JACKSON'S VALLEY CAMPAIGN AND THE OPERATIONAL LEVEL OF WAR

by

WALTER P. LANG, JR.,

J. FRANK HENNESSEE,

and WILLIAM E. BUSH, JR.

The US Army has recently acknowledged the existence of a previous gap in its framework of theoretical reference by including the concept of the operational level as a category of military activity distinct from the tactical and strategic levels in its family of manuals. This expansion of the basis on which we view warfare is likely to have a profound effect on American soldiers for a long time and should be studied thoroughly by those responsible for the direction of the nation's armed forces.

Our recognition of the operational level owes much to European military experience and thought. However, the operational art in warfare should not be considered an alien concept. Rather, it should be viewed equally as an American development, which sprang from the same basic source (the study of the wars of Napoleon Bonaparte) as continental military theory and developed here in parallel with European ideas on the subject.[1]

Although latent in recent years, the flowering of operational art in America is vividly portrayed in our military history. The Shenandoah Valley Campaign of 1862 must certainly be among the most remarkable campaigns in this respect. It is certainly not the only good example which can be found in the American Civil War. Grant at Vicksburg and Sherman in Georgia are names which come readily to mind. The Valley Campaign is a superior example, however, because its ratio of forces gives greater clarity to the issues of operational art.[2]

BACKGROUND

At the beginning of November 1861, Thomas Jonathan Jackson was promoted to Major General, Confederate States Army, and made commander of a geographical command encompassing the Shenandoah Valley and much of what is now northern West Virginia: the Valley District. The command had been called into being because Joseph Johnston's move over the Blue Ridge for the first Manassas operation had denuded the valley of trained troops, and the citizens were complaining of the threat of occupation by Northern forces located in the Hagerstown, Maryland, area as well as in trans-Allegheny Virginia.

Upon his arrival Jackson assumed command of what was really a subdivision of the eastern theater of war. The Confederate government at that time faced a number of severe threats in the east. The most serious of these was the huge Federal army being trained and equipped in the vicinity of

Report Documentation Page

Form Approved
OMB No. 0704-0188

Public reporting burden for the collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Washington Headquarters Services, Directorate for Information Operations and Reports, 1215 Jefferson Davis Highway, Suite 1204, Arlington VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to a penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number.

1. REPORT DATE **1985**	2. REPORT TYPE	3. DATES COVERED **00-00-1985 to 00-00-1985**
4. TITLE AND SUBTITLE **Jackson's Valley Campaign and the Operational Level of War**		5a. CONTRACT NUMBER
		5b. GRANT NUMBER
		5c. PROGRAM ELEMENT NUMBER
6. AUTHOR(S)		5d. PROJECT NUMBER
		5e. TASK NUMBER
		5f. WORK UNIT NUMBER
7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES) **U.S. Army War College,ATTN: Parameters ,122 Forbes Avenue ,Carlisle,PA,17013-5238**		8. PERFORMING ORGANIZATION REPORT NUMBER
9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES)		10. SPONSOR/MONITOR'S ACRONYM(S)
		11. SPONSOR/MONITOR'S REPORT NUMBER(S)
12. DISTRIBUTION/AVAILABILITY STATEMENT **Approved for public release; distribution unlimited**		
13. SUPPLEMENTARY NOTES		
14. ABSTRACT		
15. SUBJECT TERMS		

16. SECURITY CLASSIFICATION OF:			17. LIMITATION OF ABSTRACT	18. NUMBER OF PAGES	19a. NAME OF RESPONSIBLE PERSON
a. REPORT **unclassified**	b. ABSTRACT **unclassified**	c. THIS PAGE **unclassified**	**Same as Report (SAR)**	**11**	

Standard Form 298 (Rev. 8-98)
Prescribed by ANSI Std Z39-18

Washington by a soldier of high reputation, Major General George B. McClellan. The future movements of this imposing force could not be predicted, but it clearly posed the largest threat. Additional Union forces were located in western Maryland and might at any time descend upon the northern Shenandoah Valley, a region of great economic and political importance to Virginia. There were also substantial Federal forces disposed in the western portion of Virginia, a region that showed increasing signs of political disloyalty to the Southern cause. Those Federal forces located in what is now West Virginia might with little warning descend upon the valley in the area of Staunton/Harrisonburg or farther north (Strasburg/Winchester), approaching from the direction of the south fork of the Potomac River.

