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14. ABSTRACT This paper is an historical analysis of General Robert E. Lee's critical thinking during the Gettysburg Campaign. A military critical thinking model will be presented that will be used to analyze Robert E. Lee's ability in commanding his Army in the Civil War from the Seven Days Battle up through the Gettysburg campaign. A chronological review of Lee's career from his time as a cadet at West Point to his appointment as Commander of the Army of Northern Virginia will demonstrate his ability and aptitude to think critically. The argument is made and defended that General Lee made characteristic critical thinking errors in his decision making at the operational and tactical levels of war that led directly to the Confederate defeat at Gettysburg. The conclusion is drawn that several human and military factors, notably poor health, overconfidence, lack of intelligence, and partial blindness to his opponent, caused General Lee to continue an ill-advised tactically offensive battle against an enemy in excellent defensive position (while other viable options were available) that resulted in a tactical and strategic defeat from which the Confederacy never recovered.					
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**TITLE:** Lee as Critical Thinker: The Example of the Gettysburg Campaign

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**AUTHOR:** LCDR Richard Pelesky, USN

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Mentor and Oral Defense Committee Member: CHARLES D. MCKENNA PH.D.

Approved: 

Date: 2 MAY 2012

Oral Defense Committee Member: Craig P. Swanson, PhD

Approved: 

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## Executive Summary

**Title:** Lee as Critical Thinker: The Example of the Gettysburg Campaign

**Author:** LCDR Richard Pelesky, USN

**Thesis:** Uncharacteristic critical thinking errors made by General Robert E. Lee in his decision making at the operational and tactical levels of war was the main reason the Confederates were defeated at Gettysburg.

**Discussion:** The Gettysburg Campaign was a critical event in the Civil War in which Lee sought to gain a decisive victory on Northern soil which would pressure the Union to end the war. A military critical thinking model will be presented that will be used to analyze Robert E. Lee's ability in commanding his Army up through the Gettysburg campaign. A chronological review of Lee's background covering his time as a cadet at West Point, engineer in the U.S. Army, staff officer in the Mexican War, Superintendent at West Point, Cavalry Officer in the U.S. Army, and General in the Confederate Army will demonstrate his ability and aptitude to think critically. Each of the Civil War battles in the Eastern theatre in which General Lee commanded the Army of Northern Virginia will be examined from a critical thinking perspective. The way General Lee handled crucial decisions at Gettysburg will be presented in a way that makes the contrast clear between his generalship at that battle compared to the battles earlier in the war that earned him much respect and accolades. The critical thinking errors made by General Lee at the various levels of war at Gettysburg will be discussed as well as what should have been done if the critical thinking process had been conducted appropriately.

**Conclusion:** Several human and military factors, notably poor health, overconfidence, lack of intelligence, and a partial blindness to an improving opponent, caused General Lee to continue an ill-advised tactically offensive battle against an enemy in excellent defensive position while other viable options were available. This decision betrayed the plan devised for the campaign and clashed with the opinion of Lee's most trusted Corps Commander, Lieutenant General James Longstreet. After a successful first day of battle at Gettysburg, Lee's efforts to force the fighting and destroy the Army of the Potomac failed miserably despite spirited fighting by his soldiers and resulted in a tactical and strategic defeat from which the Confederacy never recovered.

## DISCLAIMER

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## **Preface**

This paper was written to apply a modern academic concept (military critical thinking) to a historical figure (Robert E. Lee) and event (Gettysburg Campaign) to better understand both the Civil War and modern military leadership. First and foremost, I would like to express my appreciation to my faculty mentor, Dr. Charles D. McKenna, whose subject matter expertise, tireless advice, skillful editing, and eternal patience made this effort a reality. I never left his office not feeling adequately challenged and inspired. Thanks also to CSC Faculty members Dr. John W. Gordon and Dr. Richard Dinardo for additional professional and personal mentorship. Additional credit goes to Ms. Rachel Kingcade at the Grey Research Center who gave me an extensive list of resources to start my research and Ms. Andrea Hamlen whose mentorship in academic writing and the MCU Style Guide was paramount in this endeavor. Finally, I would like to thank my wife Stacey, who granted me the time and flexibility needed to complete what became the most challenging intellectual project of my career.

## Introduction

It is almost impossible to understate the importance of the Civil War in American History. States rights, slavery, and the preservation of the Union were all at stake. Most scholars agree that in retrospect, the Battle of Gettysburg was one of the turning points in the Civil War. Going into the Gettysburg campaign in June 1863 General Robert E. Lee led his Army of Northern Virginia out of the South towards Pennsylvania, with supreme confidence coming off impressive victories in Virginia against a numerically superior Union Army of the Potomac. After losing the “decisive” battle Lee was looking for, the Army of Northern Virginia retreated back to the South humbled. Ultimately, the Confederacy was ground down, and Lee’s Army itself eventually surrendered in April 1865. Entering the war, Lee was so distinguished and respected that, “President Lincoln, on the recommendation of General Winfield Scott, requested that Lee lead the Union forces in putting down the rebellion.”<sup>1</sup> The experience and reputation he gleaned from West Point and his service in the Army Corps of Engineers and in the Mexican War made him a perfect fit for any Army, and the Confederacy was glad to have this son of Virginia. In the summer of 1863, “The Army of Northern Virginia went into Pennsylvania at its physical apogee, supremely confident that under Lee’s direction it could triumph on any battlefield.”<sup>2</sup> So how did Lee, after such success as the Commanding General, manage to suffer such a stunning defeat? The purpose of this paper is to examine Lee’s critical thinking at the strategic, operational, and tactical levels of the Gettysburg campaign in light of the campaigns leading up to this epic battle. The evidence shows that Lee made certain crucial, and in many cases, uncharacteristic critical thinking errors that affected decisions at the operational and tactical levels of war which ultimately led to the Confederate defeat at Gettysburg. Specifically, this paper will argue that his decision not to go on the tactical defensive on the second day of the battle was an avoidable mistake. The

overall outcome of the war, i.e., eventual Union victory, still may have occurred, but as the Commanding General Lee, had the power to shape the battle and campaign after the initial day of fighting - and decided to continue to fight what many contemporaries and historians believe was an unwinnable battle. The conclusion that this paper offers is that, while Lee had the ability to apply proper critical thinking to the campaign and battle, he made several critical thinking errors at this important moment of the war that ultimately led to his army's defeat.

### **Critical Thinking**

Critical thinking will be used as a framework to analyze Lee's decisions. A modern definition of critical thinking provided by Guillot is "the ability to logically assess the quality of one's thinking and the thinking of others to consistently arrive at greater understanding and achieve wise judgments."<sup>3</sup> Critical thinking has also been defined as "an approach to ideas from the standpoint of deliberate consideration and analysis."<sup>4</sup> The ability of an Army Commander to make logical decisions when the stakes are high cannot be understated. Critical thinking experts Richard Paul and Linda Elder assert that:

A well-cultivated critical thinker raises vital questions and problems, gathers and assesses relevant information, and can effectively interpret it; comes to well-reasoned conclusions and solutions, testing them against relevant criteria and standards; thinks open-mindedly within alternative systems of thought, recognizing and assessing, as need be, their assumptions, implications, and practical consequences; and communicates effectively with others in figuring out solutions to complex problems.<sup>5</sup>

The critical thinking model used in this paper is a hybrid of the Paul and Elder model presented by Stephen Gerras that incorporates a military dynamic and elements of reasoning that make up the cognitive decision making process.<sup>6</sup>

The critical thinking elements of the model (Clarify Concern, Point of View, Assumptions, Inferences, Evaluation of Information, and Implications) are not necessarily linear and interact

with each other as represented in Appendix A.<sup>7</sup> The first, important step in this critical thinking model is to **Clarify the Concern** because “the problem or issue needs to be identified and clarified up front, yet consistently revisited as other elements of the model are considered.”<sup>8</sup> In other words, this step is simply examining what we are trying to accomplish in a situation. In a military context, clarifying concern means determining in a crisis situation, “why are we here, what is the problem, and what must be done?” The second element of the model is **Point of View**, or simply considering a situation from a different perspective. Paul and Elder state that “Whenever we reason, we must reason within some point of view or frame of reference. Critical thinkers strive to adopt a point of view that is fair to others, even to opposing points of view.”<sup>9</sup> In addition, “leaders need to be self-aware of the egocentric tendencies that are probably the most significant barrier to effective critical thinking”.<sup>10</sup> Egocentrism is defined as “having little or no regard for interests, beliefs, or attitudes other than one’s own.”<sup>11</sup> Egocentric thinkers have a tendency to regard themselves and their opinions as most important. Paul and Elder define the common egocentric tendencies found in military decision making as follows:<sup>12</sup>

- **Egocentric memory** is a natural tendency to forget information that does not support our line of thinking.
- **Egocentric myopia** refers to thinking within an overly narrow point of view.
- **Egocentric righteousness** describes a tendency to feel superior based on the belief that one has actually figured out how the world works.
- **Egocentric blindness** is the natural tendency not to notice facts and evidence that contradict what we believe or value.

The next element is **Assumptions**, namely, something that is taken for granted. Assumptions can be biased because of political correctness, egocentric tendencies, and other factors that blind the thinker to reality. Another element is **Inferences**, which are not to be confused with assumptions. Gerras defines an inference as “a step of the mind, or an intellectual leap of faith,

by which one concludes that something is true in light of something else being true, or seeming to be true. Whereas an *assumption* is something we take for granted, an *inference* is an intellectual act in which we conclude something based on a perception as to how the facts and evidence of a situation fit together.”<sup>13</sup> Point of view, assumptions, and inferences are in the model’s center and feed clarify the concern, evaluation of information, and implications.

A main component of the model is **Evaluation of Information**, which by the name indicates how we look at information and then make decisions based on that information, all of which are susceptible to biases. When evaluating information we use mechanisms call **heuristics** that serve as “[S]implifying strategies or “general rules of thumb”...for coping with decision-making in the volatile, uncertain, complex, and ambiguous (VUCA) environment.”<sup>14</sup> Three common heuristics are: (1) the availability heuristic, (2) the representativeness heuristic, and (3) the anchoring and adjustment heuristic.<sup>15</sup> The **availability heuristic** “acknowledges that people typically assess the likelihood of an event by the ease with which examples of that event can be brought to mind. Typically, people will recall events that are recent, vivid, or occur with high frequency.”<sup>16</sup> The **representativeness heuristic** “focuses on the tendency for people to make judgments regarding an individual, object, or event by assessing how much the item of interest is representative of a known item. Several biases emanate from this heuristic; two of the most prevalent are insensitivity to sample size and regression to the mean.”<sup>17</sup>

**Sample size bias** takes place when information used to base decisions on is either not reliable or representative.<sup>18</sup> **Regression to the mean** is a “bias based on the fact that extremely high or low scores tend to be followed by more average scores. Therefore, when predicting future performance, decision-makers assume poor performers will stay poor...and strong performers will stay strong.”<sup>19</sup> Other biases relate to **anchoring** or **insufficient anchor adjustment**. In

regard to anchoring, when decision-makers calculate estimates they do so from initial anchor points based on available information, and then adjust from there.<sup>20</sup> **Overconfidence** describes “a bias in which individuals tend to exaggerate the infallibility of their judgments when answering difficult questions.”<sup>21</sup> These biases create misinformation that affects problem framing and thus must be avoided or minimized in order to produce effective solutions.

Finally, there are three remaining biases, traps, and errors that can negatively affect the critical thinking process. A **confirmation trap** describes:

A condition in which people tend to seek confirmatory information for what they think is true and either fail to search for or discard inconsistent and contradictory evidence. This bias highlights the need for subordinates to provide candid feedback to their superiors, and more importantly, for superiors to encourage their subordinates to give them all the news – good or bad. Failure to make a concerted effort to be absolutely candid will typically lead to a situation in which the boss looks for information that supports his decision, while discounting information, no matter how valid and important, that challenges his decision.<sup>22</sup>

A **fundamental attribution error** occurs when people ascribe the behavior of another based on a preconceived notion of the type of performer they are instead of viewing the results in light of the situational factors in play. This stereotyping causes leaders to misjudge a person’s performance and/or misread the environment in which the actions were made.<sup>23</sup> The last of these potential mistakes is **self-serving bias** which occurs when “[W]e are more likely to attribute our successes to internal factors and our failures to external factors.”<sup>24</sup> Failure to be on the alert for, recognize, and properly adjust for these aforementioned phenomena can ultimately taint the use of information in decision-making and lead to less predictable results.

When addressing all the information gathered to make a decision, the leader needs to assess the soundness of the arguments presented. This is considered critical reasoning – in which “a sound argument meets the following conditions: (1) the premises are acceptable and consistent, (2)

the premises are relevant to the conclusion and provide sufficient support for the conclusion, and (3) missing components have been considered and are judged to be consistent with the conclusion.”<sup>25</sup> Additionally, the following examples are logically fallacious arguments that leaders can encounter in a military context that can be psychologically attractive:<sup>26</sup>

- **Arguments against the person.** When someone tries to attack the person presenting an argument and not the argument itself, they are guilty of this fallacy.<sup>27</sup>
- **False Dichotomy.** When someone presents a complex situation in black and white terms, i.e., they present only two alternatives when many exist, they are committing the fallacy of false dichotomy. Rather than reducing complex issues to a choice between two extreme positions, critically thinking leaders need to use their creative juices to identify the wide range of possible alternatives that are actually available.<sup>28</sup>
- **False Cause.** This is a common fallacy in which someone argues that because two events occurred together and one followed the other closely in time, then the first event caused the second event.<sup>29</sup>
- **Appeal to Fear.** This involves an implicit or explicit threat of harm to advance your position. A fear appeal is effective because it psychologically impedes the listener from acknowledging a missing premise that, if acknowledged, would be seen to be false or at least questionable.<sup>30</sup>
- **Slippery Slope.** The fallacy of slippery slope occurs when the conclusion of an argument rests upon an alleged chain reaction and there is not sufficient reason to conclude that the chain reaction will actually take place.<sup>31</sup>
- **Weak Analogy.** Analogies are an effective way to communicate concepts, especially complex ones. An analogy occurs when one situation is put side-by-side to another, and a similarity is pointed out. Quite often these analogies are strong and are useful in illustrating a valid point. The fallacy of weak analogy is committed when the analogy used is not strong enough to support the conclusion that is being drawn.<sup>32</sup>

In accordance with the critical thinking model, as information is evaluated it is paramount to keep in mind the tendency to let biases influence decision-making. In summary, it is important “[t]o be aware of the traditional types of fallacious reasoning that are often used, sometimes intentionally and sometimes out of ignorance, to try and convince us to support an argument.”<sup>33</sup>

The last element of the model is **Implications** (or consequences) that come from the

evaluation of information, assumptions, and inferences. Gerras maintains that:

Critical thinkers need to understand the short-term consequences of accepting the inferences initially posited, of accepting any opposing perspectives, or of accepting the perspective developed through critical thinking. They obviously also have to appreciate the long-term consequences of the information they accept and the decisions they make. This includes the 2nd and 3rd order effects.<sup>34</sup>

Part of **implications** is that the critical thinker needs to analyze the impact of their decision on all relevant stakeholders. A military stakeholder is a person or group that has an investment, share, or interest in a particular activity or a decision to be made at the various levels of war. The elements of reasoning form a framework for critical thinking, in which the following intellectual standards act as a set of principles that help gauge or measure the quality of one's thinking: clarity, accuracy, precision, relevance, depth, breadth, logic, significant, fairness.<sup>35</sup> Critical thinking is a conscious and complex process. It represents the "ability to continually monitor thought patterns for emotional, analytic, and psychological biases...Another critical thinking attribute is a questioning or inquisitive attitude."<sup>36</sup> General Lee's thought process and decisions in the Gettysburg Campaign will be presented next, and will be examined later to identify which critical thinking errors he made.

