Press of Harvard University Press, 1967), 11.

would be reflected in the decisions of his subordinates regardless of distance. Within this thinking there was little room for amateur heroics.

Safe leadership was hallmarked by two elements: learning how to apply the principles of war and an intensive study of military history. BG William Wallace Wotherspoon, the commandant of the Army War College, stated in his introductory remarks to the students of the 1910-1911 class that history was essential to creating “uniformity of thought and uniformity of procedure” within a professional officer corps.¹²² The study of military history provided a theoretical foundation for the student officer. By necessity, the Leavenworth school studied the battles of the Civil War in depth because they provided the most recent example of American large-scale maneuver warfare. Using classroom discussion, lectures, *Kriegspiel*, and terrain rides, students learned the theory of war, which was simply the application of principles based on a given situation. In this way, officers could train for war by systematically working through various problems both on the map and during terrain rides. Because warfare had grown larger in scale and become technologically advanced, the use of clearly written operations orders to direct subordinate’s actions had become a necessity. To ensure that every element executed its mission in concert with the plan, orders must be clear, concise, and above all uniform. Reardon states: “A systematic approach to this important practice was essential to promoting safe leadership.”¹²³

Safe Leadership in the Civilian Sphere

¹²² Carol Reardon, *Soldiers and Scholars: The U.S. Army and the uses of Military History, 1865-1920* (Lawrence: University Press of Kansas, 1990), 35.

¹²³ Carol Reardon, *Soldiers and Scholars: The U.S. Army and the uses of Military History, 1865-1920* (Lawrence: University Press of Kansas, 1990), 41.

Frederick Winslow Taylor published *Shop Management* in 1903 as “a handbook for those interested in the management of industrial enterprises”¹²⁴ The key issues that he identified as being noteworthy were “the *great unevenness* . . . in the development of the several elements, which together constitute what is called *the management*” and “*the lack of apparent relation* between good shop management and the payment of dividends.”¹²⁵ Leaders who developed under different conditions, at separate locations, or with unique career backgrounds will have dissimilar opinions on how a corporation is to be run and what constitutes good management. Good shop management does not necessarily lead to success, as many other factors also contribute to a company’s prosperity or demise. Because these two issues involve numerous factors which do not necessarily indicate whether a system of management is good or bad, Taylor concluded that the essential metric for evaluating a particular system of shop management was that it gives “satisfaction to both employer and employé,” ensures that the best interests of management and workers are clearly mutual, and ensures “such thorough and hearty coöperation that they can pull together instead of apart.”¹²⁶

Taylor advocated training workers to the limit of their ability and then paying them accordingly at rates above the prevailing average. In an organization such as the Army where workers (soldiers) are given salaries which are set by Congress, that type of reform is not possible. However, Taylor also examined two other incentives which were directly applicable to the Army during its period of reform in the early 1900s. Cultivating an individual’s personal

¹²⁴ Frederick Winslow Taylor, “Shop Management,” in *Scientific Management* (New York: Harper and Row, 1947), 13. Quote is from the unnamed editor’s preface to the 1911 edition of this work.

¹²⁵ Frederick Winslow Taylor, “Shop Management” in *Scientific Management* (New York: Harper and Row, 1947), 17. Italics are the authors.

¹²⁶ Frederick Winslow Taylor, “Shop Management” in *Scientific Management* (New York: Harper and Row, 1947), 21.

ambition and giving rewards for excellent performance inside of a short window of time leads to increased production and cooperation in the workplace. If higher pay was not going to be an incentive for better leadership, then providing a systematic promotion system with faster promotions and creating more opportunity to attend Army postgraduate schools would be an acceptable substitute in a professional organization. For the soldiers, the incentive to work came from knowing that the training they received and their individual, disciplined effort increased their chance of survival and their potential for promotion.

As mentioned earlier, the scope of warfare had increased exponentially during the Industrial Age, both in size and technologically. To enable the level of uniformity needed to succeed on the battlefield, the Army had to reform its approach toward leadership to resemble that of a large civilian organization. Before money was spent on obtaining the latest equipment to achieve technological superiority, Taylor advocated that the organization itself must be good. Managers and owners like to spend money on tangible things such as machines while allocating few resources towards implementing a good scheme of organization and training people to use it effectively. However, Taylor argued that “a good organization with a poor plant will give better results than the best plant with a poor organization.”¹²⁷ He cautioned that reforming the organization was a long, slow process, but that the company must commit to the reform and not waver or retreat from it. In the case of the Army, successive commanding generals had made the decision to commit to the “safe” style of management, with an emphasis on uniformity of leadership and commonality of thinking. Generals Sherman and Schofield had started this effort with their emphasis on professionalization, Elihu Root formalized the process in the early 1900s,

¹²⁷ Frederick Winslow Taylor, “Shop Management” in *Scientific Management* (New York: Harper and Row, 1947), 62.

and the transformation reached its apex during the Plattsburgh movement as the soldiers were systematically trained to a level of proficiency according to a set standard.

Merging Elihu Root and Frederick Winslow Taylor

Dr. Ira Nelson Hollis, president of Worcester Polytechnic Institute and the American Society of Mechanical Engineers, penned a brief eulogy to Frederick Winslow Taylor in 1918 following Taylor's death in 1915. Published in the *Proceedings of the American Academy of Arts and Sciences*, Hollis stated: “[there is] an entirely new problem in the relation of great masses of labor to society, -- It is exactly to this problem that Mr. Taylor has turned our attention. His solution of it is of precisely the same significance as James Watt's contribution to the steam engine and Mr. Taylor's work will equally transform society.”¹²⁸ One of Taylor's most significant contributions was developing science-based management principles which could then be applied in many different situations. While his work was focused on the metal manufacturing industry, the theory and rules he prescribed could be applied in any setting where maximum profit at the cheapest cost was desirable.

At the core of Taylor's approach to management was the relationship of the manager to the worker. The manager must know the workers, taking care not to appear snobbish or above the worker.¹²⁹ This relationship manifested in a key rule: the worker must always know what the manager wants him to do. Vague job descriptions or initial employment agreements would not suffice to tell the worker exactly what he was expected to do every day.¹³⁰ This provides a clear

¹²⁸ Ira Nelson Hollis, “Frederick Winslow Taylor (1856-1915),” *Proceedings of the American Academy of Arts and Sciences* 53 (September 09, 1918): 871.

¹²⁹ Frank Barkley Copley, *Frederick W. Taylor: Father of Scientific Management* (New York: London, Harper and Brothers, 1923), 130.

¹³⁰ Frank Barkley Copley, *Frederick W. Taylor: Father of Scientific Management* (New York: London, Harper and Brothers, 1923), 131.

parallel to the Army's later insistence on clearly written mission orders that could be understood at every level. Expecting a junior officer to conduct a mission on increasingly complex battlefields without providing detailed and explicit instructions that ensured all elements were working together in an efficient and synchronized fashion was inviting failure, and the Army by the early 1900s had come to this realization. This principle was developed further when General Leonard Wood advocated for Universal Military Training (UMT) for all eligible male citizens in the United States. War might happen at any time, and at the time Germany was the primary antagonist. As World War I inched closer, Wood, like Taylor, knew that relying on rule of thumb was not enough for large-scale warfare against a peer enemy. Exact instruction on basic military skills taught through a rigorous program during the Plattsburgh Movement was an important first step towards defining exactly what the Army expected from each of its soldiers every day.

Copley mentions almost in passing that business executives did not fully embrace the use of scientific research and methodology to run their organizations until around 1898, twenty years after Taylor had started his career at Midvale Steel Company. Many still relied on "rule-of-thumb methods" and their own "superior natural ability."¹³¹ Although this bit of information might warrant only a few lines in a biography of Taylor, it is significant in an examination of the influence of civilian management practices on the Army. It was during this time in the late 1890s that the Army had reached a critical point in its reform movement. Generals Sherman and Schofield had made great headway in professionalizing the officer corps through their efforts with the Leavenworth school. Key instructors such as Wagner had instituted important teaching methods and published doctrine that enabled uniformity of thinking and commonality of

¹³¹ Frank Barkley Copley, *Frederick W. Taylor: Father of Scientific Management* (New York: London, Harper and Brothers, 1923), 104.

problem-solving techniques into the junior officer cohort. What remained was to broaden this effort to include both the senior officer ranks and the enlisted ranks. The former, as seen previously, were largely resistant to many of the reform efforts, and the latter were largely excluded from consideration due in large part to their lack of education.