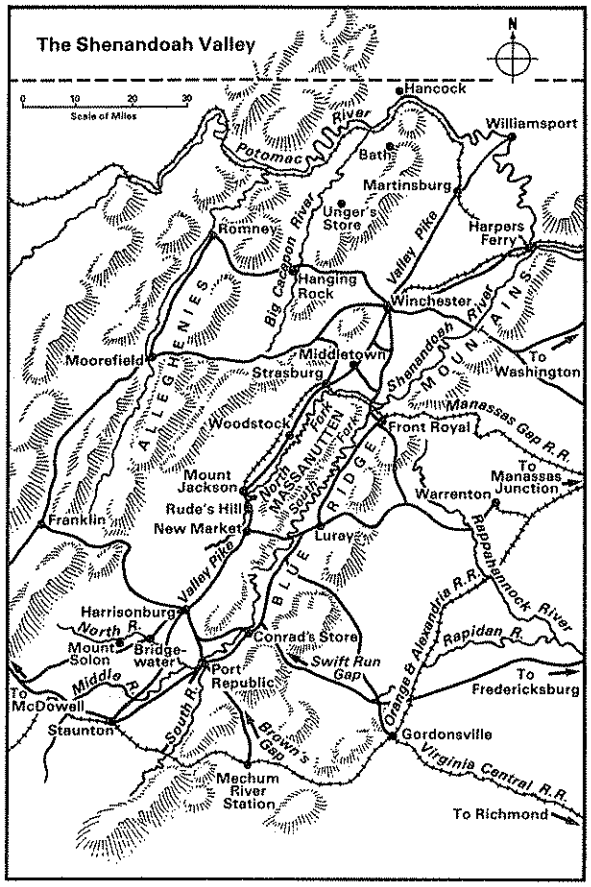
Jackson apparently felt that his duty lay at this point in: (1) protecting his district, its people and economic resources; (2) taking action to forestall a permanent separation of Western Virginia from the rest of the Commonwealth; and (3) causing as much confusion and disarray in the Union high command as he could with the limited forces available to him.

THE ROMNEY EXPEDITION

As Jackson gathered the elements of his Valley Army near Winchester in late December 1861, it was clear to his men that action was imminent. Jackson's major concern was that Federal forces to his north (Major General Banks) along the Potomac River and to his west (Major General Rosecrans) in the Alleghenies would unite in the vicinity of Martinsburg. This union would have amassed such superior strength that Confederate retention of the Shenandoah Valley would have been in jeopardy. To preempt such a potentiality, Stonewall had argued for and gained reinforcement by Brigadier General W. W. Loring's division to permit an attack to seize Romney.

On 1 January 1862, the Valley Army, now approximately 9000 men, departed its camps around Winchester without knowledge of its destination. Speculation ran high that Jackson was launching an offensive to seize Romney, where Union forces roughly equal to Jackson's were encamped. Romney was, in fact, Jackson's objective, but his movements in the succeeding week would breed confusion concerning his real objective, not only among soldiers and politicians of 1862, but also among military historians to this day. General Jackson's Confederate forces forsook the road to Romney and moved north toward Bath (now Berkeley Springs, West Virginia), an obscure Union outpost along the Potomac, where contact was made on 4 January with a Union force of three regiments.

Jackson attempted and failed to outflank the Federals and block their retreat northward, and thereafter he likewise failed to pin them against the Potomac and destroy or capture them. These tactical actions were unsuccessful because of lethargy and tactical ineptitude among Jackson's subordinate



leaders. The Union forces fought an effective rear guard action and crossed the Potomac by boat and fording with minimum casualties.

Jackson was far too prudent to try to force a crossing; he settled for destruction of the important Baltimore and Ohio Railroad bridge over the Big Cacapon River several miles to the west, severing many miles of railroad track and telegraph lines. He also shelled the town of Hancock, Maryland. These actions were not without their rewards, as they effectively cut communications between Banks and Rosecrans and apparently did substantial damage to the supply lines to Union forces in the Alleghenies.

To the surprise of everyone except Jackson, this relatively ill-fated excursion to Bath opened the door to Romney without a fight. As his men marched southward from Bath to occupy an assembly area near Unger's Store, Jackson received word from Major Turner Ashby, his cavalry commander, that the Federals, after a raid against the Confederate outpost at Hanging Rock, had withdrawn from Romney. Jackson moved westward to fill this void as quickly as the difficult terrain and the bitter winter weather permitted, and by 10 January the Valley Army occupied an outpost line (Bath, Romney, Moorefield) which effectively negated the threat to the Shenandoah Valley from the west.