### **Gettysburg Campaign Background – Strategic**

The time prior to the Gettysburg Campaign was a challenging period for the Confederacy, culminating with a May 15th conference attended by General Lee, President Davis, and Secretary of War Seddon.

It was certainly a time of strain for Robert E. Lee. For some weeks during the spring he had been troubled by ill health (the first signs of angina, as it proved), and hardly a week had passed since he directed the brutal slugging match with the Yankees around Chancellorsville. Although in the end the enemy had retreated back across the Rappahannock, the tactical victory only restored a stalemate operationally and strategically. Lee first estimated his casualties at 10,000, but in fact the final toll would come to nearly 13,500, with the count of Confederates killed actually exceeding that of the enemy.<sup>37</sup>

While the Battle of Chancellorsville was a victory for the Army of Northern Virginia, it was a very costly one. General Lee suffered heavy losses in personnel without a decided gain strategically over the Union Army. But it really was the situation in Mississippi that triggered the May 15th conference as Grant's Union troops were threatening take to Vicksburg.

On May 9th Johnston had been put in overall charge of operations against the Federal invaders of Mississippi, and by the 13th Johnston had grim news to report. He had hurried ahead to Jackson, he said, but the enemy moved too fast and had already cut off his communication with Vicksburg. "I am too late" was his terse verdict. Thus the highly unsettling state of the war in Mississippi as it was known to President Davis and Secretary Seddon as they prepared to sit down with General Lee to try and find some resolution to the crisis.<sup>38</sup>

The dilemma at Vicksburg had been a major concern for Confederate war councils ever since the Union opened their campaign there in December 1862 with the purpose of clearing the Mississippi River and cutting the Confederacy in two. Concurrently, a second Federal army under Rosecrans was threatening Chattanooga and central Tennessee, but Bragg's Army of Tennessee had achieved a standoff. Bragg could not spare any troops to help Vicksburg. In summary, the Confederate Army in the Western theatre was stretched thin and faced dire consequences.<sup>39</sup> How to balance the emergency in the West with the security of Richmond and still look to defeat the Army of the Potomac was the issue at hand.

Longstreet, Lee's second in command, had his own views on how the Confederate Army should act. Sent to southeastern Virginia to replenish two of his Divisions and send food back to the Army of Northern Virginia gave him the chance to reflect more broadly.

Longstreet proposed that the First Corps, or at the very least those two divisions he had with him, be sent west. It was his thought to combine these troops, plus others from Joe Johnston's western command, with Bragg's army in central Tennessee for an offensive against Rosecrans. Once Rosecrans was disposed of, the victorious Army of Tennessee would march west and erase Grants threat to Vicksburg. All the while, explained Longstreet rather airily, Lee would assume a defensive posture and hold the Rappahannock

line with just Jackson's Second Corps.<sup>40</sup>

But Lee wanted to keep his army intact and concentrate as much combat power as he could in Virginia, either to protect Richmond or put the pressure on Washington. Lee expected "[t]hat come spring the Federal Army of the Potomac would open an offensive on the Rappahannock, and he had no illusions about trying to hold that front with only half his army. Should the enemy not move against him, he said, he intended to seize the initiative himself and maneuver to the North — in which event he would of course need all his troops."<sup>41</sup>

After Chancellorsville, Seddon and Longstreet discussed strategy in Richmond. "In view of the abruptly worsening prospects at Vicksburg, Longstreet modified his earlier western proposal somewhat. As before, the best course would be to send one or both of the divisions with him — commanded by George Pickett and John Bell Hood — to trigger an offensive against Rosecrans in Tennessee."<sup>42</sup> This could pull Grant away from Vicksburg. He believed that once Johnson's reinforced army achieved victory the Confederates could then conduct an invasion of the North via Ohio, where they most likely would meet less resistance than the Army of Northern Virginia would in Maryland and Pennsylvania, which was in keeping with Lee's intent to fight in the North. Lee strongly believed that it would be a fruitless logistical nightmare to attempt to shift large amounts of Confederate troops across the country. He told Secretary Seddon, "It is not so easy for us to change troops from one department to another as it is for the enemy, and if we rely upon that method we may always be too late."<sup>43</sup> Seddon was also being influenced to move troops west as Beauregard in Charleston volunteered his forces. Offering a solution, Davis "proposed that in light of the victory at Chancellorsville, Longstreet and his men might be sent westward to Mississippi. Lee could fall back on Richmond on the defensive until the situation in Mississippi was resolved."<sup>44</sup> The issue now was to get buy-in from the Commanding General.

Seddon then asked Lee by telegraph if he would approve of sending Picket's Division to Lieutenant General Pemberton in Vicksburg. Lee quickly and pointedly objected to Seddon in a telegraph, bluntly criticizing the proposition as hazardous and stating that the issue was now a choice between Virginia and Mississippi.<sup>45</sup> Lee followed with a letter which contained language that made it clear as to the ramifications of such a decision:

Should any troops be detached from his army — indeed, if he did not actually receive reinforcements — "we may be obliged to withdraw into the defenses around Richmond." He pointed to an intelligence nugget he had mined from a careless Washington newspaper correspondent to the effect that the Army of the Potomac, on the eve of Chancellorsville, had counted an "aggregate force" of more than 159,000 men. "You can, therefore, see the odds against us and decide whether the line of Virginia is more in danger than the line of the Mississippi."<sup>46</sup>

Lee had put his foot down - he wanted to make a move north and fight the enemy on their own ground, and expressed his views to President Davis:

[S]ending troops from Virginia to Mississippi struck him as a very bad idea. He argued an alternative proposal: that his army should take the offensive, carry the war from Virginia into Pennsylvania, and there deliver the blow that would convince the administration in Washington to end its effort to hold the Southern states in the Union by force.<sup>47</sup>

In his opinion, regardless of what happened in Mississippi, he might still be able to put an end to the war if he could force a decisive battle in the midst of enemy territory.

President Davis read Lee's letter and endorsed it, "The answer of General Lee was such as I should have anticipated, and in which I concur."<sup>48</sup> Although one of Lee's Divisions was not going west, it did not put end to the debate. In preparation for the conference in Richmond on May 15th, "Lee called Longstreet to the army's Rappahannock headquarters at Fredericksburg, and over three days (May 11–13) the two of them intensely examined grand strategy and the future course of the Army of Northern Virginia."<sup>49</sup> Despite some misconceptions, Longstreet appeared to agree with Lee's plan which reflected in Longstreet's correspondence, both in a letter to Senator

Wigfall on May 13th upon the conclusion of his discussions with Lee and another letter to General Lafayette McLaws in 1873.

In their discussions the two generals pondered the army's past record and future prospects. In nearly a full year commanding the Army of Northern Virginia, Lee had fought five major battles or campaigns. By any measure, his record was dazzling.<sup>50</sup>

In terms of the Confederacy's continued existence, it was a record that Longstreet said was full of "fruitless victories...even victories such as these were consuming us, and would eventually destroy us..."<sup>51</sup> The strategic issue now shifted to what was to be done with Lee's Army rather than how to break it up.

General Lee believed that he would be unable to support the Army of Northern Virginia logistically if he maintained his position in Virginia, as the provisions that were being provided to his army from Richmond were inadequate...Lee wanted to take advantage of politics and popular support in the North and also use the safety of Washington, D.C. as leverage. Moving his army into the North, General Lee would put pressure on the Union commander to pull his army north in order to protect Washington, thereby reducing the threat to Richmond.<sup>52</sup>

Properly executed, this plan could further bolster a budding Northern peace movement by placing a threat on the major northern cities of Philadelphia, Baltimore, and Washington.<sup>53</sup> A significant victory in the North could benefit the Confederacy by possibly gaining recognition from foreign governments and with it much needed foreign aid. In addition, Lee believed "that a victory on Northern soil would demoralize the Northern population and move them to seek an end to the war."<sup>54</sup> According to Longstreet, "What he wanted in future was battle on his terms, on ground of his choosing, with no barriers to a final outcome. For that he had formed a plan."<sup>55</sup>

In no way was this northern expedition a new plan. Lee had attempted a northern invasion the previous September, an effort that culminated at Antietam, the bloodiest single day of fighting in American history. The battle ended as a tactical draw but strategic failure because Lee's Army sustained 10,000 casualties and he had to move his troops back South. Also, in laying out for

Davis and Seddon his plan to march north, Lee would not have been unveiling something new and unexpected. Prior to Hooker's offensive move at Chancellorsville Lee had proclaimed a May 1st deadline for his own offensive into the North.<sup>56</sup> Lee realized from the beginning of the war the disadvantages the Confederate Army was facing.

He recognized then — and it was even more obvious now, a year later — the stark reality that in the ever more straitened Confederacy his army would never achieve parity with the enemy's army. On campaign he would always be the underdog. Therefore he must assume the strategic aggressive whenever he could, and by marching and maneuver disrupt the enemy's plans, keep him off balance, and offset his numbers by dominating the choice of battlefield. It must be Lee's drum the enemy marched to.<sup>57</sup>

Despite having a numerical advantage over the Confederates, the Army of the Potomac lacked confidence. The Union soldiers were able and willing to fight but developed a fatalistic attitude, if "as Napoleon had claimed, the morale was to the physical as three is to one, the Army of the Potomac was outnumbered indeed."<sup>58</sup> Lee had the upper hand: "His army had never been stronger; morale had never been higher; Hooker was still reeling from his setback at Chancellorsville. This was the time to strike north and seek the decisive confrontation. Davis agreed Vicksburg would have to look out for itself; Lee's army was going North."<sup>59</sup>

Two others factors influenced Lee's strategic stance. The first was his understanding of what happened at Antietam. He had expected that McClellan would be timid during his first northern invasion as Lee sought battle in Pennsylvania. But McClellan had trumped him, forcing a battle at Sharpsburg in Maryland before Lee was ready for it. Only recently, Lee had finally learned the truth of the matter.

He read in Northern newspapers of McClellan testifying to a congressional committee that "we found the original order issued to General D. H. Hill by direction of General Lee, which gave the orders of march for their whole army, and developed their intentions." To Lee's mind that must have explained a great deal. He had not been wrong in his calculations for that campaign after all.<sup>60</sup>

That revelation increased his own confidence in his decision making and the strength of his Army knowing now that an administrative blunder (i.e., the infamous “lost order”) likely cost him the battle. The second factor was his belief that the defeat at Chancellorsville had negatively impacted the morale of both General Hooker and his army, making them susceptible to attack.<sup>61</sup>

For the Confederacy, "these were days of rapidly accelerating crisis, and seen in retrospect this Richmond strategy conference of May 15, 1863, easily qualifies as a pivotal moment in Confederate history. Yet the record of what was discussed and decided that day by General Lee, President Davis, and Secretary of War James A. Seddon is entirely blank."<sup>62</sup> What we do know is that Davis approved Lee’s overall plan to campaign north, with approximately a 72,000 man army. The only Confederate reinforcements sent West were three brigades that Secretary Seddon ordered out of Charleston that were previously under Beauregard's command.<sup>63</sup> The invasion would allow the Confederates to live off Northern farms while giving a war-ravaged Virginia time to recover. What is not entirely clear from these meetings is Lee’s specific operational design.

Longstreet maintained that Lee and he had an “understanding” he believed the two of them had reached back in Virginia – that in Pennsylvania they would combine offensive strategy with defensive tactics – and he assumed Lee would surely agree with those “ruling ideas of the campaign.”<sup>64</sup>

It is fairly clear that Lee intended on fighting such a campaign if possible but equally clear was his intent to fight a decisive battle in the North. How those two dynamics were prioritized in Lee’s mind prior to the campaign is unclear. Regardless, this potential conflict of priorities would eventually come to a head in the battle itself, and be a topic of conversations forever. On June 3rd, with his army in high spirits, Lee moved his army north. Being prodded by President Abraham Lincoln, Major General Joseph Hooker moved the Army of the Potomac in pursuit. He was relieved just three days before the battle by Major General George Meade.

## Gettysburg Campaign Background – Operational

Although the decision was made to take the Confederate Army north, this did not tie Lee's hands as to what tactics to employ.

Taking the strategic aggressive on campaign did not necessarily imply an equal tactical aggressive when the chosen battlefield was reached. Indeed, in the best execution of the idea, it would mean just the opposite — marching and maneuvering so aggressively on campaign that Lee might accept battle or not, as he chose, with his opponent forced to give battle — to attack — at a time and in a place of Lee's choosing.<sup>65</sup>

After the cavalry battle at Brandy Station, as the Confederate Army was approaching the Potomac, Lee was not getting a clear picture as to the enemy's disposition. In a risky move, Lee permitted Stuart to take a large part of the cavalry to the East on the other side of the Union flank. Lee's orders to Stuart gave him flexibility as to the placement of his troopers, and both generals are responsible for the long separation of the main cavalry from the Confederate infantry and lack of a more active role for the remaining cavalry. Apparently, Stuart's order gave him the latitude to ride around union army, which had brought successful results previously.

Jeb Stuart had gained renown for twice riding around McClellan's army, once during the Peninsula campaign and again after Sharpsburg, and surely this proposal to ride around Joe Hooker's army had great appeal for him. For one thing, it ought to create havoc in the Army of the Potomac's rear areas, cutting its communications with Washington. For another, it ought to confuse the Federals as to Lee's intentions. And, perhaps not incidentally, it ought to restore the shine to a reputation tarnished by...Brandy Station."<sup>66</sup>

But Stuart's cavalry failed to give Lee notice of the enemy's location and numbers. So without knowing completely the disposition of the Union army and originally wanting to avoid a battle until the rest of his forces arrived, Lee's army operated precariously close to the Federals, and the potential for contact loomed.

So, as they arrived at Gettysburg on July 1st, a general engagement developed without Lee knowing exactly what he was facing. Longstreet commented to the sudden escalation:

General Lee says of the movements of this day: "Preparation had been made to advance upon Harrisburg; but, on the night of the 29th, information was received from a scout that the enemy had crossed the Potomac, was advancing northward, and that the head of his column has already reached South Mountain." On the morning of the 1st, General Lee and myself left his headquarters together, and had ridden three or four miles, when we heard heavy firing along Hill's front.<sup>67</sup>

Heth's Division of A.P. Hill's Corps, about 7,500 men, was on the way to town but was about to stumble upon Buford's cavalry and the Union's First and Eleventh Corps closing in behind them.

