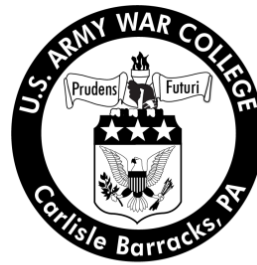


Designing a Campaign: Forbes' March to the Ohio

by

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United States Army War College
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ABSTRACT

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Brigadier General John Forbes' march from Carlisle to the Ohio River in 1758 was the first successful campaign in North America. Furthermore, it became one of the major operations during the Seven Years' War that decided control of the continent in favor of the British at the expense of the French. Winston Churchill later referred to this conflict as the first global war. As such, this campaign is worthy of further study. This paper analyzes the Forbes campaign through the lens of the elements of operational design as explained in Joint Publication 5-0 to determine the reasons for success. It also looks to synthesize some of the lessons of the campaign to apply them to contemporary operations. While the definitions of the elements of operational design are adequate, they offer no historical examples so that a reader can grasp more fully their application. The Forbes campaign – a coalition operation conducted over more than 200 miles of wilderness that required significant planning and preparation - is an excellent case study in designing a successful campaign.

DESIGNING A CAMPAIGN: FORBES' MARCH TO THE OHIO

British victory in the French and Indian War decided the fate of North America. One of the significant campaigns of this war was the 1758 British offensive against Fort Duquesne, located at the headwaters of the Ohio River at what is now the city of Pittsburgh. This campaign, led by Brigadier General John Forbes, became the first successful land campaign in North America and a model for effective campaign design. While not the decisive operation of the war, it was clearly a key effort that set the conditions for eventual French defeat. As such, it is clearly a campaign worthy of further study.

The Forbes campaign – a multi-national coalition operation conducted over a great distance of wilderness that required significant planning and preparation - is an excellent case study in designing a campaign. To understand the reasons for the success of this effort, the elements of operational design found in *Joint Publication 5-0, Joint Operational Planning*, provide a useful evaluation tool. While there is no evidence to suggest that General Forbes produced a written campaign plan, the operation unfolded in ways that consider current doctrine's key aspects of design. In any case, design is not the campaign plan; it is the intellectual framework that helps to define the problem and guide the planning. The historical evidence makes it possible to construct the Forbes campaign into the modern day elements of operational design. The result is a clear illustration of the reasons for the success of this historically significant operation.

Forbes faced a considerable challenge with no inevitability of success. His predecessor, General Edward Braddock, had failed epically three years earlier and had died in the attempt to seize Fort Duquesne. Forbes himself had never held independent

command and had not commanded troops in the colonies when Sir William Pitt, chief minister in the British government, personally picked him to lead the next campaign against Fort Duquesne. The French had enjoyed a series of victories over the preceding three years, and Britain needed a win in North America.

Pitt thought Forbes was the right military leader capable of delivering this critically important win for the empire, and his actions eventually proved him correct. Forbes already was serving as a staff officer in North America when notified of his selection for command. He had just arrived in the colonies in 1757 to serve as the adjutant-general to the Commander-in-Chief of his Majesty's Forces in North America, at that time Lord Loudon, General John Campbell.¹ Pitt often lamented openly about the incompetence of the British officer corps in general.² He developed a record of advancing commanders not based on the traditional method of seniority, but based on accomplishments. Forbes was a good choice to lead the expedition because of his administration and logistics knowledge, his previous combat and leadership and experience, but most important, his reputation for success.

Forbes received little in the way of strategic direction. He did obtain some idea about the desired strategic endstate in written correspondence from Pitt, who directed him to remove and repel the dangers that threatened the provinces' western frontier.³ Indian raids had devastated the western borders of Pennsylvania and Virginia, with the raids directed and supported by the French operating from Fort Duquesne. Forbes had to defeat the French and their Indian allies while providing better security against future incursions. Pitt also provided him with some limited means to execute his mission. Forbes received a regiment of regulars and a battalion of provincials, along with

£100,000 to fund the campaign.⁴ Pitt usually directed the administration of the army and navy down to the smallest of details, and his personal correspondence demonstrates his exacting level of scrutiny.⁵ However, Pitt left the way in which Forbes executed the campaign – the concept - entirely up to him. Thus, Forbes had to determine how to accomplish the end state with the limited means available.

The colonial frontier offered a very different operational environment than did Europe, with few roads and even fewer bridges, a very limited population except for along the coast, and vast expanses of complete wilderness. Because of these huge differences, most British officers had performed poorly when fighting in North America. Forbes hoped to change this trend. However, he first had to design a feasible plan. Along with planning, the operation also required significant preparation on Forbes' part. He had to assemble his regular and provincial forces, coordinate directly with governors for militia support, purchase most necessary supplies from numerous private individuals, direct reconnaissance across almost 200 miles of mostly trackless wilderness to find a suitable approach to Fort Duquesne, and even conduct diplomatic negotiations on behalf of the British crown with a wide array of Indian tribes. Additionally, as the commander, Forbes did not simply plan and prepare. He had to lead the operation in person. In the process, he had to demonstrate numerous strategic leadership skills atypical to a conventional British officer of the period. This included using influence on a wide variety of actors outside of his official authority, building consensus based on a shared vision, anticipating the actions of the enemy's irregular forces, and demonstrating adaptability in the face of tremendous adversity. This

differed greatly from Braddock's mode of operation. Therefore, with careful planning, preparation and leadership, Forbes set the conditions for a successful campaign.

To explain the success of the Forbes campaign adequately, a review of both the strategic situation and an overview of the conflict leading up to the operation are useful. It is also important to look at the key commanders on each side, both British and French. From there, this paper examines what Forbes planned and then what actually happened to provide the historical evidence necessary to evaluate the campaign. This will provide the foundation for an analysis of the campaign using the lens of the elements of operational design found in JP 5-0. A final section looks to synthesize some of the key points from the campaign for possible extrapolation to operations today.

Strategic Overview

To put the campaign against Fort Duquesne in historical context, it is first necessary to look at the strategic environment of the New World at the start of the Seven Years War. Winston Churchill referred to the conflict as the world's first global war, since it took place on the continent of Europe, in India, and on the high seas, as well as in North America. Britain and France already had fought a series of small wars on the North American continent starting in the late seventeenth century to gain control of its tremendous resources and trade. While the Seven Years' War traditionally spans the years from 1756 to 1763, it had actually started even earlier in North America. Known in North America as the French and Indian War, it started in mid-1754 with a series of seemingly small events that merely served to fan the flames of an already burning desire for colonial supremacy. Voltaire said, "Such was the complication of political interests that a cannon-shot fired in America could give the signal that set

Europe in a blaze.”⁶ The cannon shot was actually a volley of rifle shots fired by a young Major George Washington and his detachment of Virginia militia and Ohio Indians at a group of French soldiers led by Ensign Jumonville on a wooded hillside about sixty miles southeast of Fort Duquesne. Thus, the spark of a small wilderness engagement ignited a global war. Ultimately, all of the major powers of the period participated, with Great Britain, Hanover, Prussia, and Portugal fighting against France, Austria, Russia, Saxony, Sweden, and Spain.

At the start of the French and Indian War, French control of North America extended from Canada, through the Great Lakes, to the Ohio Valley, and then down the Mississippi River to New Orleans. This gave the French the strategic advantage of controlling the inland waterways, especially all of the great rivers and lakes, which served as the primary network of transportation.⁷ The British occupied the eastern seaboard of what is now the United States, but French control of the interior contained their greater population from further expansion westward. France in particular recognized the importance of its colonies and saw the coming struggle as decisive in determining the balance of power between the two rivals. A French minister said, “The King believes, Monsieur, that it is the possessions in America that will in the future form the balance of power in Europe...”⁸ Clearly, France saw vital national interests at stake in North America.

The initial perspective of the British differed from that of the French. For years, Britain did not see a vital national interest in North America and had long neglected the colonies.⁹ While Britain had a long-standing rivalry with France, the home government, up to this point, wanted to avoid a conflict in the New World. Concerning Canadian and

Indian incursions, Earl Granville, the Lord President of the Council, fourth in seniority in the British government, felt that the “colonists were strong enough without reinforcement from England.”¹⁰ British leaders also shared concerns that any greater conflict could lead to a disruption in international order and a probability of a larger war. Furthermore, such a conflict would be costly, something Parliament was unwilling to fund unless given no choice. The French incursion into the Ohio River valley and the subsequent defeat of Washington proved to be the catalyst of change. Britain now saw that the war was coming, which led to a significant change in British policy in late 1754. This shift started with preparation for Braddock’s campaign in 1755, beginning with the raising of additional regiments for colonial service.¹¹ Britain now proved willing to fight for its interest in North America.

Both Britain and France had devised military strategies to protect their interests in North America. Since Britain’s greatest power resided in her Navy, starting in 1755, its strategy centered on blockading the French colonies and slowly attriting their power over time, preventing the delivery of adequate reinforcements and resupply. At the same time, Britain intended to divert France’s attention from North America to Europe by supporting the continental land powers of Prussia and Hanover.¹² This allowed the shifting of Britain’s own limited land force capability to the colonies in time for a series of offensives in 1758. After Braddock’s disaster in 1755, little activity took place on the western frontier other than Indian raids. Meanwhile, the British experienced a series of defeats at the hands of the French on the northern frontier in 1756 and 1757. However, the British planned a series of campaigns starting in 1758 to break out of the eastern

seaboard and seize key terrain to allow further British expansion in North America. In sum, Britain finally would take the initiative.

The campaign season of 1758 started with the fall of Louisburg on July 26, 1758. This fortress, which controlled the mouth of the Saint Lawrence River, strengthened the British blockade, further pushing the French colonies to the edge of starvation while also severely limiting their ability to provide trade items and gifts to their Indian allies.¹³ At the same time, Britain sent fleets against the French coast and against France's possessions in western Africa and sent additional funding to Prussia, all of which served to paralyze their adversary and prevent reinforcements or supplies from reaching Canada.¹⁴ Therefore, with the strategic initiative definitively on Britain's side, 1758 became the turning point for the struggle for supremacy in North America.

However, despite gaining a critical advantage in mid-year, the British faced many problems. France remained the preeminent land power of the world and had more troops in North America up to 1758.¹⁵ The French had available 6,800 regular soldiers, 2,700 provincial troops or troupes de la marines, and up to 16,000 militia.¹⁶ For the 1758 campaigns, the British planned to assemble almost 50,000, but this entailed recruiting, training, and equipping tens of thousands of new soldiers. The French had significantly more Indians on their side, with alliances with northern, western and Ohio Indians, although the most powerful confederation, the Iroquois, remained non-aligned.¹⁷ The Indians generally saw the British as colonists, here to take their land. The British always lived apart from the Indians and slowly expanded westward, taking more and more land as they grew. By 1753, British settlements encroached on the Susquehanna River area belonging to the Delaware tribe.¹⁸ Meanwhile, the Indians

viewed the French as traders, living among them and turning villages into centers of trade and farming. Most important, the French were the key source of arms and ammunition, probably the most valuable of all goods on the frontier.¹⁹ The Indians also observed French capability first-hand in a series of British defeats, and whomever had the most power caused their allegiance to sway. While their numbers were never as great as the formations of French and British troops, Indian warriors played key roles in many of the battles.

The most significant aspect of the French and Indian alliance was the unique capability the Indians provided the French: warriors who could conduct reconnaissance, raid, and ambush, all while moving much easier than conventional forces through the wilderness. The British still used a musket accurate to no more than fifty yards, with a bayonet mount for close combat. This was an effective weapon system for a European battlefield, where armies faced each other in orderly formations at close range. Armed with muskets, soldiers could fire a volley or two, and then charge the other formation with bayonets fixed. However, the Indians used the Kentucky rifle. While it could not mount a bayonet, it had an effective range of 200 yards. Indian ambush tactics could wreak havoc on British regulars formed in traditional ranks suitable for a European battlefield against a similar foe.²⁰ After visiting the Delaware Indians, missionary Christian Frederick Post wrote:

In their way of fighting they have this method, to see that they first shoot the officers and commanders; and then, they say...the soldiers will all be confused, and will not know what to do. They say of themselves, that everyone is like a king and a captain, and fights for himself. By this way of fighting they imagine they can overthrow any body of men, that may come against them. They say, 'The English people are fools; they hold their guns half man high, and they let them snap; we take sight and have them at a shot, and so do the French.'²¹

This asymmetrical advantage for the French proved to be decisive in many of the key battles of the French and Indian War.

The physical environment challenged both sides. North America was a complete wilderness, with no roads into the interior and the Allegheny mountain range posing a serious barrier to British movement westward. Primary movement in the interior relied upon canoe along the waterways, which mainly ran north south and benefited the French-controlled areas more. With the physical environment in mind, both the British and French saw control of the Ohio Valley as the linchpin for French control of the interior and maintaining communications between New Orleans and Canada. The British made the first claim to the forks of the Ohio River in late 1753 and established an outpost there in February 1754, guarded by about forty Virginia militia soldiers. However, a much stronger French force chased them away in mid-April without losses.²² The French subsequently built a strong fort there that they named Fort Duquesne and occupied it with around 500 provincials and militia. However, the area remained hotly contested because both sides realized its strategic importance as the gateway to control of the American interior.

Lieutenant Colonel George Washington of the Virginia Militia already had moved to reinforce the British outpost with 300 men in late April 1754, when he learned of the French occupation. Based on his travels in the area in 1753, the strategic importance of the forks of the Ohio River impressed Washington.²³ After two months of limited, small-unit action in which Washington, supported by some Ohio Indians, attempted to regain control of the fort, he received news that the French had received additional reinforcements, stifling his offensive plans. Additionally, after an incident in late May in

which he ambushed and killed a French ensign named Jumonville, the French assumed the offensive and marched on him with a force of at least 500 soldiers aided by 200 Ottawa and Wyandot warriors from the Great Lakes.²⁴ While Washington received a few reinforcements, he was plainly no match for the French and fell back on a supply base he called Fort Necessity. However, Washington never really designed this small fort as a primary defensive position.²⁵ Poorly sited on low ground and in an open meadow surround by forest, this position provided an easy target for the French and Indians. The French surrounded the meadow, and then poured accurate rifle fire into the position from the protection of the tree line with impunity. After sustaining heavy casualties throughout the day, Washington surrendered on July 3, 1754, and the French paroled him with the rest of his men the next day. This action ended the frontier conflict for 1754, but the struggle for control of the Ohio River Valley served as the catalyst that started the Seven Year's War.

Despite this sharp reverse, the British still wanted to seize Fort Duquesne and take control of the Ohio Valley. The campaign season of 1755 saw the arrival of a new British theater commander, along with a reinforcement of British regulars. General Edward Braddock, unlike many of his contemporaries, had seen little combat. He was also regarded as "arrogant, assertive and quick-tempered," but loyal and a capable administrator.²⁶ Massachusetts Governor William Shirley noted that Braddock was "a General most judiciously chosen for being disqualified for the Service he is employed in, in almost every respect."²⁷ Thus, there were serious concerns about his ability lead a wilderness campaign. However, Braddock was politically well connected, and was a

friend of the influential Duke of Cumberland.²⁸ This relationship, along with his seniority, led to his selection for command.

Braddock had many shortcomings that would lead to his failure. For example, he generally saw the colonial militia, despite their recent and relevant experience, as of little use and made only limited effort to incorporate them into his army. He made an exception with Washington, supposedly based on his knowledge of the area, and assigned him to serve as his aide-de-camp.²⁹ Braddock also did not fully comprehend the challenge of the environment. Sustaining logistical flow was less difficult on European battlefields with established road networks along with villages and farms that could support an army on the march. In North America, Braddock had to cut his own road and then haul all the necessary supplies to sustain his army for the duration of the expedition. His lack of understanding of the environment directly affected the conduct of his campaign.