The Romney expedition was Jackson's first as a major independent commander and it reveals some factors that contributed to his later success. The paramount characteristic of Jackson's success was his inclination toward the indirect approach. Given Jackson's mission, most commanders would have focused on Romney as the objective and would have moved with all due urgency to attack the Union forces there. A particularly astute commander might even have pursued his goal by conducting a tactical envelopment of the Northern forces in the vicinity of Romney.

Jackson's budding genius at the operational level devised a plan which effectively maneuvered his foe out of the objective area by striking at another point. The purpose of the strike to Bath remains cloaked in obscurity even today. Most historians seek to explain this strike as either a shakedown operation for his green troops or as a raid on the line of communication of the Union Army in the Alleghenies with little real relationship to his expressed objective of seizing Romney. Few have appreciated his skill in choosing an initial objective which would cause such concern to the Union chain of command that the garrison at Romney would be weakened or abandoned. Thus General Jackson demonstrated at the earliest stage of the Valley Campaign his mastery of the subtleties of operational maneuver, developing plans that would accomplish his aims without risking his precious few troops in a direct attack against superior combat power; he sought a point of enemy weakness which, if attacked, would create such a disruptive effect on the psyche of the enemy command that important gains could be achieved without confronting the enemy head-on.

Among Stonewall's laudable attributes were his inclination toward operations security, his skill in intelligence operations, and his proficiency in using the reconnaissance and security forces which produced much of his intelligence. Throughout the planning and execution of the Romney expedition, Jackson's intelligence preparation of the battlefield gave him an unqualified advantage which he retained throughout the Valley Campaign.

Another Jacksonian characteristic in evidence here was his willingness to take

Colonel Walter P. Lang, Jr., is the Defense Intelligence Officer for the Middle East and South Asia in the Defense Intelligence Agency. He is a graduate of the Virginia Military Institute, holds an M.A. from the University of Utah, and is a 1985 graduate of the US Army War College. He has served in a variety of infantry, special forces, and intelligence assignments in Vietnam, Germany, the Canal Zone, Turkey, and the United States. Prior to attending the War College, he was the US Defense and Army Attaché in the Kingdom of Saudi Arabia; he also formerly served as USDAO in North Yemen.

great, yet prudent, risks to achieve success. His move to Bath opened enemy approaches to Winchester, Jackson's headquarters and support base, from both north and west. If he had taken counsel of his fears based on enemy capabilities, this success would not have been possible.

On the opposite side of the ledger, Jackson displayed characteristics which tended to constrain his successes. First was his uneven tactical ability. His failure to coordinate and control the operation effectively at the tactical level cost him even greater rewards at Bath. It is perhaps more important for the military professional who aspires to senior command to note that tactical success in every battle is neither a necessary nor sufficient condition for success at the operational level. Although the Valley Army suffered through a tactical fiasco during this phase of the campaign, success at the operational level was gained.

Second, Jackson's obsession with secrecy, which was carried to such an extreme that his subordinate commanders often did not know the tactical objective or his concept of the operation, was evinced in this expedition. Although he did not pay a high price for this proclivity in January 1862, he was later to have his potential successes limited considerably by lack of flexibility and initiative among subordinates. This can be attributed directly to Jackson's overly taciturn behavior concerning his campaign and battle plans.

WINCHESTER TO RUDE'S HILL TO KERNSTOWN

The spring of 1862 found Jackson's Valley Army at a strength of less than 5000 men. His mission was to hold as many Union forces as possible in the valley. When Union forces under Banks moved into the northern valley in strength in March, Jackson was forced to withdraw from Winchester to a more defensible position in the vicinity of Rude's Hill (about 45 miles south of Winchester), where an S-turn in the Shenandoah River is overlooked by a relatively low height which nevertheless dominates the river valley to the north. Banks failed to press the Valley Army, and based upon a perception of Jackson's weakness and the need for additional Union forces in eastern Virginia, Banks moved the majority of his force east of the Blue Ridge. Jackson reacted immediately. Stonewall pushed his men northward in a forced march, attempting to gain contact with the Union forces remaining in the valley under Brigadier General James Shields. Although Shields' forces still outnumbered Jackson's two to one, Jackson attacked without delay. On 23 March a bloody battle ensued at Kernstown, just south of Winchester, in which the Valley Army was soundly defeated.