Only a few miles out of Cashtown, they encountered the vedettes Buford had posted there to keep him informed of enemy movements...Heth was not concerned. He did not believe there was any more force in front of him more threatening than a scouting party. Waiting west of Gettysburg was a single brigade of cavalry-2,200 men of Brigadier General William Gamble's brigade.<sup>68</sup>

So on July 1, 1863, as Lee's troops rapidly converged on Gettysburg, elements of the two armies initially collided. At this point Lee's tactical objective was to engage the Union forces present and destroy them.

### **Gettysburg Campaign Background – Tactical**

Two of Ewell's divisions came to join Heth in the fight, Robert Rodes' division marching south from Carlisle and Jubal Early's division marching west from York, a total of another 15,000 men. Eventually, the Union cavalry and its First and Eleventh Corps were driven from the field and through town, south to the heights of Cemetery Hill. Lee arrived late afternoon and observed the Eleventh Corps collapse. As the Federals dug in on Cemetery Hill, Longstreet joined him.<sup>69</sup> Despite the confusion and nature of parts of the two massive armies meeting that day in conflict, it was a good day for the Confederates. The unexpected fight that occurred resulted in a decisive defeat for the Army of the Potomac.<sup>70</sup> But the results could have been better, as the Federals were filling in and fortifying Cemetery Hill. General Lee understood the defensive potential to the Union if they held this high ground, as artillery could be placed on it to command Cemetery Ridge.

Lee's instructions were to "carry the hill occupied by the enemy, if he found it practicable, but to avoid a general engagement until the arrival of the other division of the army..." Ewell, who had previously served under Stonewall Jackson, a general well known for issuing peremptory orders, determined such an assault was not practicable and, thus, did not attempt it; this decision is considered by historians to be a great missed opportunity. Here was another of Lee's discretionary orders – and one with a seeming contradiction. The decision was left entirely in Ewell's hands, and he was urged to start a fight but not start a battle.<sup>71</sup>

Not surprisingly, Ewell decided to do neither. While not the way Lee would have planned it, he got the type of battle he was looking for when he headed North. At this point, Lee's objective became to engage the Union army and destroy it to achieve his original strategic goals.

However, victory at Gettysburg could have been declared that day for the Confederate Army, and remained in the history books as such. Longstreet did not want further attacks.

About 5:00 p.m., James Longstreet found Lee on Seminary Ridge. Dismounting and taking out his field glasses, Longstreet scanned the high ground that eventually would constitute the famous Union fishhook. Impressed by the strength of the enemy position, Longstreet soon engaged Lee in an increasingly tense conversation. Longstreet suggested to Lee that the Confederates move around the Federal left and take up position between the Army of the Potomac and Washington; once situation, they could force Meade to attack them and seek an opening for a counterstroke.<sup>72</sup>

"We could not call the enemy to position better suited to our plans," he observed. "All that we have to do is file around to his left and secure good ground between him and his capital."<sup>73</sup> But Lee did not concur, saying impatiently, "If the enemy is there tomorrow, we must attack him."<sup>74</sup>

Longstreet strongly retorted, "If he is there, it will be because he is anxious that we should attack him – a good reason, in my judgment for not doing so."<sup>75</sup> Pleased with the day's results and his army's ability, Lee felt it would be ill-advised to withdrawal at this point to search for better ground. Lee wanted to press the action and build on the successes already accomplished that day.

Failing to achieve all the potential military objectives that evening, Lee's mind was preoccupied with recommencing assaults upon the enemy's right the following morning.<sup>76</sup>

According to Lee's Official report, he acknowledged that his current scheme deviated somewhat from the campaign's plans:

"It had not been intended to deliver a general battle so far from our base unless attacked," wrote Lee in apparent confirmation of Longstreet's assertion that he had envisioned acting on the tactical defensive in Pennsylvania, "but coming unexpectedly upon the whole Federal Army, to withdrawal through the mountains with our extensive trains would have been difficult and dangerous." Nor could the Confederates wait for Meade to counterattack, "as the country was unfavorable for collecting supplies in the presence of the enemy, who could restrain our foraging parties by holding mountain passes with local troops." A battle had, therefore, become in a measure unavoidable," concluded Lee, "and the success already gained gave hope of a favorable issue."<sup>77</sup>

The difficulty of supply arrangements and the absence of his cavalry to disengage himself were certainly concerns that impacted Lee's decision and compelled him to an offensive action. To defend at Gettysburg or withdrawal elsewhere to defend would mean the army would have to live off the land. The inability to move and forage simultaneously was a disadvantage of Longstreet's option. A summary of Longstreet's objection to Lee in his own words is as follows.

I suggested that this course seemed to be at variance with the plan of the campaign that had been agreed upon before leaving Fredericksburg, I said that it seemed to me that if, during our council at Fredericksburg, we had described the position in which we desired to get the two armies, we could not have expected to get the enemy in a better position for us than that he then occupied; that he was in strong position and would be awaiting us, which was evidence that he desired that we should attack him. I said, further, that his weak point seemed to be his left; hence, I thought that we should move around to his left, that we might threaten it if we intended to maneuver, or attack it if we determined upon a battle. I called to his attention to the fact that the country was admirably adapted for defensive battle, and that we should surely repulse Meade with crushing loss if we would take position so as to force him to attack us, and suggested that, even if we carried the heights in front of us, and drove Meade out, we should be so badly crippled that we could not reap the fruits of victory; and that the heights of Gettysburg were, in themselves, of no more importance to us than the ground we then occupied, and that the mere position of the ground was not worth a hundred men to us. That Meade's army, not its position, was our objective.<sup>78</sup>

But the General's mind was made up, impressed with the idea that by attacking the Federals he could whip them in detail. Lee's "thinking was shaping by the background of the South's waning strength, by the present illustration of the attrition in high command, and by the need for a decisive

victory away from home... his men were driving the enemy, and, though Ewell had kept them from clinching victory today, Lee thought only of how to complete it the next day.”<sup>79</sup>

The situation facing the Confederates was challenging and getting worse. The Confederates did not occupy Culp’s Hill. The Union army was now consolidating on solid defensive ground stretching from Culp’s Hill in a fish hook shape over to the Round Tops. Meade met with his Corps commanders and decided it was good ground to stay and defend – the Commanding General of the Army of the Potomac expected Lee to attack.

Through the night, the two armies continued to gather. By morning, 65,000 Confederates faced 85,000 Federal troops commanded by General George Meade. Hills overlooked the Federal position at either end. To the north, on the Union right, Culp’s Hill and Cemetery Hill. To the south, the Big and Little Round Tops. Lee wanted them taken. Meade was no less determined to hold his ground.<sup>80</sup>

Lee’s account in his official report indicates he was aware of the general tactical situation, but what was less clear was whether he fully understood the enemy’s strength and defensive measures.

The enemy occupied a strong position, with his right upon two commanding elevations adjacent to each other, one southeast and the other, known as Cemetery Hill, immediately south of town...His line extended thence upon the high ground along the Emmitsburg Road, with a steep ridge in rear, which was also occupied. This ridge was difficult of ascent, particularly the two hills above mentioned as forming its northern extremity and a third at the other end, on which the enemy’s left rested. Stone and rail fences affording protection to defenders, together with generally open approaches three-quarters of a mile wide, complicated any plan of assault.<sup>81</sup>

Lee’s plan was a complex, coordinated effort aimed primarily at the enemy’s left flank, with Longstreet “directed to place the divisions of McLaws and Hood on the right of Hill, partially enveloping the enemy left, which he was to drive in. A.P. Hill would engage the Union center with a demonstration, while Ewell’s troops would do the same on the enemy’s right with an eye toward exploiting any opening.”<sup>82</sup> Anderson’s division of Hill’s Third Corps would follow in a sequence of attack that would prevent the Federals from bringing reinforcements from the center

to the left, the same way Ewell's engagement could prevent reinforcements from the right.

Bottom line, the object of the second day was the Peach Orchard and ultimately Cemetery Hill.

Contrary to accounts that maintain that Lee had a solid plan devised that first night, the final decision and plan was not decided on and put in motion until July 2nd. Longstreet recalled:

When I left General Lee on the night of the 1st, I believed that he had made up his mind to attack, but was confident that he had not yet determined as to when the attack should be made. On the night of the 1st I left him without any orders at all. On the morning of the 2nd, I went to General Lee's headquarters at daylight, and renewed my views against making an attack. He seemed resolved, however, and we discussed the probable results. We observed the position of the Federals, and got a general idea of the nature of the ground.<sup>83</sup>

But the Union's position was too strong. Raphael J. Moses, commissary officer of the First Corps, wrote in his biography that later on the evening of July 1st Longstreet talked at length to British Army observer Lt.Col. Arthur Fremantle about the enemy's position, insisting that, "The Union army would have greater advantages at Gettysburg than we had at Fredericksburg."<sup>84</sup>

Despite spirited fighting, the Confederates could not break the Union's left flank. The Wheatfield and Peach Orchard were taken but the Union held Little Round Top. Poor coordination and delays were factors in the failure to break through, caused by the thin and long Confederate line measuring over five miles. This caused delays in communication between the Confederate corps and headquarters, making a proper coordinated attack extremely difficult.<sup>85</sup>

On the morning of the July 3rd the Army of the Potomac was about 80,000 strong while the Army of Northern Virginia had roughly 63,000 men.<sup>86</sup> Lee was convinced that the Union Army would eventually fold, and planned a grand assault that would renew the attack on July 3rd. The plan was basically the same as used the previous day: Longstreet would attack Cemetery Ridge while Ewell attacked Culp's Hill, the only addition being that he tasked Stuart's Calvary to go around the Union right flank and attack their rear. Similar to July 2nd, Lee and Longstreet met to

review the tactical plan, again with both in disagreement:

At midmorning, Lee and Longstreet rode northward together along Seminary Ridge to point in the woods at nearly the center of the long Confederate line. There Lee examined the Federal position across the open fields that separated the two armies. He knew that Meade had been forced to send reinforcements to both of his flanks, and that those reinforcements presumably had come from the center. Perhaps here, where the Federals had little protection from thick woods or high hills, perhaps this was where they were most vulnerable. If he sent his magnificent infantry on a narrow front against a single point in that thin blue line, it could not fail to win through. Of course the men would be at risk while crossing those open fields, but that could be minimized by concentrating a massed artillery barrage on the Union line beforehand.<sup>87</sup>

Longstreet would command three divisions, Pickett's from his own First Corps and two divisions from A. P. Hill's Corps, giving him approximately 15,000 troops to attack the right center of the Union line located on Cemetery Ridge. Longstreet recalled that Lee pointed with his first at Cemetery Hill and replied, "The enemy is there, and I am going to strike him", to which Longstreet retorted, "it is my opinion that no fifteen thousand men ever arrayed for battle can take that position."<sup>88</sup> Longstreet argued again to move the army right, around the enemy's left. Lee's mind remained unchanged and preparations for the attack ensued.

The battle on July 3rd did not unfold as planned. The Federals unexpectedly conducted an artillery attack on Culp's Hill, prompting Ewell's Corps to attack and thus the engagement with the Federal right began out of concert with the Longstreet's attack on the center. Shelby Foote said,

The third day began badly for Lee. Ewell's men were driven back from Culp's Hill. J.E.B. Stuart was supposed to get behind the Federals and attack them from the rear; but Union cavalry stopped and held him thanks in part to a series of reckless charges led by 23-year-old General George Armstrong Custer. Everything now depended on Longstreet's attack on the Union center on Cemetery Ridge. Meade saw it coming and was ready for him. The man Lee chose to lead the assault was dashing, perfumed General George E. Pickett, who had never before taken his division into combat. It was an incredible mistake and there was scarcely a trained soldier who didn't know it was a mistake at the time it was done, except possibly Pickett himself who was very happy at a chance for glory; but every man who looked out over that field whether it's a sergeant or a lieutenant general saw it was a desperate endeavor and I'm sure knew that it should not have been made.<sup>89</sup>

The results were catastrophic. Ewell's attempt on Culp's Hill was repulsed and Stuart's cavalry attack was cut off by Union Cavalry. The artillery barrages exchanged by both armies in the center proved indecisive. The grand assault famously known as "Pickett's Charge" failed to permanently pierce the Federal line, and the remaining Confederate attackers, which numbered about half of their original strength, returned to their lines on Seminary Ridge. A Union counterattack never materialized.<sup>90</sup> So on July 4th,

[A]fter three days of vicious combat, the two badly bled armies simply glowered at each other across a mile of open fields as they licked their wounds. That evening brought a downpour, and on the morning of July 5, Meade awoke to find the gray sky brightened by the absence of Lee and his Army of Northern Virginia. Somehow, against all odds, Lee and his army were gone. Meade could scarcely believe what this meant; he had taken on the greatest Confederate general, maybe the greatest American general ever, in a major battle, and he had repelled his final attack and so had not been beaten. Indeed, although the Confederates had not been driven off, the naked fact that Lee had left the Army of the Potomac in control of the battlefield meant that Meade won the battle.<sup>91</sup>

During the three day battle of Gettysburg, the human costs were great on both sides. The Union suffered approximately 23,000 casualties and the Confederates lost around 28,000. The Confederate force was crippled, returning back home with less than two-thirds of the army, including 4,500 dead. Compounding the difficulty was the loss of more senior leaders; 19 of 46 brigade and divisional commanders were casualties, as well as just under half of all regimental commanders. Instead of gathering additional resources and bolstering the strength of the Army of Northern Virginia, the campaign instead left it beaten and battered as it withdrew back to Virginia.

### **Gettysburg Campaign Background – Aftermath**

To complicate matters for the Confederacy even further, the city of Vicksburg fell on July 4, 1863, just one day after the Battle of Gettysburg concluded. Additionally, the spirit of the once invincible Army of Northern Virginia was broken as "staggering losses and a shift in morale thus grew out of Lee's decision to press for a decisive result on the field at Gettysburg."<sup>92</sup> Some

notable Confederates and Southerners began to question Lee's tactics. Longstreet said, "Gettysburg had been ground of no value. That day was the saddest of my life."<sup>93</sup> This criticism of the once unquestioned Commanding General was not exclusive to Longstreet. Robert Garlick Hill Kean of the War Department wrote the following in his diary on July 26, 1863:

Gettysburg has shaken my faith in Lee as a General. To fight an enemy superior in numbers at such a terrible disadvantage of position in the heart of his own territory, when freedom of movement gave him the advantage of selecting his own time and place for accepting battle, seems to have been a great military blunder...and the result was the worst disaster which has ever befallen our arms.<sup>94</sup>

Brigadier General Wade Hampton used comparably strong language in a letter to Joseph E. Johnston less than a month after the battle, stating that, "The Pennsylvania campaign was a complete failure, during which Lee resorted to unimaginative offensive tactics. The position of the Yankees there was the strongest I ever saw and it was in vain to attack it."<sup>95</sup> In summary, Gettysburg became a professional defeat that General Lee was never able to overcome.