Louis Morton stated: “Military institutions in the armed forces do not exist in a vacuum. They reflect the society they are designed to protect and defend, and they can be understood only in relation to that society.”¹³² Morton was responding to Russell F. Weigley’s assertion that the Elihu Root reforms were part of a broader Progressive-era movement to apply new ideas of public management and control to greatly enlarged private businesses. Weigley described the Progressive movement as “the search for order,” and it is within this context that Root began his reform of the Army in 1899.¹³³ At the time, Army organization did not enable centralized control over the numerous small units and commands spread out across the United States. Even at the regimental level it was rare for the commander to have his entire command assembled at one location. Far more common were the scattered posts which might hold at most a battalion-sized element, which might be further separated by vast distances from the other companies and battalions within the regiment.¹³⁴ Thus the problems of unified command, standardization of training for officers outside of West Point, and cohesive organization were magnified by geographical separation.

¹³² Louis Morton, “Commentary,” in *Command and Commanders in Modern Warfare: The Proceedings of the Second Military History Symposium U.S. Air Force Academy 2-3 May 1968* (Washington D.C.: U.S. Government Printing Office, 1969), 28.

¹³³ Russell F. Weigley, “The Elihu Root Reforms and the Progressive Era,” in *Command and Commanders in Modern Warfare: The Proceedings of the Second Military History Symposium U.S. Air Force Academy 2-3 May 1968* (Washington D.C.: U.S. Government Printing Office, 1969), 13.

¹³⁴ Russell F. Weigley, “The Elihu Root Reforms and the Progressive Era,” in *Command and Commanders in Modern Warfare: The Proceedings of the Second Military History Symposium U.S. Air Force Academy 2-3 May 1968* (Washington D.C.: U.S. Government Printing Office, 1969), 14.

Further exacerbating the issue was the problem of organization at the senior level. The commanding general only had command authority during wartime. In peace, command flowed from the President to the Secretary of War, who generally lacked the requisite military knowledge to effectively carry out his position. Due to the constitutional and legal ambiguity surrounding the Commanding General's authority, he was often bypassed by the Secretary of War, who went to the various bureau chiefs for advice and recommendations for leading the Army. Without a hierarchical organization that included a unifying military figure who had control over the bureaus, each chief was essentially free to carve out his own insular kingdom and direct the administration of the Army as he saw fit, with little to no coordination horizontally or with the Commanding General.¹³⁵

The Army's professionalization reforms had started with General Sherman and Emory Upton following the Civil War and had achieved some measure of success by the time Elihu Root took office in 1899. Efforts to train junior officers in post lyceums, branch journals, and post-graduate education had all contributed to a communal sense of professionalization and a desire for organization and order within the officer corps. Although this reform effort had some adherents in the senior ranks, it was largely the effort of junior officers, who published articles, communicated ideas, and made the effort to attend the Leavenworth school. These reforms would remain mostly confined to the lieutenant and captain ranks, as many senior leaders remained entrenched in way of thinking that decried any formal education beyond West Point and advocated for on-the-job training as the only way to learn the warfighting and leadership skills necessary for advancement.

¹³⁵ Russell F. Weigley, "The Elihu Root Reforms and the Progressive Era," in *Command and Commanders in Modern Warfare: The Proceedings of the Second Military History Symposium U.S. Air Force Academy 2-3 May 1968* (Washington D.C.: U.S. Government Printing Office, 1969), 15.

Elihu Root began practicing law in 1867 in New York. For the next thirty years he specialized as a counsel for many large and powerful businesses, which earned him the nickname “corporation lawyer.”¹³⁶ One of the aspects of his legal practice was advising companies on how to legally unify control of their various subsidiary assets under a parent holding organization.¹³⁷ Although these practices tended to produce market monopolies, Root’s concern lay predominantly with an “obsession for order and stability,” which manifested in streamlined corporations that were vertically integrated and controlled.¹³⁸ Although there is no evidence that Root was directly influenced by the work of Frederick Winslow Taylor, it is not a stretch to argue that Root would have some knowledge of Taylor’s work given the former’s penchant for common sense, order, and organization. Several papers on workplace reform had been read at meetings of the American Society of Mechanical Engineers between 1889 and 1895 and were later published by the Economic Association to expand the reach of these ideas to a broader audience. Root, as Secretary of War, shared many of these progressive ideas, and they were reflected in the way he set about organizing the Army following the Spanish-American War.

Root referred to the Army as a “great machine.”¹³⁹ He approached the organizational issues which he identified as one of inputs and outputs, like a piece of broken industrial equipment. Government policy was the input, and tactics, strategy, and care of the soldiers was

¹³⁶ Richard William Leopold, *Elihu Root and the Conservative Tradition* (Boston: Little, Brown and Company, 1954), 15.

¹³⁷ Richard William Leopold, *Elihu Root and the Conservative Tradition* (Boston: Little, Brown and Company, 1954), 16.

¹³⁸ Richard William Leopold, *Elihu Root and the Conservative Tradition* (Boston: Little, Brown and Company, 1954), 19.

¹³⁹ Elihu Root, “The American Soldier,” in *The Military and Colonial Policy of the United States*, ed. Robert Bacon and James Brown Scott (Cambridge: Harvard University Press, 1916), 3.

the output.¹⁴⁰ Following the chaotic mobilization and deployment of soldiers for the Spanish-American War in 1898, Root determined that something in the machine was broken, and to his critical eye the problem appeared to be organizational. This type of thinking is what Weigley refers to as progressive, not because of any underlying political connotations but because it was trying to figure out the best way to organize a large corporation under public leadership. The military reorganization that Root undertook was one part of a larger trend of what Paul A.C. Koistinen termed the “political economy of war,” which he described as “the interrelationships of the political, economic, and military institutions in devising the means to mobilize resources for defense and to conduct war.”¹⁴¹ Until the Industrial Age it had not been necessary for the military to work closely with political and economic leaders to mobilize the American economy for war. Each part worked independently of the rest during wartime, and the result was a haphazard national mobilization that that did not always work in concert to achieve the war aims. As the potential for international conflict grew and technological advances in manufacturing greatly increased Army capabilities, these separate political, economic, and military spheres came to the realization that for national strategy to prevail in war, the whole economy would have to be mobilized to support the effort.¹⁴² During the Progressive Era, this movement to merge political and business concerns resulted in what Weigley termed the “bureaucratic approach,” hallmarked by “constant, watchful attention and continuing remedial adjustments by

¹⁴⁰ Elihu Root, “The American Soldier” in *The Military and Colonial Policy of the United States*, ed. Robert Bacon and James Brown Scott (Cambridge: Harvard University Press, 1916), 3.

¹⁴¹ Paul. A.C. Koistinen, *Mobilizing for Modern War: The Political Economy of American Warfare, 1865-1919* (Lawrence: University Press of Kansas, 1997), 1.

¹⁴² Paul. A.C. Koistinen, *Mobilizing for Modern War: The Political Economy of American Warfare, 1865-1919* (Lawrence: University Press of Kansas, 1997), 5.

public officials.”¹⁴³ The underlying realization was that massive corporations that influenced large segments of the nation could not be controlled by merely passing a law; rather, a less antagonistic approach could prove to be far more efficient in merging the profit-centered concerns of business with the public interest.

The Root Reforms

President William McKinley’s appointment of Elihu Root as the Secretary of War in 1899 was a calculated bid to bring order to the chaos of US colonial policy regarding Puerto Rico, Cuba, and the Philippines. Formerly belonging to Spain, these territories were ceded to the United States under the Treaty of Paris in 1899 following the Spanish defeat.¹⁴⁴ As the war continued in the Philippines, the War Department was given supervisory responsibility over the islands until the larger colonial issues were resolved.¹⁴⁵ At the same time, an investigating commission headed by Major General Grenville M. Dodge had illuminated the many organizational issues within the Army that had manifested during the mobilization and deployment of soldiers for the Spanish-American War.¹⁴⁶ The legal problems of colonial policy and the Army’s organizational issues highlighted by the Dodge Commission provided McKinley the opportunity to look outside the military for a new Secretary of War. After receiving McKinley’s offer to assume the position, Root argued that he knew nothing about the military.

¹⁴³ Russell F. Weigley, “The Elihu Root Reforms and the Progressive Era” in *Command and Commanders in Modern Warfare: The Proceedings of the Second Military History Symposium U.S. Air Force Academy 2-3 May 1968* (Washington D.C.: U.S. Government Printing Office, 1969), 21.

¹⁴⁴ Robert Bacon and James Brown Scott, ed., introduction to *The Colonial and Military Policy of the United States* (Cambridge; Harvard University Press, 1916), xix.

¹⁴⁵ Robert Bacon and James Brown Scott, ed., introduction to *The Colonial and Military Policy of the United States* (Cambridge; Harvard University Press, 1916), xiii-xiv.

¹⁴⁶ Richard W. Stewart, ed., *American Military History, Vol. 1: The United States Army and the Forging of A Nation, 1775-1917* (Washington D.C.: Center of Military History, 2005), 369.

