

# The Effect of the Civil-Military Relationship on the Philippine-American War

A Monograph

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## **Abstract**

The Effect of the Civil-Military Relationship on the Philippine-American War, by MAJ Michal B. Long, US Army, 52 pages.

The prolonged Philippine-American War was unpopular with the American people, as well as with President McKinley's opposition—the Democratic Party in Congress. Even while facing these challenges, the President remained clear on his political aims and the highest levels of military and civilian leadership worked in concert to develop a sound strategy that was properly resourced to fight both the conventional and counterinsurgency campaigns. The ground commanders were then able to execute the tactical actions necessary to achieve the political aims. This relationship between America's civilian and military leaders proved to be the key to victory in a contentious and dynamic war fraught with insurgency which is, historically, incredibly difficult to win.

The Philippine-American War appears to be an enigma, fraught with political and domestic controversy. It challenged American ideals and values on imperialism, self-determination, torture, and liberty. The very nature of the war changed from conventional to unconventional. Despite these vast problems within the conflict, the United States was victorious over the Army of Liberation. The US was victorious for many reasons, but one often overlooked is the civil military relationship. That relationship, based on a professional military and active civilian leadership, was the foundation from which the conventional and unconventional campaigns were successfully prosecuted to help America win its last counterinsurgency.

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## Introduction

Policy, then, will permeate all military operations, and, in so far as their violent nature will admit, it will have a continuous influence on them.

-Carl von Clausewitz, *On War*, Book 1, Chapter 1

In the early spring of 1901, an American-led team of less than one hundred men sailed a clandestine, eight-day voyage from Manila Bay around Luzon to Casiguran Sound. This team, composed of eighty-five Philippine Scouts playing the role of reinforcements to the insurgent-king Emilio Aguinaldo y Famy and captors of the five American officers with them, slipped ashore one hundred miles south of their destination. They trekked north through thick mangrove swamps, steamy jungles, and steep cliffs. Ten days later, on March 23, 1901, these men pulled off one of the most successful ruses in American military history, capturing the former Filipino President and current insurgent-chief, *Generalissimo* Aguinaldo. Although it would take over a year for Theodore Roosevelt to sign the presidential proclamation officially ending the war in the Philippines, the capture of Aguinaldo by Brigadier General Fredrick Funston was the tipping point for the United States' last successful counterinsurgency.<sup>1</sup> (See Figure 1: BG Funston's Route to Capture Aguinaldo)

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<sup>1</sup> Fredrick Funston, *Memoirs of Two Wars: Cuban and Philippine Experiences* (London: Constable and Co., 1912), 384-423; Gregg Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream* (New York: New American Library, 2012), 215-218; and Brian McAllister Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*. (Chapel Hill: The University of North Carolina Press. 1989), 75-77.



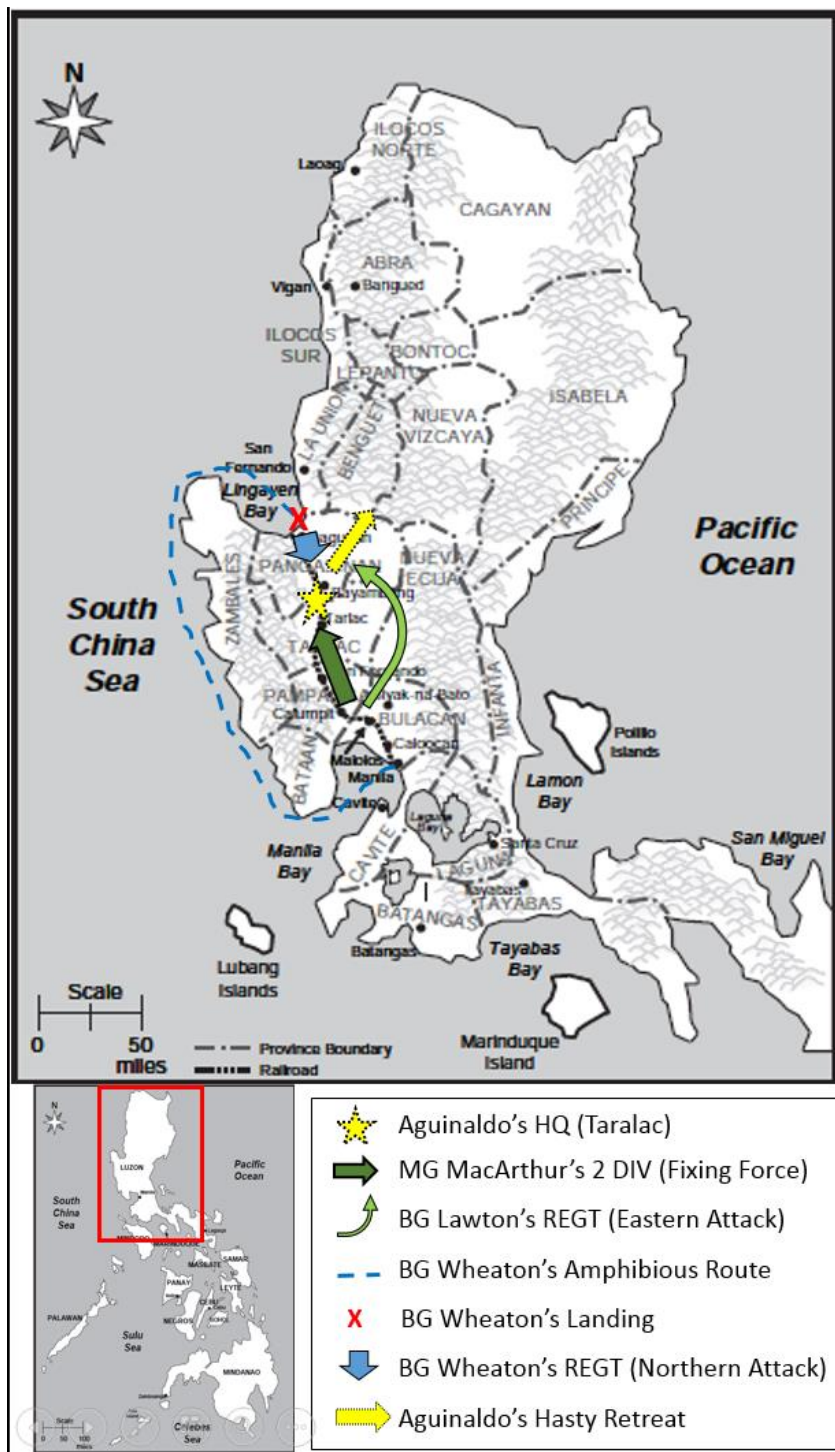


Figure 1: BG Funston's Route to Capture Aguinaldo

Source: Map has been adapted by the author from the original, Robert D. Ramsey, *Savage Wars of Peace: Case Studies of Pacification in the Philippines, 1900-1902* (Fort Leavenworth: Combat Studies Institute Press, 2007), 15.

Two American presidents and three military commanders oversaw this four-year war that took 4,200 American lives and cost four-hundred million dollars.<sup>2</sup> The prolonged conflict was unpopular with the American people, as well as the presidents' opposition—the Democratic Party in Congress. Even while facing these challenges, both US Presidents remained clear on their political aims and the highest levels of military and civilian leadership worked in concert to develop a sound strategy and properly resource both the conventional and counterinsurgency campaigns. The ground commanders were then able to execute the tactical actions necessary to achieve the political aim. This relationship between America's civilian and military leaders proved to be the key to victory in a contentious and dynamic war fraught with insurgency which are, historically, incredibly difficult to win.<sup>3</sup>

### **Literature Review**

The research for this monograph led to myriad valuable resources on the Philippine War. However, most writing on the war focused on the tactical side of combat. The acclaimed military historian, Dr. Brian McAllister Linn, created the most notable works. His award-winning books, *The Philippine War 1899-1902* and *The US Army and Counterinsurgency in the Philippine War, 1899-1902*, have become the definitive accounts of the military's tactical actions during the conflict.<sup>4</sup> Another notable historian, Andrew J. Birtle, has written extensively about the United States' counterinsurgency campaigns throughout history. In his recent book, *U.S. Army*

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<sup>2</sup> The value of \$400 million in 1902 would be worth \$11.2 trillion in today's currency. The Inflation Calculator, accessed on December 19, 2015, <http://www.westegg.com/inflation/infl.cgi>.

<sup>3</sup> Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 320-324; and Ramsey, *Savage Wars of Peace: Case Studies of Pacification in the Philippines, 1900-1902*, 203.

<sup>4</sup> Brian McAllister Linn, *The Philippine War, 1899-1902* (Lawrence: University Press of Kansas, 2000); and Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*.

*Counterinsurgency and Contingency Operations Doctrine 1860-1941*, he explains the complexity of Aguinaldo's effective insurgency comprised of a political arm (a shadow government) and a military arm (armed guerrillas) that worked in concert trying to achieve the limited political aim of ending the US occupation. Birtle goes on to explain how the well-resourced US military was able to compel the militant insurgents by force with a policy of "chastisement" while simultaneously persuading the population to join the American cause with a policy of "attraction."<sup>5</sup> Though senior military officials developed these complimentary plans, it was the flexible and tenacious junior officers and sergeants who executed them in the field to such success.

There is also a large amount of valuable original source material. The tactical commander, Brigadier General 'Fighting' Fred Funston, wrote an illuminating, but biased, memoir titled *Memoirs of Two Wars: Cuban and Philippine Experiences*. General Funston's account mostly focuses on the tactical aspect of fighting the insurgency, but he does briefly give opinions of the strategic plans and actions during his time in the Philippines.<sup>6</sup> Additionally, President Theodore Roosevelt published an extensive autobiography, which regrettably gave minimal insight into the unpopular war. Unfortunately, the other acting and future US Presidents who were key actors in the war, William Howard Taft and William S. McKinley, never wrote autobiographies and most of the biographies from the early Twentieth Century do not go into great depth about a war that many Americans wanted to forget. Most of their original source material is from letters, speeches, proclamations, and in the case of Taft, his wife's

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<sup>5</sup> The policies of "Attraction" and "Chastisement" are the basis of Dr. Birtle's understanding of the success of the United States in the Philippine War, Andrew J. Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine, 1860-1941* (Washington, DC: Center of Military History, 2004), 135-136.

<sup>6</sup> Funston, *Memoirs of Two Wars: Cuban and Philippine Experiences*.

autobiography. Additionally, the newspapers of the time have offered valuable accounts from reporters embedded with military units in combat.

There are few recent writings about the civil-military relationship of the war. The historian, Dr. Rowland T. Berthoff, wrote an article for the 1953 publication of *World Politics Journal* titled “*Taft and MacArthur, 1900-1901: A Study in Civil-Military Relations.*”<sup>7</sup> However, this well-researched work only focused on the relationship between two of the major actors and only during fifteen months of the four-year campaign. His work does not explain the complex and convoluted beginning of the conflict nor its successful conclusion.