Braddock also did not understand the Indians. He viewed them as savages that his regulars could sweep away easily and saw no need to incorporate any Indian allies into his own army. The Ohio Indians initially approached Braddock to support his expedition in return for a guarantee to declare the land theirs.³⁰ They had begun to view the French and their northern Indian allies as occupiers of their land. War chief Tanaghrisson, known as Half-King because of his position of deputy leader of the Iroquoian nation in the Ohio region, had fought with Washington in 1754 to expel the French from his territory.³¹ Although Half-King died shortly after the defeat at Fort Necessity, the Ohio Indian delegation that approached Braddock came prepared to fight the French on Britain's side once again in return for getting their land back. However,

Braddock told them, “No Savage Should Inherit the Land,” and sent them away³² The Ohio Indians returned the next day, once again offering to fight for the British in return for their lands. This time, Braddock told them, “that he did not need their Help and had No doubt of driving the French and their Indians away.”³³ Braddock refused to make any agreements with savages, missing a clear opportunity to gain a significant ally.

Braddock’s plan to march his 2,200-man force complete with baggage through the wilderness straight to Fort Duquesne, and then force the French to fight, flee, or surrender, reflected his arrogance. It was as if Braddock thought he could overcome the environment and the enemy through sheer will and a personal belief that he was right. Braddock’s title of Commander-in-Chief of his Majesty’s Forces in North America came with significant formal power and authority.³⁴ However, it takes much more than official authority to design a successful campaign.

The conduct of the campaign differed greatly from Braddock’s vision. His army quickly became bogged down and eventually separated into two groups, as the baggage could not keep up with the infantry. According to Washington, the British officers and regulars were wholly unprepared for the difficulties of moving through the wilderness.³⁵ After about two weeks of marching, Braddock decided to move ahead brashly with the main force of his army, about 1,300 men, and let the remaining men and the supply trains follow at their own pace. Braddock came within a few miles of reaching Fort Duquesne, but in a battle similar to Fort Necessity the previous summer, he found his infantry column quickly surrounded by French and Indians firing from behind trees. The more he rallied his men to remain organized and stay in formation, the better targets they made for the enemy. Washington noted the sheer folly of fighting

with compact bodies of troops against the dispersed Indian attacks and that conventional British tactics had caused the tremendous losses.³⁶ At the end, Braddock lay dead, his army had suffered 900 casualties compared to light French and Indian casualties, and the British plans for the 1755 campaign season collapsed. In this battle on July 9, 1758, the French fielded just 36 officers, 72 provincials, 146 militia, and 637 Indians warriors – 891 total fighters - to oppose Braddock's force of more than 1300, mostly regulars.³⁷ Despite the British numerical advantage, the French and Indians killed or wounded more than two-thirds of them with little effort.

Even before the tactical defeat, Braddock's army was starving. Many of Braddock's troops had not eaten for two days before the ambush because provisions had run out. Not only did Braddock not have a good plan to take Fort Duquesne, he had no plan at all to hold it. Braddock was more than just arrogant and incompetent; he was reckless. Author K.L. Parker writes that the key lesson of Braddock's defeat was that "in wilderness warfare unnecessary chances are never taken and caution must be the first rule of the commander."³⁸ This lesson strongly influenced how Forbes approached his campaign three years later. The two resounding British defeats of 1754 and 1755 gave the French almost three years of respite in the Ohio area before the Forbes operation in 1758. They also provided stark examples of how not to conduct a campaign in the wilderness.

Commanders

Sir William Pitt served as the Secretary of State for the Southern Department, which included the American colonies, and he took on sole strategic direction of the war. Many historians regard Pitt as the first British prime minister, although this position is a more modern creation. Regarding Pitt, Winston Churchill quoted Victorian Era

historian Thomas Carlyle: “It is a considerable fact in the history of the world, that he was for four years King of England.”³⁹ Obviously, Pitt’s authority for directing foreign policy and the war effort was significant. The British theater commander during most of the operation against Fort Duquesne was Major General James Abercrombie.

Abercrombie assumed command on December 30, 1757, replacing the ineffective General John Campbell, Lord Loudon, who departed after just eighteen months in command.⁴⁰ Lord Loudon had replaced the capable but irascible Major General William Shirley in July 1756, while Shirley had assumed command upon Braddock’s death in July 1755.⁴¹ Pitt sent Abercrombie along with reinforcements to reinvigorate the fight in North America after several campaign seasons of consecutive losses to the French.

Abercrombie, an officer experienced in European warfare, arrived in North America carrying plans provided by Pitt for a triad of summer offensives against Fort Duquesne in the west at the forks of the Ohio River, Fort Ticonderoga in the north on Lake Champlain, and the French fortress of Louisburg in Nova Scotia in the north east as the mouth of the Gulf of Saint Lawrence, along with a smaller affair directed at Fort Frontenac on the eastern end of Lake Ontario.⁴² The British viewed this plan as a classic breakout from encirclement by seizing pieces of key terrain around the perimeter of the colonies, which also served to interdict French lines of communication. Most importantly, it gave the British great positional advantage for future offensive operations into Canada. Seeing Fort Ticonderoga as the main effort and the key to access to the French colony in Canada, Abercrombie decided to lead this expedition personally.

The Fort Ticonderoga operation ended in disaster when Abercrombie launched a frontal assault on French and Indian forces near that location on July 8, 1758.⁴³ After

Abercrombie was repelled with heavy losses because of a tactic that worked in Europe but not in North America, Pitt relieved him of command on September 18, 1758. His replacement, Sir Jeffrey Amherst, focused his efforts on planning for the 1759 campaign season and the eventual assault on Montreal.⁴⁴ Amherst had just led a successful operation against Louisburg in the summer of 1758, so Pitt promoted him based on battlefield performance.

Thus, there was little continuity of command at the theater level, with the British changing out commanders five times in three years between 1755 and 1758. Braddock died during the 1755 Fort Duquesne campaign, Shirley and Lord Loudon both took little action while the French won a series of victories, and Abercrombie foolishly directed a frontal attack against prepared positions. These four theater-level commanders, while experienced in European warfare, had little understanding of frontier warfare. They often relied on their formal authority and conventional past experiences as opposed to applying sound strategic leadership skills like learning agility and influence. Lastly, the last three British theater commanders – Shirley, Lord Loudon and Abercrombie - focused most of their efforts against the French center, often personally leading expeditions. This practice set the stage for making Forbes responsible for an almost completely independent campaign against the most western target at Fort Duquesne.

Probably the most important decision that directly affected the outcome of the campaign was the selection of the British operational commander. William Pitt personally selected Brigadier General John Forbes for the task.⁴⁵ Forbes, a Scot by birth, had served as an officer since 1735. He had seen combat action in the War of the Austrian Succession and then later during the Jacobite rising of 1745. While Forbes

moved up the officer ranks to command a regiment, he had never had an independent command. Before arriving in North America, Forbes served as the deputy quartermaster-general for the British Army, a position in which he regularly interacted with key political and military leaders, among them Lord Ligonier, John Jean Louis Ligonier, Commander-in-Chief of the British Army.⁴⁶ In this job, he developed a reputation as a very capable administrator and logistician. Forbes had also studied military theory and had read Turpin de Crisse's *Essai sur l'Art de la Guerre*, which included principles on partisan warfare.⁴⁷ This knowledge of military theory coupled with experience in administration and logistics would prove critical in designing a campaign through a wilderness where the enemy had many advantages.

Another significant factor in the success of the campaign was the assignment of the deputy commander. Lieutenant Colonel Henry Bouquet served as a battalion commander in the 60th Regiment of Foot (The Royal American Regiment), an organization consisting mainly of soldiers drawn from Pennsylvania's German immigrant community.⁴⁸ Bouquet, a professional soldier since age seventeen, had served in a variety of armies as an officer-for-hire, including the Dutch Republic, the Kingdom of Sardinia, and in his native Switzerland. He had only been in British service since 1756, but had already served in South Carolina. Regarded as having keen military abilities - he went on to earn acclaim after winning the Battle of Bushy Run in 1763, the decisive battle in Pontiac's Wars - Colonel Bouquet served as Forbes' tactical commander. While this assignment came by chance and not as the result of deliberate decision, it offers a point to consider in organizing a campaign. Partnering a commander whose

abilities lean toward management with a deputy whose expertise is tactical leadership provides for a balanced team.

A final British key leader worthy of mention in the campaign is Lieutenant Colonel George Washington. Although a provincial officer, Washington had extensive experience in the area of operations. As noted before, he had first operated in the area in 1753 and again in early 1754. Since Fort Necessity, he had risen to command the Virginia Regiment, the first full-time American military unit in the colonies, and had fought numerous successful engagements along Virginia's western border.⁴⁹ In 1756 alone, Washington's militia skirmished more than twenty times with Indians and suffered over 100 killed and wounded. Although the tactical outcome of many of these small-unit engagements was inconclusive, they had the operational effect of preventing Indian attacks on the populace. Indeed, Virginia had suffered far less from Indian raids than had Pennsylvania in 1756 and 1757. In Pennsylvania, Indian raids destroyed most farms west of the Susquehanna River.⁵⁰ Washington clearly had learned from his earlier defeats and had grown into a capable combat commander demonstrated by the sustained security of Virginia's western border.

During the Forbes' campaign in 1758, Washington commanded about 1,000 men in the first of two Virginia regiments. He personally played only a minor role in the execution of the campaign. Although his first-hand knowledge of the area and the enemy could have been useful, he was geographically isolated from Forbes and Bouquet until late in the campaign. From the beginning, however, Washington lobbied extensively to participate in the campaign, telling a friend that Forbes should know that he had been "much longer in the Service than any provincial officer in America."⁵¹

Based on his extensive experience, he was well aware of the danger of organizing troops to fight in a massed formation to oppose Indians. This led to his greatest contribution to the campaign: he provided experienced and well-trained militia that had adopted many of the enemy's irregular tactics and could use them effectively in combat.⁵²

The French theater commander was Marquis Louis Joseph de Montcalm, who assumed command on May 11, 1756.⁵³ An experienced officer who started soldiering when he was just fifteen years old, he was known for his bravery in combat during numerous battles in Europe. Unlike his British counterparts, Montcalm became a quick study on frontier warfare, which helped him win a series of battles against the British. He had already led very successful combined operations with large contingents of Indians against Fort Oswego in 1756 and against Fort William Henry in 1757. Although he was the theater commander, he personally led operations in the center around Fort Ticonderoga. There is little evidence to suggest he gave much direction to the French forces at Fort Duquesne. Although important, Montcalm probably saw this area as an economy-of-force operation, especially based on precedent. Junior officers leading French forces no larger than a battalion and supported by Indian allies had previously defeated both Washington and Braddock with very light casualties. On the second occasion against Braddock, a smaller French and Indian force had completely defeated a much larger British contingent with ease. Therefore, there was no reason to change the French array of forces. They could continue to secure Fort Duquesne with the forces on hand, which allowed Montcalm to focus his attention on the main effort in the center.

At the same time, Montcalm realized that while he had been successful in the past, the British now held the initiative. His letters in 1757 to the political leadership in France make it clear that the British blockade on New France was denying them necessary resources. During the winter of 1757-1758, the lack of provisions pushed the population of New France to the brink of starvation. By the spring of 1758, “some of the inhabitants [had been] reduced to living on grass.”⁵⁴ Only the timely arrival of a convoy of blockade runners from France loaded with food prevented total disaster. Nevertheless, a shortfall of resources did not exclude all of his potential options. Montcalm saw his best path to victory not through the force of arms, but through intrigue. In a letter to Monsieur de Berryer, a political commissioner in France, announcing his success at Fort Ticonderoga, Montcalm concludes with the thought that fanning the flames of rebellion in the English colonies offered the greatest hope for success.⁵⁵ It is not clear, however, if Montcalm ever took any action along these lines.

Commanding the French forces at Fort Duquesne was Captain Francois-Marie Le Marchand de Lignery. Born in Montreal in 1703, he had served since age fourteen and participated in numerous skirmishes and became a tenacious officer and a master of hit-and-run tactics. He had commanded the French forces at the fort for three years, since the summer of Braddock’s defeat in 1755.⁵⁶ During the battle with Braddock’s forces, Lignery commanded the French main force company. Based on his unit’s success and his personal valor in this battle, he advanced to command of all French forces in the Ohio Valley. Since assuming command at Fort Duquesne, Lignery has used his knowledge of frontier warfare and close alliance with Indian fighters to raid the Pennsylvania and Virginia colonies continuously. In March 1758, Shawnee and

Delaware warriors operating from Fort Duquesne had killed or captured 140 settlers in Virginia alone.⁵⁷ Pennsylvania faced far worse depredations. In the fall of 1757, Indians at Fort Duquesne had 500 scalps and 200 prisoners, mostly from Pennsylvania.⁵⁸ Although Lignery never commanded a large force of colonial soldiers, known as troupes de la marine, he proved to be a very worthy opponent for the British.⁵⁹

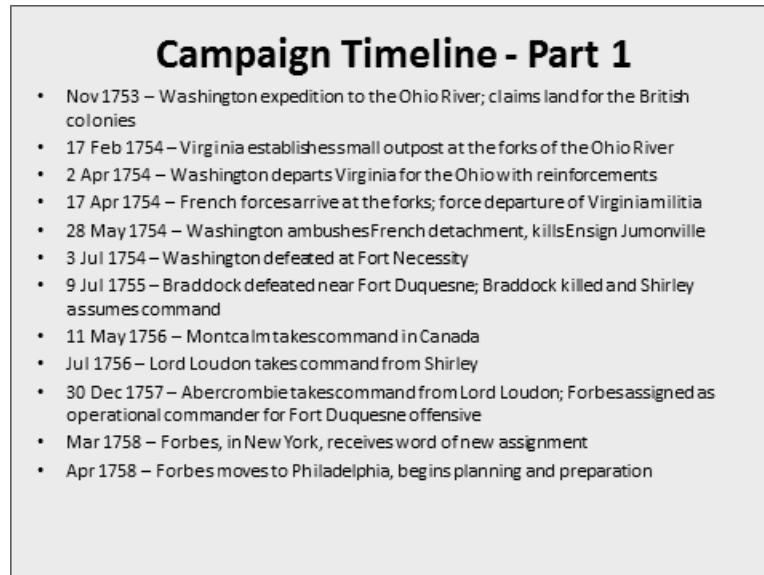


Figure 1. Campaign Timeline – Part 1: Events leading to the start of the campaign

The Campaign

To put the analysis of campaign design into adequate context, it is first necessary to review the British plan and its execution. Forbes spent the spring of 1758 planning and preparing for the campaign, viewing the logistical preparation and organization of forces as important as the execution of the campaign itself. Even though Pitt technically gave him the strategic means, Forbes had to go to great lengths to use the allotted money to assemble a real operational capability. An unnamed officer who participated in the expedition recalled:

...he arrived at Philadelphia with his Brigade Major, and army upon paper, artillery to be sent from England, provincial troops to be raised, Col.

Montgomery's regiment to be brought from South Carolina, and four companies of Royal Americans to be marched from New York to this place.⁶⁰

Starting with almost nothing, Forbes spent just a few months creating a campaign-capable army, an incredible feat.