McKinley's response was that he was "not looking for any one who knows anything about war or for any one who knows anything about the army; he has got to have a lawyer to direct the government of these Spanish islands" ¹⁴⁷ Colonial policy would take precedence, but by 1902 Root was able to turn his full attention to the organizational issues facing the Army.

McKinley had grown up in Ohio, which in the mid-1800s was the second largest producer of pig iron behind Pennsylvania. ¹⁴⁸ Following service in the Union Army during the Civil War, he started his career in politics as a state representative and later governor of Ohio. Because of his family history in the iron industry, McKinley developed a strong platform based on labor rights and protective tariffs. ¹⁴⁹ One of his primary reasons for backing protective tariffs was that they encouraged "the development of skill and inventive genius as part of the great productive forces." ¹⁵⁰ Although at first glance the ideals of McKinley and Frederick Winslow Taylor might appear antagonistic, a closer look might reveal some similarities in motivation. McKinley was concerned with protecting labor, which included maximizing wage-earning potential, supporting job creation, and defending workers' rights against anti-union bosses. ¹⁵¹ One of the key aspects of Taylor's management principles was that the boss must know the workers, taking an active role in managing the workforce to ensure that every aspect of production ran smoothly and efficiently. He decried the aloofness of the Industrial Age manager, who acted primarily as an agent of the owner, concerned only with profits while taking little

¹⁴⁷ Robert Bacon and James Brown Scott, ed., introduction to *The Colonial and Military Policy of the United States* (Cambridge; Harvard University Press, 1916), xiv.

¹⁴⁸ Kevin P. Phillips, *William McKinley* (New York: Times Books, 2003), 13.

¹⁴⁹ Kevin P. Phillips, *William McKinley* (New York: Times Books, 2003), 77.

¹⁵⁰ Kevin P. Phillips, *William McKinley* (New York: Times Books, 2003), 14.

¹⁵¹ Kevin P. Phillips, *William McKinley* (New York: Times Books, 2003), 32.

responsibility for the human factor.¹⁵² Taylor was concerned with “individualizing of workmen and the giving to each of them a personal incentive for doing his best,” which led to his efforts to increase the efficiency of workplace procedures and implement scientific principles of management.¹⁵³ While many workers decried the implantation of scientific management in the workplace because it required them to work harder and increase production beyond what they were accustomed to, an argument can be made that Taylor, although approaching the matter differently than McKinley did, was also a friend of labor. It is not a stretch to say that McKinley, as concerned as he was with labor issues, would have a working knowledge of Taylor’s work in the steel industry.

Because the Army needed organizational reform, Elihu Root was a logical choice to implement the necessary changes. His work as a corporate lawyer concerned with streamlining operations under a single controlling entity gave him the background experience, and his status as an outsider with no prior experience in the military allowed him to clearly see how best to reorganize the Army without preconceptions based on past experience. One of the main lessons that Taylor learned during his years working at the Midvale Steel Company was the proper relationship between subordinates and authority, which imbued much of his later work as he attempted to streamline the workplace hierarchy from the owner to the worker while ensuring that bosses were responsive and attentive to the needs of the employees. This same problem confronted Root as he surveyed the state of the Army’s disjointed command structure. The commanding general had no real authority, the bureaus acted independently, and the civilian

¹⁵² Frank Barkley Copley, *Frederick W. Taylor: Father of Scientific Management* (New York: London, Harper and Brothers, 1923), 154.

¹⁵³ Frank Barkley Copley, *Frederick W. Taylor: Father of Scientific Management* (New York: London, Harper and Brothers, 1923), 152.

secretary of war was often at odds with the commanding general. This imbalance would have to be corrected before any action could be taken to reform the Army's junior officer training program and implement a safe management style of leadership.

The Root reforms began in 1901 with a recommendation to Congress for the creation of a general staff and the founding of a war college to train senior leaders in the art and science of leading large formations and for service on the general staff. Although not approved by Congress until 1903, Root in the meantime directed that a war college board should be formed, which would provide the nucleus for the future general staff and begin conducting planning for the Army. His other key reform was organizing the Army's postgraduate education system, directing that the new progression would include West Point, the service schools, General Staff and Service College, and the War College.¹⁵⁴ Even though Congress approved the creation of the General Staff, it did not allow for consolidation of the bureaus under the control of the Chief of Staff, which would have ensured that all supporting efforts were organized toward the same aims. Despite this resistance, the foundation was laid for future reforms to continue organizing the Army for maximum efficiency, and the establishment of a new system of education ensured that future Army leaders would be trained under the new system of management.

Along with these important reforms, Root proposed to reorganize the militia system of the United States in 1903. Up to this point, responsibility for the National Guard had been given to the states, which resulted in "a consequent lack of standards and concern for the nation as a whole."¹⁵⁵ The states had used the militia system as patronage, handing out commissions in

¹⁵⁴ Richard W. Stewart, ed., *American Military History, Vol. 1: The United States Army and the Forging of A Nation, 1775-1917* (Washington D.C.: Center of Military History, 2005), 371.

¹⁵⁵ Richard William Leopold, *Elihu Root and the Conservative Tradition* (Boston: Little, Brown and Company, 1954), 40.

exchange for political favors while producing inadequately trained units. Root did not propose to abolish the existing system, but to organize it so that it was more closely aligned with the regular Army. His plan called for “state units [to] be given the same organization, equipment, and discipline as the regulars,” along with “periodic joint exercises and instruction” with the Army.¹⁵⁶ Most importantly, he opened up the Army education system to National Guard officers to ensure a uniform standard of training was achieved.

Root is primarily characterized as a staunch conservative, working against many Progressive Era reform measures to maintain “the traditional order of society from the assaults of both capital and labor.”¹⁵⁷ This position is defended by Richard William Leopold, who wrote a biography of Root in 1954 that details his staunch “defense of conservatism.”¹⁵⁸ Since that time, the Progressive Era has been reexamined by several authors to include Robert H. Wiebe and Russell Weigley, who conclude that the Progressive Era was typified by a search for order during a time of rapidly growing corporations, a booming economy that saw the creation of the new middle class, and a push for increased professionalization and standardization. Weigley aptly characterizes this period as “the effort to transform an invertebrate into a vertebrate society,” and in this light Elihu Root can more accurately be described as a progressive reformer despite his political affiliations.¹⁵⁹ From his days as a corporate lawyer devising ways for corporations to streamline their holdings to his tenure as the Secretary of War and the resulting reorganization of

¹⁵⁶ Richard William Leopold, *Elihu Root and the Conservative Tradition* (Boston: Little, Brown and Company, 1954), 40-41.

¹⁵⁷ Richard William Leopold, *Elihu Root and the Conservative Tradition* (Boston: Little, Brown and Company, 1954), 72.

¹⁵⁸ Richard William Leopold, *Elihu Root and the Conservative Tradition* (Boston: Little, Brown and Company, 1954), 71.

¹⁵⁹ Russell F. Weigley, “The Elihu Root Reforms and the Progressive Era,” in *Command and Commanders in Modern Warfare: The Proceedings of the Second Military History Symposium U.S. Air Force Academy 2-3 May 1968* (Washington D.C.: U.S. Government Printing Office, 1969), 13.

the Army, Root implemented progressive ideas as he sought to remake a disjointed and poorly led Army into a cohesive, organized, and safely-managed force that fought toward a common aim.

Army Leaders as Managers

Even as Taylor worked to reorganize the shop floor, his primary concern lay with transforming the management system into an organized entity that trained the workers, was responsive to their needs as well as the needs of the owners, and used scientific principles to gain maximum profit. Change started at the top with owners who were involved in the workplace and enforced the application of Taylor's principles. It trickled down to the planning centers which studied every aspect of production to devise the best possible procedures, which then passed their results over to the managers who both trained the individuals and supervised their work according to the set standards. This style of reform is indicative of the Progressive Era search for order, and it illustrates well the type of reform that Army leaders began during the professionalization movement, and which continued during the Root reforms in the early 1900s. After the Army officer corps had implemented standards for entry and added postgraduate education opportunities, which resulted in professionalizing the corps, Root could reorganize the senior leadership structure, reform the education system to train all officers in a similar fashion, implement a planning department in the form of the General Staff, and integrate the organized militia alongside the Regular Army under a common standard. The only effort left to undertake was to train the workers under the new system. Root did not formulate any reform measures in this particular area, but his efforts set the stage for Major General Leonard Wood to advocate for universal military training during the Plattsburgh Movement beginning in 1909, thus completing the progressive reform measures that were hallmarked by the Progressive search for order.

