

*Journal of the Upsilon-Upsilon Chapter
of Phi Alpha Theta*

THE UPSILONIAN

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COMMENTS FROM THE ADVISOR

While Cumberland College becomes The University of the Cumberlands on July 1, 2005, there will be few changes for the Upsilon-Upsilon chapter of Phi Alpha Theta. This will be the sixteenth year of publication for our journal. We will be entering the Best Chapter Competition for the twenty-ninth year in a row and second in the new Nels Clevan award category. Our new officers are planning a major historical trip this fall as well as the trip to the National Convention.

Each passing year we lose members to graduation. They take a part of us with them, but they also leave behind a piece of themselves that becomes a part of our tradition. And our tradition is what keeps the chapter successful. To those members who are leaving, **we wish you nothing but the best.** Remember you are still a part of us.

Eric L. Wake, Ph.D
Advisor of Upsilon-Upsilon and
Chairman, History and Political Science

COMMENTS FROM THE EDITOR

We now find ourselves concluding another academic year. For the Upsilon-Upsilon chapter of Phi Alpha Theta, the year has been filled with expectations, disappointments, hard work, but above all else success. It has been my pleasure to have been a part of the Upsilon-Upsilon tradition for the past three years. Throughout that time we have managed to carry on the winning tradition that was passed onto us, and I hope that those who follow in our footsteps will be able to rise to the occasion as well.

That being said, it has also been my pleasure to work with scholarly students in producing this journal. The reader will find that the subjects of the papers included in this journal are diverse, but intriguing. John, Heather, and Brad have submitted works that showcase our department's commitment to writing and researching the events of the past.

I would like to say a special thank you to Dr. Oline Carmical, our Chairman of the Board of Advisors for *The Upsilonian* this year. Also, I extend my appreciation to Megan Smith and Ashley Wolf for lending their assistance. Finally, I want to express my gratitude for the guidance and wisdom provided by our Faculty Advisor and Department Chairman, Dr. Eric Wake. Over the past four years that I have been acquainted with Dr. Wake, my admiration for his persevering spirit has increased. He is the backbone of Phi Alpha Theta and the factor that pushes all of us to excel.

Some of us are moving on from this undergraduate institution. Others will continue their education and experiences here next year. I wish the greatest success to everyone in their education endeavors, but most of all I wish everyone success in life.

Jessica Cox, Student Editor
Upsilon-Upsilon, 2004-2005

COMMENTS FROM THE PRESIDENT

With graduation right around the corner, it is sad to see the school year come and go with such great speed. This was a year with so many changes to Cumberland College. The biggest change came with the announcement of its new name, University of the Cumberlands. Even with the announced name change, the Upsilon-Upsilon chapter of Phi Alpha Theta continued on stronger than ever.

This group made me particularly happy, proud, and sad all at the same time. I was happy that I was involved with a group with such dedication. I was proud at all the success we accomplished throughout the year. Finally, I became sad when the reality of moving on away from the group hit me near the end. Lou Holtz, the famous Notre Dame football coach once said:

All winning teams are goal-oriented. Teams like these win consistently because everyone connected with them concentrates on specific objectives. They go about their business with blinders on; nothing will distract them from achieving their aims.

This is a direct representation of this special group of members and professors I worked alongside of for the year. Everyone stepped up above and beyond the call of duty. They accomplished more than we could have ever thought of.

This team showed their true characteristics not only in person, but in competition and work as well. We ventured to two Regional Conferences at Murray State University in Kentucky and at the University of Virginia at Wise. They come out with a sense of pride and victory, not only with an award that was earned, but with the sense of unity we held with one another. "In order to have a winner, the team must have a feeling of unity; every player must put the team first-ahead of personal glory," were the words that Paul "Bear" Bryant told his media personnel once. Personal glory was nonexistent this past school year. Every member did their part and it shows.

On my final note, it must be known that I am proud and very excited about the upcoming officers and members of the Upsilon-Upsilon chapter. I am sure they will carry on the teamwork, unity, and pride that has been established since the chapters beginning in 1974. Also, I would like to give a special "Thank you" to Dr. Wake and the entire History and Political Science Department for their continued hard work and dedication. If it were not for them, we as students would not have been molded and shaped into someone capable of using all of our abilities both academically and socially. Without you, none of this would be a reality, simply just a dream.

Steven Thomas Kissinger
President of Upsilon-Upsilon
2004-2005

AUTHORS



Brad Dobney will graduate in January 2006 with a major in history. He is from Xenia, Ohio. The original draft of this paper was written for the course entitled Russia.



Heather Wilson was a January 2005 graduate from Cumberland College with a major in History and Political Science. She is from Corbin, Kentucky. The original draft of her paper was written for the Issues in History class, a senior capstone course at Cumberland College.



John Baker is a rising junior at Cumberland College and is majoring in history. He is from Corbin, Kentucky. The original draft of this paper was written for the Historical Methods course.

The Battle of Stalingrad

By Brad Dobney

In 1942 the German Army had established a chokehold on Europe. France was crumbling and the British were in rapid retreat toward Denmark. In the east however, there remained one people the *Wehrmacht* (the German Army) had not subdued, the Russians. A rapid offensive brought the Ukraine under German control and left only the city of Stalingrad between the voracious German war machine and the heartland of Russia. Only an incredible defensive effort by the Russian 62nd Army would keep Hitler's men at bay. This would clearly be a "turning point" battle.¹ It was not to be decided by the massive alliance that the Axis powers brought against Stalingrad or by the crushing counterattack that the Soviets mounted but rather by single men, the snipers of the Red Army.

Stalingrad was the namesake of Joseph Stalin, the dictator who ruled the Soviet Union at the time. The city was a sprawling metropolis that covered nearly 20 miles of riverfront along the mile wide Volga River. This city of 700,000 people was the heart of industrial Russia and contained many of the factories that Stalin and the Soviet Union needed to maintain their army.² In the Stalingrad Tractor Plant alone 200 tanks could be built in a month.³ This city was Hitler's goal in his push toward the Ural Mountains.

The plan created by the Germans was known as "Operation Blau" and it started quite well for the German 6th Army. They reached across the Caucasus and raced for Stalingrad. However it was at this point in early August that Hitler made the same mistake as Charles XII and Napoleon had before him. He ordered his men of the 6th Army to press on and not pull back into defensive positions for the winter. This would spell the end of the *Blitzkrieg* and the German 6th Army.⁴

On August 23rd of 1942 the German Army Group B smashed through the defensive lines that over 150,000 Russian volunteers held to the west of Stalingrad.⁵ Behind the Russian volunteers the veterans of the Russian 62nd Army, eight full strength divisions, were lying in wait. Against these eight divisions commanded by Lt. General V.I. Chuikov, Field Marshal Friedrich Paulus threw his twenty-five divisions of the German 6th Army.⁶ This was the beginning of what would be the decisive battle on the Eastern European Front. Hitler pressed on; convinced that he held the technological advantage as well he did but still operating under the mistaken impression that he also held the significant advantage in manpower.⁷

For the German Army to break through they employed everything at their disposal. The *Luftwaffe* (the German air force) began the aggression by raiding and firebombing without mercy. On September 13th a German airman proclaimed "we have turned the town into a burning hell."⁸ The central twelve city blocks of Stalingrad were turned into an unrecognizable pile of ash and twisted metal, but the 62nd Army still held fast.