The humbled Lee was crushed by the defeat he brought to his beloved army, as evidenced by him walking out on the field after Pickett's charge to meet his retreating men to tell them that "It is all my fault." Continuing that theme, Lee wrote to Jefferson Davis and said, "It was all my fault. I asked more of men than should have been asked of them."<sup>96</sup> Historian Shelby Foote said, "Gettysburg was the price the South paid for having R.E. Lee. That was the mistake he made, the mistake of all mistakes."<sup>97</sup> Lee, however, did spread blame elsewhere for the defeat.

I must again refer you to the official accounts. Its loss was occasioned by a combination of circumstances. It was commenced in the absence of correct intelligence. It was continued in the effort to overcome the difficulties by which we were surrounded, and it would have been gained could one determined and united blow...been delivered by our whole line.<sup>98</sup>

Despite taking full responsibility for the result at Gettysburg, Lee made various statements that were indicative that he held Stuart and, to a lesser degree, his Corps Commanders accountable to

the extent that a more concerted effort by them would have changed the outcome of the battle.<sup>99</sup>

But the introspective Lee may have been more forthcoming and honest when speaking to others.

Captain Thomas J. Goree of Longstreet's staff recalled in an 1875 letter to his old chief a similar episode at Orange Court House in the winter of 1864. Summoned to Lee's tent, Goree found that the General had been looking through Northern newspapers. Lee "remarked that he had just been reading the Northern official reports of the Battle of Gettysburg, that he had become satisfied from reading those reports that if he had permitted you to carry out yours plans on the 3rd day, instead of making the attack on Cemetery Hill, we would have been successful."<sup>100</sup>

Since Longstreet first wanted to execute a flanking movement around the Federal left on July 2nd, it is feasible that in hindsight Lee regarded his assaults on the second day of Gettysburg also as imprudent.<sup>101</sup> At this point, the question that begs to be asked is how the prepared, critically thinking, and battle-tested Lee allowed such a disastrous outcome to his army. The answer to this question is elusive: "While Lee's battlefield mastery before and after the third day of the Battle of Gettysburg is undeniable, historians so far have been at a loss to explain this dramatic failure. Virtually all history books since that time, therefore, have simply reported that, on July 3rd, 1863, Lee just had one very bad day."<sup>102</sup>

### **Lee's Background**

To understand Lee's decision making at Gettysburg, one must understand the whole man, and as such take into account all of his life's studies and experiences. An in-depth review of his background, beginning with his days at West Point, will provide the foundation to understand that Lee was sharp intellectually and undoubtedly had the capacity and willingness to think critically. Whereas Lee may not have known the cognitive process suggested by the term "critical thinking", the logic, attention to detail, and careful consideration he applied to complex analytical tasks proved he was a premiere military critical thinker. According to Paul and Elder:

A well-cultivated critical thinker raises vital questions and problems, gathers and assesses

relevant information, and can effectively interpret it; comes to well-reasoned conclusions and solutions, testing them against relevant criteria and standards; thinks open-mindedly within alternative systems of thought, recognizing and assessing, as need be, their assumptions, implications, and practical consequences; and communicates effectively with others in figuring out solutions to complex problems.<sup>103</sup>

Using these criteria, a look at his time as a cadet, Army Engineer, staff officer in the Mexican War, Superintendent at West Point, service as a Cavalry Officer, and finally his time as a Confederate General in the Civil War will demonstrate that Lee had thought this way consistently (and with little error) up to the time that he moved the Confederate Army into Pennsylvania in June 1863.

### **Lee's Background – Academic and Early Career**

Robert E. Lee was the son of Revolutionary War hero Henry “White Horse Harry” Lee III. His father, due to personal and financial problems, was absent for a large portion of his son’s life and died overseas alone and penniless. The burden of restoring the tarnished reputation of his family was something that drove young Robert E. Lee. Lee's mother used family influence to get him an appointment to West Point in 1825, and once there he set out on the path to distinguished achievement.<sup>104</sup> His early academic and military career proved Lee had the aptitude and determination to become a premier military critical thinker and leader. Lee was an eager learner, taking courses in engineering, military arts, science and math, and the critical thinking-related subject of logic.

While at West Point young Robert thrived in the harsh environment of the academy. He displayed a talent for all things military, and scored high marks in every category of study. Constant in manner and ability he would eventually finish second in his class, never having received a demerit his entire time at West Point. In addition, Robert was well respected by his peers and the faculty for his diligent study and discipline.<sup>105</sup>

Lee always had an interest in military history, and was a well-rounded student all his life. As a cadet, Lee checked out many books from the library at West Point in a variety of subjects. Beside technical academic texts, he read such authors as Voltaire and Machiavelli as well as works on

Napoleon.<sup>106</sup> Upon graduation in 1829, Lee ranked second academically and first militarily in his class, and his future as an engineer in the U.S. Army was promising.<sup>107</sup> After graduating, Lee embarked on a career as an Army engineer, excelling in such varied assignments as fort building (Savannah), building design and budgeting (Fort Monroe), island improvement (Fort Wool), staff work as a military assistant to the Chief Engineer of the Army (Washington, D.C.), surveying (Michigan/Ohio border), harbor work (St. Louis), river engineering (Mississippi and Missouri Rivers), and as a post engineer (Fort Hamilton). In summary, Lee demonstrated the capability for deep analytical thought and analysis in various academic and work-related challenges.

### **Lee's Background – Mexican War**

It was in his duties as an engineer on General Winfred Scott's staff in the Mexican War that Lee's military skills blossomed. As expected, his engineering career during peacetime was not particularly exciting; but in Mexico at the tip of the spear, Lee faced an exhilarating challenge.<sup>108</sup> Although Captain Robert E. Lee was forty years old and been commissioned for eighteen years, he was still a relatively junior officer. But as the war progressed, Scott soon found "[t]hat Lee was very competent in a wide array of fields...he learned to rely on Lee more than on his other more senior staff officers."<sup>109</sup> Lee's courage and actions during the Mexican War quickly brought him renown and respect within the U.S. Army. Major General Scott recognized that Lee was an exceptional officer and leaned heavily on him in many battles, especially for reconnaissance.<sup>110</sup> Lee's personal scouting of the watering hole of the left wing of Santa Anna's army was vital to the invasion. His personal reconnaissance of Cerro Gordo led to a defeat of Santa Anna, in which "Lee received the brevet promotion to major, one way...exceptional performance of duty was sometimes recognized."<sup>111</sup> Afterward, twelve miles from the final destination of Mexico City, the Army confronted two strong fortresses, San Agustin and San Antonio, which lay behind a wide,

jagged lava bed known as the Pedregal. Lee did the reconnaissance of the Pedregal, which was considered by the Mexicans to be impassable. But after dangerous night and day scouting missions, “he discovered ways to bring American forces across the Pedregal while remaining concealed from the Mexican defenders.”<sup>112</sup> Lee’s prowess and appreciation of reconnaissance gained in Mexico would serve him well in the Civil War.

However, Lee’s talent was not limited to reconnaissance.<sup>113</sup> He played a critical role in placing artillery in the siege of Vera Cruz and after three successful days of heavy bombardment, U.S. troops went up the road toward Mexico City.<sup>114</sup> In the hostilities leading to the taking of Mexico City and Mexico’s surrender, Lee fought bravely and was wounded. After the war, Scott would say that Lee’s actions in the campaign were “[t]he greatest feat of physical and moral courage performed by any individual, in my knowledge...”<sup>115</sup> From observing Scott, Lee gained an appreciation of the need for a competent staff and properly thought-out strategic plan. He also understood that utter boldness could sway the result of a battle and this “audacity” in conflict became a future trademark of Lee.<sup>116</sup> Lee earned the trust and admiration of Scott and was consequently awarded with multiple commendations. Scott wrote in an official letter that Lee was “the very best soldier that I ever saw in the field.”<sup>117</sup> For his service, Lee was promoted to brevet Lieutenant Colonel and in a rare honor at that time, was mentioned by Scott in an official battle report, which said, “I am compelled to make special mention of Captain Robert E. Lee, engineer. This officer was again indefatigable during three operations in reconnaissance as daring as laborious, and the utmost value. Nor was he less conspicuous in planting batteries and in conducting columns to their stations under heavy fire of the enemy.”<sup>118</sup> In conclusion, the bravery, intellect, and military prowess Lee demonstrated in the Mexican War became well-known in both political and military circles and gained him a great reputation.<sup>119</sup>

## Lee's Background – Superintendent at West Point

The time between the Mexican War and the Civil War was extremely important to the development of Lee's military mind. After the Mexican War, he was ordered to Baltimore where he worked for several years building defenses. In September, 1852 brevet Colonel Lee was appointed to be the ninth Superintendent of the United States Military Academy at West Point.<sup>120</sup> His voracious appetite for learning further advanced his study of war while there. In the three years at West Point as Superintendent, Lee improved courses, emphasized the need for the highest standards of character, and made it a point to get to know each of the cadets.<sup>121</sup> The most important of his academic changes related to educating cadets in military art using real-world battlefield examples. His crowning achievement was "being an important force in early structured efforts to educate the staff and faculty, as well as cadets, in the military history of the great captains."<sup>122</sup> Of particularly importance were "Hannibal, Frederick the Great, and especially Napoleon, all of whom were models for Lee as he led the Army of Northern Virginia in battle..."<sup>123</sup> Fifteen of the books that Superintendent Lee drew from the library concerned war, with seven of those specifically on Napoleon and his campaigns.<sup>124</sup> Lee also began to accumulate certain titles, forming his own collection of military history books that he read in his spare time.

From these works, Lee continued to formulate his personal views of how to conduct war, now able to be put into context with his recent experiences of war in Mexico.

Probably, the most important of these was, in terms of the establishment of his personal war fighting capabilities and understanding, is Antoine Henri Jomini's *Précis de l'Art de la Guerre*, published in 1838...Consisting of two volumes, this was perhaps Jomini's greatest and most important work, and it was widely respected around the world, all the more so because precious few individuals had ever made such a thorough study of the Art of War. An early acquisition of Robert E. Lee, it would probably not be too great an exaggeration to describe it as his bible, and there seems little doubt that he studied it quite religiously.<sup>125</sup>

In this work, Jomini develops many tactical schemes from studying Napoleon, notably those used

to attack an opponent fixed in place. From his study of Napoleon, Lee learned:

[A] commander who wants to retain strategic flexibility and control will generally seek to be on the offensive, for being on the defensive entails certain restrictions and limitations to his possible actions that are not always optimal...awaiting the attack from an adversary rather than initiating such an attack places a commander in a reactive rather than an active mode, and allowing an adversary to establish where and how a battle will be fought is usually not a good thing<sup>126</sup>

Thus, the desire to be on the offensive dominated Lee's military mind - his future battle plans as a Commanding General would reflect this penchant.

Lee's future success against a numerically larger force can be traced to a broad base of knowledge of the Great Captains, with three specific battles of particular importance: Cannae, Leuthen, and Austerlitz. The Battle of Cannae culminated in a double envelopment by Hannibal against the Romans and "is important...because it shows how Hannibal was able to completely surround a much larger force Roman force (40,000 versus 70,000, as compared with Lee's 74,000 facing 90,000 Union troops at Gettysburg) and then defeat it, with the key blow being launched by Hasdrubal's cavalry who slammed the door and crushed the Roman rear."<sup>127</sup> At Leuthen, a smaller force of 36,000 led by Frederick the Great used screening movements and deception against 60,000 of Prince Charles' Austrians. Frederick the Great feigned attack on Austrian right wing but attacked and routed them on their left flank, and "is important...because it shows how Frederick the Great was able to deceive the commander of the much larger army: Prince Charles believed the Prussian attack would be made at one point and so shifted his defenses there."<sup>128</sup> Finally, at Austerlitz, Napoleon trapped and defeated enemy with a weaker force, thus "Austerlitz is important...because it shows how Napoleon was able to divide a larger adversary force into two segments and defeat them in detail."<sup>129</sup> It is important to guard against the "common but seldom considered perception that Generals during the Civil War made no tactical plans the night before a

battle, that they simply moved their forces forward without any specific intention beyond attacking the enemy's forces where they found them."<sup>130</sup> As Lee developed into an Army Commander, he took this calculating method of military planning to the extreme, being "a lifelong student of military history whose battlefield actions closely resembled those of the Napoleon of who he had so carefully studied and absorbed...the detailed planning that consumed Lee the night before a battle was the most important action he performed."<sup>131</sup> Leaving West Point, Lee would get opportunities to put this knowledge of military theory into practice on the battlefield.

### **Lee's Background – Between West Point and Command of Army of Northern Virginia**

Between West Point and the Civil War, Lee gained experience in combat arms that continued to prepare him for Civil War Generalship. In 1855, much to the delight of Lee, he received a long-awaited promotion to be second-in-command of the U.S. Second Cavalry regiment in Texas. Serving under Colonel Albert Sidney Johnston, their mission was to protect settlers from attacks by the Apache and the Comanche. Lee also led a command of militia, soldiers, and U.S. Marines who quickly put down John Brown and his band of abolitionists at Harper's Ferry who had seized the Federal arsenal in October 1859. Lee was also present when Texas seceded from the Union in February 1861 and General Twiggs surrendered the American forces to the Texans. Lee went back to Washington and was appointed Colonel of the First Regiment of Cavalry in March 1861. Lee's colonelcy was signed by the new President, Abraham Lincoln. With the election of the Republican Lincoln in 1860, the United States was thrown into turmoil and the secession movement in the southern states rapidly gained ground. Early the following year, after several states seceded, now Colonel Lee was offered the position of Commanding General for the U.S. Army.<sup>132</sup> After discussing the offer with General Scott, Lee resigned from the U.S. Army on April 20th, 1861, then accepted an assignment to command the

forces for the Commonwealth of Virginia as a Major General just three days later.<sup>133</sup>

Once the Confederate States Army was formed, Lee was appointed as one of its first five full generals and given the assignment of commanding the Confederate forces in Western Virginia. It was there that he was defeated at the Battle of Cheat Mountain. He formulated a complex plan to defeat the small Union force there with 3,000 Confederates. But the approaches by each of his three Confederate brigades were uncoordinated and the attack failed with Lee withdrawing before a major engagement would occur. Lee consequently received the blame for the failure; the growing pains of Generalship and putting together a competent staff were evident.

The expectations formed in regard to his operations there were not realized, and though he met with no disaster or defeat to his troops, the campaign was regarded as a failure. Lee had made mistakes. Perhaps no one could have saved Western Virginia...but he had failed to recover it. With it the Confederacy had lost the shortest road to the Union railway communications between the East and the West. In his operations on that front and during the Seven Days, he demanded professional efficiency of an amateur staff and had essayed a strategy his subordinates had been incapable of executing tactically.<sup>134</sup>

As a tactician, Lee exhibited at the beginning of the hostilities the weaknesses that might be expected of one who had been a staff officer for the greater part of his military career. He obviously learned and developed as the war went on and became well-versed in tactical operations.<sup>135</sup> However, following the defeat at Cheat Mountain, he was reassigned out of combat command.