Chapter 3: The Plattsburgh Movement

Major General Leonard Wood began his service in the Army in 1885 as a contract surgeon, assigned to Whipple Barracks at Fort Huachuca, Arizona under the direct command of Captain Henry Lawton. His career began as the final campaign against Geronimo was beginning, and for over a year Wood played an active role in the hunt for the Indian Chief. During this time Wood, despite being trained as a surgeon and with no cavalry training, was allowed to lead small patrols out into the desert in place of the officers who had cracked under the strain of constant campaigning.¹⁶⁰ In an interesting twist, Wood at one point asked for and received command of an infantry company, marking the first of many commands the young surgeon would hold in the active Army before becoming the commanding general. For his service during the Geronimo campaign, Wood would later be awarded the congressional Medal of Honor, given for distinguished conduct “while serving as medical and line officer of Captain Lawton’s expedition.”¹⁶¹ Joseph Hamblen Sears, who published *The Career of Leonard Wood* in 1919, wrote that one of the primary lessons that Wood learned in the first years of his time in the Army was the “value of organization.”¹⁶² The strenuous environment and long hours imparted to Wood the need for careful planning and preparation and a thorough understanding of logistics, but these areas could only be effectively applied within a well-organized system which was understood by both the leaders and the led.

In 1895 Wood was assigned to Washington, where he quickly became friends with President Grover Cleveland, serving as the surgeon to the president and his family. Wood also

¹⁶⁰ John G. Holme, *The Life of Leonard Wood* (Garden City: Doubleday, Page & Company, 1920), 13-15.

¹⁶¹ John G. Holme, *The Life of Leonard Wood* (Garden City: Doubleday, Page & Company, 1920), 26.

¹⁶² Joseph Hamblen Sears, *The Career of Leonard Wood* (New York: D. Appleton and Company, 1919), 54.

met Theodore Roosevelt, and it was during his time in the capital that he was able “to learn something of national politics and of the duties and responsibilities of the Chief Executive.”¹⁶³

When war in Cuba broke out in 1898, Wood applied for commission as a colonel of one of three regiments of cavalry in the newly formed First United States Volunteer Cavalry, with Roosevelt as the lieutenant colonel. This pairing had not happened by chance; Wood and Roosevelt had developed a strong friendship centered on a love of adventure, athletics, and the outdoors. These shared interests came together during the months prior to the outbreak of hostilities as the men talked about forming a regiment of volunteers in preparation for the war they knew was going to happen.¹⁶⁴

As the commander of the regiment nicknamed “Rough Riders,” Wood was responsible for manning, equipping, and training the volunteers. Building on the lessons he had learned chasing Geronimo across the desert, Wood began methodically preparing his regiment for deployment to Cuba. However, he ran headlong into the unorganized and inefficient Army bureaus, which at the time were completely unprepared for a major war effort. Hamblen states: “The chaos and tangle of red tape, inefficiency, unpreparedness in all branches of the service blocked every effort that a few efficient and able men were making.”¹⁶⁵ Despite the obstacles, Wood was able to procure the necessary men and equipment through a novel form of organization which entailed drafting all the required paperwork necessary for manning and equipping a regiment and then presenting them all at once to Secretary of War Russell Alger for

¹⁶³ William Herbert Hobbs, *Leonard Wood: Administrator, Soldier, and Citizen* (New York: G.P. Putnam’s Sons, 1920), 50.

¹⁶⁴ John G. Holme, *The Life of Leonard Wood* (Garden City: Doubleday, Page & Company, 1920), 41-42.

¹⁶⁵ Joseph Hamblen Sears, *The Career of Leonard Wood* (New York: D. Appleton and Company, 1919), 70.

signature, rather than piecemealing the paperwork through the established bureaucracy.¹⁶⁶ The defining moment that firmly planted the concepts of preparedness and organization in Wood's thinking occurred during the flurry of activity leading up to the Spanish-American War.

Biographer John G. Holme quotes Wood: "A certain high military officer in Washington whom I met one day was much upset by the sudden war activity, and remarked: 'Here I had a magnificent system; my office and department were in good working order, and this damned war comes along and breaks it all up.'"¹⁶⁷ That experience, combined with his efforts to form the Rough Riders and his earlier actions in the west combined to form the foundation of Wood's later efforts to reform the Army into an efficient, well-managed, and prepared organization, which aligned very closely with progressive-era workplace reform. Both civilian and military organizations had grown too large to be ran based on rule of thumb and whether the aim was rapidly increasing production while decreasing labor costs or preparing a large army for international war, the same underlying principles of organization, preparation, scientific planning, efficiency, and training were common to both efforts.

John D. Eisenhower mentions in his recent work *Teddy Roosevelt and Leonard Wood: Partners in Command* that Roosevelt and Root laid the conceptual foundation for Wood's later preparedness reform effort. It is true that these individuals shared a common ideology concerning the need for progressive-style reforms in the Army, but Eisenhower makes no mention of President Roosevelt being directly involved with Root's proposals. However, it was critical that Roosevelt, although occupied with his duties as president, was not an obstacle to reform during this time. Much has been said about Woodrow Wilson's aversion to Wood's preparedness effort

¹⁶⁶ Joseph Hamblen Sears, *The Career of Leonard Wood* (New York: D. Appleton and Company, 1919), 70-72.

¹⁶⁷ John G. Holme, *The Life of Leonard Wood* (Garden City: Doubleday, Page & Company, 1920), 50.

later in the 1900s, but Roosevelt proved to be a supporter of the organizational reform measures advanced by Root, and indeed perhaps the minimal involvement indicated by Eisenhower was Roosevelt's greatest contribution.¹⁶⁸

The Preparedness Movement and the Summer Camps

One of Emory Upton's stops during his tour of Asia and Europe was Germany. Despite being denied permission to watch the German army maneuvers in the fall of 1876, Upton was still able to observe much of the rest of the army. David Fitzpatrick notes that Upton came away impressed by four areas: "its organization for recruitment and mobilization, its officer selection and promotion systems, its educational system, and its general staff."¹⁶⁹ The latter three areas had been addressed to some extent during the earlier Root reforms. Root had attempted to reform the Army's mobilization effort through his effort to align the National Guard more closely with the regular Army. Although the Dick Act was passed in 1903 to provide funds and training and enable greater federal control over the Guard, the federal government was still unable to call the Guard up for service outside the United States. Upton described the German system of recruitment and mobilization as a twelve-year process, wherein men fit for service spent three years on active duty, four years in the reserves, and five years in a *Landwehr* battalion. During their time in the reserves and the *Landwehr*, soldiers would be called up periodically for military training.¹⁷⁰ The importance of this system "was its ability to provide men to the army who already had military experience."¹⁷¹ During wartime, the reserves and *Landwehr* battalions could

¹⁶⁸ John D. Eisenhower, *Teddy Roosevelt and Leonard Wood: Partners in Command* (Columbia; University of Missouri Press, 2014), 86-101.

¹⁶⁹ David Fitzpatrick, *Emory Upton: Misunderstood Reformer* (Norman; University of Oklahoma Press, 2017), 174.

¹⁷⁰ David Fitzpatrick, *Emory Upton: Misunderstood Reformer* (Norman; University of Oklahoma Press, 2017), 174-175.

¹⁷¹ David Fitzpatrick, *Emory Upton: Misunderstood Reformer* (Norman; University of Oklahoma Press, 2017), 174.

be called up for active service, arriving already trained and ready to deploy. Because Americans had a long-standing aversion to a standing army in peacetime, the German model would be an untenable solution to the preparedness problem that Wood had identified in 1902, although it provided an important inspiration to future preparedness advocates who sought to implement some type of readiness program in the United States.

In 1913, Wood instituted the first summer training camp to increase the military readiness of the United States in preparation for a future war against Germany.¹⁷² To rectify what he saw as a lack of preparedness for possible war in Europe, Wood had to take a more oblique approach, developing some type of ready reserve force that could be mobilized and sent overseas. The key feature of this force was that it must have some level of standardized training already completed. Wood believed that war could happen at any time, and when it broke out there would be no time to spend training the new recruits how to be soldiers. At the time, making civilians into soldiers required two to three years, a large amount of time that did not mesh with Wood's opinion on the rapidity with which war could happen.¹⁷³ One of the major sources of opposition to Wood's preparedness effort came from within the Army itself; the bureau chiefs, responsible for managing the routine functions of the Army, had adopted a bureaucratic attitude toward their role, becoming engrossed with minute details while losing sight of the Army's larger purpose.¹⁷⁴ Similar to Frederick Winslow Taylor's analysis of modern managers in the Industrial Age, the

¹⁷² William Herbert Hobbs, *Leonard Wood: Administrator, Soldier, and Citizen* (New York: G.P. Putnam's Sons, 1920), 105.

¹⁷³ John Garry Clifford, *The Citizen Soldiers: The Plattsburg Training Camp Movement, 1913-1920* (Lexington: University Press of Kentucky, 1972), 8.