One of the biggest initial challenges Forbes faced was a lack of support from the provinces. On December 30, 1757, Pitt notified the governors of his selection of Forbes to lead the coming campaign and solicited their support. The tone of this letter is far from an authoritative directive coming from the representative of the king to his subjects. Instead, it seems to attempt to motivate the colonists based on the shared interest of defending their frontier. Pitt even offered incentives. First, he stated that the king would provide all arms, ammunition, and tents, along with provisions and artillery. In return, he directed the governors to provide only "Levying, Cloathing, & Pay...".⁶¹ However, he added, "strong Recommendations will be made to Parliament, in their session next year, to grant a proper Compensation for such Expenses as above...".⁶² Pitt went even further and revoked an established policy. He made provincial officers in ranks up to Colonel equal to their regular counterparts. Previously, provincial officers always served subordinate to regular officers of the same rank, a point of strong contention with the colonies. Thus, Pitt attempted to reshape the political environment in the colonies to better support Forbes.

Despite Pitt's personal request, his effort seems to have had little effect on the colonies. Governor Horatio Sharpe of Maryland wrote back to him on March 16, 1758, stating that requiring the provinces to provide pay for the militia was "an Infringement of His Majesty's Prerogative" and that "raising the Supplies was not only unreasonable but in some Respect impracticable...".⁶³ The colonists wanted security, but they did not

want to contribute much to achieve it. Additionally, while they wanted the British to provide the security for them, they also distrusted those sent to guarantee it. Most colonists were uneasy with standing armies, an element of their political and cultural heritage.⁶⁴ Thus, during the campaign, Forbes faced suspicion and reluctant support at best, and, at times, downright obstruction of his efforts.

The political and economic environment of the colonies challenged Forbes throughout the campaign. Forbes generally used his personal influence instead of resorting to formal authority in his efforts to accomplish tasks. In a March 20, 1758, letter to Governor William Denny of Pennsylvania, Forbes took a very humble approach when lobbying the governor for raising militia. In this letter, Forbes wrote that he, “therefore must beg that the Officers and Soldiers raised in Pennsylvania for the Service are Able Bodied good Men, capable of enduring fatigue, and that their Arms be the best that can be found in the Province...”⁶⁵ Technically, it was within Forbes’ authority to demand, but that probably would have exacerbated the atmosphere of distrust. Forbes used a similar approach in a letter to Governor Sharpe on March 23, 1758 in reference to Fort Cumberland, expressing his hope that “the Province of Maryland, will [not], at this Critical time, Allow that Fort to be Abandoned.”⁶⁶ Considering the vital nature of that frontier fort to the coming campaign, Forbes was completely justified in demanding that the Maryland troops remain, but he chose a more respectful approach. Forbes understood the political environment in which he operated, however, and he knew that he needed the support of the provinces to accomplish the mission.

However, the provincial governments soon tested Forbes’ patience. Within a month, Forbes shifted from a tone of humility to one of rebuke. In an April 21, 1758,

letter to Governor Denny, Forbes writes, “I am extremely sorry that any just request of mine to you, as first Magistrate, should meet with obstructions...”⁶⁷ Two weeks later, Forbes notes to Pitt the challenge of dealing with the governors, writing, “The Province of Maryland have been extremely dilatory in their proceedings...”⁶⁸ In addition to Pennsylvania, Maryland also challenged Forbes’ authority. At the start of the campaign, the Maryland Assembly refused to provide pay for its small contingent of militia garrisoning Fort Cumberland. In a letter to Pitt, Forbes wrote, “So glaring an Infraction of his Majesty’s Royal Command at this critical time, draws the eye upon all of them; and their refusing all aid, and assistance, for their own protection, and repelling the Enemy, strikes all honest Men with a horrible idea of their Ingratitude to the best of Kings.”⁶⁹ Forbes eventually advanced the money to pay for the Maryland troops, preventing their departure. Thus, when necessary, Forbes was willing to assert his formal authority and take the provinces to task for not support the campaign.

Forbes did not shift all of his communications to this attitude, and he continued to tailor his approach. He realized that support for the campaign was as much an economic issue for the provinces as it was a political issue. The provinces did not have a uniform process to collect revenue, generally leaving the coffers empty. When trying to get money from Pennsylvania to pay for Indian interpreters, Forbes writes, “the Governor has been told by the provinciall Commissioners, that they had no money, and consequently could allow nothing for that so necessary Service.”⁷⁰ Virginia was also without money in the treasury, provoking Washington to ask the acting governor if he should use his own private fortune to pay his troops.⁷¹ Therefore, no amount of

demands could make the province give Forbes what they did not have to give. Short of seizing state or private assets, Forbes had little recourse.

Logistical planning and preparation was the second biggest challenge facing Forbes, a process exacerbated by the political and economic environment of the colonies. Forbes spent most of the spring in Philadelphia organizing logistics for the campaign. The extensive and meticulous preparation was apparently so unusual that it invited comments from observers. Charles Thomson, a Philadelphia intellectual and future leader during the American Revolution, envisioned a long delay, writing to Benjamin Franklin, "We look here as if we should be ready to set out by the beginning of October next."⁷² However, organizing adequate logistical capacity to sustain an army of more than 6000 soldiers during a march of over 200 miles through wilderness was no small task. In a letter to Pitt in which he explained his extensive preparations, Forbes detailed his expenditures on rifles, blankets, tents, wagons and packhorses.⁷³ While the initial plan was to furnish arms and tents from England, the delay of the ship carrying this equipment forced Forbes to purchase what he needed locally. Forbes estimated his requirements, sought alternate methods to acquire his needs when primary plans failed, and made deliberate effort to prevent any delays in the start of the campaign.

To sustain his army during the operation, Forbes knew that he needed to move forward a stockpile of supplies large enough to sustain a siege. This stockpile would include food for the men, food for the draft animals, ammunition, and other necessities like extra clothing. Food was readily available in Pennsylvania; the challenge was in moving it forward. As early as May 19, 1758, Forbes assembled three months of provisions for 6,000 men at Carlisle, but noted, "I am just entering into a contract for a

sufficient number of Waggon and pack-horses for the transportation of it from one deposite to another...".⁷⁴ However, despite his best efforts, transportation would remain the key logistical limiting factor.

Forbes estimated that it would take several thousand individual wagon trips to carry all of the supplies forward. At its height, Forbes' army employed more than 1,000 wagons.⁷⁵ The quantity of food alone was vast. Bouquet noted that 1,500 cattle, slaughtered, smoked, and salted, would "supply provisions for 4000 men for four months."⁷⁶ Moving this much beef would take a tremendous number of wagons alone. Also in this letter, Bouquet wrote that he needed an artillery train of 42 wagons to move the powder, shot, and other essential items. Despite the obvious critical nature of wagons, Forbes planned to contract for all of the movement, although he was quick to mention to Governor Denny that he would resort to seizing them if necessary. In a letter to the Governor, Forbes stated, "I therefore take this opportunity of letting you know that Press Warrants will be necessary all over the province...".⁷⁷ However, Forbes never took this extreme action, likely preventing a fracture with the provincial government.

One of the first major decisions Forbes made centered on his campaign's point of departure. Forbes initially planned to start in Virginia. As early as February, 1758, Forbes wrote Lord Loudon, "I am told the road from Fort Cumberland to the Monongahela, is still very practicable except a few bridges."⁷⁸ Known as Braddock's road, this route was the same way Washington traveled to the Ohio River in 1753 and 1754. A known route looked like a good choice, especially with members of previous expeditions also participating in the upcoming march. Their first-hand knowledge of the

route would help to remove one unknown, especially since Forbes knew very little else about the enemy.

However, after some initial analysis with his quartermaster, Forbes found several significant problems with this plan. Most significantly, his army was much larger, so he required more supplies and more transportation. Pennsylvania, with a larger population than Virginia, had more farms and more wagons.⁷⁹ However, there was another major problem with starting in Virginia: the Potomac River. Simply getting to Fort Cumberland, the westernmost secure position in Virginia and the point of departure for the march required numerous river crossings. A road study on the route from Fort Frederick in the east to Fort Cumberland noted, “wagons which go from one fort to the other are obliged to pass the river Potomack twice, and that for one-third of the year they can’t pass without boats to set them over the river.”⁸⁰ This major problem would hinder the sustainment of his army. Based on the availability of supplies, transportation and the obstacle of the Potomac, Forbes began to consider shifting the starting point to Pennsylvania.

He did so reluctantly. Forbes still wanted to follow Braddock’s road. After arriving in Philadelphia, Forbes met Colonel Burd, who had already built a road as far west as Raystown as an alternate route during Braddock’s campaign.⁸¹ From Raystown, Forbes could swing his army thirty miles south to Fort Cumberland and then pick up the Braddock road there. However, while waiting for the start of the campaign, Forbes studied his map. He realized that by heading directly west from Raystown, he could significantly shorten the march. He could also avoid crossing two rivers, the Youghiogheny and Monongahela. Discussions with George Croghan and John Fraser,

Indian traders who had packed goods over the mountains west of Raystown many times, seemed to convince Forbes further of the merits of heading due west.⁸² In any event, heading west to Raystown presented Forbes with two options from there: head south to Fort Cumberland to pick up Braddock's Road or cut a new road west toward Fort Duquesne.

For the organization of his forces, in addition to his regulars, Forbes wanted militia units mainly from Pennsylvania and Virginia, since they had the greatest stake in the success of the campaign. He also wanted contributions from Maryland and the Carolinas, although he did not expect much from these provinces. Maryland, North Carolina and South Carolina were far less populated than Pennsylvania and Virginia. Secondly, Maryland already garrisoned Fort Cumberland, and the Carolinas had numerous outposts they had to man along their frontier.⁸³ Most importantly, the Carolinas had far less interest in opening a road to the Ohio River than did Pennsylvania and Virginia.

Forbes still intended that the main effort of his army consist of regular and provincial infantry. First, he received 1,300 regulars of the 77th Highland Regiment of Foot (Montgomery's Highlanders). Secondly, he also received 400 provincials in a battalion of the 60th Regiment of Foot (the Royal Americans), which was a light infantry unit officered by mostly Swiss German and Swiss French gentlemen.⁸⁴ Although technically a British command, Forbes' army actually included a mix of English, Irish, Scottish, Germans, and some Swiss soldiers.⁸⁵ Forbes eventually received 2,700 Pennsylvania militia organized in a regiment of three battalions and 2,000 Virginia militia organized in two separate regiments, along with several hundred men each from

Maryland and North Carolina.⁸⁶ He also coordinated with the provincial governors to clothe and pay their militia as directed by Pitt, but in practice, he ended up furnishing most of these requirements. Forbes also directly coordinated for Indian allies from the south to join the campaign and serve as scouts, mainly Cherokees and Catawbas, and initially amassed some 500 of them at the start of the campaign. Therefore, unlike Braddock, Forbes emphasized logistical preparation, significant use of militia, and inclusion of Indians.

Given the complexity of regulars, provincials, militia and Indians, Forbes essentially commanded a coalition organization, although technically only the Indians did not fall under the authority of the King. In all, he assembled well over 6,000 total troops and enjoyed a significant numerical superiority over the French. Forbes' challenge centered on getting them all together in an organized manner and with enough supplies.

Forbes continued to plan every aspect of the advance in detail. He paid particular attention to the phasing of his combat forces. The Royal Americans under Bouquet led the march, since Forbes believed their light infantry tactics made them the most prepared if engaged by the French and Indians early in the campaign. They already possessed experience in frontier warfare and had trained specifically for small-unit combat in a wooded environment.⁸⁷ The plan called for the regulars of Montgomery's Highlanders to follow next, giving Forbes the combat power necessary to seize and hold an advanced post just several days march from Fort Duquesne. The militia secured the route and wagon trains as they moved enough supplies forward to sustain a siege, as well as augmented both the regulars and provincials with

skirmishers. Forbes demonstrated remarkable adaptability in a letter to Bouquet in which he directed him to train and equip some of his militia to fight like Indians to increase their effectiveness in wilderness fighting. As he stated, "In this country, we must learn the art of war from enemy Indians, or anybody else who has seen it carried on here."⁸⁸ Forbes also emphasized marksmanship training, now requiring soldiers to fire at specific targets instead of practicing only unaimed volley fire. He even specifically allocated barrels of precious gunpowder for this practice.⁸⁹ After the march to Loyalhanna, Forbes planned to consolidate his forces – regulars, provincials, and militia - and move the combined army on the French fort.

Forbes planned to advance slowly and deliberately, improving an old road generally south-southwest from Carlisle and establishing blockhouses a day's march apart, anywhere from three to five miles apart depending on the terrain, and then larger forts every 40 to 50 miles. He planned the initial line of advance from Carlisle, southwest to Shippensburg, Chambersburg, and Fort Loudon, and then finally west to Fort Littleton and Raystown, later known as Fort Bedford, with defensive positions at each location. Forbes could call upon a number of militia officers and soldiers in his army who had been as far west as Raystown and could attest to the suitability of the route to that point, but only traders and Indians had crossed over Laurel Mountain.⁹⁰ In a letter to Pitt on June 17, 1758, Forbes explained his concept. He planned to move to a position with a strong force, establish a fort, build up supplies, and then only after setting all necessary conditions, advance to the next position.⁹¹ Without exact knowledge of enemy numbers, disposition, or capability, and fearing that he may actually be outnumbered, he wanted to take extraordinary precautions to protect his

army. In another letter to Pitt on October 20, 1758, Forbes wrote, “as the Enemy’s Numbers had all along been represented to me, not only equal, but even to exceed what I could carry against them, so it was absolutely necessary that I should take precautions by having posts along my route, which I have done from a project that I took from *Turpin’s Essai sur l’Art de la Guerre*.”⁹² Published in 1754, Turpin’s essay on war included a chapter on campaign planning. Forbes had read this work of military theory and based his concept on its tenets.

The idea that Forbes studied military theory is worthy of a short digression. Turpin presumably based his work on a campaign model found in the memoirs of Raymond Count Montecuculi, a general of Imperial forces during the Thirty Years War and against the Turks in Hungary, who framed his ideas from examining the campaigns of other commanders, mainly in Eastern Europe.⁹³ Turpin served as the translator and publisher of these memoirs. The work emphasized the increased dangers that regular forces faced when transiting wilderness areas occupied by enemy light troops. They required a fortified position to fall back upon if engaged. Their superior firepower was useless against the hit-and-run tactics of the enemy, and they needed a secure line of communication to prevent isolation and destruction.⁹⁴ This campaign model offered a useful solution to the challenge facing Forbes. Supposedly, Forbes carried a much worn copy of Turpin’s book with him on the campaign.⁹⁵ By his own admission, this work heavily influenced the design of the campaign.

From the very beginning, Forbes knew that he needed intelligence on the enemy to create the best possible plan. As he began the logistical preparation and deciding on a route, Forbes sent out letters as early as March 1758, seeking information on the

French and Indian disposition at the forks of the Ohio River. Forbes wrote Governor Denny, "If it could possibly be contrived to find some Intelligent Person who would venture up to the Ohio, either as a Merchant or a Deserter, & would bring us Intelligence what was going on in those parts..."⁹⁶ He sent a very similar request to Governor Sharpe in early April, asking him if, "any of the scouting partys were so lucky as to bring a prisoner from Fort Duquesne, as by that means something might be learned..."⁹⁷ Forbes later advised Pitt, "I have used every art and Means to get Intelligence of the strength of the French and Indians (in their alliance) in those parts, but to little purpose..."⁹⁸ Forbes explained that he had sent out over 400 men in scouting parties, but because of the great distance, they were unable to bring back timely information. Therefore, despite these extensive efforts, Forbes received little in the way of reliable intelligence on the French during the planning phase of the campaign.