He was, subsequently, sent to the Southern sea-board, for the purpose of supervising the measures for its defense, and he proved himself a most accomplished engineer, and rendered most valuable services in connection with the sea-board defenses in that quarter. In March, 1862, he was called to Richmond, and charged with the conduct of military operations in the armies of the Confederacy, under the direction of the President.<sup>136</sup>

In summary, from his time at West point all the way leading up to his appointment as the Commanding General of the Army of Northern Virginia, Lee developed as a military leader, understanding the importance and process of building a staff and thinking strategically as well as

tactically. Lee had the mental acumen, acquired critical thinking skills, and military education now complemented with the real-life experience of battle - he was now prepared to lead an Army.

### **Pre-Gettysburg Critical Thinking – The Seven Days**

During the Peninsula campaign, McClellan consolidated his large army and finally threatened the Confederate capital. On the outskirts of Richmond, Major General George McClellan continually asked Washington for more troops, even though his army of 110,000 already greatly outnumbered the Confederates under General Joseph Johnston.<sup>137</sup> McClellan was “fooled by poor intelligence from his cavalry as well as diversions and adept movements by the Confederates while he had moved his Army up the peninsula, and was greatly deceived as to the force that was in front of him. He reported to Washington that he faced 200,000 Confederates, but there were actually 85,000.”<sup>138</sup> A minor battle at Hanover Court House on May 27th was followed up by a surprise attack by the Confederates at the Battle of Seven Pines on May 31th, with inconclusive results. But a major development of the battle was the wounding of General Johnston, with Lee now assuming command of the Army. He spent the next month fortifying the defenses around Richmond. Lee's Army was soon to become larger than the one he inherited from Johnston, with the pending arrival of Jackson and his divisions from the Valley Campaign. Lee now had about 92,000 men, which was the largest Confederate army assembled during the war, but still knew he did not have numerical superiority over McClellan. However, expecting McClellan to remain cautious, he planned a daring offensive campaign to relieve Richmond.

Once thought of as timid in Western Virginia, Seven Days was the first instance of the aggressive nature Lee would display during the remainder of the Civil War, and was indicative of the influence on him by the Great Captains. His evaluation of information included observation

of the Union Army's tentative advance, Stuart's cavalry's circumnavigation of the entire Union Army from 12-15 June that reported to Lee the enemy strength, the arrival of Jackson, and an understanding of the political and military situation of the Union. This was the first of many times in the Civil War that Lee accurately adopted the point of view of his opposing General and crafted an appropriate strategy. He read McClellan's cautiousness betelling of a commander who was not quite willing to bring it into bloody, decisive conflict. The way Lee clarified the concern was by realizing that he must defend Richmond, the problem being McClellan's Army and a potential siege (the implication of what an uninterrupted Union Plan would bring) that Richmond could not indefinitely stand, and the way to nullifying it was to drive McClellan's Army off. On the other hand, McClellan disastrously did the opposite and was unprepared, as he miscalculated Lee and his intentions, stating. "I prefer Lee to Johnston. Lee is too cautious and weak under grave responsibility. Personally brave and energetic to a fault. He's yet wanting in moral firmness when pressed by heavy responsibility."<sup>139</sup> Obviously, McClellan grossly misjudged his opponent. Lee, "wanting to get at the Union men who had dared to invade his state...renamed his force 'The Army of Northern Virginia,' seized the initiative and never let it go."<sup>140</sup>

Lee made the astute assumption that McClellan's conservative approach was due to his misunderstanding of his enemy's numbers and willingness to wait for reinforcements from Washington. Lee's inference was that if he attacked it would surprise and disarm the Federals. Lee defied all military convention, dividing his smaller army and attacking the huge Union Army, gambling successfully that McClellan would be too cautious to counter with a move into Richmond and/or an attempt to cut off his army and defeat it in detail. The implication was a risky attack which concentrated about 65,500 troops to oppose 30,000. This left only 25,000 to protect Richmond and to contain the other 60,000 men of the Union Army, but the attack was

necessary to beat back McClellan and would likely not be countered because the enemy did not realize the susceptibility of Richmond and the divided Confederate Army. McClellan advanced his lines closer to Richmond to bring it within the range of his siege guns. Getting word of a pending offensive by Lee, McClellan decided to take the offensive before Lee could, bringing on the Battle of Oak Grove. The minor battle was McClellan's only tactical offensive action against Richmond, but the “attack gained only 600 yards at a cost of over 1,000 casualties on both sides and was not strong enough to derail the offensive planned by Robert E. Lee, which already had been set in motion.”<sup>141</sup> Lee's intricate, coordinated assault to begin the Seven Days Battle did not work as planned at Mechanicsville, but he would not let up.

Determined to drive McClellan out of Virginia, Lee kept on the attack, and so it went. For seven days, the two armies clashed. From Gaines' Mill, from Savage's Station, to Frazier's Farm and Malvern Hill, where Federal gunners stopped the Confederates who came at them up the long slope. All but one of the Battles of the Seven Days were Union victories, yet McClellan treated them as defeats, continuing to back down until he reached the safety of Federal gunboats at Harrison's Landing on the James River. In just one week, Lee had completely unnerved the Union general, and demonstrated for the first time the strengths that would make him a legend. Surprise, audacity and an eerie ability to read his opponent's mind. In just seven days, McClellan had been totally out-Generalled.<sup>142</sup>

The Battle of the Seven Days ended with McClellan's army in retreat and suffering almost 16,000 casualties. Lee's army sustained heavy casualties, losing over 20,000. Successful in protecting Richmond from the Federals, Lee now prepared to lead his Army north.

### **Pre-Gettysburg Critical Thinking – Second Bull Run and Antietam**

With his army sustaining heavy losses despite victory, Lee was concerned that Maj. Gen. John Pope's Army of Virginia would eventually combine with the Army of the Potomac and overwhelm his smaller Army. Having temporarily spared Richmond, he wanted to keep the momentum and offensive but also stay strong enough to survive. Lee conducted clarify the concern in the macro-sense by understanding that the Confederate strategy needed to be survival.

Lee understood that “in order to maintain the Union and prevent the Southern attempt to secede Federal forces would have to enter the South and defeat rebel forces on their own turf; while in order to win the Confederacy didn’t need even victory in battle, for all it had to endure and survive.”<sup>143</sup> However, by putting pressure on the enemy on his terms, Lee could continue to win battlefield victories as long as the casualties were not too great on his side. Lee’s assumption was that Pope would defend any threat the capital, inferring that operating in Northern Virginia would force Pope into a battle of Lee’s choosing. The implication was that victory was probable if the battle could be fought soon enough that the Union armies could not unite. Lee sent Jackson north to intercept Pope’s advance towards Gordonsville. Once Lee determined that McClellan was no longer a threat to Richmond he sent Longstreet’s command to follow Jackson. Lee assumed Pope’s point of view by expecting him to attack what Pope likely thought was only Jackson, with the remainder of the Confederate army remaining in the vicinity of Richmond. He also read McClellan accurately as well as he expected him to not be a threat while he consolidated his Army of Northern Virginia. In summary, his evaluation of information in the aftermath of the Peninsula Campaign led him to the conclusion that the best way to endure but also to gain a victory was to threaten Washington and draw out Pope’s Army of Virginia, which at that time (with McClellan withdrawing off the Peninsula) was a prime military objective. Lee then executed a strategic offensive, tactical defensive plan to perfection. Maj. Gen. Thomas “Stonewall” Jackson led a flanking march which captured the Union supply depot at Manassas Junction, threatening Pope’s line of communications with Washington. At that point, Jackson withdrew and took up defensive positions on Stony Ridge and held until August 30th when a massed Confederate artillery assault halted the Union attack. With Longstreet now on the field unbeknownst to Pope, his wing of 25,000 men crushed the Union left flank in a brilliant counterattack. Only effective rearguard

action by the Federals spared them further disaster. Historian John J. Hennessy wrote that "Lee may have fought cleverer battles, but this was his greatest campaign."<sup>144</sup>

Lee's army picked up momentum and headed to Maryland to achieve similar objectives to the later Gettysburg Campaign, namely, to resupply the army outside of war-torn Virginia and to damage Northern morale and gain political and international support in the north, in this case in anticipation of the November 1862 elections and under the watching eyes of Great Britain. The brilliant Southern victories of 1862 had brought Lee's army international renown. Lee believed that if he could have one more successful campaign it would force Europe to recognize the Confederacy. Now, Lee led 40,000 soldiers across the Potomac and onto Union soil for the very first time. However valid Lee's strategic plan was, it was undone on the operational and tactical levels by a major intelligence blunder that revealed both that Lee's army was dispersed and its plans. The infamous "lost order" shaped this campaign and subsequently the rest of the war.

On September 13th, in a meadow near Frederick, a Union soldier found three cigars wrapped in a piece of paper. It was a copy of Lee's battle plans, accidentally left behind. McClellan now knew Lee had divided his army, sending one part off to seize Harper's Ferry. McClellan had in his hands the instrument with which to destroy Lee.<sup>145</sup>

McClellan, in character, was slow to act and did nothing for 18 hours. McClellan did not realize that a spy informed Lee that he had the plans. Lee was forced to fight at Sharpsburg, not the place and time that he preferred, but he had no choice. He placed his army in defensive positions behind Antietam Creek as McClellan launch brutal attacks on September 17th. In the first major battle of the Civil War fought on Northern soil, the losses were staggering on both sides. The bloodiest single-day battle in American history, with almost 23,000 casualties (approx. 12,400 Union, 10,300 Confederate), resulted in a tactical draw. But it was a strategic defeat for the Confederates, as Lee removed his battered army south of the Potomac River giving President

Lincoln the victory he needed to announce his preliminary Emancipation Proclamation. Again outnumbered, this time almost two-to-one, Lee's Army survived due to Lee committing all of his troops in defense while McClellan used only three-quarters of his force and then did not pursue Lee. McClellan's tenure as the Commander of the Army of the Potomac ended, having been replaced in favor of Ambrose Burnside by Lincoln, who was disappointed by McClellan's failure to destroy Lee's army.

### **Pre-Gettysburg Critical Thinking – Fredericksburg to Chancellorsville**

After the Maryland campaign, Lee's army returned to Virginia and was operating in its normal areas in the Shenandoah Valley (Jackson's Wing) and central Virginia (Longstreet's Wing) protecting Richmond. The concern clarified was simple for the Confederates: the army needed to regroup and guard the capital. The threat was obviously the Army of the Potomac, now under its new, reluctant Commander, General Ambrose Burnside. The Battle of Antietam (Sharpsburg) was so damaging to his army that Lee had to surrender the initiative, leaving Burnside to determine the when and where the next battle would be, which did not particularly bother Lee.<sup>146</sup> Lee's intelligence would need to locate the enemy and he would then maneuver his Army in response. Burnside's army was now located in the vicinity of Warrenton and the Commanding General was under pressure from President Lincoln and Union General in Chief Henry Halleck to attack Richmond. Burnside planned to feint toward Culpeper Courthouse, then rapidly shift his army southeast across the Rappahannock River to Fredericksburg while Lee was still unsure of Federal intentions, then continue on to Richmond. This plan would rely on quick movement and deception, designed to avoid a general engagement and/or a flanking attack by the Confederates, something the Union army would be susceptible to if they marched directly from Warrenton to Fredericksburg. But the Union Army was slow to arrive due to administrative

delays to get the pontoon bridges required and Burnside's reluctance to deploy troops across the river into the town before the logistics were in place.

In Lee's evaluation of information, he was aware of Burnside's move toward Fredericksburg. As usual his army was outnumbered, this time approximately 114,000 to 72,000. He originally anticipated that Burnside would beat him across the Rappahannock and was planning to assume a defensive position at the North Anna river in that case to block the approach to Richmond. However, learning of the pace of the Union Army and President Davis' reservations about defending so close to the capital, he directed all of his army towards Fredericksburg. Lee adopted the point of view of Davis to influence his plan and also expected the hesitant Burnside, who lacked professional military training, to be a pawn of Washington. Lee's obvious assumption was that Burnside would attack his Army wherever he placed them between the Federals and Richmond, inferring that obtaining the best defensive position as soon as possible was the best course of action. The implication was that if dug in properly around Fredericksburg Lee's confident Army would halt the advance and defeat the outmatched Burnside if he chose to attack. By November 23rd, Longstreet's Corps had arrived and Lee placed them on the perfect defensive ground of Marye's Heights west of the town behind a stone wall and massive artillery. Jackson would arrive later after an impressively rapid march and set up south of the town on November 29th. As expected, Burnside's plan to cross the Rappahannock by pontoon, occupy the town, and take its thinly-defended heights did not begin until December 11th.

Bold action did not come naturally to Ambrose Burnside, though he had led his men to Fredericksburg determined to display the fighting spirit his predecessor, George McClellan, had so conspicuously lacked. The great assault came two days later, on December 13th. Federal forces advanced towards Marye's Heights. Lee could not believe the enemy would be so foolish; his artillery covered all the approaches. Four lines of riflemen waited behind a stone wall that ran along the base of the hill.<sup>147</sup>

The Federal frontal assault failed miserably, resulting in one of the most lopsided battles in the

war. The Union suffered 12,600 casualties with the Confederacy having only 5,000.<sup>148</sup> On December 15th, Burnside withdrew his army to end another failed Union campaign, giving Lee another impressive victory. The Battle of Fredericksburg was such an easy victory and Lee was now extremely confident in his own ability and that of his Army.<sup>149</sup> However, there was a danger in this growing confidence. Historian Stephen Sears points out that while “Self-confidence is an essential ingredient for any general’s success...in this instance Robert E. Lee’s self-confidence was edging onto overconfidence. When the spring campaign began his overconfidence would expose him to grave danger.”<sup>150</sup>

President Lincoln was becoming impatient with the continuous defeats of his Union Army in the Eastern Theatre. At this point it was obvious Lee’s Army of Northern Virginia was a formidable force and that any plan to end the war would have to concentrate on it. President Lincoln again appointed a new general in charge of the Army of the Potomac, replacing Burnside with Joseph “Fighting Joe” Hooker, a tenacious and competent Corps commander. Hooker had a reputation for heavy drinking and braggadocios behavior. Lincoln told him that, “It was absolutely necessary...to destroy Lee's Army.”<sup>151</sup> The clarified concern for Lee was not as predictable as before. Coming off another victory Lee’s force was still outnumbered, ill-equipped, and still under pressure to protect Richmond from the Army of the Potomac, but somehow needed to continue to beat the Federals in the field while protecting Richmond. A notable consequence to Lee’s aggressive style was that he could not seem to gather enough supplies in reserve to allow for the maneuverability needed to seize the initiative.<sup>152</sup> He knew that he had to overcome the logistical disadvantages that could be fatal in a protracted war.