¹⁷⁴ John Garry Clifford, *The Citizen Soldiers: The Plattsburg Training Camp Movement, 1913-1920* (Lexington: University Press of Kentucky, 1972), 6-7.

bureaus were out of touch with the workers, and this separation, in Wood's opinion, was detrimental to the Army's ability to win the next war.

Even if Wood was able to achieve his vision of a ready reserve, he still faced the problem of providing an adequate number of junior officers to both train and lead these inexperienced soldiers into combat. Since the Morrill Act was passed in 1862, land grant colleges across the United States had been providing some type of military tactics training to the male students. The federal government had provided arms and equipment to the colleges and detailed a small number of regular officers and retired officers to instruct at the larger schools. In addition to the land grant colleges, private military institutions such as Norwich, Virginia Military Institute, and The Citadel had been founded "primarily for purposes of discipline and general education."¹⁷⁵ Even though many students attending these schools received some form of military training and might serve capably as officers, the Army had resisted tapping into this source except on a very narrow basis. Following the annual inspection conducted by the War Department, schools that obtained a rating of "Honor School" were eligible to send their honor graduate to West Point, and schools that obtained a "Distinguished College" rating had their honor graduate placed on the preferred list for commission and appointment in the regular army.¹⁷⁶ As noted earlier, commandants at West Point had asked for an increase in the annual allotment of appointments made to the Academy since the 1890s, but so far Congress had resisted this call. While Americans had little appetite for any increase in the size of the standing army during peacetime, patriotic fervor allowed for a rapid expansion, with civilians being appointed as officers through

¹⁷⁵ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America's Participation in the World War* (New York: E.P. Dutton and Company, 1921), 8.

¹⁷⁶ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America's Participation in the World War* (New York: E.P. Dutton and Company, 1921), 10.

political patronage and for their ability to raise a unit of enlisted volunteers. Although regular army officers did apply for positions in the volunteer army as a way to break out of the typical mid-career slump, providing knowledge and experience to the green volunteers, the net effect was that the same number of experienced, trained officers was merely spread even thinner across a rapidly expanded force. Wood's effort with the summer training camps sought to balance the population of experienced regular officers with a pool of trained volunteer officers who could mitigate the inevitable effects of rapid expansion.

In a letter dated May 10, 1913 addressed to the nation's college presidents, Wood described the aim of the first summer camp: ". . . primarily, to increase the present inadequate personnel of the trained military reserve of the United States by a class of men from whom, in time of a national emergency, a large proportion of the commissioned officers will probably be drawn" ¹⁷⁷ For this reason the initial round of summer camps was geared toward the college age cohort, aimed at providing a baseline of military training to rectify to inconsistent instruction that had been provided for several decades. Although the population of potential officers was the focal point of Wood's summer camp plan, the underlying purpose was to demonstrate that a soldier could be effectively trained in a much shorter period than the Army was accustomed to. Wood was under no illusions that a six-week program would produce trained soldiers and officers. However, the results of this first training camp would provide the necessary foundation for expanding the camps to include "special training regiments for regular recruits, to prove to the army that soldiers could be properly trained in six to eight months." ¹⁷⁸ During the 1913

¹⁷⁷ John Garry Clifford, *The Citizen Soldiers: The Plattsburg Training Camp Movement, 1913-1920* (Lexington: University Press of Kentucky, 1972), 12.

¹⁷⁸ John Garry Clifford, *The Citizen Soldiers: The Plattsburg Training Camp Movement, 1913-1920* (Lexington: University Press of Kentucky, 1972), 22.

camps students were given lectures on military history and policy, which had the subtle effect of introducing them to the current of military preparedness. Wood hoped that this exposure would lead to an awakening in the general public of the need to prepare for the war he was certain would soon break out with Germany.

The first six-week course featured instruction in close order drill, formations, the manual of arms, maneuvers, shooting, and a culminating exercise which included hiking approximately sixty-five miles.¹⁷⁹ Broadly speaking, the goal was to standardize the training these future officers received so that when war came there would be no question of whether an officer candidate was ready to assume a leadership position. Attendance at a summer camp was proof that the man was sufficiently qualified for a commission and was prepared to train soldiers. One of Frederick Winslow Taylor's aims was shifting knowledge from the workers to the shop managers. Typically, the workers were the source of knowledge in the shop. They had been performing their tasks for years, developing individual systems for producing parts that were based on the way things had always been done. Managers were usually clueless about the many distinct systems at play and generally left the workers to their own devices so long as a certain number of pieces were produced. Taylor believed that through scientific management, each element of production could be planned and managed so that production was maximized, and workers operated according to a set standard developed by the shop planning department. The summer camps followed a similar model, where future officers would learn the science of soldiering as directed by a central planning element, and then train the individual soldiers in accordance with a published standard. This accomplished the dual purpose of creating safe leaders who thought and acted alike while also establishing a standard of training that could be

¹⁷⁹ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America's Participation in the World War* (New York: E.P. Dutton and Company, 1921), 13-14.

reproduced at camps across the nation. The long-term effect was that the level of military preparedness (or production) would be increased as the nation became more efficiently organized.

Beginning of the Plattsburgh Movement

The Plattsburgh Movement began after the sinking of the *Lusitania* in May 1915. Ralph Barton Perry described it as originating “in the desire of a few young business and professional men in New York City to escape the ignominy of weakness and inaction in the presence of a grave national and human emergency.”¹⁸⁰ After building a network of likeminded individuals the group appointed Theodore Roosevelt, Jr., Philip A. Carroll, and Grenville Clark to form a leadership committee to direct future actions.¹⁸¹ Already familiar with the summer camps that had occurred in 1913 and 1914, the committee decided to merge the existing preparedness model with a concerted civilian promotion effort to increase the military readiness of the United States. The sinking of the *Lusitania* and the ongoing war in Europe had brought the issue of American military preparedness to the forefront of the minds of many, but at the national level President Woodrow Wilson still held fast to his anti-war principles, to the point where, historian John Garry Clifford says, “he personally discouraged the General Staff from even considering plans for a European expeditionary force prior to 1917.”¹⁸² The Plattsburgh Movement leadership committee found themselves in the awkward position of trying to efficiently organize the country for war even as the elected president resisted the preparedness movement. The prevailing

¹⁸⁰ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America's Participation in the World War* (New York: E.P. Dutton and Company, 1921), 25.

¹⁸¹ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America's Participation in the World War* (New York: E.P. Dutton and Company, 1921), 27.

¹⁸² John Garry Clifford, *The Citizen Soldiers: The Plattsburg Training Camp Movement, 1913-1920* (Lexington: University Press of Kentucky, 1972), 32.

political opinion towards preparedness was expressed by William Jennings Bryan, who stated: “The President knows that if this country needed a million men, and needed them in a day, the call would out at sunrise and the sun would go down on a million men in arms.”¹⁸³ Implied in this statement was the belief that patriotism would overcome the extreme deficits in training and leadership that would result from this sentiment; patriotism would be sufficient to win any war that America would reluctantly become involved.¹⁸⁴

Despite political resistance to the preparedness movement the committee continued planning for future summer camps. One of the key ideas that underpinned the movement was advocating for federal recognition and control of the training camps.¹⁸⁵ Obtaining federal oversight of the camps would ensure consistency of training based on established military doctrine. It would also lend credibility to the movement and would provide military oversight with civilian support and recruiting assistance. Above all, it would enable the creation of a pipeline for camp attendees to be commissioned or enlisted into the Army once war was declared. Without federal control, the Plattsburgh Movement would be subjected to “localism and divided control” at the state level, which would result in the same inconsistency of training and lack of interest that the movement was seeking to rectify.¹⁸⁶

¹⁸³ John Garry Clifford, *The Citizen Soldiers: The Plattsburg Training Camp Movement, 1913-1920* (Lexington: University Press of Kentucky, 1972), 33.

¹⁸⁴ Henri Bergson developed the idea of “*élan vital*,” translated into English as “Vital Impetus” by Arthur Mitchell in his English translation of the original French work *l'évolution créatrice*. Bergson describes the concept this way: “Intellect therefore instinctively selects in a given situation whatever is like something already known; it seeks this out, in order that it may apply its principle that, ‘like produces like.’” French officers in World War I wore bright red pantaloons and hats with tall white plumes on them to identify them as officers. The clothing theoretically made them feel brave, leading them to act brave in battle, who would follow the officer’s example in the chaos of war. *Creative Evolution* (New York: H. Holt and Company, 1911), 29.

¹⁸⁵ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America’s Participation in the World War* (New York: E.P. Dutton and Company, 1921), 33.

¹⁸⁶ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America’s Participation in the World War* (New York: E.P. Dutton and Company, 1921), 33.