While Forbes planned and prepared for his campaign, the French continued to raid from Fort Duquesne. Increasingly aware of British plans to move on their position, they intended to continue to use the asymmetric advantage their large contingent of Indian allies gave them to raid, ambush and harass the British forces as they moved west. The French and their Indian allies also raided the western frontier of Pennsylvania and Virginia to draw off militia forces from Forbes, since they expected the provincial governors to demand enhanced frontier security. When the British main body closed in, the French planned to maneuver to encircle and then annihilate it, much as they had done to Braddock. Although Captain Lignery never had more than 1000 provincials and militia (a mix from Canada, and the Louisiana and Illinois territories) and possibly up to 800 Indian warriors, his previous success may have convinced him that

he had adequate force to accomplish his mission. Canada's colonial governor, the Marquis de Vaudreuil, became aware of Forbes' approach on Fort Duquesne sometime in late August or early September, about the time Bouquet had crossed Laurel Mountain. In a letter to colonial ministers in France, Vaudreuil claims he sent additional forces and supplies to the Ohio, stating, "I have sent reinforcements to M. de Ligneris, who commands there" and "I have done the impossible to supply him with provisions."⁹⁹ However, there appears to be little written evidence suggesting that any substantial reinforcements or additional supplies ever reached Lignery at Fort Duquesne. Thus, Lignery had few options open to him other than to attempt to parry the British blow that he knew was coming with the force he had on hand.

Forbes opened the campaign with diplomatic negotiations and not ground combat operations. In May, Forbes invited Pisquetomen, brother of Ohio war chiefs Tamaqua and Shingas, to attend peace negotiations.¹⁰⁰ Although Forbes did not plan to attend in person, he wrote to Governor Denny, "I really think Teedyuscung's Demands ought to be agreed to...".¹⁰¹ Forbes' initial intent was "to persuade many of them [the Ohio Delawares and Shawnees] at least to remain neutrals for this campaign."¹⁰² Forbes clearly understood the importance of the French and Ohio Indian alliance and was willing to negotiate and even make some concessions to break it. In the end, the diplomatic negotiations proved to be as important as the military operations to the overall success of the campaign.

Forbes started his advance in June as planned, but he quickly faced some major setbacks that put the campaign in jeopardy. Building the road to Fort Duquesne took significantly longer than expected, progressing far less than the planned three to five

miles per day. With almost 200 total miles to cover, it took almost three months just to get to the site of the future Fort Ligonier, still more than forty miles from Fort Duquesne. Rain and subsequent erosion constantly reversed progress. The steepness of the ridges, especially the last at Laurel Mountain, which rose to 2900 feet, significantly impeded the march.¹⁰³ The road over the mountains proved to be excessively rocky, breaking wagon wheels faster than the British could repair them. Forbes described his own perspective of the environment in a letter to Pitt, in which he called it an “immense uninhabited wilderness, overgrown everywhere with trees and brushwood, so that nowhere can one see twenty yards.”¹⁰⁴ Thus, the extreme challenge of the terrain, almost incomprehensible to those yet to experience it, delayed even a well-planned campaign.

Although a variety of reasons delayed Forbes’ westward movement, he still had the initiative through the summer. Bouquet had occupied Raystown on June 24, 1758, with most of the Pennsylvania militia and about half of the Virginians.¹⁰⁵ This was approximately the halfway point, but definitely the easiest part of the route. While the initial plan called for the regulars to be part of the main body, they needed time to recover from a long sea voyage, delaying their arrival. From Philadelphia, they still needed to march 120 miles just to get to the starting point at Carlisle and did not arrive there until the first week of July. Instead of waiting for the regulars and delaying the campaign, Bouquet had pushed on with just the provincials and militia. Even though the British advanced with less combat power than initially intended, the French made little effort to oppose the opening movements of the campaign other than some limited

harassment conducted by Indians. Thus, neither friendly force availability nor enemy action delayed the campaign.

With Bouquet firmly positioned at Raystown, Washington moved along the Braddock's road with the remainder of the Virginia militia to Fort Cumberland. Washington remained convinced that the plan to traverse Laurel Mountain with an army was simply not feasible, with any attempt likely to lead to another disaster in the wilderness. Washington also worked to clear and repair the old road, actions which at least would keep the French guessing about Forbes' direction of attack and force them to split their counter-reconnaissance effort. Therefore, although there was some early dissent among the leaders about the next phase of the route, this did not delay the march and may have helped to confuse the French.

While Bouquet led the initial vanguard over the mountains, logistical delays kept Forbes at Philadelphia until the end of June. The ship carrying the arms and tents did not arrive until June 11, 1758, weeks later than expected.¹⁰⁶ Forbes also faced a myriad of other small logistical challenges, including a constant shortage of transport. In a letter to Bouquet, Forbes wrote "No sergeant or quartermaster of a regiment is obliged to look into more details than I am."¹⁰⁷ Meanwhile, the delay in cutting the road caused Bouquet to consume more supplies than the initial plan called for, causing the magazines at Raystown to empty faster than the wagons could fill them.¹⁰⁸ Bouquet needed to accumulate enough supplies to sustain a substantial force as it moved over the last obstacle of Laurel Mountain. This movement required a march of almost fifty miles through very rugged terrain, probably taking about a week of hard marching for a large infantry formation.

The first major sustainment step required the movement supplies from Carlisle to Raystown, the first major stop along the march. With Bouquet already at Raystown in late June, Forbes moved there himself in early July. In a letter to Pitt on July 10, 1758, Forbes writes, "I halt tomorrow and shall then proceed 100 miles further to Raestown, where I have now 1500 of the Provincials, who are building some Storehouses and stockading a piece of ground for our Ammunition and provisions."¹⁰⁹ While Forbes delegated most of the tactical conduct of the march to Bouquet, he kept much of his personal attention focused on logistics. As the campaign progressed, Forbes dedicated time to tracking the weight wagons carried and the duration of each trip. He quickly noticed "in the place of Carrying 2000 wt they never had above 14 or 1500, and in place of 12 days made 20 of their journeys."¹¹⁰ With wagons carrying 25% less than planned and taking almost twice as long as expected, the army started to consume the siege stockpile. This led Forbes to change the method of paying wagon drivers. Previously, they received pay for the number of days on the road. This was an incentive to go slow and to carry less weight to avoid wear and tear on their wagons. Forbes changed their pay per pound delivered, an incentive to carry as much weight as possible and to travel as expeditiously as possible.¹¹¹ While this measure helped somewhat, the deficiencies became too large to completely repair.

In addition to the challenge of the environment and logistics, the troops involved in the movement west endured constant Indian harassment. Compounding the problem, Forbes' own Indians mostly had deserted, complaining they had received fewer supplies than demanded and leaving him blind to enemy intentions. Forbes had started with 500 Indians in May, but by July, the majority had left. Bouquet went to

great lengths to keep the Indians on the campaign, and even adopted a Catawba chief known as Captain Bullen as his son.¹¹² Forbes wrote Pitt on the July 9, 1758, explaining the extensive measures he took to keep the Indians' services, closing the topic with "no method was left untried..."¹¹³ However, despite all his efforts, by September only eighty Indians remained. These dwindled further to fifty in October and finally to only twelve in November.¹¹⁴ Forbes could not meet their demands for supplies and gifts, and it seems they had little interest in fighting the Ohio Indians on unfamiliar terrain.

There may be more to the loss of the Cherokees and Catawbas than just Forbes' unwillingness to continue to provide gifts. In a forthcoming book, Daniel J. Tortora, a Professor of History at Colby College, plans to argue for the existence of a significant difference in vision between the British and their southern Indian allies.¹¹⁵ The Cherokees and Catawbas signed on to the campaign in order to settle old scores with a traditional rival, the Ohio Indians, as well as to gain favor with the British, a rising power in the new world. While gifts were a considerable motivation, Tortora does not believe they served as the primary one. The problem came not from a lack of gifts, but a difference in how each group viewed the aim of the conflict. The southern Indians wanted to fight a quick battle and then return home. Fighting was part of their culture; it gave a man status in the tribe. However, when they arrived for the campaign, there was no immediate battle to fight. As Forbes' protected advance crawled forward, they grew bored. Gifts kept them interested, but not for long. The British did use them effectively for scouting during the initial stages of the advance. However, the Indians did not like this mission because it was extremely arduous work and brought them little chance for glory. A breaking point seemed to arrive when tribal leaders met with Forbes, who was

too sick to stand. In Indian culture, a leader is also a great warrior, and the ill Forbes clearly was in no condition to engage in personal combat. The Indians may have thought the campaign was doomed to fail, and they began to melt away.

With the campaign underway and the militia enroute to Raystown in June, 1758, Forbes still delayed in making a decision on the final leg of the route. On July 10, 1758, Forbes wrote to Pitt, "I am in hopes of finding a better way over the Alleganey Mountain, than that from Fort Cumberland which Genl. Braddock took."¹¹⁶ At the same time, Forbes still wanted to keep the Braddock road open as an option. On July 14, 1758, Bouquet sent a letter from Raystown to Washington at Fort Cumberland advising him, "The General desires you would Send a party to reconnoiter Braddocks Road, and begin to clear a few miles, repairing the Bridges..."¹¹⁷

At this point, Washington started to lobby Bouquet on the advantages of taking Braddock's road. However, Bouquet continued to follow his commander's guidance and attempted to find a route over Laurel Mountain. On July 31, 1758, Bouquet wrote Forbes that a scouting party had found a suitable gap over Laurel Mountain, and found a good site for a future fort and grazing lands at Loyalhanna on the other side.¹¹⁸ He sent out a large reconnaissance party with Colonel Burd to confirm the route. Bouquet also remained concerned about the lack of forage for a large army available along Braddock's road. During Braddock's march three years earlier with a much smaller force, he found insufficient forage for the horses, with wagon-masters attempting to feed leaves to their draft animals at night. The horses soon started to die so fast that the supply trains could only pull half of the wagons.¹¹⁹ There might have been enough forage for a small detachment like Washington's in 1754, but clearly not enough for an

army the size of Forbes' in 1758. In this same letter, Bouquet mentions Washington's advocacy for the Braddock's road, but adds, "these gentlemen do not know the difference between a party and an army...".¹²⁰

With the strong possibility of a suitable route over Laurel Mountain and concerns about forage along Braddock's road, emphasis started to shift to the new route. Pennsylvania farmers and merchants already received the preponderance of the army's business from Forbes' original organizational efforts. However, just as much at stake was the more lucrative economic implication of monopoly of future Indian trade.¹²¹ As Washington wrote to acting Virginia Governor Francis Fauquier, "[the road] secures their Frontiers at present, and the Trade hereafter."¹²² While Washington was obviously aware of the economic advantage of a Virginia route, he also saw numerous military advantages to taking Braddock's road. Washington wrote a very long and detailed letter to Bouquet on August 2, 1758, explaining his argument.¹²³ His key points centered on the fact that it was an already established road, that there was not enough time left in the campaign season to build a new one, and that, if the campaign failed, Indian attacks would increase along the frontier. He also pointed out that the defiles and rivers did not present significant obstacles as those on Laurel Mountain might, and that although the route was longer, its use would still allow for an October attack on Fort Duquesne.

All of Washington's points created a compelling argument that at least deserved consideration. However, on August 3, 1758, Burd returned with the scouting party. Bouquet wrote Forbes, "Colonel Burd, who arrived just now reports that the new gap is practicable, and that in six days 500 men will be able to make a road there for the

wagons.”¹²⁴ Almost, at the same time, Bouquet received a letter from Forbes ordering him to take the most direct route.

The idea of using Braddock’s road was dead, but controversy continued. Somehow, one of Washington’s letters back to a Virginia associate fell into Forbes’ hands. Although the exact recipient and the nature of this letter remain unknown, the letter must have been very critical of Forbes. The general was furious with Washington and wrote Bouquet about the Virginian’s “scheme that I think was a shame for any officer to be Concerned in...”.¹²⁵ Although Washington had a good argument for the use of Braddock’s road, he had pushed too far and now lost credibility with his commander.

With the final route now decided, Forbes updated Pitt on his advance. By heading directly west, he “saved a great deal of way...” and he avoided the dangers of two rivers.¹²⁶ Forbes also wrote, “the Enemy ever suspected my attempting such a road till very lately, they having been all along securing the strong passes, and fords of the rivers, upon General Braddock’s route.”¹²⁷ With the advance guard of his army safely at Loyalhanna and no French resistance, it is probably a safe assumption that Forbes enjoyed some measure of surprise. Therefore, his route choice was shorter and it avoided some dangerous obstacles that would make his army susceptible to ambush. These are all strong arguments in support of his decision.

There is no evidence to suggest Forbes made his choice based on the influence of Pennsylvanian businessmen or government leaders. Forbes wrote to Bouquet, “the good of the service was the only view we had at heart, not valuing the provincial interest, jealousys, or suspicions, one single twopence...”.¹²⁸ There also is no evidence to suggest Forbes made his final decision on route selection until carefully weighing all

of the information. He kept his options open as long as possible. On August 2, 1758, he wrote Bouquet, "it is good to have two Strings to one Bow."¹²⁹ He also recognized the many good arguments against using Braddock's road. It required significant effort to make it usable after remaining untraveled for three years, the French clearly watched it based on previous expeditions, it was longer, and it had more river obstacles. While building the road over Laurel Mountain was time consuming and difficult work, in the end, it is hard to argue with Forbes' decision.

The decision now made, Forbes expected to take several months to build and secure his line of communication, positioning his army for a fall siege of Fort Duquesne. Forbes believed the French would be most vulnerable at that time of year because their Indian allies needed to depart to hunt before the winter set in. The deliberate advance also gave him ample time to continue to negotiate with the Ohio Indians and sever their alliance with the French before he attacked Fort Duquesne.

The movement forward became progressively more difficult as Bouquet started work on the road over Laurel Mountain. On a daily basis, he put more than 700 men to work solely on cutting the roadbed.¹³⁰ As Indian ambushes increased in frequency, Bouquet increased the guard requirements for the workers. Despite the constant harassment, Bouquet still crossed the mountain and established a fort at the headwaters of the Loyalhanna creek, about a week's march east of Fort Duquesne. The British advance guard occupied the position of the future Fort Ligonier on September 3, 1758, with 2,500 troops.¹³¹ By the time the French became fully aware of the presence of such a strong force so close to Fort Duquesne, the British had dug trenches, thrown up ramparts, and brought in cannon to an already highly defensible

position. With the establishment of such a strong position at Loyalhanna, the British reduced the chance of catastrophic loss significantly at a point when they were probably most vulnerable. Why the French did not oppose the movement over Laurel Mountain is unclear, but they clearly missed an opportunity to interdict the advance.

While the debate raged on the choice of routes, on July 23, 1758, Forbes got approval from Abercrombie to negotiate directly with the Indians, giving him significant authority to sign treaties on behalf of the British crown.¹³² Sir William Johnson, the Superintendent for Indian Affairs, usually handled all Indian diplomacy, but he focused all of his efforts the British main effort in the center. To Bouquet, Forbes wrote, "After many intrigues with Quakers, the Provincial Commissioners, the Governor, etc., and by the downright bullying of Sir William Johnson, I hope I have now brought about a general convention of the Indians."¹³³ At Forbes' personnel request, Indian chief Teedyuscung led a delegation of Delawares and Shawnee to this second round of negotiations. Forbes clearly recognized the importance of negotiations with the Ohio Indians and used his significant influence to make the meeting happen. Disgruntled with the growing French presence in the Ohio Valley, the Indian delegation eventually agreed to remain neutral for just 1,600 pounds of gifts, mostly firearms and ammunition, but also clothing, blankets, beads and even liquor.¹³⁴ This was a great success for the British, but Forbes still had to find a way to spread the news to the Indians across the frontier.