Currently, the research for this monograph has been unable to identify a single comprehensive source that focused specifically on the civil-military relations throughout the entire span of the conflict, or on how the relationship contributed to the prosecution of the war. Despite this dearth of specific information, this monograph will attempt to explain the civil-military relationship by combining the actions and statements of the civilian leadership with the tactics developed and used by the military leadership through the prosecution of the entire war. This monograph will attempt to explain the ability of the civilian and military leadership to integrate the ends, ways, and means to prosecute this conflict, despite a myriad of obstacles.<sup>8</sup>

In addition to the works about the conflict, this monograph required literature on an understanding of the civil-military relationship in the United States. The seminal work on US civil-military relations is Dr. Samuel Huntington’s classic, *The Soldier and the State: The Theory and Politics of Civil-Military Relations*. In this book, Huntington explains the value of a

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<sup>7</sup> Rowland T. Berthoff, “Taft and MacArthur, 1900-1901: A Study in Civil-Military Relations,” *World Politics* (Jan, 1953).

<sup>8</sup> Army Doctrine Reference Publication (ADRP) 3-0, *Unified Land Operations* (Washington, DC: Government Printing Office, 2012), 4-1.

professionalized, subservient military in a theory he calls “Objective Civilian Control.” The basis of this theory is that a professionalized military will maintain their subordination to the civilian leadership and to the country’s laws. This theory proves to be valuable in understanding why the civil-military relationship, while sometimes at odds, remained professional throughout the chaos, confusion, and distractions of the Philippine War.<sup>9</sup> Sociology professor, Dr Morris Janowitz, also offers a unique perspective of civil-military relations in *The Professional Soldier*. This 1960 response to Huntington’s work, introduces the civic-republican theory. His theory showed the value of an active interconnectedness between the civil society and its military to foster a greater sense of civic participation.<sup>10</sup> A more modern perspective on civil-military relations comes from Elliot Cohen’s 2002 book title, *Supreme Command*. He explains the importance of an “active statesman” makes better leaders during time of war. This is because they push their military subordinates to succeed where they would have failed without the actions of the statesman.<sup>11</sup> In this controversial work, Cohen refutes the common trope espoused in the Vietnam conflict, that civilian over-reach caused the military defeat.

This monograph will provide an explanation for the strategic context that created the conditions wherein the war occurred. In addition, it will focus on the war’s beginning and the United States’ successful execution of the conventional campaign. The author will show the transition from conventional to irregular warfare and how the United States successfully conducted the counterinsurgency campaign of the war. The monograph will conclude with

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<sup>9</sup> Samuel P. Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations* (New York: Random House, 1957), 189-192.

<sup>10</sup> Morris Janowitz, *The Professional Soldier: A Social and Political Portrait*, (New York: Free Press. 1960).

<sup>11</sup> Eliot A. Cohen, *Supreme Command: Soldier, Statesmen, and Leaders in Wartime* (New York: Anchor Books, 2002), 5.

lessons that can be learned from the civil-military relations during the four-year conflict that fostered two campaigns. Ultimately, both campaigns were required to accomplish the ultimate political aim for the United States: annexation of the Philippines for American economic and strategic interests throughout the Pacific and into Asia.

### **Strategic Context**

The strategic context surrounding this war is paramount to understanding why it started, how it was fought, and why it ended. The Philippine-American War was a result of the Spanish American War. The leadership of the United States saw the conflict as an opportunity to continue its policy of expansionism by establishing coaling stations for steam ships to project naval power throughout the Pacific Ocean. The Pacific was the key to American expansion after the settling of the frontier on the North American continent. Encouraged by the powerful US Pacific Fleet, the US Navy executed the plan designed by the Assistant Secretary of the Navy, Theodore Roosevelt, to destroy Spanish forces in the Pacific as part of an overall design to take the strategic island of Guam as well as the Philippines. Roosevelt's naval strategy was based on many of the ideas from his long-time friend, US Naval Captain Alfred Thayer Mahan.<sup>12</sup>

Captain Mahan is regarded as the most important naval theorist of the Nineteenth Century.<sup>13</sup> He published his seminal work, *The Influence of Sea Power upon History 1660-1783*,

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<sup>12</sup> Howard K. Beale, *Theodore Roosevelt and the Rise of America to World Power* (New York: Collier Books, 1956), 70.

<sup>13</sup> The works of Mahan were, and still are, studied throughout the navies of the world. In the late Nineteenth and early Twentieth Century, Kaiser Wilhelm had his German Naval Officers read Mahan and his influence led them to create the large German fleet of the First World War. *The Influence of Sea Power upon History, 1660-1783* was translated into Japanese for the Imperial Japanese Navy (IJN), who used the ideas to build a fleet capable of defeating the Russians in the Russo-Japanese War of 1904. David C Evans, *Kaigun: Strategy, Tactics, and Technology in the Imperial Japanese Navy, 1887-1941* (Annapolis: Naval Institute Press, 1997). The Mahanian theories framed the approach of major global navies through World War II.

in 1890. With this widely publicized book, Mahan explained the importance of a strong navy as a requirement for the success of any global power in both war and peace.<sup>14</sup> The vast audience that subscribed to his theory was comprised of powerful individuals from around the world. Within the United States, readers of his work included many political statesmen and military officers. No politician was more influenced by Mahan than Teddy Roosevelt, who had an affinity for the Navy ever since his uncle, James Bulloch, regaled the young Teddy with stories of warships he had built for use during the US Civil War. Roosevelt was also enamored with Mahan's idea that a strong navy, supported by many geographically-dispersed bases, was essential for the global power projection required for a country to be an imperial power. Mahan and Roosevelt first met in 1887 and quickly became fast friends. This life-long friendship influenced Roosevelt's international policies throughout his political career, begging with his efforts in the Pacific and Asia, and culminating with his greatest legacy, the construction of the Panama Canal.<sup>15</sup>

The Spanish-American War began as a result of multiple factors, including a desire by many Americans to be an imperial power and the need for strategic naval bases. However, the most significant reason was the increased anti-Spanish sentiment in the United States. US President William McKinley, who was haunted by the horrors of battle he had seen in the US Civil War, tried negotiations to avoid a war with Spain.<sup>16</sup> The President failed at negotiations, and

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<sup>14</sup> Alfred Thayer Mahan, *The Influence of Sea Power upon History 1660-1783* (New York: Dover Publications, Inc., 1890). 22-26.

<sup>15</sup> Alfred Thayer Mahan, *The influence of Sea Power upon History 1660-1783* (New York: Dover Publications, Inc., 1890); Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 20-26; and Doris Kearns Goodwin, *The Bully Pulpit: Theodore Roosevelt, William Howard Taft and the Golden Age of Journalism* (New York: Simon & Schuster, 2013), 222.

<sup>16</sup> As an officer in the 23rd Ohio Infantry, William McKinley fought in several battles throughout his four-years of military service, including the Battle of Antietam. The loss of life during the bloodiest day of battle in American history that occurred in Sharpsburg, MD, would influence McKinley's opinion of war for the rest of his life, Kevin Phillips, *William McKinley* (New York: Times Books, 2003), 1-28.

the combination of pressure from the Democratic Party, powerful businessmen, and an angry populous pushed McKinley into a war he did not want.

Much of this American anger toward Spain resulted from the propaganda-filled newspapers published by media tycoons, William Randolph Hurst and Joseph Pulitzer. The pinnacle of this Yellow Journalism was their reporting that the sinking of the *USS Maine* was the result of a Spanish attack in Havana Harbor, Cuba in February of 1898. Despite a lack of evidence to support the journalistic claims that the Spanish were responsible for sinking the US battleship in Cuba, these inflammatory headlines shaped popular opinion in the United States. As the headlines raised the enmity of the American people, the Democrats in congress used this vitriol to pressure the Republican President into a war with the European power that refused to reform its aggressive and inhumane policies in the Caribbean.<sup>17</sup>

The war between Spain and America did not last long. Starting in April of 1898 and ending in August of the same year, it was the shortest war in American history. The powerful US Navy, designed according to Mahan's naval vision, focused on massing battleships to win decisive battles. The Navy conducted two of these decisive battles in the Spanish-American War. The first sea battle was in Manila when Commodore George Dewey executed Roosevelt's orders to take Manila Bay by sailing his squadron to the Philippines to sink the Spanish Fleet. The second decisive naval battle of the war was in Santiago Harbor, Cuba, and was essentially a

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<sup>17</sup> F. W. Holman, "The Destruction of the Maine," *The American-Spanish War: A History by the War Leaders* (London: Chas. C. Haskell & Son, 1899), 91-102.



replay of the powerful US Naval domination of the inferior Spanish ships, as just witnessed in Manila Bay.<sup>18</sup>

Late on the night of April 30, 1898, Commodore Dewey sailed into Manila Bay under the cover of darkness and located the Spanish Naval forces. The early morning Battle of Manila Bay was a naval slaughter, as Dewey's far-superior warships destroyed the Spanish fleet. By the end of the day, all nine Spanish ships were at the bottom of Manila Bay.<sup>19</sup> Six weeks later, the US Navy took Guam from the weakened Spanish forces without firing a shot.

The powerful American Navy was well-suited for the Spanish-American War, which was fought completely amongst the islands of the Philippines, Cuba, Puerto Rico, and Guam. After the US Navy destroyed the Spanish Fleets, they were able to provide supporting gun fire from the sea, conduct logistical resupply operations, and facilitate amphibious assaults at will. This support was necessary for the quickly-raised land armies. In the spring of 1898, Congress began preparing for war with Spain by authorizing the creation of the V Army Corps out of Tampa, Florida, commanded by Brigadier General Rufus Shafter, which was followed by the authorization of the VIII Army Corps out of San Francisco, California, commanded by Major General Wesley Merritt. These forces had mostly inexperienced soldiers, but many of their officers and some of the non-commissioned officers had fought in the Indian wars of the last two decades or in the US Civil War, thirty years earlier. The experience in the Civil War by both corps commanders,

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<sup>18</sup> Beale, *Theodore Roosevelt and the Rise of America to World Power*, 69-71, Mahan, *The influence of Sea Power upon History 1660-1783*, 22-28; and Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 101-103.

<sup>19</sup> Linn, *The Philippine War, 1899-1902*, 8.

Shafter and Merritt, helped them understand the logistics, training, and planning required to conduct warfare, as well as the scale and speed at which it could be accomplished.<sup>20</sup>

Along with experienced, the officer corps of that fought in the Philippines was an educated and professional group. Hundreds of the Corps' officers were graduates of the United States Military Academy at West Point to include nine Congressional Medal of Honor winners.<sup>21</sup> In addition to West Point, many were trained at top civilian schools, like future commanding general, Elwell S. Otis, and future division commander, Henry W. Lawton, both graduates of Harvard Law School.<sup>22</sup> Those who came up through the enlisted ranks, like future Military Governor, Adan Chafe were students or even instructors at the Infantry and Cavalry School in Fort Leavenworth, Kansas, the precursor to the famed Command and General Staff College.<sup>23</sup> This skilled cadre of officers were prepared to lead their inexperienced soldiers through the tough challenges to come.

With the Spanish Navy beaten out of the Pacific Ocean, the United States prepared to use the Army's newest corps, the VIII Army Corps, to join forces with Aguinaldo's men and Commodore Dewey's naval forces in Manila to lay siege to the Spanish military garrisoned there.

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<sup>20</sup> Phillips, *William McKinley*, 86-108; Daniel, J. W. "War Legislation of the Senate," *The American-Spanish War: A History by the War Leaders* (London: Chas. C. Haskell & Son, 1899), 297-324; and Linn, *The Philippine War, 1899-1902*, 7-12.

<sup>21</sup> US Army Center of Military History, Medal of Honor Reipients: Philippine Insurrection, accessed April 6, 2016, <http://www.history.army.mil/html/moh/philippine.html>.