The Shortage of Army Officers on the Eve of World War I

As the United States inched closer to war, the organizers of the Plattsburgh Movement began to understand with more clarity the gravity of the situation in which the nation was about to become entangled. Since the earliest colonial days, Americans had relied on volunteers during wartime to expand the fighting force. These volunteers were disbanded at the end of the war, and the standing army would revert to a skeleton force. Even as politicians such as John C. Calhoun argued for a larger force of regulars in peacetime, political and public pressure always intervened to override these plans. At the outset of World War I, however, the realization that America was about to find itself engaged in an international conflict against the professional German army became clearer to the proponents of preparedness. Germany had over three million soldiers in its army, split between the Western and Eastern fronts. Conversely, the United States had around 100,000 soldiers on active duty. This disparity meant that the United States would have to raise a massive volunteer army, who would need to be trained before deploying to Europe. Published in 1917, *The Plattsburger* was a yearbook that covered the second year of the Plattsburgh training camps. The first article in the yearbook, “Plattsburg – Ideals and Achievements,” provides the counterpoint to William Jennings Bryan’s opinion on the volunteer army, stating: “An unlimited supply of man power could be drawn upon, but who was going to train them? There were regular army officers . . . but not enough of them. At this point a great military truism began to be understood where it had never penetrated before, the simple fact that OFFICERS CANNOT BE BOUGHT [caps in original].”¹⁸⁷ While the volunteer army had been successful in past conflicts,

¹⁸⁷ “Plattsburg – Ideals and Achievements,” in *The Plattsburger* (New York: Wynkoop Hallenbeck Crawford Co., 1917), 13-14.

preparedness advocates believed that it was insufficient to meet the German threat in an era of rapid technological advancement and massive battlefields.

Although Plattsburgh Movement supporters did not believe that two or three years was required to sufficiently train a soldier, neither were they under any impression that a six-week camp could produce a capable officer. The desired effect of the camps through 1916 was not to create trained officers capable of immediately leading soldiers, but to instill “a deep conviction that good officers of the line could be produced only by a rigorous course of field training.”¹⁸⁸ The aim was to move away from the belief that officers were naturally gifted leaders who could command soldiers in combat, and awaken an understanding that leaders must be trained in the art and science of their profession. The Army was not immune to the reforms occurring in civilian industries, although it resisted the urge to extend the professionalization movement to the volunteer officers who would make up the bulk of the junior leaders during wartime. It was left to the concerned citizens of the Plattsburgh Movement to recognize and act on this oversight after seeing the benefits of applying organizational and training principles in a scientific manner to their own industries. Keeping with the ideas of Frederick Winslow Taylor, Plattsburgh supporters advocated for a focus on the managers and the system. Trained managers and junior officers would have the power of knowledge and could then train the workers and soldiers to perform precise, coordinated actions that would benefit the organization and increase production. This idea was summed up in *The Plattsburger*: “It is the basic theory at Plattsburg Headquarters that the man who can not execute an about face with exactness could not be trusted on a battle front where exactness and precision constitute the quintessence of this theory which, when

¹⁸⁸ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America's Participation in the World War* (New York: E.P. Dutton and Company, 1921), 178.

ignored, has invariably resulted in wanton and unnecessary sacrifices of men.”¹⁸⁹ The future officers that were trained at Plattsburgh were expected to become the holders of knowledge, training the conscript National Army according to a precise set of instructions to quickly prepare them for war on the Western Front.

The Military Training Camps Association

Formed in 1915, the Military Training Camps Association (MTCA) was the civilian-led organizing body that worked to advance legislation for universal military training and assist in organizing the yearly training camps. One of the primary jobs of the MTCA was to provide organized continuity for the preparedness movement in the months between the yearly summer camps. Because the MTCA was organized on a national level with affiliates spread across the United States, they were uniquely positioned to provide immediate assistance when President Woodrow Wilson declared war with Germany in 1917. Quickly recognizing that the Army was about to face a severe shortage of officers, MTCA leaders proposed to transform the traditional month-long summer camp into a three-month officer training course. The MTCA message to Secretary of War Newton D. Baker noted that the training camps “could not only supply material for officers’ reserve corps, but could act as professional training ground for men now commissioned or recommended for commission [in] officers’ reserve corps.”¹⁹⁰ The key element of the MTCA plan was that the summer camps were already authorized under Section 54 of the National Defense Act of 1916, and had been funded for 1917 in the War Department

¹⁸⁹ “Plattsburg – Ideals and Achievements,” in *The Plattsburger* (New York: Wynkoop Hallenbeck Crawford Co., 1917), 15.

¹⁹⁰ John Garry Clifford, *The Citizen Soldiers: The Plattsburg Training Camp Movement, 1913-1920* (Lexington: University Press of Kentucky, 1972), 229.

Appropriation Bill for that year.¹⁹¹ Because the MTCA recognized the value of efficient organization and federal recognition, the foundation had already been laid in previous years to quickly transition into the important role of training officers for service in World War I.

The Army found itself completely unorganized for the herculean task of procuring the thousands of officers it would need for the National Army while also receiving the large number of conscripts provided for in the Selective Service Act. Even as the Army had made strides in reforming its organization following the Spanish-American War, it quickly became apparent that these reforms, important as they were, did not account for rapid expansion in the event of war. Essentially, the Army was having to relearn the same lessons in organization, training, and efficiency that American businesses had learned at the outset of the Industrial Age. During the initial period of figuring out how to recruit and train the required number of officers, the Army effort consisted of two officers in the Adjutant General's office devising plans similar to the MTCA summer camps already in existence.¹⁹² However, the Army did have the benefit of the decades of civilian experience to assist in rapidly transforming the land forces from a small peacetime Army focused on continental defense into a massive organization capable of recruiting, training, and deploying a force with the ability to fight Germany.

The first round of officer training camps hosted 43,000 volunteers at sixteen camps across the United States. To accomplish this monumental task, the MTCA leveraged its numerous offices across the country to assist the Army recruiting effort, which lacked "adequate

¹⁹¹ John Garry Clifford, *The Citizen Soldiers: The Plattsburg Training Camp Movement, 1913-1920* (Lexington: University Press of Kentucky, 1972), 230.

¹⁹² Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America's Participation in the World War* (New York: E.P. Dutton and Company, 1921), 181.

machinery to use for these purposes.”¹⁹³ The MTCA used its offices as recruiting and examining stations, “employed clerks, distributed blanks, secured volunteer physicians, disseminated information, and answered inquiries.”¹⁹⁴ Because the MTCA had kept records of all the camp attendees in anticipation of large-scale war, they had at the ready a list of known individuals who had already completed the month-long course in previous years, were known to be in good health, and who were ready to volunteer their services to the United States. Perry states: “For the officer candidates who now came forward were in large part former Plattsburg men, and for the rest men who had expected to attend the 1917 camps or others of the same type who had been imbued with the same spirit.”¹⁹⁵

The MTCA’s contribution is hard to understate. During the course of the war around 96,000 line officers graduated from the various training camps, almost half of the total number of Army officers. If the 42,000 physicians and 2,000 chaplains are excluded from this number, the ratio of training camp officers jumps to almost two-thirds.¹⁹⁶ In the realm of junior officer training, the MTCA and the training camps brought renewed awareness to the fact that junior officers must be trained before leading soldiers, counteracting the prevailing practice of commissioning volunteer wartime officers who had strong political and social connections. West Point provided the optimum level of initial training for regular army officers, but the fact remained that it could not provide the number of officers required for an expanded force.

¹⁹³ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America’s Participation in the World War* (New York: E.P. Dutton and Company, 1921), 184.

¹⁹⁴ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America’s Participation in the World War* (New York: E.P. Dutton and Company, 1921), 184.

¹⁹⁵ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America’s Participation in the World War* (New York: E.P. Dutton and Company, 1921), 184.

¹⁹⁶ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America’s Participation in the World War* (New York: E.P. Dutton and Company, 1921), 195.

Although untrained volunteer officers could serve admirably during wartime, their lessons were often learned at the expense of soldier's lives. The idea of universal military service never became law, but the practice of training junior officers in basic soldier and leadership skills, thus imbuing them with the knowledge to train and lead soldiers, became a reality through an expansion of the ROTC program following World War I. It also percolated into the technical branches such as signal, ordnance, and engineer. Previously, men had been selected for these branches based on their civilian technical skills. However, "experience proved that direct observation and special training were desirable . . . the general tendency was in the direction of a highly differentiated system of schools which should be a prerequisite to all appointments."¹⁹⁷

The other major achievement of the MTCA was in promoting the idea of efficient organization and showing its usefulness to the Army. Prior to entry into World War I the Army was unprepared to expand to meet the wartime demand. Elting Morison, in his book *Men, Machines, and Modern Times*, describes Theodore Roosevelt's opinion during the Industrial Age: "He believed, in fact, that if great care were not taken in the ordering of the new energies, things would jump off the rails."¹⁹⁸ The officer, acting in a similar capacity to that of a civilian manager, must be able efficiently organize his individual soldiers into an efficient group "by studying his needs and his shortcomings and teaching him better and quicker methods, and, . . . by seeing that all other workmen with whom he comes in contact help and cooperate with him by doing their part of the work right and fast."¹⁹⁹ If the leader does not know the task that is to be

¹⁹⁷ Ralph Barton Perry, *The Plattsburg Movement: A Chapter of America's Participation in the World War* (New York: E.P. Dutton and Company, 1921), 198.