Moravian missionary Christian Frederick Post volunteered to carry the wampum belt signifying peace between the Ohio Indians and the British to the distant tribes in August and September. He accepted a huge personal risk to enter enemy territory in

an effort to pull away French allies. After the success of the July negotiations, the Ohio Indians even escorted Post to Fort Duquesne so that all of the Indians assembled there could hear the message from him. Worried that the French might attempt to kill him, Post stayed close to the Indian campfire, stating, "I stuck to the fire as if I had been chained there."¹³⁵ Safely escorting a British envoy to the walls of the enemy's base obviously demonstrates the significant power of the Ohio Indians. When Post began circulating to villages, Lignery asked the Ottawas to attack a Delaware camp and kill Post, but they refused. The Ohio Indians were too strong, and this kind of action would only shift them from neutral to dedicated enemies of the French and northern Indians.

While the diplomatic negotiations and military advance progressed, Forbes continued to direct efforts to gain intelligence on the French. On August 3, 1758, Bouquet reported that one of the small Cherokee scouting parties had just returned from Fort Duquesne, and that "saw about a hundred Indians arrive there, a part in canoes, but they did not see any tents or troops around the fort."¹³⁶ A little over three weeks later, Colonel James Burd wrote Bouquet, "Captain Parris had been in sight of Fort Duquesne, but could not take a prisoner."¹³⁷ Burd went on to report that despite the Captain's efforts, he was unable to determine the French strength. Therefore, even with several reconnaissance attempts nearly to the very gates of Fort Duquesne, Forbes did not receive any usable intelligence. He felt its absence. At this point in the campaign, he could still alter his plan. If the French and Indian strength was less than expected, he could march straight to the fort with a smaller force. Besides changing the timeline and force size, he could also expend less effort on accumulating supplies. However,

the lack of intelligence continued to reinforce Forbes' initial plan of mitigating risk by using the protected advance.

In addition to an almost total lack of actionable intelligence, the challenge of sustaining the advance came to the forefront in early September, putting the outcome of the campaign at risk. The advance guard moved over Laurel Mountain to Loyalhanna, but quickly it faced a lack of supplies. Colonel James Burd, commanding one of the battalions of the Pennsylvania militia, wrote, "I found myself here a few days ago Commanding Three Thousand men, with only one days provision...".¹³⁸ The road from Raystown over Laurel Mountain proved to be much more difficult than the first leg, and the steep, rocky ground started to take a toll on the carriages and horses. At this point, Forbes made a personal plea to Governor Denny for assistance and again threatened to seize what he needed, writing that he would, "take Provisions and carriages wherever they can be found."¹³⁹

Despite the growing challenge of supplies, the British only had to stay the course, continue to secure their line of communication, build up forces and supplies, and move on Fort Duquesne when they had assembled overwhelming combat power. However, Bouquet made one of the more perplexing decisions in the campaign, probably the only blemish on his otherwise sterling career. In early September, Bouquet sent a reconnaissance-in-force to Fort Duquesne to ascertain enemy capabilities and to disrupt the relentless enemy attacks on the supply convoys, heavily influenced by Major James Grant's determined insistence. At that time, Major Grant served as the commander of the forward detachment of Montgomery's Highlanders and carried influence greater than his rank would suggest, probably because he was the only senior British regular

officer at Loyalhanna with Bouquet. To Colonel Burd of the Pennsylvanian militia during the movement over Laurel Mountain, Bouquet wrote, "If any difficulty should occur to you, Consult Major Grant, whose Experience and perfect knowledge of the service, you may rely intirely upon."¹⁴⁰ In addition, Bouquet based the decision on the negative effects on the morale of his men from the constant Indian raids and ambushes.¹⁴¹ To General Amherst, Bouquet wrote, "The day on which I arrived at camp, which was the 7th, it was reported to me that we were surrounded by parties of Indians, several soldiers having been scalped, or made prisoners."¹⁴² The British lost men, horses, and cattle daily to the Indian raids, with little ability to strike back.

Bouquet's operation presented a very high risk, with a low probability of success. He sent forward a mixed force of regulars, provincials and militia, some 800 in all, under the command of Major Grant. Astonishingly, at the start of the campaign, the British estimated the combined French and Indian forces at Fort Duquesne to number approximately 1,200 total. The British also knew that the French had destroyed Braddock's army of over 1,300 with a much smaller contingent. Bouquet later claimed that he had reliable reports of only 600 total enemy fighters in the area, still a very formidable force to approach in a hasty manner.¹⁴³ Furthermore, with more than forty miles between the fort at Loyalhanna and Fort Duquesne, Bouquet was unable to reinforce or cover the withdrawal of Major Grant's force if decisively engaged. Lastly, since the French had the reconnaissance edge, the British moved forward almost entirely blind.

Despite the many challenges, Grant moved undetected to Fort Duquesne. Although he had the advantage of surprise, his next series of decisions led to the most

significant reverse of the campaign. In the early morning hours of September 14, 1758, Grant divided his force and sent in skirmishers to probe the area around the fort.¹⁴⁴ He intended to draw the enemy out of the fort and then ambush them with his main body, while keeping a rear detachment to secure his baggage trains and route of withdrawal. Instead, the skirmishers became lost and disorganized. At the same time, the main body had difficulty organizing an ambush in the dense forest and became separated. The French and Indians, identifying the threat, sallied out as expected, but the ambushers quickly became the prey. Much as had happened to Braddock's army, the French and Indians encircled the individual detachments and nearly annihilated them with accurate rifle fire from behind cover. The British regulars fared the worst since they fought in ranks, while the provincials and militia coped somewhat better fighting in a dispersed manner. Some 300 British soldiers fell, killed or captured, the remainder broken and fleeing to the east. However, the French did not conduct a pursuit to complete the destruction of Grant's force, and their Indian allies quickly focused on scouring the battlefield for prisoners and equipment.

Grant's defeat became a huge setback for the campaign and left the forward post at Loyalhanna vulnerable to French counterattack. It also served to attrit Forbes' main body of combat power, mostly the regulars, which he needed for a successful siege. Even more important, it once again demonstrated to the Indians who had the most power. Forbes worried that this loss would embolden the Indians as it had done after Braddock's defeat.¹⁴⁵ Forbes was furious over this action because he had previously disapproved a request from Major Grant to do something similar. He had made clear to all in his army the need to protect his force until assembled for decisive action. Forbes,

still at Raystown, admonished Bouquet in writing while also re-emphasizing the importance of following the plan. Forbes wrote, “I could not well believe that such an attempt would have been carried into execution without my previous knowledge and concurrence.”¹⁴⁶ However, Forbes ended the reprimand with an emphasis on following the plan, and directed Bouquet to report to him so that they could decide on “the first favorable opportunity of marching directly forwards.”¹⁴⁷ Bouquet did not stray from the intent again. To show Forbes’ state of mind, in his admonishment of Bouquet he quickly shifted from the bad news of the tactical defeat to logistical details like the pending arrival of “1,000 barrels of pork and at least 1,200 barrels of flour...”¹⁴⁸ Despite the reverse, Forbes continued to focus his mental efforts on making the campaign a success.

Grant’s defeat demonstrated once again the profound lack of understanding of frontier warfare on the part of many of the British regulars. Explaining his defeat to Forbes, Grant recalled little concern when the French and Indians did not march out in good order against him. They had seemed to move only in small, disorganized parties.¹⁴⁹ In a letter to Forbes written while in captivity at Fort Duquesne, Grant writes, “I must own I thought we had nothing to fear.”¹⁵⁰ At least the loss was not as significant as Braddock’s had been, with enough regulars surviving to learn an important lesson. They did not make a mistake of this magnitude again. Thus, despite this tactical reverse, Forbes’ army learned and adapted, while retaining enough infantry to assemble overwhelming combat power against the French. The major challenge for Forbes centered on getting the rest of the infantry and enough supplies across the mountains to conduct a siege before winter.

Surprisingly, Grant's defeat resulted in some positive effects for the British. Forbes remained unaware of them, however, since they seem so counterintuitive. First, some of the Indians left the French after arguments over the spoils of the battle, leaving a far smaller force of these essential allies.¹⁵¹ Secondly, the British surprised the Indians by how easily they had moved on Fort Duquesne without detection. The Indians had boasted that they would intercept and destroy the British as they had done to Braddock before, and Grant's sudden appearance scared them. Instead of looking weak, the British appeared powerful. One Indian war chief assumed that the only reason Grant did not immediately attack them in force while they slept was because he had to be drunk.¹⁵² The Indians' concept of the art of war centered on surprising and ambushing the enemy. They could not understand Grant's conduct of announcing his presence with drums other than to assume intoxication. Lastly, the Virginia militia trained by Washington effectively had covered the retreat of the regulars using frontier tactics, which had inflicted unexpected numbers of Indian casualties. Bouquet wrote to Amherst that one hundred Virginians had sustained the combat, and that they "appear to have done well, their good men are better in this war than the regular troops."¹⁵³ He added, "It appears from the testimony of the Indians and of our men that the French have lost many men, mostly Indians."¹⁵⁴ This adjustment of tactics had to cause concern among the Indians. No longer would they just fight British regulars in close formations, organizations they could fight without taking casualties themselves. Now they had to contend with militia trained in tactics similar to their own. In a letter to George Fairfax, back in Virginia, Washington wrote, "[T]he General has complimented me publicly on their [the Virginia troops'] good behavior."¹⁵⁵ Washington was referring

to a compliment received from Forbes for the Virginia militia troop's performance during Grant's expedition and later against two French and Indian spoiling attacks launched against the British fort at Loyalhanna.

Despite growing Indian concerns of increased British capability, Grant's defeat restored the initiative to the French. In early October, they sent out a raiding party several hundred strong to launch a spoiling attack on the fort at Loyalhanna. A captured French soldier made the claim that the raiding party numbered more than 1200 men, although that seems an exaggeration since they did not have that many men at Fort Duquesne. However, the French proved to be sufficiently strong to force five hundred Virginia militia troops into the defenses of the fort after two hours of skirmishing.¹⁵⁶ During the raid, the French successfully killed or carried off 200 head of cattle and horses, as well as killed, wounded or captured more than sixty British soldiers, while only taking light casualties. However, even with success, this engagement highlighted the limitations of the French capabilities. While they engaged the British troops in and around the fort, inflicted some casualties, and stole some livestock, they proved completely incapable of laying siege to the fort or assaulting the breastworks.

The October attack also had a negative effect on the Ohio Indians. They started to refer to the Virginia militia as Ashelecoa, or Great Knife, and did not want to face their improved tactics and accurate rifle fire.¹⁵⁷ Instead, they only wanted to fight the redcoats who stood in the open, made easy targets, and shot poorly. The Indians fought best in the forest, using the advantage of cover and concealment to surprise and destroy their disoriented enemy with rifle fire. However, against troops with similar

tactics or operating from a prepared position, they had no answer. The French and Indians succeeded against Washington at Fort Necessity four years earlier because they encircled his small fort and put plunging fire into the position from the surrounding tree line. But the fort at Loyalhanna sat on high ground, with high protective ramparts and cannon. Therefore, while the French and Indians won the tactical engagement, they had no significant operational effect on Forbes' plan.

Adding to Forbes' growing list of problems, he received word in early October of renewed political intrigue that had a potentially damaging effect greater than the two tactical reverses. On September 14, 1758, the Virginia Assembly voted to withdraw their militia no later than December 1, 1758.¹⁵⁸ This was both a political and economic decision. Virginia grew tired of the extended campaign and wanted its men back. The assembly also showed significant frustration with Forbes for choosing his primary route through Pennsylvania, which would now reap the economic benefit of Indian trade. Lastly, the Virginia treasury was empty and had no money to pay the troops. Luckily for Forbes, the assembly amended their decision in early November when they found out Forbes was on his way to take Fort Duquesne. While it would seem they made this decision to support the final effort, their motivation stemmed more from avoiding blame if the expedition failed.¹⁵⁹

In retrospect, Forbes probably could have done little to improve the political and economic environment in the colonies. At the same time, he had the potential to make the situation worse, especially if he acted arrogantly. Thus, Forbes used more influence than authority to convince the provinces to help because it was a shared interest. While his efforts often fell short of the ideal, he could not have accomplished his mission

without the support he received. The Pennsylvania and Virginia militia proved vital to the campaign, and provided the preponderance of his troop strength. In light of the successful outcome of the campaign, it is hard to find any fault with Forbes' actions.

One of Forbes' greatest continuing concerns centered on the possibility of enemy reinforcements from Canada. In early September, on the march from Fort Loudon, Forbes wrote to Pitt, "I was greatly afraid that the unfortunate stop Genl. Abercrombie met with [at Fort Ticonderoga], might have enabled the French to strengthen themselves with regulars in those parts..."¹⁶⁰ That did not occur, however. In fact, Forbes' first reliable report of enemy strength did not come until after the destruction of Grant's expedition on September 14, 1758. This event, followed by the strong French and Indian spoiling attack on Loyalhanna a month later on October 12, 1758, probably confirmed Forbes' worst fears. In both instances, the French and Indians had strong numbers and demonstrated great capability. Coupled with the potential for enemy reinforcements from Canada, the risk for any action other than a protected advance would be foolish.

Considering what little Forbes knew about the enemy, it is hard to imagine him choosing any other maneuver concept. After repulsing the October spoiling attack, he could have directed Bouquet to take the entire force at Loyalhanna and advance on Fort Duquesne. Bouquet would have greater numbers and the added fire support of cannons. Additionally, Forbes could attempt to speed up some of the units still on the march and possibly reinforce Bouquet enroute to Fort Duquesne or shortly after his arrival. However, there was still the danger of ambush on a ten-day march from Loyalhanna to Fort Duquesne on an incomplete road, with the added challenge of

insufficient supplies to sustain a siege. Had Forbes chosen this option, he likely would have to make several assumptions. First, the probability of a battle between main force units would be high. Second, the outcome of this battle likely remained highly questionable, even with greater British numbers. Third, even if the British won, they likely would take significant casualties and have difficulty holding the field. Thus, while many saw Forbes advance as slow and ponderous, he actually took appropriate and prudent measures based on the situation. Therefore, his choice of the protected advance was probably the best solution to the problem he faced.

Almost concurrently with the October attack, a major Indian negotiation had started back in Easton, Pennsylvania, a development that proved to have far greater impact on British fortunes than the battle. Known as the Easton Congress, more than 500 Indians representing fourteen tribes attended the meeting, the third and largest in a series initiated by Forbes back in May. Although Forbes was already forward at Raystown, he continued to affect the diplomatic efforts from afar. In a letter to Pennsylvania's provincial secretary, Forbes urged him and the other delegates to make it a success.¹⁶¹ Forbes even threatened the delegation that if they did not make an agreement with the Indians: "never after...either look for, or expect the favour or protection of Great Britain."¹⁶² Therefore, while Forbes never personally led the diplomatic efforts with the Indians, he definitely influenced the effort. On October 26, 1758, the British and Ohio Indians signed the Treaty of Easton. The result of a series of determined negotiations over the preceding six months, this treaty successfully severed the alliance between the French and the Ohio Indians, shifting the Indians to the British side. Bouquet wrote that he personally saw this event as the decisive blow of the entire

campaign.¹⁶³ In a letter to Anne Willing, daughter of a prominent Philadelphia businessman, Bouquet wrote that the Treaty of Easton had, “deprived the French of their chief strength.”¹⁶⁴ In December, Bouquet wrote to the Duke of Portland, “we have succeeded, and the honor is justly due to the general, who, by his adroitness, prudence and resolution, was able to detach the Indians from the French.”¹⁶⁵ The French had already lost Indians in arguments over prizes and now lost many more through the signing of the treaty. The Treaty of Easton provided a British operational victory that far eclipsed the two tactical defeats.