Again, confused, piecemeal commitment of forces to a battle and a general lack of good command and control cost Jackson dearly. Nevertheless his boldness, daring, and timing brought great success without tactical victory, for the battle at Kernstown caused McClellan to direct the return of significant Union forces (approximately 25,000) under Banks to the Shenandoah. Major General Irvin McDowell's Union corps was held near Washington rather than proceeding south toward Richmond. Additionally, Major General Blanker's division was dispatched west to the Alleghenies to reinforce Major General John C. Fremont, who had replaced Rosecrans there. Coming at a time when the North had just embarked on a grand maneuver to seize Richmond through an amphibious envelopment on the Peninsula coupled with a supporting attack due south from Washington, the distraction in the

Colonel J. Frank Hennessee is assigned to the Army Studies Group in the Office of the Army Chief of Staff. He is a graduate of the US Military Academy, holds an M.S. from Georgia Tech, and is a 1985 graduate of the US Army War College. Colonel Hennessee has commanded infantry companies in the United States and in Vietnam and served as operations officer for battalions in Vietnam and Korea. He has also served on the Army Staff in ODCS-OPS and in Legislative Liaison in the Office of the Secretary of the Army. From 1981 to 1984 he commanded a battalion in the Berlin Brigade.

valley was extremely costly in that it caused a diversion of forces which the Union could ill-afford.

KERNSTOWN TO SWIFT RUN GAP

After the tactical defeat at Kernstown, Jackson withdrew south to preserve his force. Initially, he moved to occupy again the position along Rude's Hill. He was pushed out of this position by mid-April. At this point, although his Valley Army had grown to about 6000, he was badly outnumbered and could not afford a major battle. He withdrew again; however, in so doing he discarded two obvious alternatives. With the absolute necessity of protecting his support base—the important city of Staunton with its strategic rail and road junctions—the temptation must have been powerful to establish a strong defensive position on the most defensible terrain north of Staunton in the Shenandoah Valley. Alternatively, he could have recalled Brigadier General Edward Johnson who was deployed with a brigade-sized force west of Staunton protecting that city from Fremont's forces in the Alleghenies. With the scarcity of forces under his command and the growing Union strength, concentrating his forces might have seemed logical or even necessary, but Jackson again gave notice that he was not an ordinary general.

By this time he had made an assessment of his opposition which suggested another alternative—one which required risk-taking, but which offered the attraction of preserving his freedom of action. Retaining the opportunity for initiative was extremely important to Jackson. He kept Johnson west of Staunton in the Allegheny passes and moved the Valley Army around the south end of the Massanutten Mountains to a position in Swift Run Gap in the Blue Ridge. To those not sensitive to the intricacies of an operational-level mind at work, this must have seemed like a foolish plan, for it removed all Confederate forces from Banks' direct path to the most important Union terrain objective in the southern Shenandoah—Staunton!

Jackson's assessment of his enemy was correct. Banks was too timid to seize the opportunity to move into Staunton unmolested, for he feared exposing his flank to Jackson who sat in a classic flanking position. From that position Stonewall had his cake and was eating it too. He was effectively protecting the approach to Staunton without doing battle against a superior force; he gained time for recuperation and refitting of his army; and he put himself in a position from which he could move quickly east to support Confederate forces around Richmond, if necessary, or link up with Major General Richard Ewell who was located just east of the Blue Ridge near Gordonsville. Again, Jackson had displayed the operational acumen to accomplish by maneuver what he could not have obtained by direct action.

BROWN'S GAP TO McDOWELL TO FRANKLIN

While Jackson had maneuvered Banks to a stalemate, the situation elsewhere looked grim for the Confederacy by late April. McClellan was firmly established on the Peninsula with over 100,000 men threatening Richmond from the east. McDowell's corps of about 30,000 was just north of the Rappahannock near Fredericksburg in good position to put pressure on Richmond from the north. Fremont's strength in the Alleghenies had been increased by about 7000 with the addition of Blenker's division, and an advance force under Brigadier General R. H. Milroy was putting pressure on Staunton from the west—so much so that Johnson had

Colonel William E. Bush, Jr., is Director of Personnel and Community Activities, Fort Gordon, Georgia. He is a graduate of Middle Tennessee State University, holds an M.A. from Wayne State University, and is a 1985 graduate of the US Army War College. He has held various command and staff assignments in Vietnam, Germany, and the United States. From 1980 to 1983 he was Adjutant General of the 24th Infantry Division, and just before attending the War College he was Readiness Group Commander, Headquarters WESTCOM.

withdrawn to a position only a few miles west of Staunton.