<sup>22</sup> Rudolph Rau, *General of the Night: Henry W. Lawton A Biography*. 2007, accessed April 6, 2016. [https://books.google.com/books?id=V9psVU2lcosC&pg=PP1&lpg=PP1&dq=General+of+The+NightHenry+W.+Lawton+A+Biography,+Copyright+2007+Library+of+Congress&source=bl&ots=UJeLSR1ZRN&sig=HEJYLviu7MQQ3FSMiS7vpP0IWjI&hl=en&sa=X&ved=0ahUKEwi\\_09nqrfvLAhWmvIMKHYSCKIQ6AEIjAB#v=onepage&q&f=false](https://books.google.com/books?id=V9psVU2lcosC&pg=PP1&lpg=PP1&dq=General+of+The+NightHenry+W.+Lawton+A+Biography,+Copyright+2007+Library+of+Congress&source=bl&ots=UJeLSR1ZRN&sig=HEJYLviu7MQQ3FSMiS7vpP0IWjI&hl=en&sa=X&ved=0ahUKEwi_09nqrfvLAhWmvIMKHYSCKIQ6AEIjAB#v=onepage&q&f=false), 33.

<sup>23</sup> Merrill Edwards Gates, *Men of Mark in America: Ideals of American Life told in Biographies of Eminent Living Americans* (Washington, DC: Men of Mark Publishing Company, 1905), 260.

Realizing the futility of fighting the Americans, the Spanish Governor-General of the Philippines, Fermín Jáudines y Álvarez, agreed to surrender the city under two conditions: that there would be a mock battle to maintain the appearance of Spanish honor, and that the Filipino forces working with the US Army commander, General Merritt, would not be allowed to occupy Manila.<sup>24</sup>

Merritt agreed to both conditions, and on August 13, 1898, the US Army controlled the capital of the Philippines, as well as Cuba, Puerto Rico, and Guam. The victories over Spain in both the Caribbean and Pacific led to the December 1898 Treaty of Paris, ending the Spanish-American War and selling the Philippines to the United States for twenty million dollars.<sup>25</sup> The United States' purchase of the Philippines, however, ended any belief amongst the Filipinos that the United States would grant them independence.

With the treaty of Paris signed and ratified by the US Senate, the United States owned the Philippines by international legal standards of the time. America was now the proprietor of a country with which it had no history and about which it knew very little.<sup>26</sup> The Pacific archipelago consists of 7,000 islands that comprised 500,000 square miles and was home to a population of seven million people in 1899. The local population, though was not a homogeneous group. The Filipino people consisted of dozens of different tribal groups, each with unique cultures, religions, and languages. The tribal groups were broken down by region, resulting in different languages spoken throughout the islands: Ilocano in the North, Tagalog concentrated around Manila Bay, Waray in the East, Visayan in the central islands, and Moro by the Muslims in the South and West. These local tribes were independent of each other and were often at war,

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<sup>24</sup> Brian McAllister Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902* (Chapel Hill: The University of North Carolina Press. 1989), 8.

<sup>25</sup> The value of \$20 million in 1898 would be worth over \$560 million in today's currency, The Inflation Calculator, accessed on December 19, 2015 <http://www.westegg.com/inflation/infl.cgi>.

<sup>26</sup> Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*. 1-2.

each having different local alliances. The American were joined into those alliances and like the imperial Spanish before them.

General Aguinaldo and his Filipino forces felt betrayed by the Americans. He believed that he was working with the United States to defeat Spain for Filipino independence. Whether or not the Filipinos were ever promised this by Commodore Dewey, General Merritt, or any other American leader is unknown. While working with the Americans, Aguinaldo established the Revolutionary Government of the Philippines and appointed himself President and General-in-Chief of its Army. After the Americans took Manila and refused to allow the Filipino forces in the city, Aguinaldo maintained the positions of his forces outside of the capital. As the relationship between the Filipino forces and the Americans shifted from camaraderie to tension, the self-declared Filipino President worked to improve his military forces and government structure. In February of 1899, rising tensions escalated into gunfire between the Americans and the Filipino forces on the outskirts of Manila, starting the war between the United States and Aguinaldo's Filipino Liberation Army.<sup>27</sup>

### **The Conventional Campaign (February – December 1899)**

It is against the interests of the United States to have the fruits of Dewey's victory gathered by insurgents...When a flag replaces the blood-and-fear ensign of Spain, it should be our flag.

–*San Francisco Chronicle* June 10, 1898

The conventional campaign of the Philippine-American War lasted less than a year. The United States was successful in this short campaign because of the cooperative efforts of the President, his appointed civilians, and the military. President McKinley laid out a clear political

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<sup>27</sup> Linn, *The Philippine War, 1899-1902*, 42; Ramsey, *Savage Wars of Peace: Case Studies of Pacification in the Philippines, 1900-1902*, 8-11; and Wesley Merritt, "The Manila Campaign," *The American-Spanish War: A History by the War Leaders* (London: Chas. C. Haskell & Son, 1899), 263-280.

aim for the Philippines and worked with Congress and his cabinet to resource it properly. The senior military leadership was composed of two Army generals: the commanding general in the Philippines, Major General Elwell S. Otis (Merritt's replacement upon his departure to assist in negotiations in Paris) and Commanding General of the United States Army in Washington DC, Major General Nelson A. Miles.<sup>28</sup> These men helped to develop the strategic and logistical plan required for a major conflict fought thousands of miles from the American continent. The tactical success can be attributed to the prosecution of the conventional land campaign by the 2nd Division, commanded by Major General Arthur MacArthur. The relationship between the civilian and military leadership resulted in clear objectives, well-articulated constraints, and appropriate resources that were the basis of the successful prosecution of the conventional campaign.

In 1899, the Treaty of Paris made it clear that President William McKinley's political aim would be the annexation of the Philippine Islands under American sovereignty. Taking the opportunity for an independent government was incredibly unpopular with many Filipinos. Unlike in the Caribbean, the United States was not able to persuade the local militia to disband after the Spanish forces were defeated.<sup>29</sup> The Filipino rebels, however, would not readily accept American rule. Thus, they surrounded Manila with approximately 20,000 troops led by Aguinaldo, and declared their government as the rightful sovereign of the Philippine Islands.<sup>30</sup>

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<sup>28</sup> Commanding General of the United States Army was the title of the senior ranking member of the Army from the War of 1812 to the Spanish American War. Upon LTG Miles' retirement in 1903, the position became the Army Chief of Staff, Peter R. DeMontravel, *A Hero to His Fighting Men: Nelson A. Miles 1839-1925* (Kent: The Kent State University Press, 1998), 290-325.

<sup>29</sup> The circumstances are varied throughout the Caribbean, i.e. The Teller Amendment, passed in April of 1898 ensured that the United States would not be able to annex Cuba, but did not explicitly state the same for Puerto Rico, Guam, or the Philippians, H. Wayne Morgan, *William McKinley and His America*. (Syracuse: Syracuse University Press, 1963), 378.

<sup>30</sup> Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine, 1860-1941* 108-109.

For annexation to be successful, the Philippines would have to be pacified. McKinley laid out his policy to Secretary of War Russel A. Alger in December of 1898. The President's policy was that of benevolent assimilation, designed to focus on the dignity of the Filipino people. In a proclamation issued from the Executive Mansion (White House) about the subject, McKinley explained:

Finally, it should be the earnest wish and paramount aim of the military administration to win the confidence, respect, and affection of the inhabitants of the Philippines by assuring them in every possible way that full measure of individual rights and liberties which is the heritage of free peoples, and by proving to them that the mission of the United States is one of Benevolent Assimilation substituting the mild sway of justice and right for arbitrary rule. In the fulfillment of this high mission, supporting the temperate administration of affairs for the greatest good of the governed, there must be sedulously maintained the strong arm of authority, to repress disturbance and to overcome all obstacles to the bestowal of the blessings of good and stable government upon the people of the Philippine Islands under the free flag of the United States.<sup>31</sup>

The Benevolent Assimilation Proclamation made it clear that the Commander-in-Chief wanted his Secretary of War to accomplish the pacification by preserving property and individual rights and the opening of ports for commerce. With a clear presidential policy, the military commander in the Philippines, General Otis, prepared a strategy to accomplish the political aims of pacification within the presidential restraints cited above. General Otis' strategy would be a two-part simultaneous approach: he would conduct a military campaign to destroy hostile forces, while also working to improve the infrastructure and providing opportunities for the locals.

The fighting between the Americans and the Filipino Army of Liberation started late on the night of February 4, 1899, resulting in minimal changes of positions and locations.<sup>32</sup> Realizing

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<sup>31</sup> William McKinley, "Benevolent Assimilation Proclamation," December 21, 1898, accessed on December 21, 2015 <http://www.msc.edu.ph/centennial/benevolent.html>.

<sup>32</sup> It is still unclear whether the Americans or the Filipinos shot first, with each side blaming the other after February 5, 1899. There was also suspicion at the time that the United States started this war intentionally to destroy the Army of Liberation. The general belief amongst historians is that aggressive actions of the Americans and Filipinos, combined with their mistrust and fear of their opponents, led to an overreaction by both sides, ultimately starting the battle.

the importance of this first battle to both maintain the Manila strong-hold and set the stage for subsequent tactical actions, General Otis attacked at first light. The 21,000 strong VIII Army Corps attacked using thirteen of its regiments in multiple locations working in concert with the powerful eight-inch howitzers from the warships *Charleston* and *Callao*. The Battle of Manila was the bloodiest battle of the Philippine-American War. This battle was a complete victory for the US military, which inflicted far greater losses upon the Army of Liberation than those it sustained (Casualties: 238 US; 4,000 Filipino) while seizing a considerable amount of ground around Manila.<sup>33</sup>

The Battle of Manila was followed by a large insurrection within Manila that was another clear victory for the US Army. General Antonio Luna organized this insurrection on February 22, 1899. The violence started with a series of fires set throughout Manila. In the resulting confusion, the Filipino forces attacked. However, this plan was poorly orchestrated, as there was only sporadic firefighting amongst few Filipino forces from positions that were non-mutually supported. Other factors that contributed to the failure of Luna's plan were the capture of key documents from the Army of Liberation, which detailed a plan of attack a few weeks earlier, and a lack of professionalism within the Filipino forces.<sup>34</sup>

The ease with which the US VIII Army Corps defeated the Filipinos in Manila would continue throughout the conventional campaign. The Filipino Forces were barely-trained soldiers who rarely hit the targets at which they were shooting, due to the limited availability of weapons and ammunition for training. The supply lines, a necessity for large-scale conventional

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Stuart Creighton Miller, *Benevolent Assimilation, The American Conquest of the Philippines, 1899-1903* (New Haven: Yale University Press. 1984), 59.

<sup>33</sup> Linn, *The Philippine War, 1899-1902*, 42-53.