It was here that *Blitzkrieg* came to die. The veterans of the Russian 62nd Army were told by General Chuikov to get inside the ring of artillery and air cover the Germans had, to “hug” their enemies.⁹ At Stalingrad World War II became a Russian war. From those few desperate months on until V-E Day the lightning war was over, buried in central Russia.¹⁰

Surrounding the 62nd Army in Stalingrad were more than just the German armies. In attempting to mollify Hitler in his march across Europe several nations had joined forces in the offensive. Romania, Italy and Hungary were notable among the nationalities that now surrounded Stalingrad in the late summer of 1942.¹¹

Romanian troops had joined the war as an act of gratitude to Hitler from Ion Antonescu, the leader of Romania. Hitler had sent six army divisions into Romania to protect them from the threatening Hungarians in early 1941. When Hitler, in turn, came looking for support in his foray into Russia Antonescu answered the call by sending twenty-six divisions that eventually ended up camped around Stalingrad.¹²

Hungary came to war against Russia by much more troubling and muddled circumstances. On June 26th, 1941, several fighter planes attacked peasant villages just across the Russian-Hungarian border. Hungarian Prime Minister Bardossy was assured by several “reliable” sources that the planes were Russian. Forward spotters for Hungary were actually much more convinced that the planes were German but Bardossy was assured by the Germans that they would never commit such an act. Through this duplicitous move the Germans acquired the assistance of the Hungarian divisions that were included in the growing ring of steel around Stalingrad.¹³

If any army had less reason than Hungary to be around Stalingrad in the autumn of 1942 it was the Italians. In correspondence to Benito Mussolini, the dictator of Italy, on June 21st, 1941, Hitler revealed his great desire to attack Russia in a “war of liberation.” Mussolini was quick to join Germany in this war of aggression as repayment for German help in the campaign in North Africa. Despite Hitler’s claims that he did not require much help the overeager Mussolini sent an entire army.¹⁴

The combined forces of the Italians, Romanians and Hungarians should have been a powerful force in Russia; they were trained well and were equipped.¹⁵ Yet the nationality of these troops soon turned out to be much more of a hindrance than help as the Germans approached Stalingrad. Hungarian and Italian troops refused to fight under German command as a matter of national pride and the Romanians and Hungarians could barely tolerate the sight of each other. Even some of the Hungarians were not actually Hungarian but rather an amalgamation of troops from countries Hungary had dominion over.¹⁶ This was the situation of the army encircling Stalingrad. Without the power of the German Army it was

hardly an impressive collection.¹⁷

As the curtain descended on Stalingrad it fell to the Russian 62nd and 64th Armies to save their country here in the battle that would determine the fate of their country. Inside the besieged city an elite few men rose to the challenge presented by the onrushing Germans. These men, the snipers of the Russian Army, would become the heroes of World War II.¹⁸

At the outset of the battle no one had paid much heed to the need for snipers. A rolling battle across the steppes of Russia had given the sharpshooters precious little time or cover from which they could do their job. All that would change when the Axis armies rolled into the devastated metropolis of Stalingrad. On September 14th the Germans attacked the city on a two-mile wide front and quickly gained ground until they were near the high-rise buildings nearest the heart of the city. The Russian storm troops and snipers tried desperately to buy time for reinforcements to arrive. It was from these buildings the Russian snipers began the task that they would complete some months later. The German columns, already under heavy fire, began to lose spotters and commanders as the snipers riddled their ranks.¹⁹

The snipers of Stalingrad made a huge and almost immediate impact when they entered the battle on September 14th and this did not go unnoticed by the Soviet high command. Colonel Derevyanko of the Russian High Command reflected that the Russians recognized the need for a rifleman who could kill an officer with a single shot at a range up to 900 yards.²⁰ To this end the Lazur Chemical Plant was stripped of the artillery that had been placed there and outfitted to become a training place for the marksmen of the Russian Army. (At this time the factory and works were in Russian hands but ownership of the area seemed to change with the week).²¹ Against walls were painted the outlines of German helmets, the torsos of men and observation slits. The graduates of the impromptu school were sent directly to the front lines of the fighting where they were often incredibly successful.²²

As the need for snipers became more significant the Soviet Marshals began to call for more extensive training for these sharpshooters and more propaganda based on the snipers work. Front Commander A.I. Yeremenko and Military Council Member N. S. Khrushchev were instrumental in the implementation of the training of the men they called “hunters of two legged animals.”²³ The Communist Party and Komosol organizations went to great pains to publicize the feats of these “hunters.” In the Soviet Army newspaper, *In Our Country's Defence*, a running tally of Germans killed by snipers during the battle of Stalingrad was kept.²⁴

As the Soviets continued Stalin's practice of active defense it became apparent to any informed observer that this Stalingrad battle would be where the war was won or lost.²⁵ One man soon rose above the other snipers as the one who

would make the difference that the Soviets needed. This man would be the one to train the other Soviet snipers, the one who would engage the best of the German snipers and would single-handedly kill over 240 Germans during the course of the battle of Stalingrad. The name of this man was Vassili Zaitsev.

Vassili Zaitsev had learned to shoot in the Ural Mountains where he was raised. There, as a young man, he had spent his summers as a shepherd protecting his flocks and was soon well trained in the ways of stalking and killing. At the age of fifteen Zaitsev went to technical school and eventually ended up a bookkeeper for the Soviet Far East Fleet. Zaitsev continued to rise through the ranks and, on September 20th, 1942, walked into Stalingrad as a member of the 284th Division.²⁶

Word of Zaitsev's skill as a sniper spread through the ranks thanks to correspondents who traveled with him and the ever-present Soviet Army newspaper. In the first ten days in which he was engaged in fighting he killed nearly forty Germans who ventured too close to him.²⁷ This fame led him to meetings with General Chuikov, who was leading Soviet troops in the area. At times Zaitsev and other snipers even served as advisors to the General, who was impressed with their humility even in the face of constant adulation.²⁸

Zaitsev was by far the most famous of the Russian sharpshooters but he was by no means the only one. Viktor Medvedev was also heavily involved in the training of the younger snipers and was renowned for a kill total that would eventually eclipse that of even his mentor, Zaitsev. Viktor Medvedev would follow the Soviet Army all the way to Berlin.²⁹ Joining the "heroes of the Battle of Stalingrad" in Batyuk's 284th Infantry³⁰ were Nikolay Kulikov,³¹ Anatoli Chekhov³² and Akhmet Avzalov.³³ These men also gained their renown as snipers in the Battle of Stalingrad. This famous crew of snipers added to all the other publicity that they were being given by keeping a register of the Germans that they killed and regularly noting them in the divisional paper.³⁴

Despite the accomplishments of these sharpshooters it was Vassili Zaitsev and Tania Chernova that would ride the battle to immortality. Tania Chernova began the battle not wanting to be a soldier and packed on a barge filled with men who saw her more as a plaything than a soldier.³⁵ Tania was destined for much more than the life of a simple soldier. On her very first night Tania was assigned a reconnaissance mission in which she crawled through a stinking sewer into a German mess hall and returned to her lines foul smelling but alive and unharmed.³⁶ Tania learned the craft of sniping under Vassili Zaitsev and was soon engaged on the same type of covert missions that the snipers would become famous for.³⁷ At some point she transferred to the same division as Vassili Zaitsev and swore on her party card to fight in the Bolshevik spirit.³⁸ Soon Tania Chernova fell in love with the daring Vassili Zaitsev. On what would prove to be her last mission, an attempt to kill the German Field Marshal Paulus, Chernova was far behind enemy lines when a mine exploded and nearly killed her. Zaitsev

carried his fallen comrade all the way back to the Volga River where doctors labored long into the night to finally save her.³⁹ This moment served to heighten the fame of Tania Chernova but also cemented Vassili Zaitsev as a hero in the Russian mind.