General Robert E. Lee, who had assumed control of all operations in Virginia in mid-April, encouraged Jackson to attack Banks, believing the pressure on Fredericksburg (and ultimately on Richmond) would be greatly relieved if Jackson could deal a heavy blow to Banks in the valley. If nothing else were gained, such an action would preclude the reinforcement of McDowell by forces from the valley.

Again, rather than a direct attack on Banks, Jackson had a better idea. His aim was a quick strike against Fremont's Allegheny forces which, if successful, would facilitate an attack on Banks' flank from the west, an ambitious and daring plan. Jackson first put great effort into a deception operation designed to dupe the Union forces into believing that the Valley Army was headed east to assist in the defense of Richmond. Upon receiving control of Ewell's division for the operation, Jackson moved him to occupy the flanking position in Swift Run Gap. Jackson then moved out of the gap in full view of Banks' scouts and marched south toward Port Republic, then turned east through Brown's Gap in the Blue Ridge, thus leaving watchful Union eyes to draw the obvious conclusion. Once out of range of Federal observation and over the crest of the Blue Ridge, Stonewall turned his columns south to Meechum's Station on the Staunton railroad line and entrained heading west. Following a quick rail move to Staunton where he linked up with Johnson, Jackson moved his combined forces west into the Alleghenies. It is important to note that by so doing he assumed great risk, for Banks could have blocked Ewell with a small force and moved south to secure Staunton, thus trapping Jackson in the mountains between two forces of greatly superior numbers.

Jackson's quick strike against Fremont's army materialized at McDowell, Virginia, on 8 May. Before Jackson could concentrate his forces, the Federals under Brigadier Generals Milroy and Schenck launched a highly successful spoiling attack which dealt heavy losses to Jackson's lead regiments under Johnson. Under cover of darkness, the Union troops withdrew north toward Franklin without Jackson's knowledge. Jackson pressed the pursuit the next day, but effective rear guard actions, which included setting forest fires, slowed the Confederate advance and permitted the Federals to reestablish a strong position at Franklin.

Again, Jackson did not let a tactical defeat intimidate him. He had planned to move east from Franklin, after having defeated Fremont, to strike Banks' flank. But he realized the futility and danger of a major battle with a strong force in a fortified position far from his main objective. So Jackson modified his original plan and withdrew to McDowell, then east back into the Shenandoah, positioning himself for a heavy blow against Banks.

Upon reentering the Shenandoah on 17 May, Jackson had set the stage for a decisive blow against Banks with an operational maneuver of considerable risk and complexity. Although he had suffered a tactical defeat (casualties at McDowell were two to one in favor of the North) in the only major engagement in this phase of the campaign, Jackson had raised great concern in the Union command structure. His deception operation had caused a complete misreading of his intentions, so his appearance in the Alleghenies created Northern fears far beyond any logical reasoning. Jackson was beginning to prey on the psyche of the Union chain of command all the way back to Washington. The result was a hesitation in the planned Union drive on Richmond. Jackson had already begun to achieve his operational objective. He was again demonstrating the ability to look far beyond the tactical.

Additionally, his push into the Alleghenies neutralized Fremont's 20,000-man force, reducing the threat to the upper valley and to Staunton in particular, and producing favorable conditions for the deep attack. Through his actions, Stonewall had profoundly disturbed the Union high command, disrupted ongoing operations in eastern

Virginia from a great distance, and in a very real sense was inside the enemy command decision cycle.

MOUNT SOLON TO HARPERS FERRY (THE DEEP ATTACK)

Even though Jackson's action had been highly effective, the situation on 18 May looked increasingly dark for the Confederacy. McClellan, with over 100,000 men, was scarcely 30 miles down the Peninsula from Richmond. McDowell was poised at Fredericksburg, restrained by the disruptions created by Jackson, but fully capable of a rapid attack on Richmond. Banks had withdrawn to Strasburg, and Shields' division from his command was close to joining McDowell's force.

Lee must have been sorely tempted to call Jackson eastward to strengthen the Richmond defenses, but both Lee and Jackson showed their understanding of the operational art by rejecting the obvious "necessity" for increasing Confederate strength in eastern Virginia in favor of a daring maneuver—a deep attack by the Valley Army.

Jackson had already used deception and speed to mass unexpectedly against Fremont. Now he pushed his light infantry to its limits as he marched north along the Shenandoah toward Banks' position at Strasburg. With his cavalry screening to his front, Jackson created the impression of a headlong thrust at Bank's position while he turned his columns east through the New Market Gap in the Massanutten to link up with Ewell's division in the Luray Valley, a terrain compartment which runs parallel to the Shenandoah Valley. Concentrating his forces on the move, Stonewall continued north and fell upon the unsuspecting Union garrison at Front Royal. The small Federal force of about 1000 was routed, and Jackson seized the important bridges across the Shenandoah River complex.