<sup>34</sup> *Ibid.*, 59-61.

operations, were minuscule and poorly managed by the Filipinos. Most detrimental to their success in the conventional campaign was their command structure. The Filipinos based this process on the primitive societal structures they had used under Spanish rule. This highly-centralized structure required most decisions to gain approval from the highest levels of leadership before any actions. This command structure was useful for the Spanish during colonial administrative rule, but was cumbersome and ineffective when trying to orchestrate a conventional military campaign against a well-resourced enemy who fought using combined arms to seize and maintain the initiative.<sup>35</sup>

Realizing that defeating the Army of Liberation required a conventional campaign, General Otis worked with Lieutenant General Nelson Miles and the civilian leadership to receive appropriate resources for his conventional campaign strategy. Conducting operations into Central Luzon while defending both the capital garrison and the supply lines required many more soldiers. Adding to his problems, 5,000 of his men were volunteers whose enlistment obligations would be fulfilled in April of 1899, just two months away. Through an open dialogue between the President, the Secretary of War, the Commanding General of the United States Army, and even Congress, the civilian leadership provided the human resources needed to conduct the conventional campaign by authorizing Otis to keep the volunteer soldiers, increasing the size of the US Army to 65,000, and raising an additional 35,000 volunteers to serve in the Philippine-American War. This professional civil-military relationship allowed open dialogue between the civilian and military leadership resulting in the military receiving the means necessary for the commanding general to prosecute the conventional campaign as required to accomplish the strategic ends.<sup>36</sup>

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<sup>35</sup> Linn, *The Philippine War, 1899-1902*, 42-64.

<sup>36</sup> Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise*



Having the number of soldiers required for his strategy of a conventional campaign to destroy Aguinaldo's forces to pacify the Philippines under his command, General Otis began the offensive in late March of 1899.<sup>37</sup> Otis' initial strategy was to seize the Army of Liberation's capital, Malolos. He saw the capital as the center of gravity because it was a protected strong point that offered sanctuary for Aguinaldo's troops, a position by which to resupply, and a central operating headquarters.<sup>38</sup> In early April, General MacArthur's 2nd Division integrated artillery, cavalry, and infantry together in a combined-arms attack of Malolos. The Army of Liberation successfully conducted a hasty retreat, abandoning both their capital and important supplies.<sup>39</sup> With the enemy capital taken, General Otis would then focus on the Army of Liberation as the enemy's center of gravity.

While Otis was continuing to push north on a military line of effort, the Philippine Commission was working on a governance line of effort in Manila to attempt to win the support of the Filipino people—a future center of gravity of the Army of Liberation.<sup>40</sup> Otis' strategy was

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*and Fall of America's Imperial Dream*, 115-118; Morgan, *William McKinley and His America*, 438-446.

<sup>37</sup> With the arrival of three regiments of US Army regulars in early March and congressional authorization to keep many of his reserves, General Otis had enough men to secure his positions and conduct an offensive, Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 118-120.

<sup>38</sup> The famous Prussian military theorist, General Carl von Clausewitz describes the Center of Gravity as "the hub of all power and movement...the point against which all our energies should be directed." Three examples that Clausewitz describes in *On War* are the Capital, the Army, and the will of the people, Carl von Clausewitz, *On War*, translated and edited by Michael Howard and Peter Paret. (Princeton, NJ: Princeton University Press, 1984), 595-596.

<sup>39</sup> Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 115-123.

<sup>40</sup> This first Philippine Commission was sent on the directive of the president. It was comprised of three civilians and two military officers: a Cornell professor, a University of Michigan professor, the former US Ambassador to China, Commodore Dewey, and General Otis. Both military officers did not see much value in the commission and spent little time working

based on both lines of effort working in concert to destroy the Army of Liberation.<sup>41</sup> On April 4, 1899, the commission published a proclamation guaranteeing the civil rights, liberty, property, religious freedom, self-government, and equality of the Filipinos under American law. The proclamation also explained the civil works projects that the United States would fund and construct, including schools, roads, railroads, and telegraph lines. Lastly, the proclamation attempted to convince the locals that fighting the United States would prove to be a futile effort, by stating “America is ready to furnish armies and navies and all the infinite resources of a great and powerful nation to maintain its rightful supremacy over the islands.”<sup>42</sup> With America firmly in control of the enemy capital and defeating the Army of Liberation at every battle in this conventional campaign, the commission saw the proclamation as the carrot to the Army’s military stick to convince the natives to end the fighting.

As the 2nd Division continued to push farther north into Luzon, they continued their tactical success in every engagement. MacArthur’s *protégé* and commander of the 20th Kansas Regiment, Colonel Fredrick Funston, helped ensure victory in several battles, including an incredible feat of courage, leadership, and imagination in crossing the Marilao River under extreme fire to flank Luna’s strong hold of Calumpit and Baliuag. His success in the Spring Offensives not only earned Fearless Freddie (one of Funston’s many nicknames describing his

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with them, Linn, *The Philippine War, 1899-1902*, 90-92.

<sup>41</sup> ADRP 3-0, *Unified Land Operations* states that lines of effort are designed to link objectives to commander’s end state. Commanders synchronize and sequence actions deliberately to create complimentary and reinforcing effects. These were General Otis’ goals, to both improve the governance aspect in Manila while destroying the military’s center of gravity in Malolos, 4-5.

<sup>42</sup> The commission had the proclamation published in the local languages of Tagalog and Spanish and widely circulated throughout the Philippines, “Proclamation at Manila,” *New York Times*, April 4, 1899, accessed December 22, 2015, <http://timesmachine.nytimes.com/timesmachine/1899/04/05/117917818.html?pageNumber=7>.

heroism) the Congressional Medal of Honor, but also resulted in his promotion to Brigadier General. While pursuing the Filipino forces, the US Army destroyed enemy supplies and buildings. Despite the progress made on the ground, the Americans had moved so quickly that they had nearly culminated when the monsoon season arrived, bringing a break in the war. Both sides went to garrison at new headquarters: Macarthur in San Fernando and Aguinaldo, thirty-eight miles north, in Tarlac.<sup>43</sup>

As the monsoon rains slowed, General Aguinaldo was in a dire position. Without the supplies lost in the Spring Offensive, the Army of Liberation resorted to foraging and stealing from the local wealthy farmers around Tarlac. These criminal acts dropped the morale of his men and angered the indigenous population. While Aguinaldo was stealing from the very people he had sworn to liberate, General Otis was developing a plan to deliver the *coup de grâce* on this fading conventional force. The Great Roundup was what the soldiers called Otis' plan to divide his forces into three groups to encircle and destroy the enemy. This classic double envelopment would use the 2nd Division to fix the Army of Liberation from the south, while General Wheaton conducted an amphibious landing and attack from the north, and General Lawton marched around from the east. As the Americans began to execute this well-orchestrated maneuver, Aguinaldo held a war council to discuss the last nine months of defeats the Army of Liberation had suffered while waging a conventional campaign against the American forces. Here, the *generalissimo* decreed they would end the conventional campaign and begin to fight a guerrilla war "without fronts or fixed positions...exchanging their uniforms for the clothes of simple farmers they would

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<sup>43</sup> This scorched-earth technique implemented by senior tactical leaders like General Loyd Wheaton was learned while serving under Major General William Sherman during his March to the Sea in the American Civil War. Funston, *Memoirs of Two Wars: Cuban and Philippine Experiences*, 265-297; Linn, *The Philippine War, 1899-1902*, 96-98; and Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 120-123.

blend in with villagers and townsfolk, awaiting opportune moments to strike.” Aguinaldo realized his forces had no potential for victory against the well-resourced conventional campaign the Americans were conducting and knew the only chance for victory was to change his strategy and tactics.<sup>44</sup>

As the American trap encircled Aguinaldo, he began another hasty retreat. His quick action in retrograde and an impressive delaying effort by one of his boy-generals, Manuel Tinio, allowed the main body of the Army of Liberation to escape less than three miles before the encirclement was complete.<sup>45</sup> The struggling Filipinos again lost tons of precious food, ammunition, and equipment to the American army. Realizing they were so close to Aguinaldo, Wheaton and Lawton pushed their men hard in pursuit, getting within a few miles of their prize. A valiant delaying effort along Tirad Pass by another of Aguinaldo’s boy-generals, Gregorio del Pilar (who gave his life protecting the withdrawal of Aguinaldo and his men), bought the time needed for *el presidente* to escape into the mountains.<sup>46</sup> (See Map 2: MG MacArthur’s Attempted Double Envelopment)

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<sup>44</sup> William Thaddeus Sexton, *Soldiers in the Sun: An Adventure in Imperialism* (Harrisburg: Military Service Publishing Co., 1939), 180-186; Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America’s Imperial Dream*, 127-136; and Funston, *Memoirs of Two Wars: Cuban and Philippine Experiences*, 297-335.

<sup>45</sup> Three of Aguinaldo’s Generals were in their early twenties and were given the sobriquet, the boy generals, Linn, *The Philippine War, 1899-1902*, 148-158; and Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America’s Imperial Dream*, 131-136.

<sup>46</sup> The brave and selfless heroism of General Gregorio del Pilar was made famous as the “Thermopylae of the Philippines” by the war correspondent Richard Henry Little. The *Chicago Tribune* journalist was embedded with the Fighting 33<sup>rd</sup> during the Battle of Tirad Pass. Richard Henry Little, “The Superlative Value of the Philippines,” *Chicago Tribune*, December 3, 1899, accessed December 22, 2015, <http://archives.chicagotribune.com/1899/12/03/page/45/article/the-superlative-value-of-the-philippines>.

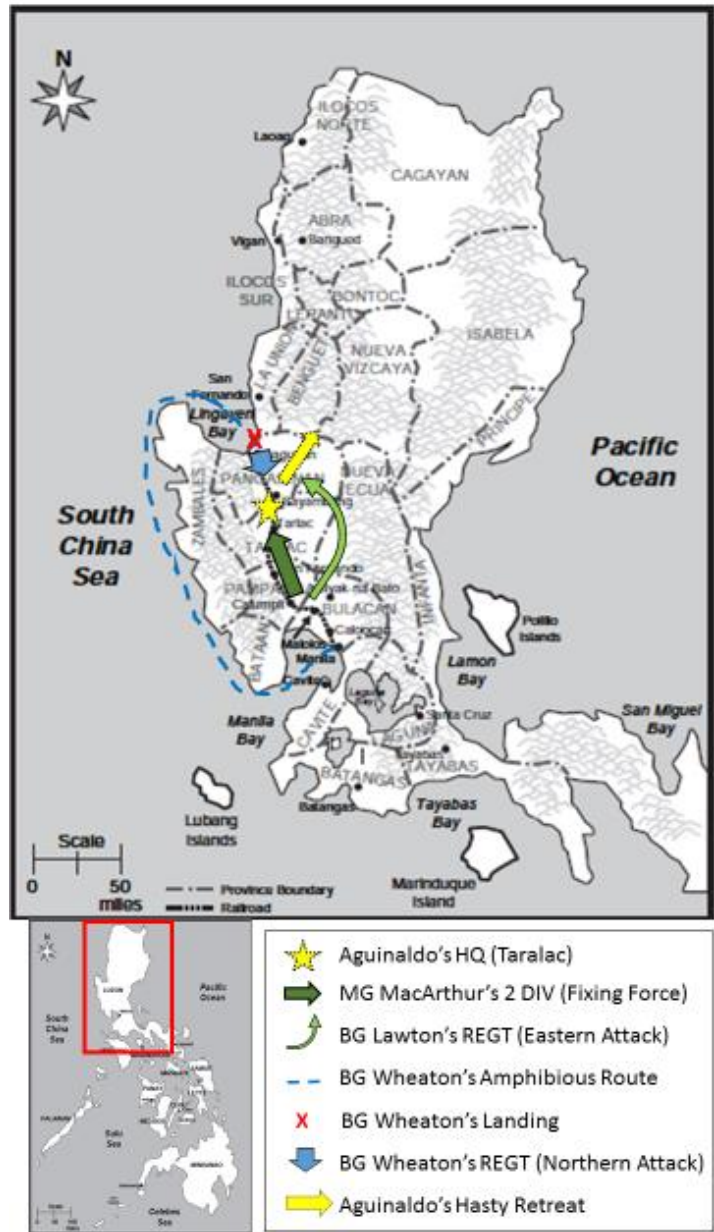


Figure 2. Map 2: MG MacArthur's Double Envelopment of Aguinaldo

Source: Map has been adapted by the author from the original, Ramsey, *Savage Wars of Peace: Case Studies of Pacification in the Philippines, 1900-1902*, 15.