The man that the Battle of Stalingrad did the most to enhance the reputation of was Vassili Zaitsev. Prior to the battle Zaitsev was simply another man in the massive Soviet Army, but when the battle ended he had recorded 242 kills, inspired books, a movie and countless other young men to follow in his route. The Battle of Stalingrad assured Vassili Zaitsev of historical significance forever.

The so-called “counteroffensive of the gods” was already being planned when Zaitsev was inserted into the battle on September 20th but he had no way of knowing that.⁴⁰ Zaitsev settled in to make the most difference that he could in his part of the war. So effective was the difference that he made that the Germans felt it necessary to silence him permanently. Sent from Berlin to kill Vassili was a man who headed the German sniping school, Major Koning.⁴¹ This man was sent in from Berlin specifically for the purpose of tracking down and killing Zaitsev. Zaitsev learned the story from a German who was taken prisoner by his 284th Division.⁴² Zaitsev immediately set out to find this man who had been sent to kill him. He knew that he would have to wait for the perfect time to kill the man from Berlin with a single shot or he would be killed himself.⁴³ Two of Vassili’s close friends were gunned down by the man that Vassili began to refer to as the “super-sniper.”⁴⁴ Zaitsev began to stalk the man that had killed his friends. On the third day of the duel another man that Vassili was working with was shot and wounded severely but Zaitsev was able to get a bead on the Nazi’s position.⁴⁵

On the fourth day of the fight Vassili Zaitsev finally was able to bag his elusive prey, that even his enemies had sent their best to duel Zaitsev was a testament to the skill of the Russian snipers in Stalingrad.

The story of Vassili Zaitsev does not end with his killing of the German super-sniper. He was rotated to defend the Red October Plant in a different sector of Stalingrad and there was nearly killed in an explosion.⁴⁶ Though he was never able to fight again Zaitsev was named a Hero of the Soviet Union and remains very much an integral part of the story of the battle of Stalingrad.

When, in early 1943, the Soviet breakout from Stalingrad was complete the heroism of the Soviet soldiers was finally properly recognized by the military ground forces journal.⁴⁷ It was readily evident at that point, as it is now, that it was not the conglomeration of troops the Germans brought to the fight or the crushing counterattack of the Soviets that won the battle. Rather it was the contributions of single men and women that eventually won the largest battle of World War II for the Soviet Union.

ENDNOTES

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² Andrew Rooney, *The Fortunes of War* (Boston: Little, Brown and Company, 1962), 62.

³ *Ibid.*, 10

⁴ Major Timothy Wray, *Standing Fast: German Defensive Doctrine on the Russian Front During World War II* (Fort Leavenworth, Kansas: U.S. Army Command and General Staff College, 1986), 140.

⁵ Graham Lyons, *The Russian Version of the Second World War* (New York: Facts on File, 1976), 49.

⁶ David Glantz and Jonathan Howe, *When Titans Clashed: How the Red Army Stopped Hitler* (Lawrence, Kansas: University of Kansas Press, 1995), 122.

⁷ *Ibid.*, 133.

⁸ Lyons, *The Russian Version of the Second World War*, 49.

⁹ *Ibid.*

¹⁰ Glantz and Howe, *When Titans Clashed*, 125.

¹¹ Mario Fenyo, "The Allied Axis Armies and Stalingrad," *Military Affairs* 29 (Summer 1954): 59.

¹² *Ibid.*, 58

¹³ *Ibid.*, 59.

¹⁴ *Ibid.*, 60-61.

¹⁵ Albert Seaton, *The Russo-German War, 1941-1945* (New York: Praeger Publishers, 1972), 95.

¹⁶ Walter Goerlitz, *Paulus and Stalingrad* (New York: Citadel Press, 1963), 156.

¹⁷ Seaton, *The Russo-German War*, 271.

¹⁸ Lyons, *The Russian Version of the Second World War*, 50.

¹⁹ William Craig, *Enemy at the Gates* (Old Saybrook, Ct: Konecky and Konecky, 1973),89.

²⁰ Robin Higham, "The International Conference of Military History Meeting in Washington D.C., August 1975," *Military Affairs* 39 (December 1975): 164.

²¹ Vasili Chuikov, *The Battle for Stalingrad* (New York: Holt, Rinehart and Winston, 1964), 212.

²² Craig, *Enemy at the Gates*, 121.

²³ Chuikov, *The Battle for Stalingrad*, 141.

²⁴ Ibid.

²⁵ Mira Beth Lansky, "'People's War' and the Soviet Threat: The Rise and Fall of a Military Doctrine," *Journal of Contemporary History* 18 (1983): 631.

²⁶ Craig, *Enemy at the Gates*, 121.

²⁷ Ibid.

²⁸ Chuikov, *The Battle for Stalingrad*, 142.

²⁹ Ibid.

³⁰ Ibid., 257.

³¹ Ibid., 143-145.

³² Ibid., 142.

³³ Ibid., 257.

³⁴ Ibid., 279.

³⁵ Craig, *Enemy at the Gates*, 106.

³⁶ Ibid., 107.

³⁷ Ibid., 123.

³⁸ Chuikov, *The Battle for Stalingrad*, 280.

³⁹ Craig, *Enemy at the Gates*, 123.

⁴⁰ David Glantz, *Zhukov's Greatest Defeat* (Lawrence Kansas: Press of University of Kansas, 1999), 13.

⁴¹ Chuikov, *The Battle for Stalingrad*, 143.

⁴² Craig, *Enemy at the Gates*, 127.

⁴³ Ibid.

⁴⁴ Chuikov, *The Battle for Stalingrad*, 144.

⁴⁵ Ibid., 145.

⁴⁶ Craig, *Enemy at the Gates*, 386.

⁴⁷ Paul Cocks, "The Purge of Marshal Zhukov," *Slavic Review* 22 (September 1963), 484.

Ann Rutledge and Abraham Lincoln: An Unlikely Romance **By Heather Wilson**

The legendary romance between Ann Rutledge and Abraham Lincoln has been chronicled in novels, portrayed on the silver screen, and discussed by serious researchers for more than a century. Scholars have constantly changed conceptions about the alleged romance, and their changes follow a pattern. Early writers, mostly non-professional historians such as Lincoln's former law partner, William Henry Herndon, accepted the romance as reality. During the early 1920s, professional historians began to question the romance, largely refusing to accept it as fact. More recently, scholars' views regarding the romance have again shifted with such biographers as professional historian Douglas L. Wilson, who believes the romance was real. Despite scholars' differing ideas, the fact remains there is little hard evidence, basically only assumptions, to support the claim by Herndon and others of romance between Rutledge and Lincoln, and the evidence regarding their relationship has often been distorted and misused.