¹⁹⁸ Elting E. Morison, *Men, Machines, and Modern Times* (Cambridge: M.I.T. Press, 1966), 4.

¹⁹⁹ Frederick Winslow Taylor, "The Principles of Scientific Management," in *Scientific Management* (New York: Harper and Row, 1947), 84.

done, then he is unable to organize and direct his workers to cooperate and accomplish the task in an efficient manner. The MTCA, comprised of civilian business leaders and concerned citizens, had learned the art and science of efficiently organizing their concerns to produce optimal results. It was these lessons, which Frederick Winslow Taylor had earlier encapsulated in his scientific study of management, that the MTCA contributed to Army organization, thus completing the cycle of Army reform that had started in the 1870s with General Sherman's advocacy for postgraduate officer education at Fort Leavenworth.

Conclusion: The Impact of the Plattsburgh Movement

Sometime after the Armistice in 1918, two officers, one American and one French, were discussing their service in World War I. The French officer commented on the American mobilization effort in 1917 which produced over 3,000,000 soldiers for service in France. Although that was certainly an achievement, the French officer was far more impressed that “you [America] somehow found 200,000 new officers, most of them competent. That is what is astonishing and what was impossible.”²⁰⁰ The identities of these two officers are lost to time, but this exchange, first mentioned in the magazine *National Service* in 1919, was cited by John Garry Clifford as being written by Grenville Clark, a leading figure with the MTCA during World War I. Clark attributed the achievement of producing 200,000 competent officers to the Officer Training Camps that sprung out of the Plattsburgh movement. However, the training camps did not produce officers who were able to immediately lead soldiers on the Western Front. After arriving in France, the AEF still had much to learn from the French about how to fight a large-scale industrial war. In fact, the American Expeditionary Force (AEF) spent a period of several months training with the French Army before being allowed to assume control of their own sector of the front line. So perhaps what the French officer actually meant when he used the word competent was that American officers arrived in France with a good understanding of basic soldier skills, which gave the French a foundation to build on as they taught the Americans how to fight the Germans.

By 1917 the French Army had completely restructured to reflect both manpower losses and the realization that to defeat the Germans a greater emphasis had to be placed on firepower. More machine guns were provided to the machine gun companies, and regular infantry

²⁰⁰ John Garry Clifford, *The Citizen Soldiers: The Plattsburg Training Camp Movement, 1913-1920* (Lexington: University Press of Kentucky, 1972), 228.

companies were organized into four sections, each containing two squads who carried an impressive array of hand-thrown and rifle-fired grenades. According to Elizabeth Greenhalgh, “the much wider range of weaponry meant that, instead of a line of riflemen placed a regulation distance apart and controlled from on high, the troops became specialised [sic] and forced to work more independently as a team.”²⁰¹ Generals could move large formations from one sector to another, but in the actual fighting the French realized that small-unit initiative combined with overwhelming fire superiority would actually achieve a breakthrough of the German defensive line. It was these lessons that the American junior officers would have to learn before taking part in the fighting.

The Officer Training Camps were an important part of the Army reform effort, but the tactics taught to the officer candidates were still outdated, reflecting the fact that America’s last conventional war at that point was the Civil War. As part of the effort to prepare civilians to attend the training camps, Captains O. O. Ellis and E. B. Garey condensed the existing Army technical service manuals into a single primer for civilians to study before attending the camps. Using Frederick Winslow Taylor’s principle of telling the worker exactly what he needs to know, these two captains sought to cut through the confusion of having to read through multiple, sometimes confusing, manuals by providing the essential elements in a single book. Despite noting in chapter eight that American attention was clearly on the war in Europe, the authors proceed to describe the attack as being a contest of bravery, which “constitute a better defense than steel and concrete.”²⁰² Ellis and Garey’s effort, though notable for preparing American

²⁰¹ Elizabeth Greenhalgh, *The French Army and the First World War* (Cambridge: Cambridge University Press, 2014), 252.

²⁰² O. O. Ellis and E. B. Garey, *The Plattsburg Manual: A Handbook for Military Training* (New York: The Century Co., 1917), 144.

officer candidates to attend a training camp, was woefully behind the times in terms of tactics. The authors give brief mention to preparing the battlefield with artillery, and fire superiority is referenced in terms of individual riflemen, not machine-guns. The reports of Colonel Spencer Cosby, the American attaché to the French Army, had not been widely disseminated or even given earnest consideration. According to Michael S. Neiberg, Cosby noted that artillery was supremely important, for “without it the bravest and most skillfully led troops cannot hope for success against a well-supplied foe.”²⁰³ The massive increase in firepower possessed by advanced industrial countries essentially nullified the effect of courage and bravery, elements which the American Army planned to exploit in their concept of mobile warfare.

Although a discussion of the particular tactics that were taught to officer candidates at the Plattsburgh camps is outside the scope of this paper, it is worth noting that even as the Army reformed its organization and leadership methods in response to the management practices of the Industrial Age, the tactics that leaders were taught to employ were still based in large part on Civil War-era concepts, in which artillery was certainly important, but the bayonet was the ultimate decider of victory. This concept of fighting did not require safe, managerial-style planning or a lieutenant capable of combined-arms fighting as much as it required bravery. So, in this sense, just as the quagmire of the mobilization for the Spanish-American War was crucial to bringing about Army reorganization, the need for tactics suited to World War I meant a transformation of the Army to become a 20th century force.

The Army had begun transforming its concept of combat leadership within the broader professionalization and organizational reform effort, but as World War I loomed the fundamental question of how a professional officer corps would fight remained unanswered. The Army

²⁰³ Michael S. Neiberg, “American Attachés in France, 1916”. https://centenaire.org/sites/default/files/references-files/5._neiberg_-_texte_10_avril.pdf

wanted to fight in the most efficient way, but the definition of efficient fighting had changed during the war. Machine guns, tanks, long-range artillery, airplanes, and vehicles employed by rather well-matched opponents turned large-scale war into a stalemate. As the French discovered in 1917, small, incremental gains could produce substantial advantages, helping to position larger forces for the decisive breakthroughs that would end the War. These small gains were produced at the small-unit level, as junior leaders seized opportunities to attack enemy positions and move the line forward. Even though the Army was teaching the concept of safe leadership, there was still room for heroic action to take place, albeit within an efficient and systematic planning process.

Embodied in Wagner's emphasis on wargaming and Swift's development of the five-paragraph operation order, this idea had its roots in the Prussian concept of *Auftragstaktik*, which had been developed following defeat against Napoleon in 1806 and further refined by General Helmuth von Moltke in his *Instructions for Large Unit Commanders* after the Austro-Prussian War. Essentially, subordinate leaders are given the reason for action by higher headquarters, but not necessarily the how. This allowed for freedom of action to achieve the objective without being bound by a prescriptive plan dictated by a centralized command. As Geoffrey Wawro states: "though great successes presuppose bold risk-taking, careful thought must precede the taking of risk."²⁰⁴ The key ingredient of *Auftragstaktik* was a common language and training within the officer corps that enabled trust between higher and subordinate leaders. This trust was cultivated in the curriculum at the School of Infantry and Cavalry at Fort Leavenworth and through the Plattsburgh Movement Officer Training Camps, which enabled senior headquarters

²⁰⁴ Geoffrey Wawro, *The Franco-Prussian War: The German Conquest of France in 1870-1871* (Cambridge: Cambridge University Press, 2003), 168.

to develop a coordinated plan while allowing for independent and opportunistic action on the part of trained subordinate leaders to accomplish the defined mission and intent.