With thousands of the Army of Liberation captured or killed, four of its best generals dead, and tons of irreplaceable ammunition and equipment seized, it was clear that the Americans had won the conventional campaign by a wide margin. Because of the civil-military relationship,

the American Army was properly resourced to achieve the President's political aim by implementing an effective strategy that was well-executed by the tactical commanders. The victory of the conventional campaign was born from a healthy professional civil-military relationship that allowed open dialogue.

### **The Counterinsurgency Campaign\_(December 1899 – July 1902)**

War in its proper meaning had ceased to exist.

-Major General Elwell Otis, December 1899.

In December of 1899, General Otis realized the conventional war was over, and he began to focus the military's efforts on policing, infrastructure, and governance. Otis reorganized the VIII Army Corps from divisions to smaller forces that could "extend police systems" to protect the locals. He assigned more men to work on infrastructure projects, and he worked with Filipinos to take on more of the responsibilities of local-level governance. The low-level of violence for the next few months gave the false impression to Otis that Aguinaldo was powerless and that there was not a growing insurgency within the population. With his belief that he had successfully developed a conventional campaign that accomplished President McKinley's political aim of Philippine pacification, General Otis delivered his "Mission Accomplished" speech, changed command with Major General Arthur MacArthur, and departed the Philippines forever.<sup>47</sup>

With a successful end to the conventional campaign, President McKinley decided it was time to begin the transition of the Philippines to civilian rule. He came to this decision after conferring with several of his confidants, including his trusted new Secretary of War, Elihu Root.

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<sup>47</sup> Despite the similarities of leader giving a premature speech touting combat successes, General Otis' speech was called the "Mission Accomplish" speech, well before President George W. Bush's infamous speech from aboard the *USS Abraham Lincoln* in May of 2003. John M. Gates, *Schoolbooks and Krags: The United States Army in the Philippines, 1899-1902* (Westport: Greenwood Press, 1976), 128-140.

Root replaced the ineffective Russel Alger, who had become a political liability because of failures in the Caribbean Campaign of the Spanish American War. Root, a former Wall Street Banker, complimented McKinley, who had been essentially acting as his own Secretary of War. Together, with the advice of the first Philippine Commission, they decided a second Philippine Commission would be necessary to carry out the President's policy of transitioning the Philippines from a military-run government to civilian rule.<sup>48</sup>

McKinley wanted this second Commission to work with the military to transition power to a civilian control of all governmental responsibility in the Philippines. This transition from military to civilian rule of a foreign territory was unprecedented for the United States. The Republican Senator, John Spooner, authored a bill that would give the executive branch the power to determine colonial policy for the United States. The anti-imperialist Democrats in Congress were against the bill because they feared the Republican-controlled executive branch would use the power to bypass congressional power over the budget. Congress was able to reject the Spooner Bill on September 1, 1900 causing the Congressional Republicans to bypass this problem by attaching an amendment to the 1901 Army Appropriation Bill that authorized the funding for the Philippine-American War. Thus, the Spooner Amendment became law because Congressional Democrats found it politically unwise to vote against army funds in wartime.<sup>49</sup>

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<sup>48</sup> Phillips, *William McKinley, 126-144*; Morgan, *William McKinley and His America, 144*; Goodwin, *The Bully Pulpit: Theodore Roosevelt, William Howard Taft and the Golden Age of Journalism, 264-265*.

<sup>49</sup> Secretary of War Elihu Root told his biographer, Philip Jessup, that he actually wrote the Spooner Bill and gave it to Senator John Spooner to put to a vote in Congress in 1899, Philip C. Jessup, *Elihu Root* (Dodd, New York: Mead & Company, 1938); Rene R. Escalante, *The Bearer of Pax Americana: The Philippine Career of William H. Taft, 1900-1903* (Quezon City: New Day Publishers, 2007), 220-227; and Richard W. Leopold, *Elihu Root and the Conservative Tradition* (Boston: Little, Brown & Company, 1954), 90-91.

With the executive power from the Spooner Amendment, McKinley began to assemble a second Philippine Commission to lead the government's transition to civilian rule. Initially, the Commission would have legislative power, and the military would retain executive power. The legislative power consisted of the power of appropriation, establishing taxes, developing political departments, and creating local courts. Once pacification was complete, the commission would then take over executive power. With an appointment that would be entrusted with this much power, the President needed an honest man to lead the commission, someone both trained in the rule-of-law and a believer in its value.<sup>50</sup>

McKinley made a calculated decision in hand-selecting the Judge of the Sixth Circuit Court of Appeals out of Cincinnati, William Howard Taft, a man well-known for his integrity and adherence to the rule of law. It was also important that Taft would be eligible for favors from the Republican Party.<sup>51</sup> In January of 1900, the President brought Taft into the Executive Mansion (White House) to request the judge's help in person. Following a week of deliberation with his family and colleagues, Taft accepted McKinley's offer to lead the second Philippine Commission.<sup>52</sup>

The second Philippine Commission consisted of an experienced and versatile team of five men: General Luke E. Wright was a trained lawyer and a former Confederate officer, Henry C. Ide was a lawyer and Chief Justice of Samoa, Dean C. Worcester was a professor from the

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<sup>50</sup> Goodwin, *The Bully Pulpit: Theodore Roosevelt, William Howard Taft and the Golden Age of Journalism*, 264-272.

<sup>51</sup> Judge Taft had made it clear that his ambition was a nomination to the US Supreme Court and President McKinley explained his "career would not be hurt by giving up his lifetime appointment to judge...to be a part of the second Philippine Commission." Henry F. Pringle, *The Life and Times of William Howard Taft* (New York: Farrar & Rinehart, Inc., 1939), 148-162.

<sup>52</sup> *Ibid.*, 163-180.



University of Michigan and member of the first Philippine Commission, Bernard Moses was a History professor at the University of California, and Taft served as President of the Commission. During the six-week voyage to Manila, this team had considerable time to get to know each other and devise a plan with some initial goals for the commission and how it would work with the military to achieve the President's political aim of pacification.<sup>53</sup>

General MacArthur's understanding of the problems facing the Philippines, and his experience commanding the 2nd Division during the conventional campaign, made him an ideal choice to take over as Military Governor. Unlike his predecessor, who rarely left the walls of his compound, much less Manila, MacArthur was in the field leading the tactical effort. His battle experience throughout most of Luzon under Otis' command exposed him to the realities of this war and the challenges faced by the field commanders.<sup>54</sup> This led him to two salient conclusions. The first was identifying an imbalance in Otis' pacification program, which had focused too heavily on building infrastructure while neglecting the effort required to eradicate the armed resistance. His second conclusion was that the insurgency derived its strength from the local support received in the urban areas of the Philippines.<sup>55</sup> These conclusions gave MacArthur the perspective that Otis' indirect approach to fighting the insurgency was insufficient and that the local population was the center of gravity that provided logistical and moral strength.<sup>56</sup>

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<sup>53</sup> Pringle, *The Life and Times of William Howard Taft*, 163-166; Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 194-196; and Goodwin, *The Bully Pulpit: Theodore Roosevelt, William Howard Taft and the Golden Age of Journalism*, 264-272.

<sup>54</sup> Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 137.

<sup>55</sup> Linn, *The Philippine War*, 208-209.

<sup>56</sup> ADRP 3-0, *Unified Land Operations*, 4-3 – 4-4.

The five months before the arrival of the second Philippine Commission were rife with guerrilla warfare, which was more deadly than the conventional campaign. General Otis continued sending cables to Washington DC that overemphasized the success from the end of the conventional campaign (and downplayed the growing American casualties) until his departure from the islands in early spring of 1900. Aguinaldo's strategy of insurgency proved effective against the Americans. The first four months of 1900 were more deadly than the last four months of the conventional campaign at the end of 1899—555 casualties in 442 engagements, versus 371 casualties in 329 engagements.<sup>57</sup>

On June 3, 1900, under an oppressive heat wave, the *USS Hancock* arrived unceremoniously in Manila Bay carrying the second Philippine Commission. General MacArthur was not pleased with the arrival of these civilians, to whom he would eventually have to surrender most of his power as Military Governor. Showing his disdain, MacArthur did not officially greet the Commission until the next day, when he had them brought before him as though he was “holding court.” Taft, describing this meeting in a letter to his wife, wrote that MacArthur's frigidity was the only thing in Manila that “made his perspiration stop.”<sup>58</sup> Following the icy meeting, MacArthur continued his petty display of power by assigning the Commission one of the smallest rooms in the palace for the rotund Taft and the rest of the commission to work. Their cold, but professional, introduction would foreshadow the civil-military relationship on the island until Taft had the General removed in July of 1901.<sup>59</sup>

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<sup>57</sup> US Casualties: September – December 1899 (69 killed, 302 wounded); January – April 1900 (130 killed, 325 wounded). Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 151-153.

<sup>58</sup> Hellen Herron Taft, *Recollections of Full Years* (New York: Dodd, Mead & Co., 1914), 80-82.

<sup>59</sup> Pringle, *The Life and Times of William Howard Taft*, 167-170.

The following twelve months that Taft and MacArthur would be working together was fraught with problems. The commanding general with thirty-eight years of military experience, the last two of which were in the Philippines, believed the transition to civil authority was being rushed by Taft. As would be expected the, General's concerns with the deadly insurgency made him more risk-averse than his civilian counterparts. Where Taft perceived MacArthur's refusal to authorize him military naval transports or to allow the civilians to transfer military personal as a deliberate affront to the civilian authority, the commander of all military operations had legitimate concerns about the military needs for these combat ships and soldiers to be available to conduct military operations. In contrast, the pragmatic long-serving judge had been handpicked by the President and helped the Secretary of War author the transition plan. The politically-astute and well-connected Taft was unlikely to defer to MacArthur on matters outside of the military campaign. The problems, however, were relatively minor and did not stop their ability to work together to achieve the President's policy of civilian transition of the Philippines to achieve the political aim of pacification.<sup>60</sup>

The new phase of war changed the strategy of the Army of Liberation from victory on the battlefield to a protracted war designed to bleed the American forces until they decided the cost of remaining in the Philippines was no longer worth the investment. Aguinaldo was attempting to attack the American center of gravity, the will of the people of the United States. He understood that a protracted war, with the high cost of American lives, would be unpopular amongst the American electorate, and he was hoping for a Republican Party loss in the Presidential election of

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<sup>60</sup> Berthoff, "Taft and MacArthur, 1900-1901: A Study in Civil-Military Relations," 196-213.