However, just as Forbes was solving one problem, a greater challenge arose. October brought heavy rains, which damaged the road and made it impassable for days. Quartermaster James Sinclair wrote Bouquet that a convoy of wagons “[has] been detained at two miles distance from this place on account of the heavy fall of Rain.”¹⁶⁶ The situation only got worse. On November 11, 1758, Bouquet wrote in his journal that the troops lacked clothing, provisions were scarce, and that the prospect was bleak of providing sufficient supplies to continue the campaign.¹⁶⁷ Therefore, despite meticulous planning and preparation, the campaign almost ended due to a lack of supplies caused mainly by the terrain and bad weather.

It is hard to judge Forbes too harshly. Despite his efforts, many factors remained beyond his control. The challenges of the political and economic environment of the colonies, the weather, and building a suitable road through the mountains were almost too much to overcome. It is hard to imagine additional steps that would alleviate these factors, other than the possibility of confiscating private property, mainly wagons. This action may have had an adverse political and economic effect and led to conflict with

the government of Pennsylvania. It could have even led to the departure of the Pennsylvania militia, a disastrous consequence. Perhaps Forbes' greatest failing was underestimating the length of the campaign by almost three months. Instead of a three-month stockpile of supplies, he needed twice that. Even then, the limiting factor was never the supplies themselves but the transport to move the supplies forward. Anyway, in the end, Forbes still succeeded although with critically low supplies.

With the October spoiling attack repulsed and despite the weather, the British continued to assemble troops and much needed supplies at the fort at Loyalhanna. The plan now had fallen well behind the intended schedule, and Forbes himself did not arrive there until early November. While he had wanted to attack Fort Duquesne in the fall, he expected to do so much earlier in the season, and he worried that inadequate time remained to conduct a siege before winter set in. He also did not know if he possessed sufficient supplies to sustain continued operations. Forbes held a council of war with his key commanders, and, based on the conditions, decided to cease operations for the winter and resume the advance in the spring.

However, on November 12, 1758, just a day after Forbes made this decision, the French launched a second spoiling attack. Although much smaller and less effective than the first, it succeeded in drawing two large militia units out of the fort at the end of the day. With darkness falling, several of Forbes' militia contingents fired on each other, causing several dozen friendly-fire casualties and only ending when Washington rode among the troops, ordering them to ceasefire. Forbes reported to Abercrombie after this battle that he had lost two officers and 38 soldiers killed or missing in this

engagement.¹⁶⁸ French losses in the battle appear very light. The French had won a third tactical victory.

Lignery assumed - even hoped - that this reverse would stall Forbes' campaign until the spring. Supply posed as much a challenge for Lignery as for Forbes, and especially for his Indian allies. Indian enthusiasm for fighting ebbed and flowed with the availability of French supplies and gifts. At first, the Indians carried off supplies raided from British frontier farms to augment what the French gave them. However, French success drove off most of the settlers, eliminating their farms as a source of war booty. Many of Lignery's Indians already had departed with prizes captured in the September and October battles. Many others wanted to return home and hunt before the winter set in, and Lignery finally permitted it, a vulnerability that Forbes had anticipated.¹⁶⁹ At the same time, the successful British capture of Fort Frontenac in late August severely interdicted Lignery's supply line. He could no longer provide sufficient supplies to his own troops, let alone give enough to the remaining Indians to keep them interested in the fighting. With French supplies interdicted, some of the Indians even resorted to raiding from the garrison at Fort Duquesne.¹⁷⁰ The reduction in combat power due to the lack of supplies became evident in the November French attack, which consisted of only 30 provincials and about 140 Indians.¹⁷¹ Fort Duquesne had become more vulnerable than ever.

During the last French spoiling attack, the British captured three enemy personnel, two Indians and an English deserter named Johnson. Under interrogation, Johnson told the British that the Louisiana and Illinois militia had departed, the Ohio Indians had gone back to their local villages, and the western and northern Indians also

had left, leaving Fort Duquesne weakly defended.¹⁷² He even divulged that the French had resorted to eating their horses due to a severe supply shortage.¹⁷³ Thus, while the French technically had won a third tactical engagement in as many months, they now risked losing the campaign. Realizing the opportunity presented to him, Forbes immediately sent off a strong detachment to march on Fort Duquesne. Washington already had moved forward, working on a new road in that direction with 1,500 men. Forbes sent another 1,000 men to him on November 13, 1758, with orders to move as an advance guard. Four days later, Forbes himself departed the fort at Loyalhanna advancing with the main body of 4,300 men and leaving only a small garrison behind.¹⁷⁴ Forbes' plan had come to fruition; he now moved his entire combined army of over 6,000 men against a much-weakened Fort Duquesne. Always prudent in his methods, and to avoid the risk of another tactical reverse, Forbes proceeded very cautiously, averaging only about five miles per day. As the British closed in on the forks of the Ohio, the few Indian allies remaining with the French quickly abandoned them. The negotiations at Easton, coupled with this final show of British power, had severed the French-Ohio Indian alliance.

On November 24, 1758, with the British only a day's march away, some Ohio Indians raised the British flag at the fort, even though the French still remained present.¹⁷⁵ At this point, the garrison included only three hundred French troops, and only one hundred remained combat-ready.¹⁷⁶ Knowing he could not withstand a siege, Lignery finally detonated his magazines, burned the fort and its stores, and split his force, withdrawing both south to the Mississippi territory and north toward the Great Lakes. Even after hearing the explosion and receiving news of the French departure,

Forbes still approached the fort ready for battle. He even took a longer route, approaching the fort from the north so that he could anchor his right flank on the Allegheny River and limit the enemy's options for ambush.¹⁷⁷ He took almost a day to cover the remaining twelve miles, arriving at the fort on November 25, 1758, to find it in ruins. Forbes quickly occupied the site, established a new fort, and renamed it Fort Pitt in honor of Sir William Pitt. Washington wrote that the collapse of the French had come as a surprise to everyone.¹⁷⁸ However, while the suddenness of the victory came as a surprise, it was a conclusion carefully shaped by the planning, preparation, and leadership of Forbes. Forbes had anticipated the conditions that led to this outcome, and he was prepared to move rapidly on the French once he identified these conditions. Thus, the campaign had ended in a significant British operational victory without a major battle of main force units and despite a series of tactical defeats.

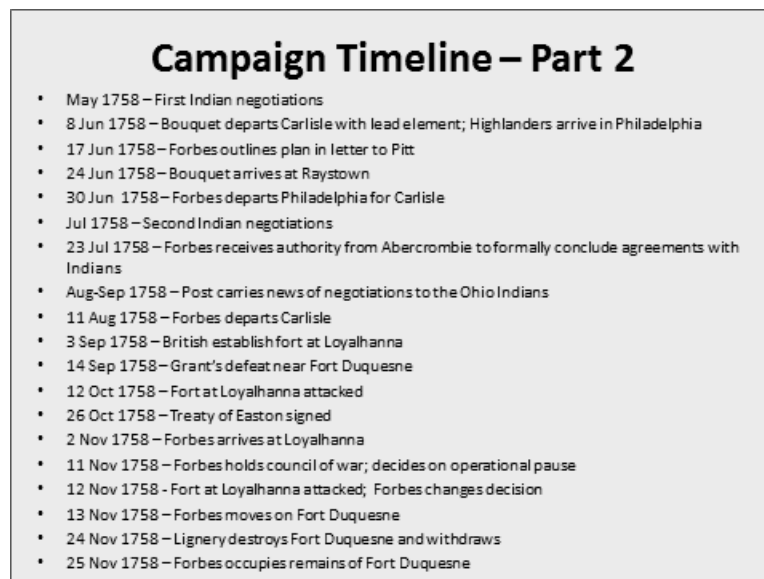


Figure 2. Campaign Timeline – Part 2: Key campaign events.

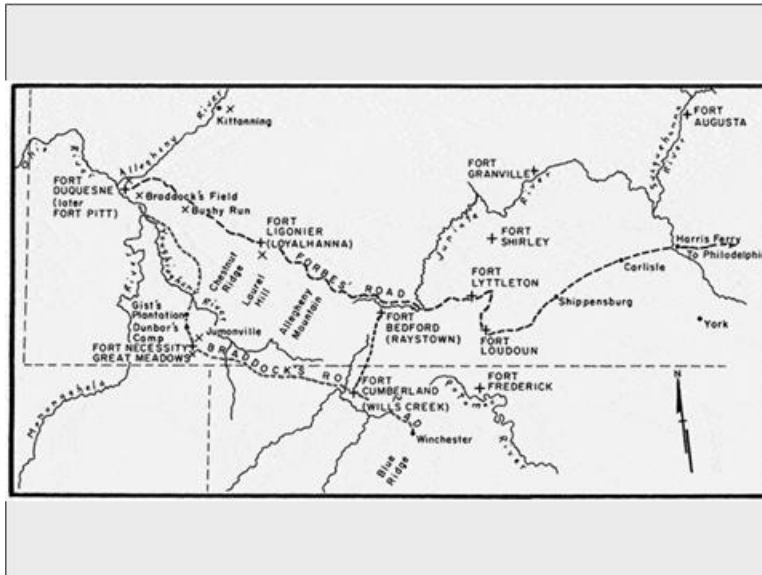


Figure 3. Map of Forbes' and Braddock's roads.¹⁷⁹

Analysis of Campaign Design

The first step in designing a campaign is determining when to end military operations while maintaining a posture that ensures retention of key accomplishments. This element of operational design is designated *termination*. JP 5-0 states, "Knowing when to terminate military operations and how to preserve achieved advantages is key to achieving the national strategic end state."¹⁸⁰ In a letter from Pitt to Abercrombie dated December 30, 1757, appointing Forbes as commander of the Southern Provinces, Pitt provided appropriate strategic guidance. Pitt directed Abercrombie to order Forbes to conduct offensive operations to remove the dangers that threatened the frontier of the southern colonies.¹⁸¹ While Fort Duquesne was the tactical focus of the operation, since it presented the largest mass of French and Indians, destroying it might not attain the larger goal. Therefore, the best description of termination criteria for this campaign is: the security of the frontier of the southern provinces guaranteed.

The second aspect of campaign design translates the termination criteria into a *military end state*. As JP 5-0 states, “Military end state is the set of required conditions that defines achievement of all military objectives.”¹⁸² To secure the frontier from attacks and remove the threat in accordance with the strategic guidance, Forbes both had to defeat the French and Indians and establish a new security zone along the frontier to protect against future attacks. Therefore, this requirement argues for two conditions to achieve the desired end state: French and Indian forces operating on the frontier must be defeated, and British forces must be positioned forward in a new security zone west of the Allegheny Mountains. Completing just one part of this end state alone would not accomplish the mission; Forbes had to achieve both to secure the frontier.

The next step in campaign design is selecting *objectives* that help identify the military tasks that must be accomplished to achieve the end state. JP 5-0 states, “An objective is a clearly defined, decisive, and attainable goal toward which every military operation should be directed.”¹⁸³ The first element of the desired end state, the defeat of French and Indian forces, can be subdivided into two more precise objectives. Forbes had to (1) defeat the French and their western/northern Indians allies (mainly from the Wyandotte, Ottawa, and Huron tribes) by taking away their physical means or will to fight, most likely achieved through some kind of offensive military operation. Next, the British had to (2) break the French and Ohio Indian alliance, draining off support, mostly from the Delaware tribe, but also Shawnees, Cayugas, Senecas and Mohawks. Forbes could do this using military power or through diplomacy. Unlike Braddock, Forbes did not make all Indians his enemy.

The second element of the desired end state required British forces to maintain positions of strength west of the Allegheny Mountain range. Forbes could not do what Braddock had planned: take a flying column straight to Fort Duquesne and wrest the fort from the French. To ensure that the frontier stayed secure, he also had to stay there and establish a new security zone. To do that, he decided to build a secure line of communication (LOC) from Carlisle to the west, supported by a chain of forts. Secondly, he then had to seize Fort Duquesne and its key terrain and establish a new British fort in the same vicinity. Lastly, he had to occupy and operate all of the forts with adequate troop strength. Thus, a new security zone required accomplishing a third objective, in addition to the first two: (3) a new British fort established on the Ohio River with adequate forces for security operations and supported by a secure line of communication. Forbes planned for and accomplished these three objectives during his successful campaign.

After establishing objectives, the next step in campaign planning centers upon determining desired *effects*. Effects describe the conditions needed to meet the objectives. As JP 5-0 states, “A desired effect can also be thought of as a condition that can support achieving an associated objective.”¹⁸⁴ Since the first objective aimed at defeating the French and western/northern Indians, the desired effect was rendering them incapable of continuing any further organized operations, most likely by killing, capturing, or forcing their withdrawal. For the second objective of breaking the French and Ohio Indian alliance, the desired effect required forcing the organized war parties of Ohio Indians to stop fighting, disperse, and return home, mostly through diplomatic negotiations. The final objective required the construction of a new British fort on the

Ohio River with adequate forces for security operations and supported by a secure line of communication. This positioned British forces on the frontier to prevent future incursions. Each of these effects describes a condition that supported the accomplishment of the associated objective. In fact, each of these effects provides a close description of actual events.

Determining the friendly and enemy *centers of gravity (COG)* remains one of the most important steps in designing a successful campaign. JP 5-0 defines center of gravity as “a source of power that provides moral or physical strength, freedom of action, or will to act.”¹⁸⁵ Prussian theorist Carl Von Clausewitz called it “the hub of all power and movement, on which everything depends...the point at which all our energies should be directed.”¹⁸⁶ Attacking the adversary’s COG should be the focus of a campaign, since neutralizing it usually leads to victory. At the same time, a commander should protect his own COG from enemy attack.

The British center of gravity for the campaign centered on their fielded forces, built around the nucleus of the regulars of the 77th Highland Regiment of Foot. Forbes organized an army almost three times the size of Braddock’s force, with a mix of regulars, provincials, militia, and some Indians. Each element played an important role in the campaign. Forbes sought to husband his forces carefully until he had them and their supplies all assembled at Loyalhanna. From there, he could march the remaining distance to Fort Duquesne with overwhelming power. If Forbes could deliver this army to the vicinity of Fort Duquesne in overwhelming strength, he could win a traditional battle or lay siege to the French fortification. Forbes had to attend to logistics, the critical requirement of his center of gravity. The critical vulnerability of the main British

force remained the line of communication; Forbes needed the secure road to ensure supplies moved forward to support the army. The British lacked mobility – they moved only by foot - and they could not forage for supplies in the wilderness. If the French cut the line of communication and prevented supplies from moving forward, the British army would collapse. Forbes had to protect this vulnerability to shield his center of gravity. His string of forts and blockhouses along the route prevented the French from exploiting this vulnerability.

While the French had a sizeable force of colonial regulars and militia, possibly up to 1,000 men at their strongest, this alone probably was not their operational center of gravity. The French required a portion of the force for security of the fort, reducing the number available for maneuver. Additionally, some of the men would have served as support personnel, once again further reducing the total number that could leave the fort and fight. At least 800 Indian warriors augmented the French, effectively doubling the French maneuver capability. Most of these Indians came from villages in the local Ohio Valley area. While the French brought some northern and western Indian allies with them, these warriors were in the minority.¹⁸⁷ Therefore, breaking the French and Ohio Indian alliance reduced French combat power by almost fifty percent, a decisive blow. It also would render Fort Duquesne untenable since the French relied on their relationship with the local Indians to secure freedom of movement through the Ohio River area. Thus, the French and Ohio Indian alliance was the French operational center of gravity.