Robert E. Lee was unblinkingly realistic about how the South might win its independence. Victory on the battlefield was the surest path to the peace table, he believe, and the best chance to achieve victory was force the enemy to march to his drum. At Fredericksburg he

had had to march to Burnside's drum, but was saved from any embarrassment by the Yankee's disastrous tactics. Whatever Lee's view of Joe Hooker, he had to consider that the next battle might not be so easily won.<sup>153</sup>

The Union's point of view with this recent change to "Fighting Joe" Hooker would be to continue to attack. Lee was growing in his disdain and disrespect for the ever-changing Union Generalship, although he was aware that Hooker was more competent militarily than Burnside.

Having faced down and beaten down the likes of George McClellan (twice), John Pope, and Ambrose Burnside, Lee expressed no concern that in Joseph Hooker he would finally meet an equal. When he found the newspapers referring to his newest opponent as "Fighting Joe" Hooker, Lee was amused and contemptuous. In his correspondence he spoke derisively of "Mr. F.J. Hooker."<sup>154</sup>

Lee's underestimation of Hooker was a mistake. Hooker had the ability to formulate what was to be the most ingenious battle plan against Lee to date. Lee had outgeneraled all of his adversaries to this point, but his enemy's overall capabilities were improving.

Lee had previously been able to gather better intelligence than the Union to give him advantages on the field as "It was Lee's habit to read every Northern newspaper he could lay his hands on, thereby gaining a good deal of valuable intelligence; the Northern press had little respect for military secrets."<sup>155</sup> But this was about to change. Hooker immediately revamped the Union intelligence organization, now named the Department of Military Information, giving him much better information to make battle plans.

From his reading of Northern newspapers Lee had gleaned the interesting fact that his opponents – or at least General McClellan – greatly and consistently overestimated the size of the Confederate army. This was indeed one of McClellan's delusions, and it was he who had given Lee one more edge of the battlefield. So far as he knew, the Federals were still inflating the size of the Army of Northern Virginia. He could not know that since the arrival of Colonel Sharpe and his Bureau of Military Information this was one battlefield advantage he would no longer enjoy.<sup>156</sup>

Lee still had his cavalry, but his superiority over the North in gathering and evaluating information was dwindling. The strategic assumptions, inference, and implications were identical to those

prior to Fredericksburg, namely defense at all costs against an enemy surely coming.

Hooker's plans called for one part of his enormous army to feign an assault on Lee's front, still at Fredericksburg, while the rest marched up to Rappahannock, crossed the river, and attacked Lee from the rear. On April 30th, Hooker's main force, 70,000 strong, reached Chancellorsville, a lone house in a clearing surrounded by a thick forest called "The Wilderness." Hooker and his officers moved in downstairs and continued to map out the assault they were sure would trap Lee...But Robert E. Lee, outnumbered nearly two to one, was not fooled by Hooker's plan. Defying all military convention, he divided his own, much smaller force, leaving only a quarter of his men at Fredericksburg before rushing west to shore up his flank.<sup>157</sup>

Outnumbered and out maneuvered to this point, Lee made a desperate and daring move that was in keeping with his Napoleon influence. The following is how Lee read the situation:

From the way the Yankees had pulled back at almost first contact – they did not make a sustained fight of it anywhere that day – and the way they had by report strongly entrenched themselves around Chancellorsville, it was obvious that Hooker wanted to fight defensively. He was inviting attack; he was daring Lee to attack. But by doing so he had to give up the initiative, and on the battlefields of this war the initiative was something that had always served Robert E. Lee well.<sup>158</sup>

Also, by taking this tack, Hooker put his trust in Howard and his XI Corps, which he warned of a potential flanking attack. But Howard did nothing in preparation. Tactically, the situation had changed and forced Lee to critically think and reevaluate. His assumption was that he was in a tenuous situation to defend but the enemy's historical reluctance to attack his army gave him an opportunity. He inferred that a risky flank attack could achieve surprise and dramatic results on an unexpecting enemy who would not likely counterattack. The implication was that another blow to the Union could stun Hooker and his Army to give up once again. So Lee divided the army once more, sending Jackson on May 2nd on a flanking attack against the XI Corps and routed the Union right flank. Unnerved by this attack and despite the urging of the majority of his Corps commanders, Hooker decided to recross the Rapidan thus giving Lee another stunning triumph.

The Battle of Chancellorsville was perhaps the greatest Confederate victory of the American Civil War. Outnumbered two to one, and caught between the pincers of a cleverly-devised maneuver, Lee responded with breathtaking audacity, diving his forces

twice and thus seizing the initiative. Some 12,000 Southern soldiers fell during the two day fight, and one of them was Stonewall Jackson who would be irreplaceable. And though Northern losses were even greater (some 17,000), Confederate losses constituted 21 percent of those engaged while Federal losses constituted only 14 percent. Many more such victories would doom the Southern cause.<sup>159</sup>

The win raised the Army of Northern Virginia and Lee to celebrity status in both the North and South. Lee “would build on the victory won at Chancellorsville, demoralizing the enemy. This time Longstreet would be with him. He considered the men of the Army of Northern Virginia to be all but invincible. He had taken the measure of Mr. F.J. Hooker once; he would do so again.”<sup>160</sup> Not surprisingly, a month later Lee’s army was heading north to fight him once more.

### **Pre-Gettysburg Critical Thinking - Generalship**

From studying Lee’s background, it is clear that he was certainly an accomplished Commanding General by the summer of 1863. He had mastered the art of military critical thinking. His overall method of clarifying concern and evaluation of information was effective, using his cavalry, a healthy relationship with subordinates, and knowledge of his adversaries. During the war, Stuart’s cavalry had become Lee’s most trusted source of providing information on enemy movements and activities as they utilized aggressive and superb reconnaissance. In addition to Stuart, Longstreet and Jackson earned Lee’s trust and the three became the subordinates he respected and relied on the most to carry out his orders. Lee was also open to suggestions from his all subordinates, patiently considering their point of view.<sup>161</sup> While West Point Superintendent, Lee believed it important to establish a personal relationship with as many cadets as possible. This policy led to Lee being familiar with many cadets who fought on both sides in the Civil War and his “mentorship of these young men gave him remarkable serendipitous insight into the men who would play major leadership roles in the Union or Confederate Army.”<sup>162</sup> This not only allowed him to understand the point of view of his soldiers but his enemy as well.

Once his problem was thus made graphic, he projected himself mentally across the lines to the position of his adversary. What was the logistical thing – not the desirable thing from the Confederate point of view – for his opponent to do? After he had studied the probabilities, he would turn to his intelligence report. Prisoners' statements, captured correspondence, newspapers, information from his spies, dispatches from the cavalry outposts—all these he studied carefully, and often at first hand. Every stir of his enemy along the line he canvassed both for its direct meaning and for its relation to other movements. In assembling this information he was not more adept than many another capable general, and in studying it he was not more diligent, but in interpreting it he excelled.<sup>163</sup>

When Lee learned of McClellan's dismissal and replacement by Burnside, he remarked to Longstreet, "I fear they may continue to make these changes till they find someone whom I don't understand."<sup>164</sup> In retrospect, Gettysburg was:

[T]he fight that most agree was the centerpiece of the Civil War. But it is important at the outset to see it as a Union victory that came after Robert E. Lee had sequentially thrashed and humiliated Generals McClellan, Pope, Burnside, and Hooker on the battlefield, causing them all to be replaced by President Lincoln as he sought desperately for a General that could defeat that Confederate colossus.<sup>165</sup>

It appears that Lee had always been adept at putting himself in the shoes of his opponent and his formed his battle plans very much considering his opposite general.<sup>166</sup> He knew many of the senior Union leadership from his time in the U.S. Army. For Lee, that exposure proved invaluable to him as he made many critical decisions in the war that involved these very people.

The key component of Lee's critical thinking genius was his ability to make proper assumptions, inferences, and implications.

The accurate reasoning of a trained and precise mind is the prime explanation of all these achievements. Lee was preeminently a strategist, and a strategist because he was a sound military logistician. It is well enough to speak of his splendid presence on the field of battle, his poise, his cheer, and his manner with his men, but essentially he was an intellect, with a developed aptitude for the difficult synthesis of war. The incidental never obscured the fundamental. The trivial never distracted. He had the ability – who can say how or why? – to visualize his fundamental problem as though it had been worked out in a model and set before his eyes.<sup>167</sup>

As evidenced in the aforementioned campaigns and battles, Lee used the intellectual standards of

clarity, accuracy, precision, relevance, breadth, depth, logic, significance, and fairness as needed to balance and hone his military critical thinking. The quality of Lee's cognitive thought translated into his stratagems, as "[a]side from what has widely been seen as his one great failure at Gettysburg, Lee's battle plans, as any careful review of his personal military history will show, are generally acknowledged to have been both bold and masterful."<sup>168</sup> However, since subordinate commanders had to execute them, Lee's tactical plans weren't always properly implemented.<sup>169</sup>

Lee's military critical thinking skills combined with his study of military history and his own battlefield experience formed a distinct character that defined his Generalship. His traits as a general had been demonstrated repeatedly, namely Lee's "devotion to the offensive, daring, combativeness, audacity, eagerness to attack, taking the initiative"<sup>170</sup> Lee's propensity for speedy offensive thrusts suggests that he believed the battle was found in the destruction of the enemy army.<sup>171</sup> Defense was not always the best option as Lee said, "[W]e must decide between the positive loss of inactivity and the risk of action."<sup>172</sup> The offensive was different - Lee said in November 1863, "It is only the concentration of our troops that we can hope to win any decisive advantage."<sup>173</sup> Lee was "[c]onfident of the élan of his troops, it was his custom to hurl forward in his assaults every man he could muster, on the principle that if enough weight were thrown against his enemy, there would no need of reserves. The final attack at second Manassas and the operations of May 3 at Chancellorsville illustrate this."<sup>174</sup> However, defensive posture had its place in battle and Lee, an engineer by trade, knew when and how to protect his army from attack. Once Lee understood what the composition and capability of his army would be he would place them in an efficient defense, chosen meticulously and with forces in reserve.<sup>175</sup> Fredericksburg was a perfect example of that. However, Lee's true brilliance was combining the two, offensive and defensive, on the strategic and tactical levels of war.

Following the heel of the Seven Days, the Second Bull Run campaign was strategically offensive in an operational sense although, except for Longstreet's counterattack on August 30th, it may be classified as defensive from a tactical standpoint. At Antietam Lee stood on the defensive, but the Maryland campaign was strategically offensive; his moving into Maryland assured a major battle in that state. At Chancellorsville, he chose not to retreat when confronted by the Federal pincer movement. Instead, he repeatedly attacked, and the Federals retreated back across the river.<sup>176</sup>

In summary, Lee masterfully adapted the military situation he faced with a stance appropriate to that situation.

Lee also had a dynamic personality that motivated the execution of military strategy and plans. He was "bold, decisive, and able to inspire boundless confidence among the men he commanded."<sup>177</sup> Lee has the highest respect from his troops. Artillery Officer Porter Alexander remembered:

Nothing gave me much concern so as long as I knew that General Lee was in command. I am sure there can never have been an army with more supreme confidence in its commander than the army had in General Lee. We looked forward to victory under him as confidently as to successive sunrises.<sup>178</sup>

Five qualities gave life to his strategy, "[h]is interpretation of military intelligence, his wise devotion to the offensive, his careful choice of position, the exactness of his logistics, and his well considered daring."<sup>179</sup> His reputation was not reserved to his own troops. Many of his adversaries in the Union Army unquestionably considered him the Civil War's best leader. Conditioned to lose under the progression of inadequate commanders in the first part of war in the Eastern theatre, these men eventually prevailed under General U. S. Grant without necessarily seeing him as Lee's equivalent.<sup>180</sup> The legacy of Lee was that he was dominating the Eastern theatre of war beyond all odds. The risks he continued to take in order to achieve victory, while ultimately successful, increasingly put his army's and country's immediate future on the line each time he fought. Going into Pennsylvania, Lee was seeking another of the "morale-shattering

victories that would eventually sap Northerners' support for the war. Gaining a third successive victory, of whatever dimension, over the Army of the Potomac, this time on Northern soil, should go a long way toward that goal. That was clearly a risk worth taking"<sup>181</sup> Lee admitted after the war that it was an audacious game he was playing, but it was his only real option.<sup>182</sup> In conclusion, Lee's superb leadership and first-rate military strategy and tactics led to unparalleled success of his army and proved he was a master of critical military thought.

### **Gettysburg Campaign – Critical Thinking Analysis**

For the Gettysburg Campaign, clarify the concern was done at all the levels of war. The framing of the problem by the Confederates was done fairly well at the strategic level but failed at the operational and tactical levels once at Gettysburg. In the campaign planning the main goal of Lee and Davis was to gain a decisive victory that could lead to ending the war. While the strategic objective of the Pennsylvania Campaign ultimately failed due to the Confederate defeat at Gettysburg that does not invalidate its worth. A different operational and/or tactical battle plan may have brought better results to the campaign. The Confederates had to make a move, and staying in Virginia would likely have resulted in the same defeat by siege and attrition as evidenced in 1865, although the Army of Northern Virginia's effort would have delayed it somewhat without the losses in morale and personnel that the Gettysburg campaign claimed. They had valid reasons (logistical, political, and military) to invade the North for such a battle. The main mistake was that Lee fought a battle against an entrenched enemy, something that he had seen the Federal Army do against his troops several times with disastrous consequences. The fact that Lee suddenly abandoned the supposed strategic offensive, tactical defensive plan was risky considering the cost. Lee could have chosen to fight elsewhere after July 1st or arranged his forces in a defensive position and the problem would not have worsened. The Confederates had

approximately seven days sustainment on hand and had the opportunity to get more, depending on where they chose to go. Tactically withdrawing and replenishing in the face of the Union Army would not be easy but the speed and effort the Union Army took to concentrate and build defenses on Cemetery Ridge made it unlikely that anything more than small and disjointed efforts to harass the Army of Northern Virginia were possible. At the tactical level, when Lee had a chance to plan the battle for the 2nd and the 3rd of July, his goals were clear on both occasions. The Union Army was to be driven off and defeated by offensive action. Lee said to Longstreet after their famous argument, “If the enemy is there tomorrow, we must attack him.”<sup>183</sup> Expecting Meade to be cautious but also under pressure to engage the Army of Northern Virginia in the North, undoubtedly Lee expected the Federal Army to remain or at the minimum to take their time to coordinate an offensive response. This left the onus on Lee to decide the course of action, but the ultimate results (despite the intense and spirited fighting by his soldiers) indicated that the methods employed to achieve that goal were inadequate.