1900. Aguinaldo followed the American election and knew a Democratic president would mean the removal of the foreign troops from the Philippine Islands permanently.<sup>61</sup>

With growing US casualties and the transfer of the legislative power to the Commission, General MacArthur was able to focus exclusively on the guerillas. He initiated an amnesty program to conciliate with the guerrillas throughout 1900. Additionally, he gave considerable autonomy to the regional commanders with broad, but limited, constraints. This allowed each regional commander to fight their unique enemy in the district for which they were responsible with limited constraints from Manila. In the First District, Northern Luzon, Brigadier General Samuel B. M. Young focused on benevolent pacification. His district was relatively permissive with a large ethnic divide that had historically worked well with the Spanish colonial government and a lighter approach was more effective. The Second District, Southern Luzon, was not permissive. This ethnically homogenous Tagalog region had historically resisted Spanish colonialism and required a much more aggressive operational approach. The commander, Brigadier General J. Franklin Bell, controversially used concentration camps and protected zones to separate the populace from the *insurrectos* by force and provost courts to administer swift justice to those who violated his totalitarian policies. This separation of the populace from the insurgency allowed Bell to focus his military force on successful counter-guerilla operations. Despite MacArthur's efforts to empower his commanders, the number of American deaths from insurgent violence continued to rise as the Philippines initially became less secure.<sup>62</sup>

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<sup>61</sup> Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*, 66-68; Linn, *The Philippine War*, 186-189; and Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine, 1860-1941*, 111-113.

<sup>62</sup> Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*, 21-23; Ramsey, *Savage Wars of Peace: Case Studies of Pacification in the Philippines, 1900-1902*, 31-112; and Linn, *The Philippine War*, 300-301.

With the 1900 American presidential election approaching, Aguinaldo doubled his efforts to attack the will of the people. The Democratic presidential candidate, William Jennings Bryan, opposed the acquisition of the Philippines and insisted he would end the war by making the United State a protector of the Philippines, allowing them sovereignty of their government.<sup>63</sup> McKinley stayed firm in his view that the Philippines was, and should remain, part of the United States. At a campaign stop he assured the voters that the “[Stars and Stripes] shall float triumphantly in every island of the archipelago under the undisputed and acknowledged sovereignty of the republic of the United States.”<sup>64</sup> In order to make headlines in the United States just before the November election, Aguinaldo ordered dozens of attacks throughout the archipelago from 15-23 September 1900. Despite Aguinaldo’s tactical success of inflicting high casualties with coordinated attacks, he was unable to achieve his strategic goal of influencing the American people to elect Bryan to the US presidency.<sup>65</sup> McKinley won an easy victory gaining sixty-five percent of the Electoral College, five percent more than the 1896 election against Bryan. With the economy booming and McKinley’s dramatic success in the Spanish-American War, the American people were easily persuaded to vote for the Republican platform running under the slogan “four more years of full dinner pail.”<sup>66</sup>

The result of the election was devastating to Aguinaldo’s political aim of total Philippine independence. His gamble was a strategic failure. All of the fighting had inflicted hundreds of

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<sup>63</sup> Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America’s Imperial Dream*, 188-197.

<sup>64</sup> *Ibid.*, 167.

<sup>65</sup> Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*, 22-27.

<sup>66</sup> “Treats of Prosperity and Full Dinner Pail Appeal,” *New York Times*, October 17, 1899, accessed March 15, 2015, <http://timesmachine.nytimes.com/timesmachine/1900/10/17/105753917.html?pageNumber=3>.

casualties on the Army of Liberation, depleted supplies and ammunition they could not replenish, increased desertion rates, and exposed much of the guerilla network to the American forces that continued to grow on the islands. Most devastating to the insurgency, the population was turning on Aguinaldo and his forces. Many locals, both wealthy land owners and farmers, began to view the guerilla's violence and theft as indiscriminate, unjust, and pointless, especially after Bryan's loss.<sup>67</sup>

The federal election of 1900 continued the reign of the Republican Party over the country. The people re-elected William McKinley to the presidency, and in Congress the Republicans maintained their absolute majority in the House and Senate. This election gave McKinley the political mandate to continue his effort to pacify the Philippines. He should have theoretically had at least the next four years to use all of the resources at the disposal of the presidency to achieve his political aim. McKinley continued supporting MacArthur's request for the men and resources required to win the tactical fight. Additionally, the election made the Republican Party outsider and well-publicized jingoist, Theodore Roosevelt, the Vice President of the United States.<sup>68</sup>

The spring of 1901 was the beginning of the end of the insurgency. With President McKinley providing over 70,000 American soldiers to the insurgency and an internally-recruited

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<sup>67</sup> Brian McAllister Linn, *The Philippine War, 1899-1902* (Lawrence: University Press of Kansas, 2000), 273-278; Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*, 74-75; and Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine, 1860-1941*, 123-135.

<sup>68</sup> Roosevelt did not want to be Vice President. He was persuaded to leave his position as Governor of New York after his nomination in the 1900 Republican National Convention. The position of Vice President was vacant after the sudden death of McKinley's first running mate, Garret A. Hobart in November of 1899. Republican party insiders were happy to sideline the political career of Roosevelt, while using his national popularity for the reelection of McKinley. Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 186-187.

regiment of local Macabebe Scouts, MacArthur now had the forces to prosecute a two-part campaign focused simultaneously on chastisement and attraction.<sup>69</sup> Chastisement (inflicting harsh punishment on those still fighting) and attraction (enfranchising those locals who accepted US rule) were used in concert to dissuade the locals from continuing the insurgency.<sup>70</sup> The population continued to turn against the Army of Liberation, as their tactics had become even more violent. As a result, the Americans offered more freedom and autonomy at the local level to the Filipinos.

MacArthur's use of chastisement increased the violence and intimidation with policies of concentration, aggressive interrogation, and scorched earth, which destroyed resources, including crops and settlements, believed to be useful to the guerrillas.<sup>71</sup> The methods approved by MacArthur were severe, but they were allowed under US law. General Order 100, *Instructions for Government of Armies of the United States in the Field*, was the basis doctrine that MacArthur used to ensure that his policy of chastisement was legal.<sup>72</sup> However, the violence used by the Americans was not as devastating to the locals as the murders, intimidation, theft, and banditry of the guerrillas. The violent tactics of chastisement utilized by the Americans, however, were juxtaposed by the simultaneous policy of attraction.

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<sup>69</sup> Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*, 24-25.

<sup>70</sup> Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine, 1860-1941*, 121-128.

<sup>71</sup> The Concentration policy was designed to move the population to a concentrated area where the Army of Liberation would have no access to their resources and the locals could be protected by the American Army. This is similar to what the policies the soldiers used in the frontier conflicts against the American Indians. The most infamous integration technique was water boarding or as it was known then "the water cure." Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine, 1860-1941*, 130-131.

<sup>72</sup> Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*, 23.

Taft and MacArthur put considerable effort into Philippine public works as part of the benevolent campaign. The Americans were continuing the benevolent assimilation by building more infrastructure and empowering many of the locals in the Philippine Scouts, and governance of their own country.<sup>73</sup> General MacArthur began granting the newly-created Filipino Federal Party special access throughout the archipelago. The general allowed this party of pro-American locals to move freely throughout conflict zones as they began to help negotiate peace with bands of insurgents and organize rallies to encourage locals to accept American rule.<sup>74</sup> MacArthur also insisted that prisoners be treated well. He deported hundreds of hard-line guerrillas, but instituted amnesty and reintegration programs for those whom he believed would not return to fighting.<sup>75</sup> These policies further increased the desertion and surrender rates of the Army of Liberation in the spring of 1901.

The reduced power of the guerrillas added so much stress to their campaign that they became sloppy, accepting more risk. The US military ultimately captured Aguinaldo by successfully applying this stress in an indirect approach against the Army of Liberation. With the insurgency desperately in need of more troops because of the successful policies of MacArthur, Aguinaldo's men were unable or unwilling to vet a large group of Filipinos coming to join with the guerrilla leader in the jungles of northeast Luzon. This large group of Filipinos was actually General Funston's Macabebe Philippine Scouts, posing as the captors of the great American

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<sup>73</sup> The Philippine Scouts, formerly the Macabebe Scouts, were the first local military force developed by the Americans in September 1899. Realizing they were natural enemies of the Tagalog *insurrectos* an industrious First Lieutenant, Matthew A. Batson, convinced his commanding officer General Lawton to authorize the creation of five companies of Scouts recruited from Macabebe Province. Edward W. Coffman, "Batson of the Philippine Scouts," *Parameters*, VII (January 1977): 68-72.

<sup>74</sup> Linn, *The Philippine War, 1899-1902*, 214-216.

<sup>75</sup> Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*, 22-26.



general.<sup>76</sup> The force was allowed to enter Aguinaldo's headquarters camp without being searched or questioned. In his memoirs, Funston describes Aguinaldo as being taken by such surprise he thought the shots were from his desperate men who had "broken loose to celebrate the arrival of the reinforcements."<sup>77</sup>

Aguinaldo's capture in March of 1901 ended the dream of Filipino sovereignty. He was taken back to Manila where MacArthur treated him with the dignity and respect of a fallen general and president. The American general made his counterpart a guest in his own residence, the famous Malacanan Palace. Aguinaldo was impressed by the kindness of his captors and on April 19, he took the oath of allegiance to the United States and penned a proclamation to the insurgency calling for the end of fighting and acceptance of the governance of the United States over the Philippines. General Funston used Aguinaldo's Proclamation to encourage the powerful Filipino Brigadier General, Urbano Lacuna, to surrender the last stronghold in Luzon, Nueva Ecija, less than a month later.<sup>78</sup>

With the top two Filipino generals out of the fight, the rest of the Army of Liberation's leadership quickly surrendered to, or were captured by, the large American forces. Many of these generals made deals with the Army to publish their own open letters to convince the men they commanded to quit the insurgency. By July 1901, just eight months after the American election, dozens of generals and other prominent revolutionaries had surrendered. The insurgency would

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<sup>76</sup> Coffman, "Batson of the Philippine Scouts," 68-72.

<sup>77</sup> Funston, *Memoirs of Two Wars: Cuban and Philippine Experiences*, 419-421.

<sup>78</sup> General Funston personally wrote General Lacuna to negotiate a surrender on which he attached a copy of Aguinaldo's Proclamation for Peace. Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*, 22-26; Funston, *Memoirs of Two Wars: Cuban and Philippine Experiences*, 427-434; Pringle, *The Life and Times of William Howard Taft*, 196-197.

not end in all of the islands for years, but the tactical military successes of the counterinsurgency, coupled with the social programs of benevolent assimilation, were working well to achieve a strategic victory—pacification.<sup>79</sup>

Despite a multitude of personal differences between Governor Taft and General MacArthur, their congruent efforts amplified each other's success. While General MacArthur continued his tactical successes by defeating the armed insurgents, Taft directed his Commission to focus on building a government in the Philippines accepted by the population. Taft was a natural diplomat. He respected the local people, whom he referred to as his "little brown brothers."<sup>80</sup> The Commission helped empower the locals by appointing councils, filling the majority of civilian government jobs with Filipinos, and financing MacArthur's efforts at growing a professional Filipino military that was invaluable to the counterinsurgency campaign. Having had full legislative power since September 1, 1900, Taft had wisely used the revenue gained from customs, seizure from insurgents, and limited taxes, reinvesting these funds in building infrastructure and government systems and capabilities. He also worked well with MacArthur, developing a program called "no peace—no jobs" that would disenfranchise anyone still in arms after April 1901 and render them ineligible for government appointments.<sup>81</sup>

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<sup>79</sup> Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*, 26-8.