In 1974, M. B. Brodie and E. A. Life edited a collection of essays in *Education for General Management*. The purpose of their work is to describe the administrative staff colleges of various countries, showing how individuals are trained to assume the role of general manager as they progress from “the management of a specialist or subordinate activity.”²⁰⁵ In section one, which describes the British staff college, they quote Lloyd Warner, who describes managers as “cultural mediators of the present as it moves from the past into the future, people who have to handle a structured past and yet make decisions which take them into an unstructured future”²⁰⁶ Essentially, the manager must have a good grounding in the past to take independent action toward understanding the future. Brodie and Life went on to describe the role of education, noting the importance of formal education because it enables the “capacity to learn” in young managers while also providing a level of experience, whereby managers are capable of influencing their surroundings rather than merely being conditioned by them.²⁰⁷ Written over seventy years after the American Army reforms began in earnest, nevertheless this analysis lends context to the way the Army approached leader development in the early-twentieth century. Senior lieutenants and captains were being trained at the Leavenworth schools to approach problems in a similar fashion. Basing their analysis on Civil War battles, these officers developed unique plans and ideas to solve problems of coordination and operations

²⁰⁵ M. B. Brodie and E. A. Life, Preface to *Education for General Management: The Staff College Approach*, (UNITAR, 1974), 5.

²⁰⁶ M. B. Brodie and E. A. Life, Preface to *Education for General Management: The Staff College Approach*, (UNITAR, 1974), 9.

²⁰⁷ M. B. Brodie and E. A. Life, Introduction to *Education for General Management: The Staff College Approach*, (UNITAR, 1974), 9.

according to their experience and education, producing safe solutions that fit into broader campaign plans. The essential component was that the officers were trained to think and develop solutions within a common framework that would provide predictability across various Army echelons. At the tactical level, officer candidates at the Plattsburgh camps were given a rudimentary military education to supplement their civilian education but were also given initial experiences they could build on as they deployed to France and began training with the French Army. Although the tactics were outdated, the larger purpose was to train officers based on a common history, giving them the necessary foundation to make sense of an uncertain future.

The graduates of the General Service Schools at Fort Leavenworth left an enduring legacy following World War I. Many of the senior staff officers in the AEF shared a common bond as both combat veterans of the Spanish-American War and as graduates of the Leavenworth schools. Pershing selected these officers for their “high-level of work ethic and professionalism,” attributes that had been cemented at Leavenworth and which contributed to “a close working relationship between the commanding general and his staff.”²⁰⁸ Of primary importance for the AEF staff officers was developing a “single-mind,” which Thomas M. Richardson describes as “the commander and his staff develop a cohesion that maximizes workplace efficiency amongst administrative duties, logistical work, and issuing battlefield commands, all based on the premise that every officer operates on the same operational level.”²⁰⁹ Safe leadership, as described by Carol Reardon, depended on staffs cultivating a single mind

²⁰⁸ Thomas M. Richardson, “Frontline Education: The Role of Ft. Leavenworth Officers in the American Expeditionary Forces General Staff and the Army General Staff College during and after World War I,” *Emporia State Research Studies* 51, no. 1 (2016): 2.

²⁰⁹ Thomas M. Richardson, “Frontline Education: The Role of Ft. Leavenworth Officers in the American Expeditionary Forces General Staff and the Army General Staff College during and after World War I,” *Emporia State Research Studies* 51, no. 1 (2016): 4.

with the commander, which allowed the staff to earn the commander's trust and the ability to make command decisions in the absence of the commander. In this way, the organization becomes streamlined and works toward a common goal. Power is retained at the management level, precise direction is provided to the workers, and rule of thumb is replaced with methodical planning and instruction. Frederick Winslow Taylor would have wholeheartedly approved.

Taylor's system of scientific management can be described using a statement from Brooks Adams: "Human society is a living organism, working mechanically, like any other organism."²¹⁰ Adams used the growth of the human body and the regeneration of its skin as an analogy for societal change, characterizing the process as occurring through "those painful and conscious efforts which we call revolutions."²¹¹ Revolution comes in many forms and may include somewhat peaceful transitions such as the transformation of the Confederation into the United States under the constitution. In much the same way, the Army experienced this sort of revolution as it moved from the heroic leadership of the Civil War era to the safe leadership model that was tested in World War I. During this process, as with Taylor's model, individual humanity was kept intact as leaders were charged to intimately know and understand their soldiers. However, leaders in the age of large-scale industrial warfare must be able to respond to changing situations by using a common understanding that produces predictable results, operating in an almost mechanical way that is understood by both superiors and subordinates.

The legacy of the reform movement was carried on by General Douglas MacArthur when he was assigned as the superintendent of West Point in 1919. Despite years of reform within the officer corps, West Point, as described by Army chief of staff General Peyton March, was "forty

²¹⁰ Brooks Adams, *The Theory of Social Revolutions* (New York: The Macmillan Company, 1914), 6-7.

²¹¹ Brooks Adams, *The Theory of Social Revolutions* (New York: The Macmillan Company, 1914), 7.

years behind the times.”²¹² MacArthur’s first annual report as superintendent, dated 1920, stated: “Have new conditions developed, have the lessons of the World War indicated that a changed type of officer was necessary in order to produce the maximum of efficiency in the handling of men at arms?”²¹³ Because war now occurred between nations rather than professional armies, MacArthur’s opinion of the modern soldier was that he “generally needed only to be told what to do, rather than be forced by the fear of consequence of failure.”²¹⁴ This new type of officer no longer had to engage in extreme discipline to gain compliance from unruly soldiers; rather, he would possess “an intimate understanding of his fellows,” featured by “a substitute of subjective for objective discipline” and would lead through “initiative and force of character rather than automatic performance of stereotyped functions.”²¹⁵ In essence, MacArthur was using Adams’s theory of the human organism to describe the officer of the future, who retained his own humanity and that of his soldiers while leading in a mechanical, objective fashion using the concept of safe leadership.

Over the course of some forty years, the Army had followed a trajectory of reform like that of the civilian world. First came the professionalization effort along with an increased focus on postgraduate education, standardization, and defined, predictable career paths that allowed the

²¹² Douglas MacArthur, *Reminiscences* (New York: McGraw-Hill Company, 1964), 77. MacArthur, in an interesting position, pressed for change at West Point while asserting that the reforms he proposed were the embodiment of long-standing institutional values.

²¹³ Douglas MacArthur, “Annual Report of the Superintendent of the United States Military Academy,” in *Annual Report of the Superintendent: United States Military Academy* (West Point: United States Military Academy Press, 1920), 3.

²¹⁴ Douglas MacArthur, “Annual Report of the Superintendent of the United States Military Academy,” in *Annual Report of the Superintendent: United States Military Academy* (West Point: United States Military Academy Press, 1920), 4.

²¹⁵ Douglas MacArthur, “Annual Report of the Superintendent of the United States Military Academy,” in *Annual Report of the Superintendent: United States Military Academy* (West Point: United States Military Academy Press, 1920), 4.

professional to advance through the ranks. This was followed by a realization that the rapidly increasing size of corporations meant that reorganization was required to manage subordinates more efficiently on a large scale. This meant that power in the workplace had to be moved up the chain from the workers to the managers. On the Army side, this led to a shift from the administrative bureaus managing affairs in a vacuum to the general staff and the chief of staff providing overall direction and supervision. The final piece was training the junior level managers and officers to lead in a way that was predictable and contributed to organizational success.

The Army lagged behind the civilian sector during the post-Civil War period, but due to the efforts of forward thinking individuals such as General William Sherman, Lieutenant Colonel Emory Upton, General John Schofield, Elihu Root, General Leonard Wood, and the civilian leaders of the MTCA, the lessons of civilian business reform were gradually implemented within the Army, laying the foundation for success in World War I. Over the next twenty years the legacy of the Plattsburgh Movement was carried on through an expansion of ROTC in colleges across the nation, and although UMT was never mandated by law, “thousands of other college graduates received at least some military training through the inexpensive program, which paid rich dividends in 1940 and 1941, when the nation began mobilizing to meet the threat of war.”²¹⁶ Albeit in a different form, the work of the MTCA and others involved with the Plattsburgh Movement laid the foundation for the rapid expansion and structure of the World War II United States Army officer corps. Many of the important reform measures adopted by the Army can be traced back to the work of Frederick Winslow Taylor, whose research into the best practices for

²¹⁶ Richard W. Stewart, ed., *American Military History, Volume II: The United States Army in a Global Era, 1917-2008* (Washington, D.C.: Center of Military History, 2010), 63.

cutting metal revolutionized the way businesses were organized and managed. As I. N. Hollis wrote of Taylor:

His system, scientific management, is simply a plan under which the work of the industries can be done effectively and with a minimum expenditure of energy. It has come to stay because it has called attention to absolutely necessary organization of mankind is to have a real and lasting benefit from the inventions that followed the use of the steam engine and of stored energy.²¹⁷

This sounds simple enough, but it took several decades for the Army to fully adapt and implement the reform measures advocated by Taylor. In doing so, the Army finally achieved a measure of parity with the armies of the other leading countries in the world during the age of large-scale industrial warfare.

²¹⁷ Ira Nelson Hollis, "Frederick Winslow Taylor (1856-1915)," *Proceedings of the American Academy of Arts and Sciences* 53 (September 09, 1918): 870.

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