The critical capability the Indians provided the French created a truly asymmetric situation: in contrast with the British; they enjoyed great mobility and could move rapidly through the wilderness, and they could forage and live off the land when required. They

were also experts at conducting surprise raids and ambushes, and they were precision marksmen with their rifles. For the French, the critical requirement was maintaining a constant supply of gifts to keep the Indians fighting. They provided most of the Indians' rifles, ammunition and powder, as well as necessities like blankets. Such generous gifts also reassured the tribesmen that they were on the winning side. The longer they remained mobilized as fighters, however, the more reliant they became on French supplies, since they no longer had opportunity to hunt for food. Therefore, the line of communication that provided supplies became a critical vulnerability the British could exploit. Lastly, because one of the Indians' primary motivations centered on gifts, they did not want to take significant casualties or engage in direct battle. Once they started taking losses, their desire to continue fighting dropped precipitously. Thus, in the end, the French were unable to keep any significant number of Indian fighters on their side.

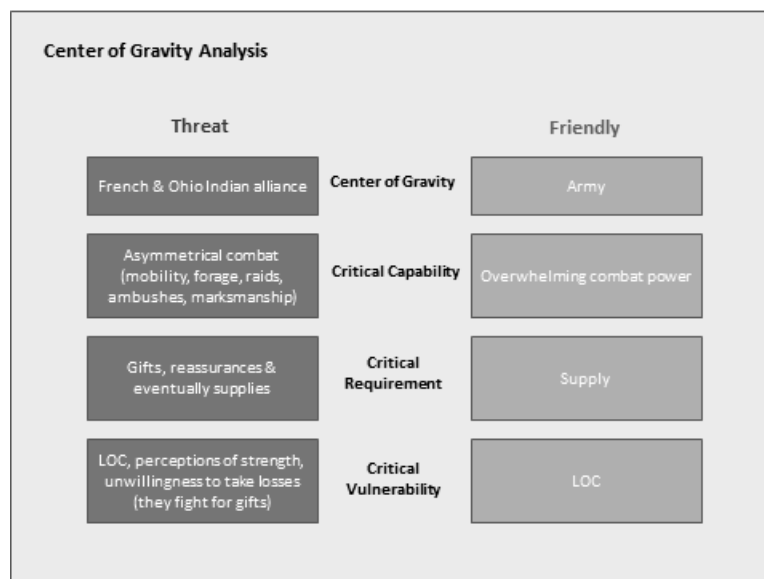


Figure 4. Center of Gravity Analysis.

After determining the enemy center of gravity, the next step in campaign planning is selecting *decisive points*. JP 5-0 states, “a decisive point is a geographic place,

specific key event, critical factor, or function that, when acted upon, allows a commander to gain a marked advantage over an adversary or contributes materially to achieving success.”¹⁸⁸ When connected by *lines of effort*, decisive points can also determine the operational approach to attacking the enemy center of gravity and accomplishing campaign objectives. Therefore, for the purpose of this analysis, this paper discusses decisive points within the context of lines of effort and their approach to the previously established objectives.

Starting with the first objective, defeating the French and western and northern Indians, Forbes moved a large conventional military force within striking distance of Fort Duquesne and then marched on it. Achievement of this objective required successful completion of at least five decisive points along a singular line of effort: (1.1) assembly of an army of regulars, provincials and militia, (1.2) dispatch of an advance guard to conduct reconnaissance and start building the road, (1.3) movement of the main body forward to striking distance of Fort Duquesne, (1.4) destruction of the French in battle or, if this proved impossible, conduct of an attack or siege of the French fort, and, finally (1.5) seizure and occupation of the fort. Each of these decisive points contributed to accomplishing Forbes’ first objective. Forbes accomplished points one, two, three, and five in this sequence and the French withdrawal precluded his need to complete the fourth.

The second objective required Forbes to break the French and Ohio Indian alliance. While Forbes primarily achieved this through negotiations, he also had to demonstrate military strength and the capability to employ a significant military force in the Ohio River valley. Knowing that the Indians always chose to be on the winning side,

he had to demonstrate the inevitability of British success. To break the alliance required Forbes to develop a second line of effort with five decisive points: (2.1) initiate negotiations, (2.2) start ground combat operations, (2.3) conduct major negotiations, (2.4) announce results of the negotiations to the various Indian villages, and then (2.5) sign a formal treaty. Simply initiating negotiations with the Ohio Indians created disruption in their alliance with the French, and accomplished more than Braddock, who refused to negotiate with the Indians. However, without a simultaneous show of British strength, the Indians had little incentive either to remain neutral or to change sides. Once the British moved a large army forward and the result appeared to be a foregone conclusion, the Indians increasingly became more amenable to signing a treaty with the British. However, the British still needed to bring together a meeting of key tribal leaders to conduct negotiations. Once they proved successful, the British then had to assist the Indians in spreading the news of the results of the negotiations to garner greater popular support from the many tribes. Lastly, the British still needed to assemble a large representative body of Indian leaders to finalize the negotiations and sign a formal treaty. The successful accomplishment of these decisive points in this sequence served to achieve the campaign objective of breaking the Ohio Indian alliance with the French.

The third objective of the campaign required the construction of a new British fort on the Ohio, one with adequate forces for security operations and supported by a secure line of communication. This specific objective required sustained, long-term operations and, therefore, probably demanded the greatest effort. Without a secure line of communication, Forbes could not move forces forward, conduct a successful siege,

negotiate from a position of strength with the Indians, sustain any success, and establish the future security zone. The land west of Carlisle was mostly trackless wilderness. Moving due west to Fort Duquesne entailed building a road almost two hundred miles long over a series of significant ridgelines, with thousands of bridges, all supported by a series of outposts.¹⁸⁹ This third line of effort for security operations required five decisive points: (3.1) conduct reconnaissance and select the primary route, (3.2) initiate operations to build the road, (3.3) establish outposts and blockhouses along the route, (3.4) establish a chain of forts with a final, secure forward operating base within striking distance of Fort Duquesne, and then (3.5) seize and hold Fort Duquesne or build a new British fort on the Ohio. Forbes accomplished each of these decisive points in this sequence during the campaign, although the first point overlapped with subsequent ones, with Forbes not making the decision on the final leg of the route until after the march began.

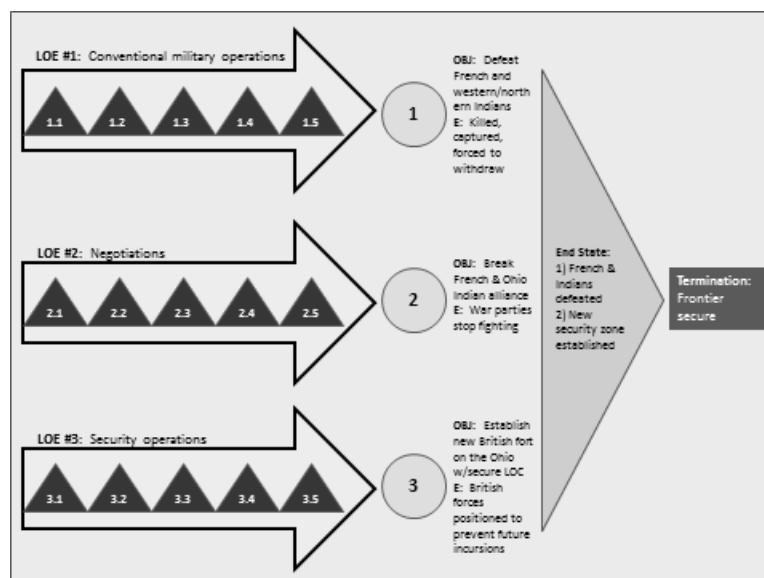


Figure 5. Lines of Effort, Objectives, End State, and Termination.

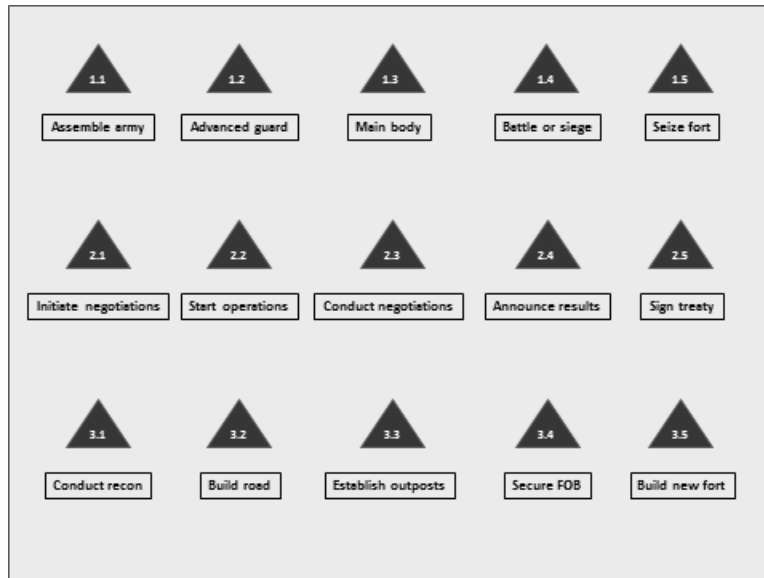


Figure 6. Decisive points.

With the three lines of effort already established, the *operational approach* becomes clear. JP 5-0 states that the approach is the way a commander attacks the enemy center of gravity.¹⁹⁰ A joint force commander can approach the enemy center of gravity either directly or indirectly. Forbes chose to do both simultaneously. Since the French center of gravity was their alliance with the Ohio Indians, Forbes opened diplomatic negotiations with their leaders, an example of a direct approach. At the same time, he initiated ground combat operations, started building the road and supporting chain of forts, and then moved his army as far forward as Loyalhanna, within striking distance of Fort Duquesne. These actions served to demonstrate British strength and French weakness to the Ohio Indians, an example of an indirect approach. This eroded the Indian will to continue to support the French and helped shape future negotiations. Thus, there is clear evidence of both a direct and indirect approach toward the operational center of gravity.

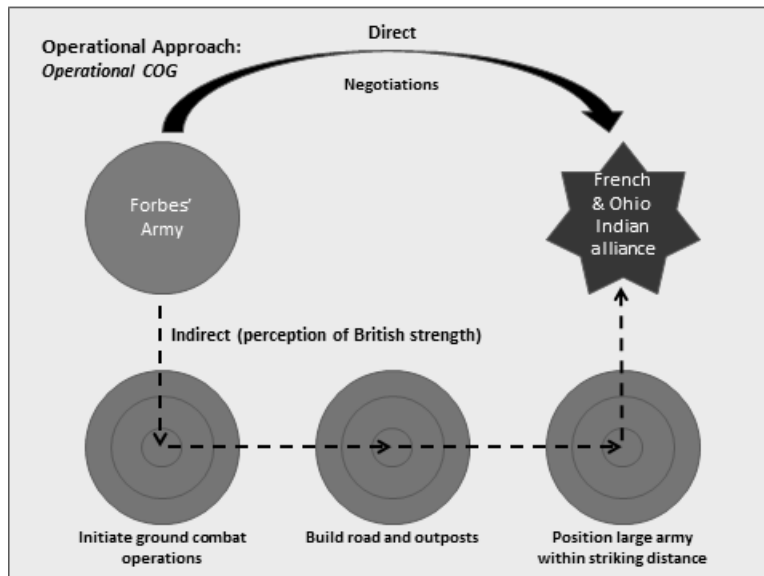


Figure 7. Operational approach: Operational COG.

Anticipation is the next step in design. JP 5-0 states that commanders “must consider what might happen and look for the signs that may bring the possible event to pass.”¹⁹¹ Forbes anticipated that if he could deliver his army safely to the vicinity of Fort Duquesne, he could win. However, he remained keenly aware of Braddock’s disastrous attempt and determined not to make the mistakes his predecessor had made. Therefore, he planned a deliberate advance with a secure line of communication. Along the route, he built a chain of substantial forts to protect his army during the advance as well as to provide safe bases to fall back on in the event of a major French attack. Secondly, Forbes anticipated that the French likely aimed to delay and interdict his approach with small harassment attacks, mainly by Indians. Thus, he emphasized the building of numerous smaller outposts and blockhouses along the road. Forbes realized he had a limited campaign season before winter started that affected both sides. If winter started before he had fully assembled the army, Forbes was prepared to go into winter quarters. However, considering the situation from his enemy’s

perspective, if Fort Duquesne became low on supplies – likely resulting in an inability to support the Indians who relied upon the French for basic necessities and encouraging them to break from the French - the fort would become vulnerable. This growing likelihood explains why Forbes quickly changed his mind about an operational pause for the winter and immediately marched on the fort.¹⁹² He knew these conditions improved his chance of success, and he had retained the flexibility to act quickly and capitalize on new information.

Determining the *operational reach* of the force is the next step in planning the design of a campaign. JP 5-0 states that operational reach is the “distance and duration across which a joint force can successfully employ military capabilities.”¹⁹³ It is a tether, or limit, to the distance a land campaign can advance. Commanders can take steps to extend their reach. Forbes did this first by building a road passable by supply wagons. Secondly, Forbes secured the road by establishing a chain of major forts as well as outposts or blockhouses every three to five miles. Third, Forbes developed a plan to move sufficient supplies forward to sustain a siege of Fort Duquesne. Braddock had done none of these things, giving himself no secure base to fall back on, no improved and secure line of communication, and no continual source of supplies. Therefore, a single reverse had ended the campaign. Forbes’ design enabled him to extend his reach beyond Braddock’s effort and position his army to attack Fort Duquesne in strength. If, in early November, he determined that he had insufficient supplies forward and that winter was too close to support a siege, Forbes could conduct an operational pause for the winter. Had Forbes taken this action, however, he would be able to re-initiate the campaign in the spring with some forces already in a forward position.

The limits of operational reach leads to consideration of *culmination*, which is the next step of design. JP 5-0 states that culmination “is that point in time and/or space at which the operation can no longer maintain momentum.”¹⁹⁴ Even though Forbes had made considerable effort at conducting a deliberate, protected advance, he faced several obstacles. First, his regulars arrived late. Additionally, Grant’s disaster had eroded his combat power. However, the availability of sufficient transport and the environment itself provided the greatest challenges. The mountains and rain delayed the forward movement of supplies in the limited wagons, leaving Forbes without enough provisions to sustain his army during a major siege operation. By November, Forbes realized that he had lost the momentum to succeed for the time being. Thus, he decided to pause for the winter. However, he quickly changed his mind once he became aware of the increasingly precarious position of the French forces at Fort Duquesne. This decision – to capitalize immediately on an exposed French vulnerability – proved decisive in the campaign. Forbes’ anticipation of this scenario allowed him to make the decision rapidly.

<u>Anticipation</u>	<u>Operational Reach Considerations</u>
1. Chance of major French & Indian attack ⇒ Deliberate advance, secure LOC, chain of forts 2. Chance of Indian harassment ⇒ Secure LOC, outposts and blockhouses along road 3. End of campaign season ⇒ If insufficient supplies or forces; conduct pause ⇒ If insufficient time for siege; conduct pause ⇒ If enemy lacks supplies and loses Indian allies; attack	1. Road trafficable by supply wagons 2. Secure LOC with chain of major forts and outposts/ blockhouses every 3-5 miles 3. Supply stockpile to sustain siege
	<u>Culmination Considerations</u>
	1. Insufficient forces or supplies for siege 2. Insufficient time to conduct siege before winter begins

Figure 8. Anticipation, Operational Reach and Culmination.