<sup>80</sup> While the term "little brown brothers" is considered offensive paternal racism in 2016, it was genuinely intended by Taft as a term of endearment of the Filipinos in 1900. The imperial spirit of America at the turn of the Nineteenth Century was based on the theory of Manifest Destiny. The vast majority of Americans believed the superiority of the Americans over the Filipinos was based as much on genetics as nationality. This included the US military fighting in the Philippines who called the Filipinos "negros" and deeply resented Taft using the term brothers. A song made up by the soldiers to disparage Taft's assertion of the Filipinos contained the line "he might be a brother of big bill Taft, but he ain't no brother of mine." Leon Wolf, *Little Brown Brother: How the United States Purchased and Pacified the Philippines* (Oxford: Oxford University Press, 1960), 300-326.

<sup>81</sup> Pringle, *The Life and Times of William Howard Taft*, 192-198.

Despite the ability of Taft and MacArthur to work together professionally, there was some mistrust and frustration between them. MacArthur did not relinquish power to the commission easily, requiring Taft to go through significant bureaucratic obstacles for every requirement—such as man-power and access to combat areas. Within the first month of the Second Commission’s arrival, the General wrote to the War Department pleading to reduce their authority.<sup>82</sup> MacArthur went so far as requiring formal authorization for his subordinates to respond to any of the Commission’s requests and insisting on formal correspondence.<sup>83</sup> As the civil-military relationship grew increasingly bureaucratic and formal, the Commission was unable to make suggestions or attempt to reassign the lowest ranking of officers without an immediate rejection from the military for breaking the protocol.<sup>84</sup> With the increased military success, Taft began to realize the need for a military governor had come to an end and it was time to continue the President’s plan to transition to civil control. He wrote Secretary Root in 1901 that “things are certainly coming our way, and if we could only have a civil government supreme here with an efficient police force...the situation of the islands would change marvelously.”<sup>85</sup>

Taft used his growing influence in Washington DC to persuade Secretary of War, Elihu Root, and the McKinley administration that it was time to turn the Philippines over to civilian rule, and also time to replace the military governor with whom he had made so much progress. Taft’s argument was persuasive to the McKinley administration because MacArthur had become a political liability, publishing reports that contradicted the administration’s position that the

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<sup>82</sup> Berthoff, “Taft and MacArthur, 1900-1901: A Study in Civil-Military Relations,” 198.

<sup>83</sup> *Ibid.*, 199.

<sup>84</sup> *Ibid.*, 201-202.

<sup>85</sup> Pringle, *The Life and Times of William Howard Taft*, 192-199.

majority of the Filipinos wanted United States rule. Additionally, he was seen as arrogant, taking personal credit for the “effective pacification of the Archipelago.”<sup>86</sup> Unfortunately, the decision to replace MacArthur was leaked to the press, who reported it in March of 1901, weeks before the administration notified the general of their decision.<sup>87</sup> MacArthur was disappointed in the way he was removed from the position, but had not wanted to stay on past civil transition and was perfectly happy to continue his military career back in the United States.<sup>88</sup>

Adorned with waving flags, the Cathedral Palace of Manila filled with music as a local band played *The Star Spangled Banner* for an audience of thousands of Filipinos who came to witness the transfer of authority from military to civilian rule on a patriotic Independence Day, 1901. Governor Taft became the chief executive and leader of the legislature in the islands as he assumed control of MacArthur’s Office of Military Governor in the Philippine Islands. The retiring general, Arthur MacArthur, gave his military command to Major General Adna R. Chaffee. McKinley explained to the new executive that he was expecting him to do well for the Filipino people, writing in a congratulatory telegram that he hoped “that their [Filipinos] participation in the government, which is our purpose to develop among them, may lead to their highest advancement, happiness, and prosperity.”<sup>89</sup> Taft agreed with the President, and to the dismay of many of his fellow countrymen, appointed three Filipinos to the Commission over which he presided. He wanted to add two more, but the rest of the commission outvoted his proposal. Within his first month in the position, the new civilian Governor General of the

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<sup>86</sup> Linn, *The Philippine War, 1899-1902*, 218.

<sup>87</sup> *Ibid.*, 216-217.

<sup>88</sup> Berthoff, “Taft and MacArthur, 1900-1901: A Study in Civil-Military Relations.” 208.

<sup>89</sup> Pringle, *The Life and Times of William Howard Taft*, 200.

Philippines also quickly worked to increase the Filipino's role in their security, authorizing the establishment of the Philippine Constabulary to be the civilian security counterpart to the military Philippine Scouts.<sup>90</sup> He inherently realized that he needed legitimacy amongst the locals to succeed as a government.<sup>91</sup>

General Chaffee was not Taft's choice, but that of the Secretary of War, Elihu Root, who realized this tough Civil War cavalryman, who had also distinguished himself in the Spanish American War and the Boxer Rebellion in China, was considerably more politically astute than his predecessor. Root wanted to begin to remove the military from the role of the civilian government in the Philippines. He charged the new commander with the task of using the military exclusively for combat functions. To accomplish this, Chaffee retrained hundreds of young officers who had spent years in the Philippines working exclusively in the civilian government. The President and the Secretary of War decided it was time to reduce the amount of soldiers in the Philippines, forcing Chaffee's team to make those transitions quickly. The price of fighting this prolonged counterinsurgency had grown unacceptable. The military began to draw down so quickly that by October of 1901, Chaffee's command was losing 2,000 men a month as enlistment contracts expired.<sup>92</sup>

Meanwhile in the US, the new Vice President, Theodore Roosevelt brought fervent energy and national attention to a campaign that was a boon for the Republicans in the election of 1900. However, after the election, the McKinley administration and the Republican Party bosses

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<sup>90</sup> On August 1, 1901 Governor Taft signed Act 175 authorizing the establishment of the Philippine Constabulary. They were a civilian police force that fell under the jurisdiction of the civil government, unlike their military counterparts the Philippine Scouts. John R. White, *Bullets and Bolos: Fifteen Years in the Philippine Islands* (New York: The Century Co., 1928), 7-9.

<sup>91</sup> Linn, *The Philippine War, 1899-1902*, 216-218.

<sup>92</sup> Linn, *The Philippine War, 1899-1902*, 216-220.

had little use for the outspoken politician who refused to follow the party line. Republican Senator and friend of McKinley, Marcus A. Hanna, called Roosevelt a “Madman” and feared that only the survival of his friend stood between Roosevelt and the office of Presidency. Those plans ended forever when President McKinley attended the Pan-American Exposition on September 6, 1901. Two bullets from the gun of a young anarchist made Theodore Roosevelt the twenty-fifth President of the United States, and as America’s Commander-in-Chief, he would be responsible for shaping the future of the Philippines.<sup>93</sup>

Despite being a friend of the new president, Taft worried that the Philippine program had lost its most valuable ally and would no longer be a top priority for a skilled presidency. Just after Taft received news of the President’s death, he wrote to Secretary Root that the assassination of McKinley “robbed our work...of the interest it had before.”<sup>94</sup> Taft also feared that Congress would be less supportive of the war, writing to his mother in October 1901 “it was not to be expected that [Roosevelt] will be able to retain the control over Congress which McKinley, by reason of his long Congressional experience had succeeded in obtaining.”<sup>95</sup> Roosevelt was much less diplomatic and measured than McKinley. Governor Taft and General Chaffee saw this first hand, when Roosevelt responded to a disagreement they brought to him over the rights of

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<sup>93</sup> President McKinley had tried unsuccessfully to convince several “abler” men to take the position before the convention. Roosevelt wanted to be in charge of the Philippine transition to civilian government, but he did not have McKinley’s trust or confidence. Given no assignments, tasks, or responsibilities from the President, Roosevelt believed his political career was over. He fell into a state of depression and wrote to his friend, William H. Taft, that he began to make plans to attend law school so he could start private practice in New York or teach history at a university. Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America’s Imperial Dream*, 186-199; Goodwin, *The Bully Pulpit: Theodore Roosevelt, William Howard Taft and the Golden Age of Journalism*, 263-279; and Morgan, *William McKinley and His America*, 475-508.

<sup>94</sup> Pringle, *The Life and Times of William Howard Taft*, 210.

<sup>95</sup> Pringle, *The Life and Times of William Howard Taft*, 211.

Filipinos to *habeas corpus*. The young President refused to make a decision, but rather telegrammed both Taft and Chaffee and curtly ordered them to settle it themselves. Both men were unsatisfied with the President's reaction, which they both viewed as obtuse. The rest of the year was even worse for Taft. He became very sick, during which time the Filipino insurgents conducted the most deadly attack of his tenure.<sup>96</sup>

The island of Samar, on the far eastern edge of the Philippines, was still a stronghold of insurgent activity. The insurgent, Vicente Lukbán, promoted to General by Aguinaldo, was the self-proclaimed Governor of Samar. Army reports show they believed he had a militia of over 600 men, which he was using to conduct raids and ambushes on small US patrols. On September 28, 1901, Lukbán's men, with the help of the disgruntled local townspeople, conducted a successful attack that shocked the United States. They executed a dawn ambush on an American garrison, manned by seventy-four soldiers in the town of Balangiga. The Americans were devastated by the attack, suffering forty-four killed, twenty-two wounded, and four missing. The newspapers in America called it a "massacre" and compared it to the Battle of Little Big Horn. The Governor and Commanding General working together decided that a prompt response would be required to pacify the island immediately. President Roosevelt skipped his usual protocol of going through the Secretary of War and cabled General Chaffee directly with orders to pacify Samar.<sup>97</sup>

Even before the Samar Massacre, General Chaffee realized the complex problem that pacifying the Visayan island of Samar would be to the military. Samar was one of the most primitive and inaccessible islands in the Philippines, located over 300 miles from Manila and

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<sup>96</sup> Pringle, *The Life and Times of William Howard Taft*, 212; Linn, *The U.S. Army and Counterinsurgency in the Philippine War, 1899-1902*, 151-153.