Jackson had deceived Banks through the effective use of cavalry while using the masking effect of terrain compartments to mass against a point of enemy weakness. He was acting faster than Banks could react. The way into the Federal rear lay open.

In fact, this success created an interesting dilemma for Jackson. Clearly, the opportunity existed for a quick march to Winchester, which lay astride Banks' line of communication. Securing Winchester before Banks could react would have constituted a classic turning movement which would have forced Banks out of his strong defensive position at Strasburg. In all probability Banks would have been forced to attack Jackson on less than equal terms since Stonewall would have had the advantage of choosing good defensive terrain along Banks' communication line.

Jackson was keenly aware of the multi-leveled nature of the operational art. Even though his mission to deal Banks a strong blow would have been best served by a rapid move on Winchester, there existed the possibility that if the Valley Army executed this maneuver, Banks could move due east through Front Royal and the Manassas Gap to effect a linkup with McDowell. Even though this possibility seemed somewhat remote, its consequences were so dire that Jackson sacrificed his opportunity to fall upon Banks' line of communication. Instead he deployed his advance elements between Cedarville and Ninevah until he confirmed that Banks was withdrawing north.

Upon receiving this information from his cavalry, Jackson leaped into action, moving his infantry west at the double-time to intersect the Valley Pike at Middletown. From there he moved quickly into the exploitation, falling upon Banks' combat service support tail as it moved down the Valley Pike. He pressed the exploitation ruthlessly and relentlessly northward toward the Potomac, frustrated only by the ineptitude of his cavalry. In spite of this ineptitude, however, the results were spectacular. In retreating over 50 miles in two days (24 and 25 May), Banks' force lost 2300 men captured and enormous amounts of equipment and supplies.

As both Lee and Jackson had known, the real success of the operation could not be weighed in the battle statistics from the

Shenandoah Valley. As Jackson pursued Banks and moved to occupy Harpers Ferry, the consternation in Washington grew to great proportion. Lincoln dispatched orders to McDowell to call off his attack on Richmond, planned for 25 May, and move to the Shenandoah to cut off Jackson. This respite relieved the Confederate defenders of Richmond from a precarious situation. Although the siege of Richmond was not abandoned, not for another two years would the existence of the Confederacy be so much in doubt.

As Jackson closed on Harpers Ferry in late May, his deep attack had been successful almost beyond the bounds of logic. It had achieved results completely out of proportion to the physical correlation of forces. The ultimate objective of the operational deep attack had been the enemy high command psyche, not enemy casualties or key terrain. The choice of a terrain objective (in this case Harpers Ferry) was important only to the extent that its attainment would cause psychological panic in Washington. And that it did, for Harpers Ferry was well known not only as a strategic junction of transportation arteries and for its importance to the lines of communication to the west, but also for its proximity to unprotected Union cities. The illogical fears generated by the deep attack secured results in geometric proportion to the depth of the penetration (50 miles from where Jackson had initially penetrated Banks' position a few days earlier and over 120 miles north of the Union position of three weeks prior).

Jackson's successes were not accidental. From the complexities of the mind of a master of the operational art had emerged a spectacular operation. The insight to see the potential for success on this scale was born of many years of study and analysis of military history. Stonewall had preserved his freedom of action and seized the initiative. He developed sound, timely intelligence and demonstrated the willingness to act on it. He had the audacity to plan a deep attack and the boldness and skill to ensure its proper execution. He moved with great speed, massing unexpectedly to fall upon the enemy with violence at his weakest point. He achieved superiority and then exploited relentlessly. He showed flexibility in adjusting to enemy reactions once he had penetrated the enemy's lines while never losing sight of his real objective. He had clearly gotten "inside the decision cycle" of the Union high command.