All in all, the evaluation of information leading up to Lee’s decision to change to the tactical offensive were not conducted properly to justify changing the “why are we here, what is the problem, and what must be done” questions (clarify the concern) in light of the situation facing the Army of Northern Virginia the night of July 1st, 1863. Considering that the operational problem did not really change (i.e., draw out the Union Army to ground of our choosing) and the tactics did not match the initial strategy, the question of Lee’s point of view must be addressed. Not only was Lee’s point of view skewed but he failed to effectively consider the perspectives of his own senior leadership as well as that of his enemy. The disagreement with Longstreet in regard to Lee’s tactics cannot be overstated. The Pennsylvania Campaign marked the first time that Lee encountered “questioning and the outright opposition on the battlefield...from his chief

lieutenants...He had met (this) by a stubborn and all-but-blind enforcement of his will.”<sup>184</sup> The advantage Lee had in regard to seasoned, competent subordinate senior commanders was diminished due to the recent promotions, demotions, and casualties that changed the faces of Union and Confederate leadership dramatically up to the Gettysburg Campaign. He might have miscalculated Meade’s intentions and point of view by pressing the offensive battle after day one.

George Meade was by nature a careful, cautious general, yet the moment called for boldness and decisiveness...which he clearly understood. Here he was, newly appointed to the command and abruptly so, leading a recently twice-beaten army of possibly doubtful morale, confronting a recently twice-victorious army led by a daring opponent. Meade refused to be intimidated.<sup>185</sup>

Meade wrote his wife on June 29th, “We are marching as fast as we can to relieve Harrisburg, but have to keep a sharp lookout that the rebels don’t turn around us and get at Washington and Baltimore in our rear...I am going straight at them, and will settle this thing once way or the other.”<sup>186</sup> General Meade, new to command, who believed he had about 105,000 troops against approximately 100,000 Confederates, seemed perfectly content with not going on the offensive against Lee once he realized he occupied good ground. Meade’s overall plan was “to force Lee to battle, but if at all possible to fight that battle defensively on the ground of his own choosing.”<sup>187</sup> Sears asserts that, “There was of course nothing unique or even novel about the ‘ruling ideas’ of this strategic and tactical plan. It was exactly what any field general always hoped and dreamed of achieving — to maneuver the enemy into attacking him in circumstances and on defensive ground of his own selection.”<sup>188</sup> However, the possibility of potential pressure Meade could get from Lincoln if the Confederate Army had a prolonged campaign in the north kept his options flexible. His circular announced, “The general believes he has relieved Harrisburg and Philadelphia, and now desires to look on to his own army, and assume position for offensive or defensive, as occasion requires...”<sup>189</sup> Based on Lee’s awareness (and use of) the reasons why it

would be good for his Army (and bad for the Federals) for the Army of Northern Virginia to maintain a presence in the North, it is odd why Lee did not seem to force Meade's hand to have him give battle on ground of Lee's choosing.

Moreover, several egocentric tendencies displayed by Lee suggest that his point of view was distorted. First and foremost, Lee's overconfidence in his army and himself as the war went along led to egocentric righteousness on his part.

Lee's confidence of himself was drawn, understandably enough, from the certain knowledge that he outgeneraled every opponent in every battle. On the peninsula, studying McClellan's actions and finding him cautious to a fault, he boldly divided his smaller army in the face of McClellan's larger one and put him to flight with intimidating, aggressive attacks. Of John Pope he was openly contemptuous, calling him a "miscreant." Again he divided his army in the presence of the enemy, maneuvered around and about Pope until he had him befuddled, then drove him from the Manassas field. At Sharpsburg, Lee fought a battle he did have to fight because he saw McClellan was once again his opponent. And true to form, he outgeneraled cautious McClellan, although it cost him almost a third of his army to prove his superiority.<sup>190</sup>

Adding the recent triumph over Hooker at Chancellorsville, his confidence had grown to a point that would become counterproductive.

Lee, by the summer of 1863, had come to believe that he was invincible and so was the army of Northern Virginia. The record would almost invite that when you see how they had pummeled one Union general after the another and had defeated or least fought to a draw the Army of the Potomac almost on every battle after that point; and Lee really did think that if he asked his boys to do something, they would do it, that they would do anything. He had come by Gettysburg then to believe in his invincibility and that of his men, and it was his doom.<sup>191</sup>

Overconfidence was the main culprit of Lee's flawed decision making at Gettysburg. It hindered Lee from taking Longstreet's counsel throughout the campaign, especially when Longstreet's objections were based on the danger of attack by the same Federals than Lee had such disrespect for. Lee also desperately wished he still had Jackson with him, but how "Stonewall" would have

advised Lee at Gettysburg is impossible to fathom. Regardless of what might or might not have happened had Stonewall lived, Lee now had to plan his forthcoming campaign without him.

A failure of egocentric memory occurred as Lee seemed to overlook the fact that his recent changes to Corps and Division Commanders (many who lacked experience at their current positions) might require different leadership behavior on his part.. Before his reorganization of the Army of Northern Virginia after Chancellorsville, he was confident to give mission-type orders to Jackson, Longstreet, and Stuart, knowing that each would take the personal initiative to devise a plan to meet Lee's objective. Lee understood their character, believed in their abilities, and trusted their judgment. Mistakenly, he continued to give general orders which relied on a significant amount of initiative. One example was Lee's orders to Ewell on July 1st. Ewell "[h]ad proven himself a sound battlefield tactician and a good manager of troops. Like all of Jackson's lieutenants, however, Ewell had always operated on a tight rein held in the iron grip of the secretive Stonewall."<sup>192</sup> But Lee gave him latitude to interpret what were orders of great consequence at Culp's Hill. Lee demonstrated egocentric myopia by refusing to realize that if he was in Meade's position after July 1st, he would have wanted the Confederates to attack his fortified positions. Further compounding this was his egocentric blindness by failing to consider Longstreet's testimony to the reason not to remain and fight on the night of July 1st. Lee failed to seriously consider and heed his best and most senior military advisor. Longstreet's argument was not without merit. General Longstreet "had good reasons to worry about attacking the Union position at Gettysburg. After all it was his corps at Fredericksburg that mowed down the Union troops in front of the stone wall. He could realize what the rifled musket could do, held in the hands of determined troops."<sup>193</sup> So, as only one of his trusted trio of Generals remained (with the passing of Jackson and the current absence of Stuart), Lee would have been better served to get a

better degree of buy-in from Longstreet. Otherwise, although it was his right and responsibility as Commanding General, he put himself on an island, with the fate of his army solely in his hands.

Lee also made false assumptions and inferences that affected the battle's outcome. First, he made the assumption that his loyal troops would not lose in a battle of such magnitude so Lee continued to attack even as the tactical situation worsened. Additionally, Lee's "assaults on the second day were a grave error explained by overconfidence in the prowess of his soldiers, fear that withdrawal without battle would harm morale in the Army of Northern Virginia and among Southern civilians, and contempt for the Army of the Potomac."<sup>194</sup> On a tactical level, he made the assumption that Stuart was going to provide meaningful intelligence (as he had always in the past) but drew the inference that if he had not heard anything from Stuart then the enemy could not have been as large and as close as they were once his army crossed the Potomac. Lee really shouldn't have been surprised, as the entire campaign was predicated on the assumption that the Army of the Potomac would follow Lee's army into Pennsylvania. Since Lee had not received reports from Stuart, the implication to Lee was that the Federals were still south of the Potomac.<sup>195</sup> In summary, Lee grew overconfident in his army's abilities and it led him to place his forces in position to fight where both their positioning and numbers were inferior to the enemy, and whose strength and placement was unclear.

As for his evaluation of information, the aforementioned errors in problem framing, point of view, assumptions, and inferences impacted the quality of information he considered. Lee also made heuristic errors and fell victim to other biases and traps that further degraded his evaluation of information. It is only fair to say that Lee did spend ample time thinking over his military decisions as evident in the amount of planning taken for the campaign and numerous on-field

discussions with his commanders, although his failure to visit Culp's Hill with Ewell was a significant error. Lee did not always get the amount of information he needed to make informed decisions as evident in the latter stages of the march north into Pennsylvania when he was not contacted by Stuart and thus lacked his primary intelligence source.<sup>196</sup> Without the knowledge of where and how the Union forces were arrayed, General Lee had to make assumptions and take risks in engaging his forces at Gettysburg that he might not otherwise have needed to make. Lee's health was limiting his ability to personally observe and supervise field operations, being not recovered from the sickness that had plagued him for the last few months. Lee said, "I am so dull that in making use of the eyes of others I am frequently misled. I cannot even accomplish what I myself desire."<sup>197</sup> Furthermore, General Lee did not ensure that either he or members of his staff properly scout the route or terrain for the assaults on the second day of battle, causing delays and confusion. For example, Lee's battle plan for July 2nd was based on the incorrect assumption that there were minimal Federal forces in the Peach Orchard.<sup>198</sup> Unfortunately for Lee, a general lack of and unreliability of intelligence defined the Gettysburg Campaign – something he was definitely not used to.

Lee also made errors in using some heuristics. The availability heuristic may have been in play due to Lee's recent victory at Chancellorsville, explaining his overconfidence and assumption that Hooker and the Union Army were susceptible to attack. The small sample size of the number of battles in the war that Lee commanded may have led him to be biased as to the capabilities of the both armies. Additionally, Lee's failure to consider the concept of regression to the mean definitely seems to have played a role as Lee's egocentric attitude assumed his troops would continue to win and that the Union would continue to make strategic, operational, and tactical blunders. Not only was Lee underestimating the fighting spirit of the North, he was ignoring the

fact that Federal generalship was improving. This was evident in the relief of Hooker as Lincoln replaced him with Meade to command the Union Army. Hooker was not respected by most of the Union Corps commanders, but the opposite was the case for Meade.<sup>199</sup> Additionally, an insufficient anchor adjustment may have been used by Lee in that he believed he could continue to win battles despite numerical inferiority, regardless of the enemy and field conditions at Gettysburg. In terms of anchoring, Lee depended on the quality of complicated, coordinated attacks to be unaffected although they now were being executed by several inexperienced corps, division, and brigade commanders. Even in previous victories, coordination and execution of his brilliant, yet complex, tactical orders were at times a struggle for the Army of Northern Virginia, and a negative trend should have been expected. When simpler and clearer battle plans were prudent, Lee instead hinged the outcome of Gettysburg on simultaneous, multi-faceted attacks. These aforementioned heuristic errors caused the ways and means of war to be used incorrectly.

Lee made other critical thinking mistakes. A fundamental attribution error was made by Lee in that he based his estimation of the enemy disposition on the type of job Stuart was used to doing, not what he was presently doing. A self-serving bias also seemed to affect Lee as he attributed the Confederate success in the Eastern theatre to internal factors, not looking at what the Union did wrong and if they were addressing those errors in future planning. An example from Chancellorsville is that it did not occur to Lee that Hooker had a brilliant operational plan which should have worked, but did not only due to Hooker's loss of nerve and the inexplicable failing of some of his subordinate corps commanders. In other words, if he would have faced a general at Chancellorsville willing to attack, he probably would have lost. But by not acknowledging that fact he was blind to the susceptibility of his troops. Furthermore, Lee's inability to accurately assess the Union defenses on the second and third day attacks led him into confirmation traps. In

addition to the previously mentioned mistakes in intelligence gathering, the best confirmation trap example is how Longstreet and his Divisional Commander, John Bell Hood, feverishly protested the Day 2 plan after sending scouts out to view the Union left flank. Longstreet's attempts to persuade Lee to flank the Federals via the extreme right, either by the eastern portion of Little Round Top or Big Round Top, were ineffective. Also, Lee failed to heed advice when planning Pickett's charge. Lee's weak analogy was his assessment that since he attacked the Union's right and left previously, the center was weak, although the short, interior lines and ample reserve forces belie that view. At that point, the same options were available to the Confederates: attack, defend, or withdrawal, which existed after the first day of fighting. Nonetheless, Lee remained committed to attacking the Federals and breaking their line. The aforementioned mistakes led to an overall sense of Lee ignoring negative factors and using only information that he needed to justify his course of action, a textbook mistake in critical thinking.

It also appears that certain critical reasoning errors in the form of logical fallacies led to the arguments for his courses of action at Gettysburg to seem better than they were. While there was not a good example of an argument against a person, a false dichotomy was obviously apparent in Lee's decision to stay and fight at Gettysburg: A major defeat or victory (from an offensive attack) seemed to be the only options in Lee's mind as he disregarded the options of remaining to defend Seminary Hill or selecting a defensive position elsewhere. Porter Alexander argued that:

[T]he Northern public would have forced Meade to take the offensive, affording Lee the luxury of selecting a strong defensive position and exploiting a repulse of the enemy with a counter attack. Lee's costly attacks on 2-3 July were thus unnecessary, though only delays and poor execution denied him victory on 2 July.<sup>200</sup> Even after the second day's battle, in my humble judgment, it was possible to have withdrawn from the offensive and taken the defensive, and forced Meade to assault us, and to have given him a crushing defeat.<sup>201</sup>

Lee used a false cause argument to justify Pickett's charge. Since he attacked the Union's right and left previously, the Union *had* to be weak in the center. An appeal to fear was used by Lee to convince Longstreet that the morale of the troops would drop if he did not choose to fight at Gettysburg. The major reason for Lee's success was "[h]is ability to maintain the hope and the fighting spirit of the South...Gradually the South came to fix its faith on the Army of Northern Virginia and on its commander. Elsewhere there was bickering and division; in Virginia there was harmony and united resistance."<sup>202</sup> Finally, it seems that Lee's entire strategic plan was based on a "slippery slope", namely that if he just got the Union into a decisive battle in the North, then the Confederates would win, and the war could end. Logically fallacious arguments can be compelling and the appeal of finally getting the Union in a decisive battle was too much for Lee to pass up. The major implication of these mistakes was Lee's ignorance of the tangible effects of losing Jackson and failure to adjust his leadership style to that. Another implication of his critical thinking was that Lee was oblivious to the improving nature of the Federal Army. Not only were the Commanding Generals improving (and continued to improve), but other combat capabilities of the Union, such as intelligence and cavalry, were more effective. For example, the Union Cavalry for the first time in the war started to hold up against the Confederate Cavalry as evidenced at Brandy Station, in Buford's delay of the Gettysburg heights, and in Custer's checking of Stuart behind the Union Army on July 3rd. All in all, if these errors had not been made, one could speculate that Lee would have never fought under these conditions. Regardless, with his Army in the North and the entire Army of the Potomac in front of him, Lee indeed made the critical thinking mistakes that allowed the lure of battle unable to be resisted.

### **Gettysburg Campaign Analysis**

After analyzing the Gettysburg campaign from a critical thinking perspective, what this

crucial campaign came down to was whether or not it was prudent for Lee to stay and attack on July 2nd after the first day brought him into battle with the entire Federal Army unexpectedly. Longstreet wrote that Lee “was excited and off his balance,” relenting only when “enough blood was shed to appease him.”<sup>203</sup> Others share Longstreet’s sentiments, suggesting “that Lee may have very well been ‘off his balance’ that day, suffering not only from the understandable anxiety that would result from fighting a major battle deep in enemy territory without the comforting intelligence of Stuart’s regular reports, but also from intermittent heart problems.”<sup>204</sup> Along with the high regard that Lee held his troops in, he had a reciprocal disrespect for the Union soldiers, which was observed by Prussian Army Captain Justus Schiebert. He noted that Lee’s attitude was detrimental as his “[e]xcessive disdain for the enemy...caused the simplest plan of a direct upon the position at Gettysburg to prevail and deprived the army of victory.”<sup>205</sup> Many historians, especially Lee’s contemporaries of the Lost Cause movement, argued that Lee’s decision to keep attacking was reasonable.