As a child, Herndon, an early originator of the legend, moved with his parents from Kentucky to live in Illinois. Herndon's interest in law led him to become an apprentice in the Lincoln and Stephen Logan law firm in 1842. After two years, Herndon was admitted to the Illinois Bar Association and was made a full partner by Lincoln in 1848, Lincoln's partnership with Logan having dissolved by this time.¹ Herndon was not only Lincoln's law partner but also became his close friend and biographer. After Lincoln's assassination in 1865, Herndon began delivering a series of lectures dedicated to the life of Lincoln. The third of these lectures, presented November 16, 1866, introduced to the world what is known as the "Ann Rutledge Legend."²

Even before Herndon's lecture, the romance had been mentioned in a newspaper article but drew little attention. John Hill, former New Salem, Illinois resident, published on February 15, 1862, an article in the *Menard Axis*, "A Romance of Reality," in which the romance of Rutledge and Lincoln was recounted. According to Benjamin P. Thomas, professional historian and author of a renowned biography of Lincoln, Hill "...told how the awkward young man had met and wooed a young belle of the village and won her heart. They planned to be married, but the maiden died, and her lover became so melancholy that friends feared he might attempt suicide."³ Hill then revealed the young man in the article was none other than the current President of the United States, Abraham Lincoln.

The account by Hill cannot be viewed as completely accurate or unbiased. The story shared with Hill's readers was based on memories relayed to Hill by his father long after the actual event had occurred. Hill was also addressing an audience that was decidedly anti-Lincoln.⁴ In more recent times, however, the article has proven helpful in establishing that Herndon had not invented the

romance between Rutledge and Lincoln and opened the possibility the romance had occurred.⁵

Herndon became interested in the possibility of a romance between Rutledge and Lincoln after reading the Hill article. Herndon interviewed residents of New Salem, Illinois, and began with the former fiancé of Ann Rutledge, John McNamar, in early fall of 1866.⁶ On November 16, 1866, Herndon delivered the third lecture of his series, “Abraham Lincoln. Miss Ann Rutledge: New Salem Pioneering and the Poem.”⁷ The lecture was based largely on Lincoln’s relationship with Rutledge, as outlined by McNamar.⁸

Herndon followed the McNamar interview and lecture by writing to every member of the Rutledge family and every resident of New Salem with whom he could establish a contact and then interviewing those who allowed it. Through interviews and correspondence, Herndon collected a mass of contradictory evidence.⁹ Later, critics would declare this evidence non-documentary, coaxed from witnesses, insubstantial, and collected too late after the fact.¹⁰

The alleged romance begins with McNamar, then known as John McNeil, moving to New Salem from some eastern state. McNeil began working right away and quickly began to accumulate wealth and property, much of which he purchased from the father of Ann Rutledge while establishing a relationship with the family. McNeil and Ann became acquainted, fell in love, and became engaged.¹¹ It was at this point that McNeil revealed his true identity to Ann. John was a native of New York and had come to New Salem under the assumed name McNeil to reclaim his family’s fortune. His family was too poor at the time to relocate, and he was returning to New York for the purpose of bringing them to live in New Salem. McNamar left New Salem, bound for New York about the same time Lincoln was returning from the Black Hawk War in 1832. McNamar did not contact Ann for some time and did not return to New Salem for three years.¹²

Ann’s friends “encouraged the idea of cruel desertion” by McNamar, insinuating he had merely used her for his own interest during his stay in New Salem.¹³ McNamar’s name change left some believing he had committed a horrible crime and was in hiding under an assumed name. Others believed McNamar shared affections with another in the east, and the name change allowed him to court other women while accumulating his wealth.¹⁴

During McNamar’s absence, Lincoln began to direct his attentions toward Ann. Lincoln shared many visits with Miss Rutledge, and those, according to professional historian Mark E. Neely, Jr., “...resulted in an engagement to marry, conditional to the release from the contract with McNamar.”¹⁵ Ann did not want to pursue a marriage with Lincoln before being honorably released from her engagement with McNamar. Ann wrote McNamar and asked him for release from their engagement.¹⁶ There was no answer, and Ann accepted Lincoln’s proposal.¹⁷

The marriage between Ann and Lincoln never occurred. The summer of 1835 was unusually hot with high levels of precipitation, and Illinois became what modern historian Douglas L. Wilson calls, “a breeding ground for disease.”¹⁸ Early amateur historian and biographer William Barton writes that Ann became “...stricken with what may have been typhoid but her family knew only as brain fever.”¹⁹ Ann was bedridden for several weeks, then fell unconscious, and remained so until her death at age 22.²⁰

The death of Ann Rutledge devastated Lincoln and caused him to fall into depression. Amateur historian, biographer and professional journalist Ida M. Tarbell reports that Lincoln “...was seen walking alone by the river and through the woods, muttering strange things to himself,” and “...seemed to his friends to be in the shadow of madness.”²¹ According to Herndon and co-biographer Jesse W. Weik, Lincoln’s condition climaxed and became “...so alarming, his friends consulted together and sent him to the house of a kind friend, Bowling Green.”²² Lincoln remained with Green for “...some weeks under the care and very watchful eye of the noble friend, who gradually brought him back to reason.”²³

Most scholars addressing this topic have largely relied on the research of Herndon. Herndon’s account of the romance, however, is “based entirely on the testimony of others,” second-hand information collected almost thirty years after the alleged romance, according to professional historian James G. Randall.²⁴ Herndon’s sources, Randall continues, reveal that “old settlers, or in some cases their children” relayed versions of the friendship and romance of Lincoln and Rutledge.²⁵ Randall also contends that some statements given about Lincoln and Ann were induced under suggestion, or psychological stimulus, and call for special appraisal.²⁶

One of Herndon’s principal witnesses was Ann’s younger brother, R.B. (Robert) Rutledge. R.B. answered eight questions supplied to him by Herndon in a lengthy written response about the life of Lincoln in New Salem. R.B. devoted several pages to the relationship between Lincoln and Ann, writing:

A friendship grew up between McNeil and Ann which ripened apace and resulted in an engagement to marry...he revealed his true name and returned home...to bring the family with him to Illinois...he was absent two or three years. In the mean time Mr. Lincoln paid his addresses to Ann, continued his visits and attentions regularly and those resulted in an engagement to marry. Ann refused to consummate the relationship until she was honorably released from the contract with McNamar. Mr. Lincoln lived in the village, McNamar did not return and in August 1835 Ann sickened and died. The effect upon Mr. Lincoln’s mind was terrible; he became plunged with despair, and many of his friends feared that reason would desert her throne. His extraordinary emotions were regarded

as strong evidence of the existence of the tenderest relations between himself and the deceased.²⁷