SOUTH TO PORT REPUBLIC

Lincoln had not only ordered McDowell to cut off the Valley Army by moving west, he had dispatched similar instructions to Fremont to move east out of the Alleghenies into the valley. His plan was to close the jaws of a trap behind Jackson and destroy him before the Valley Army could escape south. Stonewall had not let the euphoria of success blind his operational foresight. He carefully positioned reconnaissance elements to report the approach of forces which might threaten his ability to withdraw. Jackson had maximized the results he could achieve in the deep attack. Now he showed the good judgment to recognize that preservation of the force had become the paramount mission. Therefore, on 30 May when reports indicated the movement of Union forces to cut him off, Stonewall moved with characteristic swiftness, sending an advance guard to delay Shields (from McDowell's force) and Fremont in their move to close the trap. While his cavalry fought these delaying actions, Stonewall moved his main body over 50 miles in two days, squeezing through the jaws of the planned trap just before they could be closed. Jackson then skillfully used his cavalry both to cover his rear and to destroy bridges and emplace obstacles at key points. Of particular note is his destruction of the bridges over the South Fork of the Shenandoah River in the Luray Valley. By so doing, he denied Shields the opportunity to move quickly up the Luray Valley and preclude a move eastward by the Valley Army to reinforce the defense of Richmond, if that should become necessary.

Clearly Jackson now needed to rest his weary troops. The deep attack had drained his men, not only physically, but emotionally

as well. Jackson therefore needed to occupy terrain which offered great advantages to the defender (since he was now outnumbered by at least four to one in the area) while still protecting his support base at Staunton and positioning the Valley Army for rapid movement east of the Blue Ridge. Jackson moved up the Shenandoah Valley around the Massanutten, and into the Port Republic area on 5 June, from which an impregnable position in Brown's Gap could have been established.

At this point, with Union columns approaching from two directions (around the Massanutten from the northwest and down the east bank of the South Fork from the northeast), Jackson chose to attack rather than defend. His scheme was easy to understand but would be more difficult to execute than he realized. His plan was to use his interior position to mass rapidly against each of the Union forces in succession while his cavalry screened to the northwest. Jackson intended to mass his force against Shields east of the South Fork, defeat him quickly, and then turn against Fremont to the northwest.

The result was a complete tactical failure. The concept required moving the majority of his forces across two rivers to strike Shields at 0800, then recrossing the two rivers to defeat Fremont before nightfall. Chaos ensued! The buildup of forces east of the South Fork went slowly, and units were committed piecemeal against Shields. By day's end, Jackson had barely managed a draw against Shields and had lost over 800 men. The second phase of the operation had, of course, been abandoned, and Jackson moved into Brown's Gap as night fell on 9 June.

Thus the Valley Campaign ended on a sour note. Although morale and confidence had been soaring as a result of the successful deep attack, Jackson had failed to realize fully its physical and emotional toll on his men. His initial inclination to occupy a strong defensive position had been the right one. In fact, Jackson had not recognized or admitted to himself the profound physical, emotional, and mental effects of the deep attack on him personally. His plan to attack was ill-fated from its inception. Stonewall either failed to understand the tactical complexities of moving his force through the bottlenecks of a bridge and a hastily constructed man-made ford twice in a single day, concentrating, attacking, breaking contact, recrossing, and reconcentrating in the face of the enemy; or his judgment was severely impaired by the events of the preceding weeks.

Either possibility suggests a learning point for the aspiring practitioner of the operational art. In the first case the operational-level commander must recognize the fundamental differences between the operational and tactical levels. Given greater dimensions of space and time (i.e. at the operational level) Jackson's plan was potentially brilliant, certainly executable with at least a good probability of success. The considerations at the tactical level are radically different. Maneuvering forces in the face of the enemy necessitates simple, direct plans (not complex schemes of maneuver), and a detailed understanding of the time required to perform a multitude of simple tasks while under direct observation and fire.

Ironically, most contemporary US Army commanders are much better prepared to conceive operations, fight, and win at the tactical level than at the operational level. Jackson was apparently just the opposite.

The other obvious lesson from Jackson's example is that senior commanders must develop an understanding of the limits of human endurance. By the time of Port Republic, the men who had rested in Swift Run Gap six weeks before had marched almost 400 miles and fought many engagements. Senior commanders must also recognize the increased emotional and mental demands of operating deep inside enemy territory. Seizing the initiative and attacking are necessary to ultimate success, but the astute commander must recognize when *not* to attack.

Another lesson to be learned from this example is the importance of reconnaissance and security operations inside territory controlled by the enemy. Stonewall's attention to this aspect of the deep attack and

good judgment in recognizing when to redeploy his forces to friendly lines were prerequisite to preservation of the force. Any commander who hopes to fight outnumbered and win should learn this lesson well.

THE RELEVANCE OF JACKSON'S EXAMPLE

An analysis of Jackson's Valley Campaign of 1862 seems to reveal that the fundamentals of Jackson's success are as relevant today for the senior leader as they were in the 19th century.