Longstreet’s proposed flanking movement posed logistical problems, Stuart was unavailable to screen the march, and the whereabouts of much of the Union Army remained unknown; moreover, a “shift to the left and away from the valley that sheltered the Confederate line of communications was virtually out of the question.” A defensive stand would transfer the initiative to Meade, who might circumscribe Southern foraging while calling up Union reinforcements.<sup>206</sup>

Lee did have reasons that supported attack, but the historical record shows that he did not really consider any alternative plans seriously, instead quickly acknowledging and dismissing them. He told William Allan in response to the question of why Gettysburg was fought and lost:

First he did not intend to give general battle in Pennsylvania if he could avoid it – The South was too weak to carry on a *war of invasion*, and his offensive movements against the North were never intended except as part of a defensive system. He did not know the Federal army was at Gettysburg, *could not believe it*, as Stuart had been specially ordered to cover his (Lee’s) movement of the position of the enemy, and he (Stuart) had sent no word. He found himself engaged with the Federal Army therefore, unexpectedly, and had to fight. This being determined, victory would have been won if he could have gotten one

decided simultaneous attack on the whole line. This he tried his utmost to effect for three days, and failed... Thus the Federal troops were enabled to be opposed to each of our corps, or even divisions in succession.<sup>207</sup>

Lee wrote in his official report that “to withdrawal through the mountains with our extensive trains would have been difficult and dangerous.”<sup>208</sup> Also, Lee “[p]ostulated a logistical crisis should he take a defensive position and await Meade to attack - his men had stripped the immediate region clean of supplies, and the enemy might use local troops to frustrate Southern efforts to forage on a large scale.<sup>209</sup> Historian Gary Gallagher maintains that “Lee’s decision to resume the offensive on 2 July was not entirely foolish...because Confederate momentum and morale stood so high...Lee understood that those two factors had brought victory on other fields and expected that they might do so again.”<sup>210</sup> In Lee’s mind, Gettysburg was where he had to fight.

However, for every argument in favor of attack on the second day, they are even stronger ones against them. Military historian John Fuller disapproved of Lee’s tactics on July 2<sup>nd</sup> because it “depended on the earliest possible attack and the most careful timing to effect cooperation; further, Lee’s troops were by no means concentrated, and to make things worse he issued no written orders.”<sup>211</sup> Additionally, there was no real danger of the Union counter-attacking or forcing Lee to make a quick decision, as Meade, new to command, seemed perfectly content with not going on the offensive against Lee. Where Lee failed greatly is that he focused almost solely on his army and what he thought it would do; and not the enemy’s ability to counter him. This blindness was a departure from every battle and campaign he had participated in as the Commander of the Army of Northern Virginia. In light of the strategic and tactical stance agreed on going in, the evidence on July 1st clearly supports that “Lee should have taken a defensive position after the first day’s smashing victory. Political pressure would have forced Meade to attack, which might have yielded a decisive opening for a counterstroke.”<sup>212</sup> As his subordinates

explained why not to stay, Lee gave them little regard, particularly the option to defend at Seminary Ridge. Porter Alexander turned to a quotation from Jackson in emphasizing this point, “We did sometimes fail to drive them out of position, but they always *failed* to drive us.”<sup>213</sup>

Now when it is remembered that we stayed for three days longer on this very ground, two of them days of desperate battle, ending in the discouragement of a bloody repulse and then successfully withdrew all our trains and most of the wounded through the mountains; and finding the Potomac too high to ford, protected them all and foraged successfully for over a week in a very restricted territory along the river... it does not seem improbable that we could have faced Meade safely on the 2nd at Gettysburg without assaulting him in his wonderfully strong position.<sup>214</sup>

Instead of defending, Lee’s “decision to attack on July 2 betrayed confidence that his soldiers could take a strong position from the enemy. It makes no sense to assert that those men would fail to hold a position against attacks from the same foe.”<sup>215</sup> If the Confederates conducted a tactical withdrawal to somewhere with better ground and/or better logistics than Seminary Ridge somewhere between Gettysburg and Washington as Longstreet maintained, the Union Army would have eventually had to follow and attack. At a minimum, the Union would most certainly be in no better position to inflict damage to the Army of Northern Virginia than they were now. A strategic offensive, tactical defensive was still viable.

The likely result of Northern assaults would have been a bloody repulse followed by some type of Confederate counterattack. Readily at hand was the example of Second Manassas, where Jackson had fixed the Federals with assaults on August 28, 1862, gone on the defensive the next day, and set the stage for Longstreet’s smashing counterattack.<sup>216</sup>

The argument concerning the obstacles to a tactical withdrawal can be countered by considering the fact that Lee was able to do so after the battle in a much weaker condition. Moreover, the dilemma Meade was facing should have been considered and exploited by Lee, a stark departure from Lee’s usual adept ability to adopt and react to the Union point of view. President Lincoln and the Republicans would not tolerate the Army of Northern Virginia on their soil for any considerable time - the real pressure was on Meade to get rid of Lee.<sup>217</sup>

Meade's initial orders underscored his responsibility as head of "the covering army of Washington as well as the army of operation against the invading forces of rebels." Should Lee menace either Washington or Baltimore, Stated General in Chief Henry W. Halleck in a telegram to Meade on June 28, "it is expected that you will either anticipate him or arrive with him so as to give him battle." The crucial part of this order is that Meade was *to give* battle rather than simply await the enemy's moves. Lee's comment that a battle had become "in a measure unavoidable" after July 1 applied far more realistically to Meade than himself.<sup>218</sup>

But Lee had made up his mind that an epic battle was at hand, one that could end the war, and that he must retain the initiative and strike his opponent *now*. Going into Pennsylvania he sought decisive victory but also realized that one grand battle to end the war may not come and that the campaign could draw out until political pressure in the North prevailed.<sup>219</sup> But now an opportunity had arisen to possibly bring this bloody war to an end, and Lee took it.

Clearly a number of factors militated against Lee attacking on July 2. Just as clearly, a defensive posture might have opened the way for a decisive counterattack. The prudent decision would have been to shift to the defensive following the tactical victory on July 1. From such a posture, Lee would retain great freedom of action following a likely Union attempt to defeat the Army of Northern Virginia through offensive tactics. The Confederates could have stayed north of the Potomac for a protracted period of time, thus adding logistical and political accomplishment to any military success. Finally, had Lee opted for the tactical defensive after the first day's battle, thousands of men shot down in assaults on July 2-3 would have been in ranks for future service.<sup>220</sup>

By taking this chance, what Lee failed to do was give his army better odds to succeed. At this point, whether Lee realized it or not, he believed that his Army did not need better odds - they could win regardless of the field, and their adversary was waiting on the next ridge.

### **Conclusion**

Robert E. Lee, feeling the pressure he had placed on himself to end the war, and conversely ignoring the pressure on his opponent, decided to make that attack.

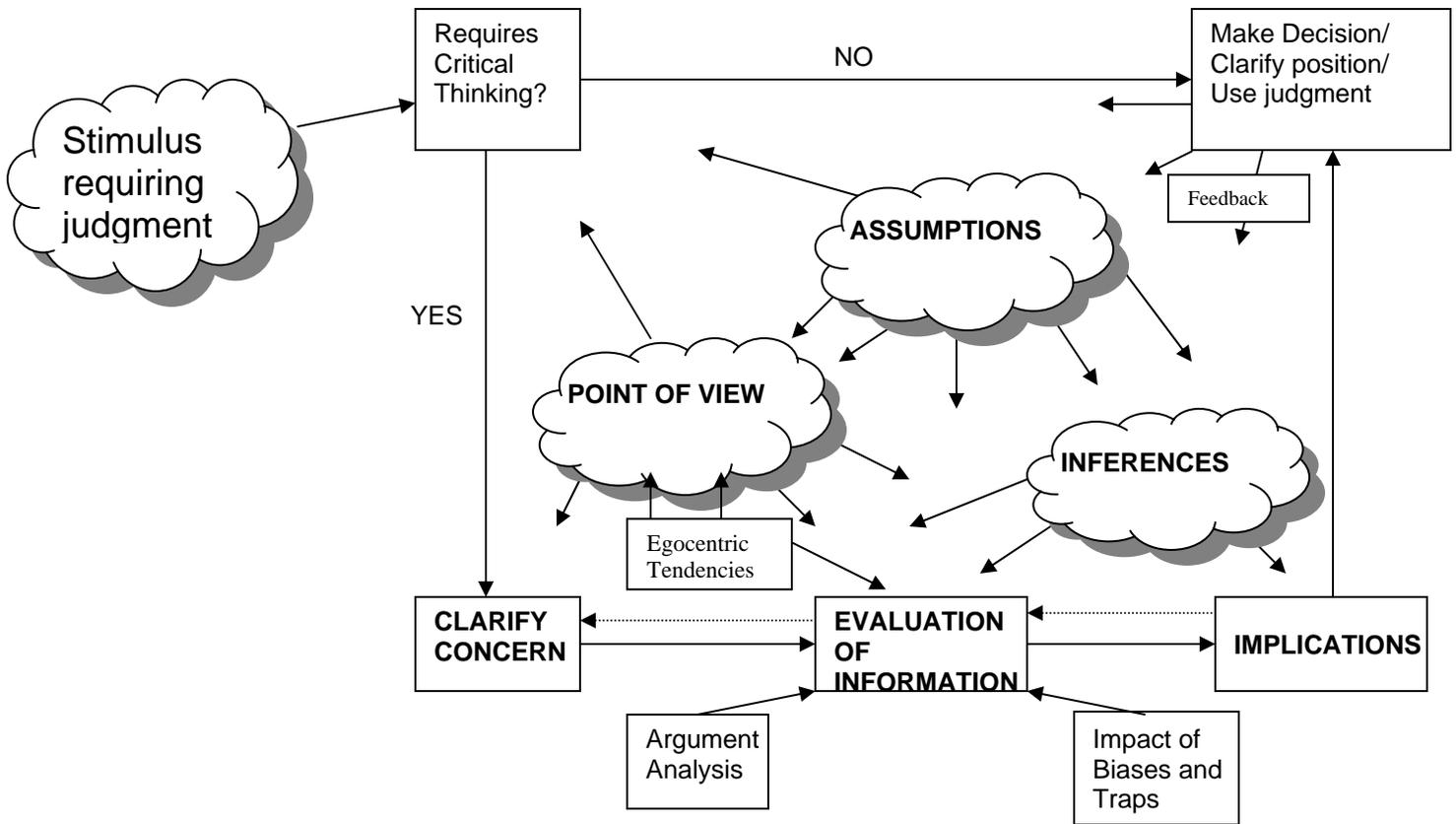
Had his full plan been carried out, it seems probably that Lee would have destroyed the Army of the Potomac in Pennsylvania and no sizable army could have been brought to face in him within weeks, perhaps months. Indeed, after such a shattering triumph, what Union General would have dared faced him. The result, with Washington, Baltimore and

Philadelphia helpless before Lee's ebullient army, probably would have been a quick armistice to end the fighting and return things as much as possible to the status quo anti-bellum, the situation as existed before the war.<sup>221</sup>

When Lee made this decision to stay and attack, the entire critical thinking model used previously for the campaign was altered in place of another one with fatal flaws. The concern clarified changed to a tactical offensive. Lee's aforementioned errors in regard to point of view and evaluation of information, namely the egocentric errors cause by overconfidence that betrayed his military thought process, caused a different assumption, inference, and implication. Originally, the assumption was that the Confederate Army operating in the North would force the Union to pursue, inferring that the ground could be chosen by Lee, with the implication of this advantage being probable military victory on both tactical and strategic levels. When Lee decided to go on the offensive, ignoring the battlefield evidence and the pleas of his second in command, the problem changed unnecessarily. Lee's ultimate decision, made through his internal critical thinking, was negatively influenced by physical and psychological factors and his failure to compensate for those with Longstreet's counsel. Lee's health was breaking down, due to his angina and general wear that a month-long campaign (spent mostly on horseback) would do to a man of his age. Additionally, the burden of commanding his army and thus being at the tip of the spear of Confederate military effort took its toll. During the last year, his army (a large portion of which were men of his home state) was being worn down by a bloody conflict of attrition. Additionally, he got caught up in the excitement and anticipation of a climactic battle, becoming impatient and stubborn. Furthermore, experienced senior leadership in the Army of Northern Virginia was greatly reduced, which was making Lee more frustrated with a prolonged war. These considerations, combined with supreme confidence in his army, led him to jump at the first chance to get a decisive battle in the North and end this conflict once and for all.

These factors, namely poor health, overconfidence, and a partial blindness to the battlefield situation, formed a “perfect storm” of critical thinking errors that caused him to make the wrong call. The false assumption, namely, that the Army of Northern Virginia could not be defeated, inferred that only the full presence of the Union Army was needed as a prerequisite for attack, regardless of circumstances. The unfortunate implication for the Confederates was that this brought them into a battle with an opponent with superior numbers, firepower, and on ground further fortified with quality defenses and an equal desire to fight. This was a combination of disadvantages that even the great Army of Northern Virginia could not overcome – even with the valiant effort they gave at Gettysburg. In closing, despite being one of the great generals in American military history, Robert E. Lee made a crucial error at the worst time with all the chips on the table. He allowed over-reliance on self, overconfidence in his army, and a underestimation of his enemy to alter his usually flawless military judgment. Unfortunately, the decision to continue attacks on the Federal Army on July 2nd, 1863 was one that should not have been made. More simply put, General Lee got caught up in his own success, and this caused his greatest defeat - one that marked the beginning of an end of the War for Independence fought so courageously by the Confederates and General Lee himself.

## Appendix A



**A Critical Thinking Model**

From: Col (Ret) Stephen J. Gerras, *Thinking Critically About Critical Thinking: A Fundamental Guide For Strategic Leaders* (U.S. Army War College, 2006), 6.

## Endnotes

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- <sup>1</sup> Richard Harwell, *Lee: An abridgment in one volume of the four-volume R.E. Lee by Douglas Southall Freeman*, (New York, NY: Charles Scribner's Sons, 1961), 6.
- <sup>2</sup> Gary W. Gallagher, "'If the Enemy is There, We Must Attack Him': R. E. Lee and the Second Day at Gettysburg," in *Lee The Soldier* ed. Gary W. Gallagher (Lincoln, NE: University of Nebraska Press, 1996), 497.
- <sup>3</sup> Col W. Michael Guillot, "Critical Thinking for the Military Professional," *Air & Space Power Journal* (17 June 2004): 3.
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