<sup>97</sup> Ramsey, *Savage Wars of Peace: Case Studies of Pacification in the Philippines, 1900-1902*, 93-96.

covered in mountains, jungles, and swamps with less than ten miles of usable roads. Despite the planned reduction of troops, Chaffee dedicated significant resources to begin the pacification effort in Samar. A month before the attack, he deployed seven companies from the 9<sup>th</sup> Infantry Regiment to the southern area of the island. These troops began using the scorched-earth techniques that had been so effective in Luzon. The plan was to starve the insurgents within the interior of the island. To accomplish this they burned crops, removed merchants that were working with the insurgents, and destroyed equipment that was useful to the insurgency. This effort infuriated the local population, pushing them closer to insurgency. Complicating the US Army's effort, General Lukbán was liked by the locals because of his efforts to immerse himself in their culture and because he rarely resorted to violence. He married a local woman and lived and traded with the local population. The confluence of the American aggression and the insurgency's ingratiating caused the locals to join the insurgency on the September 28 attack.<sup>98</sup>

The response by Chaffee was swift and aggressive. He instantly sailed two battalions to Samar, and assigned Brigadier General Jacob Smith to take command of all forces there. The general carried the moniker *Hell Roaring Jake* and had a history of unethical and aggressive behavior. Smith was exactly the overreaction that the moderate Governor Taft feared. The General ordered his men "to shoot on sight anyone over twelve years old, armed or not, to burn everything and to make the island of Samar a howling wilderness." Smith mistrusted the locals and believed any who had not taken the oath of allegiance were part of the insurgency or were, at a minimum, working with them. He fostered an environment in which torture and summary executions of prisoners by his subordinates occurred. Reporters embedded with the soldiers and

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<sup>98</sup> Funston, *Memoirs of Two Wars: Cuban and Philippine Experiences*, 427-432; Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 221-231.



marines of Samar published articles about this behavior, causing an uproar back in the United States.<sup>99</sup>

The abuses by the military in Samar were exactly the controversy that the anti-imperialist Democratic minority in Congress needed to sully Roosevelt's stated goal of colonizing the Philippines. On January 31, 1901, the US Senate began hearings about the current state of affairs in the islands. The Philippine Governor, William Taft, was the first witness to testify. He had sailed back to the United States for medical reasons a month before and decided to travel to Washington DC to ensure he could influence Congress to stay the course. The former judge's testimony downplayed the abuses and focused on the many successes achieved thus far in what was considered a second-class country by most Americans, including Taft. Secretary Root wrote a letter to the Senate Committee that was conducting the inquiry. In this letter, he agreed with the testimony of Taft and the military's field commanders, which stated that the abuses by the troops in the Philippines were rare and were a response to the brutality of the insurgency. During this political hearing in Washington, a court-martial began for the Marine Company commander in Manilla, Major Tony Waller, who was accused of executing prisoners on Samar. The court-martial added to the negative newspaper headlines about military actions in the Philippines, increasing political pressure on the administration. The accused Marine Major admitted to the execution of twelve prisoners, but claimed he had the authority. A jury of seven soldiers and six marines agreed with Waller and found him not guilty of murder. The trial brought about testimony that implicated General Smith's conduct as overall commander on the island as the cause for all of the abuses conducted by the military. Waller's testimony led to General Smith's subsequent court-martial by which he was found guilty of "conduct to the prejudice of good order

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<sup>99</sup> Ramsey, *Savage Wars of Peace: Case Studies of Pacification in the Philippines, 1900-1902*, 95-106; Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 236-268.

and military discipline.” Secretary Root recommended that General Smith be discharged from the Army. President Roosevelt agreed with the Secretary of War’s recommendation.<sup>100</sup>

The controversy over the actions of a few commanders in Samar overshadowed the result. By the beginning of 1902, the insurgency was barely holding on. The Navy’s control of the rivers, ports, and coast contained the insurgents while the attack by the Army and Marines deep into the island kept the insurgency dispersed and on the run. By February, a weak and starving General Lukbán was captured by an Army patrol. The insurgency was so depleted on Samar, they were forced to spend all their energy foraging instead of fighting. By April, the last of the island’s guerrillas had surrendered, marking the end of the notorious pacification campaign.<sup>101</sup>

While the relationship between the civilians and military remained professional and productive in Manila, it became toxic in Washington DC. The Commanding General of the United States Army, Lieutenant General Nelson Miles, had become increasingly disgruntled with the President and the Secretary of War. He thought he should have a bigger role in the Philippines, but believed he was deliberately left out by Roosevelt’s administration. In an interview with a left-leaning journalist in March of 1902, he stated that the President had personally blocked his request to conduct an inquiry into the actions in Manila, implying that the Commander-in-Chief was obfuscating the truth. General Miles added that only he could uncover the facts in the Philippines, stating “he could and would bring order to chaos if sent to Manila...[but his request] sleeps in a pigeonhole.” This blatant attack on the Presidency should

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<sup>100</sup> Ralph E. Minger, *William Howard Taft and United States Foreign Policy: The Apprenticeship Years 1900-1908* (Chicago: University of Illinois Press, 1975), 86-96; Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America’s Imperial Dream*, 269-295; and David H. Burton, *William Howard Taft, Confident Peace Maker* (Philadelphia: St Joseph’s University Press, 2004) 34-38.

<sup>101</sup> Linn, *The Philippine War, 1899-1902*, 319-321.

have ended the General's career. However, in order to avoid political fallout from the firing of the top military officer in the country, Roosevelt sidelined Miles, giving him no duties.<sup>102</sup>

Much of the American public was growing tired of the expensive and increasingly embarrassing Philippine-American War. The effect of Secretary Root's cost-cutting effort began in October of 1901, when the United States reduced its military presence in the Philippines by 2,000 men per month. The military transitioned as many non-combat positions as possible to the civilian government to keep an effective fighting army available. The political mudslinging increasingly involved highly decorated and high-ranking military members that often contradicted each other's accounts from the Philippine-American War. Popular anti-imperialist, Mark Twain, continued to publish dozens of pages of prose against the war effort, further dividing public opinion regarding the war effort. On June 28, 1902, Republican Senator and staunch imperialist, Henry Cabot Lodge, adjourned the hearing on the Philippine-American War. With the hearings over, Congress adjourned for the summer three days later.<sup>103</sup>

With Congress adjourned, Theodore Roosevelt prepared a document that he knew would smother the political infighting about the war. On July 4, 1902, with no fanfare, Roosevelt signed a Presidential Proclamation that ended the war in the Philippines. Though violence in the Philippines would continue, especially among the southern islands of the Muslim Filipinos, this proclamation effectively ended the Philippine-American War and buried the majority of its political debate.<sup>104</sup>

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<sup>102</sup> Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 296-304.

<sup>103</sup> Linn, *The Philippine War, 1899-1902*, 216-220.

<sup>104</sup> Jones, *Honor in the Dust: Theodore Roosevelt, War in the Philippines, and the Rise and Fall of America's Imperial Dream*, 323-324.

Though the exact date of the war's end was determined based on political convenience, the war was actually already ending successfully. The counterinsurgency everywhere except the distant Moros Islands was gone or in its death throes. The seat of the civilian government was the bustling modern city of Manila. Trade and business had boomed throughout the country. The US military was leaving and was being replaced by two Filipino security forces: the Philippine Constabulary working as civilians charged with peace enforcement and the Philippine Scouts, a strictly military force, working for the US military commander.<sup>105</sup> Filipinos ran most local governmental affairs having three seats on the legislative commission. Despite all the progress, the war was, unfortunately, never viewed as a success by the American people or most of the government leadership whose work with the military orchestrated its victory.

This unprecedentedly successful counterinsurgency could not have occurred without a strong relationship between the civilians and the military. Though the relationship was often frosty and unpleasant, it remained professional. The civilian leaders clearly articulated their political goals. The professional dialogue between the civilian leaders and the military leadership ensured the means required were available for the military to achieve those political ends. No matter the grievances (real or perceived) that the military had with the civilian leadership, the American military leadership always remained subordinate, policed themselves, and maintained their ethical and legal duties as laid out in the constitution and their oaths.

### **Conclusion**

The Philippine-American War, on the surface, appears to be an enigma. It was a war born from the bounty of war, which turned an ally into an enemy within weeks. It was fraught with political and domestic controversy. It challenged American ideals and values on imperialism, self-determination, torture, and liberty. The very nature of the war changed from conventional to

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<sup>105</sup> White, *Bullets and Bolos: Fifteen Years in the Philippine Islands*, 7-9.; Coffman, "Batson of the Philippine Scouts" 68-72.

unconventional in 1899. Despite these vast problems within the conflict, the United States was victorious over the Army of Liberation. This was America's last successful counterinsurgency.

Much of the literature on this conflict focuses on these obstacles to the success of the war. There is a multitude of research that focus on the mistakes and failures made by the military or on the petty bickering between leaders. The cases of war crimes committed, while horrible, were limited and rare for such a large scale war. The infighting between leaders like Taft and MacArthur are to be expected in a power transition unprecedented in US history. Unfortunately, there is too little focus in the literature on the successful leadership it took for the commanders to limit retribution and ill-treatment of the native population from a force trained in counterinsurgency in the bloody Indian Wars. The story of Taft and MacArthur would be better focused on their ability to work together despite opposing personalities. MacArthur was a stereotypically proper military man when compared to his affable yet pragmatic civilian counterpart. Their ability to overcome their differences and to determine how to transition this territory from military to civilian rule, while fighting an insurgency was crucial to winning the counterinsurgency campaign and ultimately the war.

The professionalism of the experienced general kept him subordinated to the inexperienced civilian, thus allowing Taft to focus on the President's policy of a quick transition to civilian rule with the best military advice from MacArthur. The collocation of Taft with MacArthur in Manila forced the two to work together to achieve the ends. Additionally, Taft's constant pressure to focus all action on civilian transition forced MacArthur to keep the initiative by massing his military means on the fading insurgency. This is an example of what Cohen describes as the value of an "active statesmen" whose constant pressure drives the military to

victory, preventing them from getting side tracked on less important problems.<sup>106</sup> This was true of the Taft as upon his arrival in Manila and even more so once he took over as civilian Governor.

The military and the civilian leadership also shared a dialogue in this conflict. Once given ends by their leadership, such as destroying the Spanish Fleet in Manila and Guam, taking the Spanish Garrison in Manila, or pacifying the Philippines, the senior commanders, with help from their staff, assessed if they had the appropriate means to arrange tactical actions to accomplish those ends. When they did have those means, they executed. When they did not, they went back to the civilian leadership giving their best military advice to start a dialogue over their additional needs. The civilian leaders then stayed active in the process, never allowing the military commanders to lose focus on the ends.<sup>107</sup> This system worked well in both campaigns, ultimately, resulting in victory.

Despite the unlikely American victory, policy makers and the military have forgotten the Philippine-American War. The lessons of counterinsurgency, paid for with blood and treasure, should have been passed down, not put away because of political differences or embarrassing incidents. These lessons should have shaped policy and strategy through three decades of war in Vietnam, Iraq, and Afghanistan. But it is not too late. This monograph was not written to expose the failures of the past, but in hopes to illuminate successes that can be used in future campaigns. Whether the fight is in the deserts of the Middle East, the plains of Africa, or the jungles of Asia, the lessons learned from McKinley, Roosevelt, Taft, Otis, MacArthur, and Chaffee can offer assistance. They can show how America can defeat the next insurgency, both militarily and politically.

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<sup>106</sup> Cohen, *Supreme Command: Soldier, Statesmen, and Leaders in Wartime*, 5.

<sup>107</sup> *Ibid.*, 5.

Future commanders, with help from their staffs, have to be honest brokers of best military advice. They must have the moral courage to ask powerful civilian leaders for the means required to meet desired ends, given the restraints placed upon them (often by those same civilian leaders). Additionally, the military advisors to these civilian leaders must articulate the risks of military action to achieve ends with insufficient means.

An important factor to the success of the United States was because of the civil-military relationship. In spite of all the personal issues between the highest ranks of military leadership in the Philippines and those of their civilian superiors, the US military remained under what Dr. Samuel Huntington has coined “objective civilian control.” This theory states that a professionalized military will subordinate itself to the civilian leadership for the good of the country.<sup>108</sup> This ensures there is no need for the civilian government to place artificial legal and institutional restraints on the military, which could hinder mission success, simply to ensure their subordination. The basic belief is that a professional force will police itself; the military of 1898-1902 was a professionalized force with a specialized officer corps that maintained this professionalism. Working with the professional military, the active statesmen, Taft and to a lesser extent, McKinley worked to keep the military on task. Ultimately these two groups working in concert were an unstoppable force against the Army of Liberation.

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<sup>108</sup> Huntington, *The Soldier and the State: The Theory and Politics of Civil-Military Relations*, 189-192.

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