There are questions surrounding the writings of R.B. Rutledge. Randall writes that Rutledge "...confessed uncertainty on points of Herndon's questioning and spoke of comparing notes with others."²⁸ R.B. did not claim that his own knowledge was complete in itself. For example, Herndon asked about the mental state of Lincoln after Ann's death. Rutledge replied, "I cannot answer this question from personal knowledge, but from what I have learned from others at the time..." Lincoln was devastated.²⁹ This statement is in contrast to the statement previously cited. Rutledge wrote:

I trust largely to your courtesy as a gentleman, to your honesty and integrity as a historian, and to your skill in writing for the public, to enlarge wherever my statements seems obscure, and to condense and remove whatever seems superfluous...any of my statements are made from memory with the aid of association of events; and should you discover that the date, location and circumstances, of the events here named should be contradictory to those names from other sources, I beg you to consider well the testimony in each case, and make up your history from those statements, which may appear to you best fitted to remove all doubt as to their correctness.³⁰

James Short is another witness questioned by Herndon. A resident of New Salem, Short was a close friend of Lincoln and the Rutledge family. Short's response to Herndon's question about the relationship between Ann and Lincoln is typical of other responses to the same question. Short stated, "I did not know of any engagement or tender passage between Mr. Lincoln and Miss Rutledge at the time. But after her death...he seemed so much affected and grieved so hardly that I then supposed there must have been...something of the kind."³¹ Reference to the extraordinary depression of Lincoln after the death of Ann was a general response given to Herndon when investigating the relationship between Ann and Lincoln. Looking back, several of the respondents concluded Lincoln's grief was so deep, that he "must have been in love."³²

The statement of John Cogdal is also important to note when examining recorded data regarding the romance. Herndon spoke face to face with Cogdal when the interview occurred; there were no written responses. Cogdal claimed to have interviewed Abraham Lincoln, who, at that time, had recently been elected President. Cogdal relayed from memory the interview, which had taken place several years earlier.³³

Lincoln and Cogdal began talking to one another and began to reminisce about their lives in New Salem. The conversation was later recorded by Herndon.

Cogdal asked, "Abe is it true that you fell in love with and courted Ann Rutledge?" Lincoln replies, "It is true, true indeed I did. I have loved the name of Rutledge to this day...I loved the woman dearly and sacredly: she was a handsome girl - would have made a good loving wife...I did honestly and truly love the girl and think often of her now."³⁴

The statements compiled by Herndon are not the only questionable sources regarding the alleged Lincoln-Rutledge romance. By the 1920s, the relationship between Ann and Abraham had become one of the great national legends.³⁵ In fact, radio networks aired dramatizations of Lincoln's life as early as 1925, and a favorite subject was the Ann Rutledge romance.³⁶ At this time, the legend had been analyzed by amateur and professional historians, who viewed it as "neither proved nor disproved."³⁷ The entirety of Herndon's evidence was unavailable to the historians. The accessible information that remained appeared vague and contradictory.³⁸ Despite the factual deficiencies, the public could not resist the appeal of a tragic love story involving such a prominent national figure. As interest in the legend grew, desire uncovering infallible evidence intensified.

The status of the Lincoln-Rutledge legend in late June 1928 was that it "...had no basis in contemporary records, no documentary existence as a historical event."³⁹ In early July 1928, evidence purporting to prove a special relationship between Lincoln and Rutledge surfaced. *The Atlantic Monthly* biennially held a nonfiction book contest with a five thousand dollar grand prize awarded to the writer of the winning book, which would also be published.⁴⁰

Wilma Frances Minor of San Diego, California, contacted *The Atlantic Monthly* to report she had written the "true love story" of Lincoln and Rutledge and asked the publication's representatives to verify their interest in it.⁴¹ Minor's story was allegedly based on original letters written between Ann and Abraham and other related manuscript materials, which had been handed down in Minor's mother's family.⁴² According to professional historian Paul M. Angle, "There were ten letters written by Lincoln, including three to Ann Rutledge. There were several pages from the diary of Matilda Cameron, Ann's cousin and bosom friend. There was a memorandum about Lincoln written in 1848 by Shelly Calhoun," who had appointed Lincoln as deputy surveyor of Sangamon County.⁴³ There were also four books bearing Lincoln's signature and annotations. And there were letters verifying the provenance of the collection, which had passed through a number of hands.⁴⁴

Ellery Sedgwick, owner and editor of *The Atlantic Monthly*, and Edward A. Weeks, who had charge of the magazine's book publication, were skeptical but

eager to learn more about the documents. They informed Miss Minor that her book would be accepted as an entry in the prize contest, but under specified terms. When Miss Minor mailed her manuscript to the *Atlantic*, she also sent photostats of some of the documents, as required.⁴⁵

Sedgwick and Weeks wanted to know better what they were actually dealing with as evidence to Miss Minor's story. If the collection of materials proved authentic, they would "confirm the betrothal of Lincoln and Ann Rutledge."⁴⁶ Still skeptical, Sedgwick negotiated printing rights prior to the release of the book. The first installment of "Lincoln the Lover" by Wilma Frances Minor was published in *The Atlantic Monthly* in December of 1928. At this time, the validity of the Minor documents began to be questioned. Then, in the February 1929 issue of *The Atlantic Monthly*, the second installment of "Lincoln the Lover" was published. The question of validity of the Minor documents had reached a climax at this point. The truth came out that the documents were fraudulent. Miss Minor had "received the text in her documents" from "supernatural sources," professional historian Worthington Chauncey Ford, Paul M. Angle, and Oliver Rogers Barrett cynically wrote, and was given "instruction in how to go about fabricating them."⁴⁷ The tragedy of the deception by Miss Minor left the public and some scholars feeling as though all the Rutledge evidence was tarnished.

Lincoln did court a young lady named Mary Owens, also known as the "other Mary", after the death of Ann Rutledge. The evidence of the relationship Lincoln shared with Miss Owens helps to determine Lincoln's relationship with Ann.⁴⁸ The one thing most all of Herndon's interviewees agreed upon was that Lincoln fell into depression after Ann's death, and some go as far to say he never recovered from it.⁴⁹ The legend adherents believed that Lincoln's depression must prove the two were in love. Unlike the romance Lincoln allegedly shared with Rutledge, there is evidence of a real romance shared with Mary Owens. There are, according to Douglas L. Wilson, "...several letters which Lincoln wrote her in which he discussed the question of marrying him, and a complete account of the whole affair, including Miss Owens's refusal of his marriage proposal, which Lincoln wrote to his friend Mrs. O.H. Browning."⁵⁰

Mary Owens differed from Ann Rutledge "in early education and the advantages of wealth."⁵¹ She had received an excellent education, and her father was of the wealthiest and most influential men of his time and locality.⁵² Mary lived in Kentucky, and was sister to Mrs. Elizabeth Abell, a resident of New Salem. In 1833, while visiting with her sister, Lincoln met Mary Owens, two years before the death of Ann in 1835.⁵³ According to his own words, Lincoln then considered Mary a "desirable matrimonial partner."⁵⁴ After the departure of Mary from New Salem, Lincoln said to Mrs. Abell, "if ever that girl comes back to New Salem I am going to marry her."⁵⁵

Three years after Mary returned to Kentucky, Mrs. Abell approached Lincoln with a proposal. She was going to visit relatives in Kentucky and would bring back Mary if he would agree to marry her. Lincoln accepted the offer made by Mrs. Abell and later wrote that he "...was most confoundedly well pleased with the project, seeing no good objection to plodding life through hand in hand with her."⁵⁶