The next-to-last step in campaign design is called *arranging operations*. JP 5-0 states, “commanders must determine the best arrangement of joint force and component operations to conduct the assigned tasks and joint force mission.”¹⁹⁵ A joint force commander such as Forbes has to determine how he will apply his various capabilities, sequentially or simultaneously, as well as the overall tempo of the operation. Clearly, Forbes intended to negotiate and move forces forward simultaneously, since the two mutually supported each other. Meanwhile, in the field, he planned to advance sequentially and deliberately, with the aim of bringing a very large army safely forward and positioning it to attack or besiege Fort Duquesne. This was a much slower tempo than Braddock had attempted when he tried to overwhelm the French with a single, quick blow. Forbes’ controlled tempo allowed him to proceed methodically and position himself for future operations, even if that meant pausing for the winter. Had he not planned so deliberately, the British could have had to start all over again in the summer of 1759.

Forces and functions is the final step in design. JP 5-0 states, “commanders and planners can design campaigns and operations that focus on defeating either adversary forces, functions, or a combination of both.”¹⁹⁶ Functions generally include such warfighting aspects as maneuver, fires, intelligence, sustainment, command and control, and protection. Typically, a successful campaign attacks both the enemy’s forces and key functions. Forbes attacked both French forces and functions with his direct and indirect approaches. While the movement of British forces primarily aimed at eventually striking French forces at Fort Duquesne, over time the advance also slowly limited the freedom of action of French maneuver forces, denying their ability to conduct

raids against the frontier. As for the negotiations, while Forbes aimed these directly at breaking the Ohio Indians away from the French, they also likely distracted the French commander at a critical point in the campaign. Lastly, while not planned by Forbes, the fall of Fort Frontenac on Lake Ontario in late August 1758 interdicted the French line of communication and limited the flow of supplies from Canada. Thus, the French functions of maneuver, command and control, and sustainment came under attack during the campaign, pushing them off balance and making them more vulnerable to direct attack.

<u>Arranging Operations</u>	<u>Forces & Functions</u>
1. Simultaneous – Negotiations and movement of forces 2. Sequential – Deliberate advance of military forces; slow, controlled, methodical tempo	1. Forces – Strike French main force at Fort Duquesne 2. Functions – Maneuver (limit freedom of action by deliberate advance), Command & Control (distract C2 with negotiations), Sustainment (LOC interdiction)

Figure 9. Arranging Operations and Forces and Functions.

Synthesis of Lessons Learned

While Forbes's march to the Ohio River is an excellent case study in successful campaign design, it also offers several other key lessons learned still applicable today. For example, a key lesson reinforced by the Forbes campaign is the importance of protecting the friendly center of gravity, specifically identifying and protecting a friendly critical vulnerability. In expeditionary warfare conducted by the forces of the United

States today, this remains a vital consideration. Forbes' critical vulnerability centered on his line of communication. However, Forbes turned this potential weakness into a source of strength. By taking extensive steps to secure his line of communication, Forbes extended the operational reach of his army over a significant distance of wilderness. Without it, the British would not have been able to move a fully capable and overwhelming force on Fort Duquesne. Operational reach is a key aspect of campaign design, and extending it as far as possible is essential to success in expeditionary warfare.

Another example of the importance of possessing a secure line of communication can be seen in Grant's defeat in September 1758. The reverse may have caused a panic and a subsequent rout similar to Braddock's expedition if the British detachment had not been able to fall back on the fort at Loyalhanna. At this secure area with a stockpile of supplies, the British consolidated, reorganized, and then continued the campaign. Also, If Forbes executed an operational pause in November 1758 without a secure line of communication, he could not have sustained his whole force anywhere west of Carlisle. He would have had to move the bulk of the army back east over the mountains, against constant French and Indian harassment along the way. Thus, having a secure base to fall back on remains an important aspect of expeditionary warfare. Without it, an adversary can cut off and annihilate an isolated force.

Additionally, Forbes' secure line of communication gave him freedom of action. It allowed Forbes to consider an operational pause in the first place, without condemning the campaign to total failure. If he took this step, the road made it possible for the army

to re-start the campaign the next spring. The secure line of communication also enabled Forbes's freedom of action when he changed his decision from an operational pause to a rapid march on Fort Duquesne in November, knowing that he could sustain some forces forward in the new security zone over the winter. Therefore, a secure line of communication clearly gives a commander freedom of action.

Each of these considerations – extending operational reach, protecting the force, and freedom of action - - remain relevant today in U.S. expeditionary warfare. Potential adversaries often see the line of communication as a potential critical vulnerability they can attack while avoiding U.S. strength. The technology requirements of U.S. forces demand significant supplies to operate effectively and, even with a large fleet of transport aircraft, the greatest majority of those supplies still move on the ground. Like Forbes' army, U.S. forces cannot forage off the land and quickly become combat ineffective if choked off from their source of sustainment. The on-going combat operations in Afghanistan provide a contemporary example. The preponderance of supplies for North Atlantic Treaty Organization (NATO) forces move over a very long and vulnerable ground supply line through Pakistan. Taliban fighters have made increased efforts to interdict this line of communication, which NATO attempts to secure through diplomacy with Pakistan. However, it is still a critical vulnerability that must be protected to enable effective NATO operations in Afghanistan. In the example of the Forbes campaign, protecting a critical vulnerability to the point of making it a source of strength enabled tremendous flexibility and supported campaign success.

Another key lesson learned still applicable today focuses on the idea of protecting the main force until decisive action. This factor deserves most serious

consideration when establishing campaign objectives, lines of effort, and decisive points along those lines. If any activity does not support the accomplishment of an objective, it is wasted effort. In this example, Forbes wanted to avoid tactical engagements until he had moved his entire force forward. Then, he could engage the French on his terms with overwhelming combat power. He wisely rejected attempts to counter every Indian raid and ambush. Since the Indians clearly had the advantage of mobility, Forbes could have expended considerable effort without the benefit of bringing the Indians to some kind of engagement favorable to the British. The campaign could have ended in failure due to the loss of time, supplies, or combat power. Contemporary adversaries likely will attempt to delay U.S. forces and slowly exhaust them over time. This gives them opportunity to continue their own operations while attempting to attack the will of the U.S. populace and political decision-makers. While U.S. forces should not anticipate a large tactical battle like Forbes envisioned, protecting the force for decisive action, whatever that action is, remains paramount. Even more important, the achievement of campaign objectives require the focus of all efforts.

A third and final lesson of the Forbes campaign centers on the importance of strategic leadership skills such as those the general displayed in his 1758 campaign. Even after extensive planning and preparation, Forbes still had to lead his army effectively during the operation itself to ensure success. Forbes demonstrated learning agility, used influence rather than relying solely on formal authority, remained self-aware of his own strengths and weaknesses, and constantly communicated his intent for the campaign. All of these skills were atypical for many conventionally-trained British officers of this era, including his predecessor, Braddock. To many, Braddock

“exemplified the ultimate in an inflexible, arrogant, and incompetent British officer, unwilling to conform to the realities of the American environment and enemy.”¹⁹⁷ By contrast, Forbes used these skills to great effect during the campaign, ultimately leading to a tremendous operational success despite many tactical setbacks.

Realizing the minimal chance of success using a traditional approach, Forbes studied the Braddock campaign, his enemy, and the environment. His ability to learn from a variety of sources and then act on what he discovered shaped the campaign. The Center for Creative Leadership defines learning agility as “the ability to constantly be in a learning mode, to value and seek out the lessons of experience.”¹⁹⁸ It means recognizing the need for new skills or changes, taking responsibility for the changes, and then implementing them. During the campaign, Forbes made non-traditional changes to his forces and the concept of operations. The highly regarded French and Indian War Historian Francis Parkman noted that Forbes “did not hesitate to embrace military heresies which would have driven Braddock to fury.”¹⁹⁹ First, Forbes reached out to provincial governors and used persuasion to amass a significant force of militia to augment his regulars. Then, Forbes took this one step further, an action that many observers considered unusual, by training and equipping many of them to fight like Indians. Forbes’ ability to learn tactics from the Indians and even to equip some of his forces like them differentiated him from his predecessor. Furthermore, Forbes also emphasized marksmanship training, requiring soldiers to fire at specific targets instead of practicing only unaimed volley fire, a practice that proved effective on European battlefields against another massed formation at close range. Forbes clearly made a

deliberate effort to learn from his enemy and incorporate those lessons into his army's training.

Forbes viewed the Indians very differently than had Braddock. Forbes clearly saw the French and Ohio Indian alliance as the enemy operational center of gravity, and the evidence shows that he put substantial personal effort into breaking it. While Forbes shaped the success of the campaign by his deliberate inclusion of diplomacy and willingness to negotiate with the Ohio Indians, he also sought to counter their power by incorporating his own Indian allies into the campaign. Forbes saw the need to have friendly Indians to conduct reconnaissance, serve as guides, and conduct raids and ambushes against the enemy. The idea of including such a large contingent of half-naked savages in a regular British army was unprecedented and demonstrated learning agility.

A final example of Forbes remarkable adaptability is his plan for the campaign. Forbes studied military theory and in particular read Turpin de Crisse's *Essai sur l'Art de la Guerre*, which included principles on partisan warfare.²⁰⁰ Relying on this knowledge, he implemented a tactic called the "protected advance." He planned to move to a position with a strong force, establish a fort, build up supplies, and then only setting necessary conditions, advance to the next position.²⁰¹ An interesting side note is that Turpin de Crisse's work was published only in French and never translated into English. However, Forbes could read French, another example of his learning agility.

By executing the protected advance, and advancing carefully and gradually, Forbes expected to mitigate risk. Forbes remembered the disaster that had befallen Braddock when he rushed headlong into an ambush without a secure base upon which

to fall back. However, throughout the campaign, some subordinate officers, especially Washington, thought Forbes moved too slowly. Of all of the strategic leadership skills, basing actions on the new knowledge that learning agility produces requires the most courage. It took courage to continue the deliberate advance in the face of criticism, as well as to negotiate and trust Indians regarded by most Europeans to be savages, let alone learn from them and incorporate some of their concepts into an otherwise conventional army. Thus, he clearly demonstrated the strategic leadership skill of learning agility by recognizing the need for a variety of changes, identifying reasonable responses, taking responsibility for these innovations, and then personally implementing them.

Learning agility remains critical today. Since U.S. forces expect always to fight on the enemy's terrain, the enemy always will possess an advantage in understanding the environment. They will have perfected ways to fight that may be unique to that area of the world. Even with a tremendous technological advantage, U.S. forces may have to learn and adopt some of these methods. The current use of donkeys as a means of supply transport in Afghanistan offers a very simplistic example. Many key observation posts high in the mountains receive supplies primarily through trains of donkeys, a method found nowhere in current doctrine. Hiring local nationals to serve as translators and even as external perimeter security of remote outposts in some instances offers another example. In addition, the partnering of Afghan forces with U.S. forces in the conduct of combined operations, ideally with the Afghan forces in the lead, may give the United States an advantage in a foreign environment. Thus, adopting some local tactics and techniques and the use of indigenous forces remain important today. At the

strategic level, this entails supporting a campaign with adequate means to do this. It could include providing funding to purchase additional equipment or even to pursue training outside of traditional military schooling (a donkey handler's course?). It can also involve delegating authority for certain lower-level diplomatic arrangements so a commander can make agreements with indigenous forces.

Forbes also demonstrated the strategic leadership skill of influence. Influence means compelling people to act or change their behavior. Influence is important in aligning the efforts of others and building the commitment of people at all levels.²⁰² At the strategic level, influence may be more important than authority, since some key players will reside outside of the scope of direct control. Additionally, authority alone does not gain a leader true commitment from all subordinates. For example, although technically all British, Forbes' army was actually quite multi-national and ethnically diverse. Combined with the complexity of regulars, provincials, militia, and Indians, Forbes commanded a coalition organization. Each group fought for different reasons and required different motivation to fight their best; orders did not motivate them primarily. Forbes sought to influence his army by constantly explaining his vision for the campaign, how each element played a vital role, and how success benefited all.

Additionally, Forbes had to rely on provincial governors to provide the bulk of the forces and much of the supplies. Their direct support was critical to Forbes' success. In a letter to Bouquet, Forbes explained how he had used personal requests, behind-the-scenes intrigue, and, when necessary, bullying, to get what he needed from the governors.²⁰³ Forbes successfully operated along a spectrum of influence, transitioning

from the lowest level of developing relationships and making personal requests to the opposite end, which involved asserting formal authority when required.

Forbes also exhibited extraordinary self-awareness during the campaign. Self-awareness means understanding your own strengths and weaknesses.²⁰⁴ During the operation, Forbes became very sick and died shortly after his victory. During much of the campaign, he was too ill to stand or even eat, a fact that was well known and that he made no effort to hide from his army. To move through the wilderness, his aides placed him in a sling tied between two horses. Despite his terminal illness, Forbes' mind remained completely clear. He previously had commanded an infantry regiment in England, and he knew the importance of leadership from the front and by example. He also knew that he had grown incapable of doing this during the march. Therefore, he appointed Bouquet, a proven tactician, as the ground tactical commander. Despite this delegation of tactical leadership, Forbes retained ultimate authority for all key decisions during the campaign. However, the manner in which he exercised this authority differed greatly from that of Braddock. Recognizing that his army was really a coalition, Forbes made key decisions with input from a council of war. He did this on November 11, 1758, after a third tactical defeat at the hands of the French.²⁰⁵ While he took input from all in attendance, he alone ultimately made the decision to conduct an operational pause.

Additionally, although he delegated tactical leadership, Forbes continued to exercise operational command and control through a large volume of directives penned while lying prostrate. When too sick to hold a pen, he dictated to aides. Many of these letters focused upon important management aspects of the campaign: directing the

movement of logistics, reporting to Pitt, and keeping the governors informed. Clearly, Forbes understood both his strengths and weaknesses, and took deliberate measures to use one of his primary strengths – management – while mitigating his top weakness – physical disability that had led to an inability to lead from the front.

Probably the most essential of the strategic leadership skills, Forbes displayed a powerful talent for communication throughout the campaign. The Center for Creative Leadership found in one study that communicating information and ideas was the most important skill for leaders to be successful.²⁰⁶ Forbes illustrated this skill in his constant efforts to explain his intent for the campaign. Forbes used his commander's intent as a general framework of synchronization for the wide variety of forces in his army. In many of Forbes' written directives, all very clear and concise, he often closed with re-emphasizing his intent. In early September 1758, Bouquet strayed from Forbes' guidance, leading to a significant tactical defeat. Forbes admonished Bouquet in writing, and closed the letter by reiterating the importance of following the plan. Thus, Forbes showed trust in a subordinate despite a substantial mistake, used the event as a teaching opportunity, and as a chance to re-emphasize his intent. This is an excellent example of successful senior leader communications. Thus, overall, the Forbes campaign is an excellent case study in the application of strategic leadership skills.

Conclusion

While Forbes never produced a written campaign plan, the evidence clearly shows he accurately accounted for the key aspects of operational design during the planning and preparation of his offensive against the French at Fort Duquesne. This led to his army's resounding success and makes this operation an excellent case study in operational design. While the definitions of the elements of operational design found in

JP 5-0 are adequate, they offer no historical examples so that a reader can grasp their use more fully. The Forbes' campaign – a multi-national coalition operation conducted over a great distance of wilderness that required significant planning and preparation – provides a useful historical example. Furthermore, this campaign also provides several important lessons-learned still applicable to contemporary operations. Lastly, Forbes' march to the Ohio remains historically significant as the first successful land campaign in North America. While it was not the decisive action of the French and Indian War, it clearly stood as a key effort that set the conditions for eventual French defeat and British domination of North America. As such, it is definitely worthy of even further study.

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