Then as now:

- The essential goal of the deep battle is most likely to be some form of interdiction, whether it be of arriving reserve or second echelon combat forces, support, the enemy commander's intentions, or his train of thought.
- Operational maneuver requires a skillful use of deception and operations security in order to allow smaller forces to concentrate against local enemy weakness with relative security.
- Highly reliable and timely intelligence is essential to the deep battle.
- Decisive deep maneuver requires the willingness to commit a relatively large percentage of the available force to maneuver into the enemy rear and the assumption of the attendant risk.
- The commander involved in deep maneuver must be prepared to bypass some enemy forces.
- At the operational level the astute commander can often accomplish through the indirect approach that which he does not have the means to achieve through direct action.

In any war with our principal adversary, the operational art would be critical. In other theaters which would not be likely to receive the bulk of resources, we, like Jackson, will have to rely on our artistry to win.

NOTES

1. A question that logically suggests itself is why the idea of the operational level of war should have become more typical of the armies of the continent of Europe than of the US Army. The institutions of the United States and Prussian armies both seem to have derived their theoretical texts for the study of warfare from the same basic source, the wars of Napoleon Bonaparte.

In the case of the Prussian army, firsthand experience of defeat by Bonaparte followed by the reform and restructuring of their forces, which led to victory over Napoleon, provided a powerful incentive for the study of his methods. The Prussians did this principally within the context of their War Academy, the creation of which had been one of the post-Jena actions by reformers such as Clausewitz. The Prussians focused on that part of the example of Napoleon which showed that by highly skilled large-scale maneuver of forces it was possible to deal deadly blows to numerically superior enemies.

Over a protracted period of time the Prussians came to the view that it was the particular function of the army senior leadership to be prepared to perform what had been Napoleon's purely military role above the tactical level. With minds thus focused, the Prussian general staff sought to develop a high degree of skill in the conduct of large operations. Over the decades they sought to do this through the media of intensive theoretical study of past experience, operational testing of plans through war-gaming, and the widespread use of staff rides at the campaign level. With this focus they acquired and retained a great dexterity in this art, the operational art. From the example of the Prussian and later German armies, all European development of operational art, including that of the Soviets, is derived.

In the case of the American experience, the importation of Napoleonic ideas came about largely through the vehicle of the writings of Jomini as interpreted first by Dennis H. Mahan and later by Henry W. Halleck. Mahan's teaching at West Point, and indeed the whole corpus of his writing, tended to stress Jomini's division of the study of warfare into: (1) Strategy; (2) Engineering; (3) Logistics; and (4) Tactics. Jomini also mentioned the existence of something he called "Grand Tactics" by which he apparently meant the maneuver of large forces to accomplish large ends. This would seem to be a different formulation and expression of the same basic concept which led to the idea of the operational level in the collective mind of the Prussian general staff. This Jominian vision of warfare was transmitted directly to the minds of the future chieftains of the US Army in the section rooms of West Point in the 1840s and 1850s.

That Jackson had absorbed some of this at West Point may be inferred from a letter he wrote to his sister from Jalapa, Mexico, during the Mexican War. He critiqued the conduct of operations by Generals Scott and Taylor:

> General Scott is by far the most talented and scientific, and, his comprehensive mind embraces not only different objects and ends but their several and combined bearings with regard to the ultimate object . . . . General Taylor is a plain, honest, sound minded, straight forward & undesiring man (the noblest work of God), if you knew him you would certainly like him. But he wants comprehensive view of a means to an end.

Jackson explained to his sister that victories should be obtained "without so reducing our army as to be unable to follow up the successes." He told her that Taylor did not meet this requirement well in Northern Mexico where he was "deceaved (sic) at Monterey he thought that their (sic) would be no fighting their (sic) and consequently did not prepare himself to take Ampudia's army prisoners or else make it a total reck (sic) with the loss of its arms and the saving of his own array." He thought Taylor did not follow up at Buena Vista as he should

have done. "In fine, General Taylor can not look beyond the gaining of a battle." (Lenoir Chambers, *Stonewall Jackson, The Legend and the Man*.)

2. This paper does not seek to make a historical contribution, per se. The Valley Campaign cannot be satisfactorily analyzed by using the existing correspondence and record. This is due in large measure to Jackson's extreme concern with operations security. He seldom discussed his aims, objectives, and methods even with his closest advisors, and he edited from after-action reports anything that he believed might have the slightest usefulness to the enemy (Jedediah Hotchkiss, *Make Me A Map of the Valley*). Therefore, the authors have drawn conclusions based not only upon the available historical record, but upon their collective military experience and judgment after a careful, on-site inspection of the terrain.