Mrs. Abell returned from Kentucky and with her she brought Mary in the fall of 1836. Unfortunately, Lincoln quietly regretted the promise he had made to Mrs. Abell. Mary had once been an attractive young lady. Lincoln now found her to be "so fat that she appeared a match for Falstaff," and had such a "weather-beaten appearance" and "want for teeth" that she seemed to be in her late thirties, although, in fact, she was only twenty-seven.⁵⁷ Nevertheless, Lincoln became involved in a prolonged courtship with Miss Owens, just short of the one-year anniversary of Ann's death. Lincoln did propose to Mary, but followed the proposal with the advice that she should reject his offer of marriage.⁵⁸ Mary rejected the proposal, later writing, "Mr. Lincoln was deficient in those little links which make up the chain of woman's happiness."⁵⁹

Most recently, the Ann Rutledge legend is being discredited by the assumption that Lincoln was gay. In 2000, C.A. Tripp, psychologist, sex researcher, close friend and research assistant of the famed Alfred C. Kinsey, and author of *The Homosexual Matrix*, called on Lewis A. Gannett, a gay liberation activist and editor of *The Gay and Lesbian Review*, to help complete his study of Lincoln's sexuality. Tripp asked Gannett to begin by sifting through the Rutledge information for the chapter dedicated to Ann.⁶⁰ Gannett discovered that, "...under close scrutiny, the non-Rutledge testimony stands up little better than does the Rutledge testimony," of Herndon's informants.⁶¹ The conclusion Gannett has reached is that the Rutledge legend is so important to scholars "because it sexes up the Lincoln story and sells books," or "because Lincolnists feel a need to find evidence that Lincoln was sexually attracted to women."⁶²

Reliable accounts of Lincoln's sexuality until his marriage to Mary Todd at age thirty-three are absent.⁶³ In fact, it seems there may be more statements made about his lack of interest in women than made about his interest in them. The consensus of Lincoln's relatives and neighbors was that he was not much attracted to girls. Lincoln's stepmother, Sarah Bush Johnson Lincoln, said that he "was not very fond of girls," and his stepbrother, John D. Johnson, commented that he "didn't take much truck with the girls."⁶⁴ Lincoln's cousin, John Hanks, stayed with the Lincoln family many years and said, "I never could get him in company with women; he was not a timid man in this particular, but he did not seek such company."⁶⁵ J.C. Richardson said that Abe, "never seemed to care for the girls," and David Turnham said point-blank, "Abe Lincoln was not fond of girls."⁶⁶ A.Y. Ellis told Herndon:

He also used to assist me in the store on busy days, but he always disliked to wait on the Ladies he preferred trading with the Men and boys as he used to say... I also remember that Mr. Lincoln was in those days a very shy man of Ladies.⁶⁷

The relationship Lincoln shared with Joshua Speed has also recently been called into question by the gay liberation movement: was it homosexual? Erotic relationships between males were documented during the time of Lincoln. It was also common during the frontier days for two or more non-gay men to share the same bed. There was little space, and privacy was not a valued commodity it is today.⁶⁸ However, Speed himself noted that the relationship he shared with Lincoln was special. Speed said of Lincoln, "He disclosed his whole heart to me."⁶⁹ Biographers John G. Nicolay and John Hay, who served as Lincoln's secretaries during his Presidency, have both asserted that Speed was "...the only-as he was certainly the last-intimate friend Lincoln ever had."⁷⁰ Lincoln biographer and poet Carl Sandburg writes that the relationship between the two men has a "streak of lavender and spots soft as May violets," which some may have taken as a veiled reference to homosexuality.⁷¹

The scholars who have studied and written about the alleged romance of Rutledge and Lincoln have done little more than repeat Herndon. Herndon collected most all of the evidence used when analyzing the story. The evidence not collected by Herndon, such as that of Wilma Minor, has been proven fraudulent. The Ann Rutledge story rests solely on wavering memories, recorded years after the events took place. No proven evidence is known to exist; therefore, the legend can neither proven nor disproven. As a result, the differing opinions of scholars on this topic make little difference in the validity of it. No proof equals no reality and no place in historical record. Accordingly, the possibility of a romance between Rutledge and Lincoln is but a possibility.

ENDNOTES

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Developments in the Roman Military from Romulus to Caesar **By John Baker**

The famous Roman historian Tacitus once claimed that great empires are not maintained by timidity. The military history of the Roman Empire confirms his assertion. Indeed, the Empire spanning from 218 to 44 B.C. was won and maintained by military might alone – diplomacy of any sort never figured prominently into Roman strategy.¹ This military strength, however, came at a steep price. Millions of Roman Citizens and allies were required to sacrifice numerous years on campaign to serve in the legions, while countless others paid their duty to Rome with blood. Because of its reliance upon simple farmers from Italy, the Roman militia army became increasingly inept after the mid-2nd century and was unable to cope effectively with the growing number of adversaries from “barbaric” kingdoms such as Lusitania and Britannia. Despite this flaw, the Roman Empire’s aggressive foreign “policy,” combined with the reform efforts of brilliant individuals, such as Gaius Marius and Camillus, ultimately led to complete Roman dominance.

According to Roman tradition, Rome was founded by the twin brothers Romulus and Remus in 753 and carries the name of the former. The brothers were supposedly sons of the god Mars. This myth has been accepted in various symbolical forms by some modern scholars.²

Certainly, Rome originated from several smaller towns on the seven hills within a mile of each other: Palatine, Aventine, Capitoline, Quirinal, Viminal, Esquiline, and Caelian. These towns combined to create what the Latins called *Roma*. Early Rome fell under the dominance of Etruscan cities and remained so until the late 6th century under the rule of the monarchist Tarquins. The last of these kings, Tarquinius Superbus, was ousted in 509 and Rome was proclaimed a Republic.³

Rome gradually expanded among the other city-states of Latium, uniting the entire area in a defensive alliance against a number of local hill tribes. Using this Latin Alliance as a means of securing her own borders, Rome looked north to the nearest Etruscan city, Veii. Veii and Rome warred in the fifth to early fourth centuries until the Etruscan city was destroyed making it the first Roman victory against an enemy of similar strength.⁴

During the rest of the fourth century, Rome conquered or absorbed into her territory several cities equally powerful and many smaller ones. Rome gained a strong position in Latium and prestige across the borders, but a people called Samnites threatened her new power. After a series of Samnite wars, ranging from 343-290, Rome controlled all native Italians south of the River Po.⁵

The Roman army originated from tribal warfare, where small groups of armed men would raid cattle and steal grain. Smaller tribes banded together forming larger confederations. Three tribes combined to form the earliest known

Roman military system. The tribes would contribute warriors based around the *curiae*, supplying ten each. *Curiae* comes from *co-viria* meaning “an assembly of armed men.” Furthermore, this organization is confirmed by etymology of *tribus* (tribe), derived from *tris* (three) and literally meaning “derived from three.” Each tribe committed 1,000 men each, 100 men in every *curiae*.⁶ Cavalry in this early system divided into three groups of 100 men with the names *Ramnes*, *Tities*, and *Luceres*. The purpose of the cavalry is unknown, but following earlier and contemporary Greek patterns, they may have been wealthier foot soldiers who rode to battle (instead of marching) and would dismount to fight as infantry.⁷

The Venetic Fighting System followed the “tribal pattern.” Four basic types of infantrymen are known: the Pikeman, the Shield-Bearer, the Hoplite (coming from the term *hoplon*), and the Axeman. What is known about this system comes from the Certosa Situla vase. This vase was found in northern Italy and has vague drawings referring to each kind of infantry. In the Venetic system, there were four ranks of men. The pikeman fought in front, followed by the shield-bearer, and so on. The pikeman and shield-bearer probably fought as medium infantry. The hoplite, following the Greek pattern, was a heavy infantryman, with a large bronze *hoplon*, bronze or linen cuirass, spear, helmet, and possibly greaves (leg armour). The axeman may have been a type of “shock” infantry.⁸

The Venetic System was short-lived and a Greek-style phalanx army emerged after further reforms. The Romans underwent a hoplite revolution only after encountering Etruscan hoplites and exposure to the Greek colonies of Southern Italy. The man credited with the transition from “noble warbands” of the early tribes to citizen hoplites is Servius Tullius (578-534), sixth of the seven Tarquins. It is unknown whether or not this man is fictitious, but the structure of this system was preserved in the *Comitia Centuriata*, one of the most important assemblages of voters in Rome. The *Comitia* was a census taken on all adult male citizens with a recorded value of their property, which divided them into classes accordingly. These classes were subdivided into centuries (a group of a hundred men). Individuals provided their own equipment; the wealthiest (*equites*) would have horses to use as cavalry and good armour, while the poorest would use leather slings and stones.⁹

The only formation available to the hoplite army was the phalanx, a dense, all-infantry configuration that utilized heavy to very heavy spearmen to form a solid hedge with multiple ranks of spear points. Each hoplite could be covered head-to-toe in bronze armour with the addition of a large wooden shield faced with bronze. The shield was about three feet in diameter and offered superb protection, but was heavy, weighing almost twenty pounds. A hoplite would be armed with a spear and a *kopis* (slashing sword). Primarily a spearman, the hoplite could use his sword with some effect against lesser troops, but could find

himself at a severe disadvantage when confronting well-trained swordsmen in close quarters-combat.¹⁰

The primary advantage of the phalanx was its invulnerability to frontal attack. It could also benefit from the phenomena *othismos*, which modern day scholars (with much deliberation) compare to a “shoving match” between two opposing forces, the thinner formation being pushed back by the deeper.¹¹ This deep formation may have added impetus to an attack, staying power to a defensive arrangement, a way to replace frontline casualties, or a means of intimidation. A phalanx could vary in depth, from a shallow 4-deep formation to a massive 50 ranks. There is no such thing as a perfect formation, however, and the phalanx was no exception. The flanks and rear of the ponderous arrangement were vulnerable to attacks from lighter, quicker troops; whereas frontal cavalry charges were suicidal, to the rear it was a war-winner. The phalangites (phalanx-soldiers) needed to maintain the formation, lest a gap in the wall of spear points appears. Thus, it was essential that it stay out of uneven terrain. As long as order was preserved, it was indestructible.¹²

After a Gallic sack of Rome in 390, the military was reformed again, this time by a man named Camillus. Tradition says he appeared in the city as the Gauls were weighing out the indemnity money and drove them away. Camillus instituted the flexible legion as opposed to the unwieldy phalanx.¹³

In the Servian army, the smallest unit had been the century. This seems to have been an administrative rather than a tactical unit, based on economic and political situations, rather than military thinking. According to the Roman historian Polybius, the Roman army’s organization had changed little since the early third century. He was writing to describe the army of the second century, but believed it was generally the same as the current one. In the post-Camillan army, the largest unit was the legion, consisting of some 4,000 infantry. There were sixty centuries in every legion. Centuries were coupled to form a maniple (*manipulus*) which was a new unit designed to counter various tactical demands and add greater flexibility to the legion.¹⁴

The post-Camillan Roman military remained a militia and had vast reserves of manpower, but lost skill as the impermanent legions disbanded (which they did after every campaign) and the experienced soldiers dispersed. The citizens were always “drafted” into their respective units and placed into a newly raised legion. *Ala* (ally) contingents were raised to ease the strain on Roman manpower. Both legionaries and *ala* could serve up to sixteen years consecutively or individually.¹⁵

The Camillan, or “Polybian” legion, consisted of 4,200 infantry and 300 cavalry. There were four permanent legions called the urban legions, and these were numbered, I, II, III, and IV. The wealthiest men served as the cavalry, or *equites* (knights), grouped into 10 *turmae* (troops) led by three *decurions* (leaders

of ten). The footmen were allocated into a certain class according to their age, experience, and property, not unlike the Servian reforms. The youngest and poorest men served as *velites*, the next youngest formed the *hastati*, men in their “prime of life”, and the oldest and most experienced were designated *triarii*. All soldiers provided their own equipment.¹⁶

When drawn up for battle, the Polybian legion would deploy in the *triplex acies* (triple lines), based upon three lines of legionary heavy infantry. The *hastati* were placed in the front line, forming 6-8 men deep with the intervals between each maniple equivalent to the frontage of the unit between them. The formation of the infantry in the second line (*principes*) was the same, but was stationed directly following the gaps in the first line. The units of *triarii* in the third line were then placed behind the gaps in the second line. The size of a Roman army would consist of 20,000-30,000 soldiers; larger armies than this tended to have rather poor records, owing to the difficulty for one commander to control them. This pattern was known as the *quincunx* or checkerboard.¹⁷

From Polybius, it is known that each legionary required a frontage of three feet in close formation, with a depth 6 feet. Assuming a one yard per man width, a maniple would span a breadth of sixty feet and roughly thirty-six feet deep. The entire legion would form up on a front of about 1,200 feet. A consular army (two legions, two *alae*, and two “blocks” of cavalry) would have a width similar to a modern mile. This way, an accurate estimate of scale can be known.¹⁸

Whenever the *triplex acies* went into battle, it would be preceded by the *velites*. These young men would be no older than twenty and would, by definition, be faster and lighter than the other troops. The 1,200 *velites* would emerge from the gaps between the *hastati*, skirmish with the enemy light troops in an attempt to drive them back, and cause disorder in the enemy line.¹⁹

Velites would also be assigned to specialty tasks, as is usually the case for light troops. Another Roman historian, Livy describes how during the Second Punic War, *velites* hand-picked for their dexterity were assigned to ride on the hindquarters of the cavalry’s horses to hop off and fight dismounted. Gallic troops seemed to have practiced this technique as well, but whether the Gauls were influenced by the Romans or vice versa (or at all) is not known.²⁰

A typical *velites* would be armed with a short sword and several javelins. His only defence would be a *parma* which was a shield three feet in diameter used to parry missile weapons, primarily javelins. A type of garb donned by the *velites* would be a helmet covered with the head of an animal, often tigers, wolves, bears, and other ferocious beasts such as badgers. Whenever skirmishing ended, the *velites* would retire though the line of battle, redeploying either behind the *triarii* or on the wings of the *triplex acies*.²¹

When the *velites* withdrew, the *hastati* advanced (sometimes hours after the skirmishing and sometimes immediately following) battle. It is largely

thought that prior to melee, the 1,200 *hastati* would give a volley of both *pila* and then charge the spear-riddled enemy. They fought until fatigue overcame strength. The name *hastati* literally means “*hasta*-men” (spear-men), and this may have meant whenever the term originated the *hastati* did actually fight primarily with spears. On the other hand, the Roman historian Ennius first uses the term *hasta* when describing a throwing spear, no doubt a reference to the *pila*.²² Their equipment consisted of a short stabbing sword, the *gladius*, two *pila* (a heavy javelin), a bronze pectoral plate (gear was provided on an individual basis and may vary), a similarly simple *Montefortino* helmet, and the large, oval *scutum* (shield).²³

If the *hastati* were unable to drive the enemy back, they would withdraw and reform behind the *triarii*. As they withdrew, the *principes* would advance and resume the fight by hurling their *pila* at the enemy and charge. Early *principes* (third century) carried the *hasta longa* (long spear) until sometime shortly before the First Punic War commenced. The 1,200 men that formed the *principes* were wealthy enough to provide high quality armour, such as *lorica hamata* (mail-cuirass) and a more expensive helmet. A Roman general could place the *principes* in the first rank, to lessen casualties among the more lightly armoured *hastati*, if the situation warranted such a precaution.²⁴

Whenever the *principes* became too exhausted to fight, they too would withdraw and reform behind the *triarii*. The *triarii* were composed of “grizzled veterans” and could be compared with the tactical reserve of a modern army.²⁵ Because they were less numerous, *triarii* would be formed into maniples of sixty men instead of 120 other troops would constitute. Thus, the *triarii* totaled only 600 men per legion. Because of these smaller maniples, formation depth of the third line would be lessened in order to preserve the battle line. Before actually going into battle, the *triarii* would kneel or sit to avoid advancing impetuously. They could afford *lorica hamata* of fine quality, a *scutum*, a spear and a good helmet.²⁶

The *alae* were not Roman, but Latins aligned with Rome or from areas they controlled. Even ex-enemies would become allied to Rome and fight in her wars. The purpose of using these soldiers was to be able to field a larger army without having to burden further the rural farmer population of Rome. *Alae* are depicted as having similar equipment to legionaries and as adopting the Camillian legion structure. *Alae* also usually spoke the Latin language, whether as a primary or secondary, and were able to mesh into the flexible Roman military system.²⁷

As the Romans increasingly shifted focus to infantry, allied contingents were depended upon for light infantry and cavalry. Each Roman army was joined by an allied legion (called an *ala*) that consisted of an equal number of medium and heavy infantry, less *velites*, and three to four times more *equites*. As the size

of Rome's citizen manpower grew, the citizens would act as the heavy infantry and use foreign contingents for roles such as light infantry and, more importantly, cavalry; the latter being an arm of service in which the Romans were notoriously deficient. Peoples that contributed to the Roman war machine were Celtiberian infantry, German cavalry, Rhodian slingers, Numidian light cavalry, Cretan archers, and even war elephants, among others. Even these troops were organized into units along Roman lines.²⁸

Equites (knights) were among the highest echelon of Roman society, their official title being *equites equo publico*. They served as the cavalry arm of the legion and numbered some 1,800. Mounts were supplied and maintained by the state, but also cared for by the riders themselves. Exactly 300 cavalry were assigned to each legion, although more could be attached. Since 1,200 men served in the legions, the remaining *equites* were protected from harm, unless they were called up as a sort of "reserve." If more than four legions were raised, their numbers could be supplemented by citizens supplying their own horses. *Equites* were armed after the Greek model, with cuirasses and a round shield reinforced by a bronze boss. Despite their noble status, *equites* have been recognized as inferior quality cavalry when compared to the majority of their foes because of their lack of experience, training, and mediocre breed of horse.²⁹

This shortcoming was remedied only somewhat with allied Latins providing a greater abundance of horse, but little better quality. Few distinctions could be made between allies, except in social standing. More effective allied cavalry included Hellenistic, Celtic, and German horse. Hellenistic cavalry were heavily armed and armoured. Conversely, Celts would fight unarmoured and Germans would not even use saddlecloths!³⁰

Yet another notable Camillan reform was the first regular pay for military service. This was the first step towards removing the differences among property classes and standardizing the equipment for each type of legionary. Unlike the Greeks, the Roman officers led by merit.³¹

Even so, the highest class officers were elected or appointed from the upper-crust of society, many having no record of military service. Indeed, consuls were joint heads of the Roman state and commanders-in-chief of the army and elected annually. A consular army would consist of two of the four urban legions with accompanying *alae*. A praetor then acted as a deputy to the consuls. Tribunes were often young men with little military experience, usually from influential families. Six tribunes went to every urban legion (totaling of twenty-four tribunes). They held office for one year, or if appointed, as long as their appointer remained in office. Elections of senior military positions illustrate how aristocratic elements still existed.³²

Having developed its unique structure, the Camillan army held two great advantages over rival militaries. The first was manpower. The second advantage

was the willingness of the citizenry and allies of Rome to submit to the army's discipline, without which the sheer manpower would have been much less advantageous.³³

Nevertheless, as the wars of Rome began to be fought further afield and lasting many years, the legionary farmer's land would lay fallow, causing severe agricultural loss. Due to length of service, recruits fell dramatically, and the peaceful period between 180 and 155, the "*Pax Republica*," further reduced the experience of the militia army. The Roman people became overconfident and believed they would inevitably triumph, neglecting the careful preparation and training of earlier days. After the "*Pax Republica*," almost every conflict began with humiliating disasters, Rome eventually overcoming after overwhelming their enemies with manpower. The militia was coping, but barely. This led to the abandonment of the entire militia system and creation of the professional army by the most revolutionary reformer, Gaius Marius.³⁴

Gaius Marius was a *novus homo*, or "new man," not just in his social position, but in his ideas as well. He was elected consul in 107 to command an army in the Numidian war. Denied the right to levy troops by Senatorial decree, he could only recruit volunteers. In an exceptional move, he instead called to the poorest citizens (*proletarii*) for recruits. These men, typically the urban poor, were previously unable to serve because they lacked the funds for even the most rudimentary equipment.³⁵ These legionaries were paid for their service on a more regular basis than even the Camillan system had afforded, and the state provided their equipment.³⁶

The Marian reforms completely standardized all equipment, and the *equites*, *velites*, *triarii*, and other such divisions disappeared. Every soldier had a *gladius*, two *pila*, and a *scutum*. The *alae* also ceased to exist, as all Italians became Roman citizens. The legion began to consist of ten cohorts, each of three maniples of two centuries (centuries now had eighty men each), for a total of 4,800 infantry per legion. A form of the *triplex acies* remained, with four cohorts in the front line and three in the second and third lines. Even the depth and spacing of each line could be changed, adding greater tactical flexibility. The only immediate drawback was that cavalry and light troops had to be drawn from auxiliaries since the Italian allies and velites had been done away with. An ideal form of a Marian army was that of Julius Caesar's on the eve of the Gallic Wars: 4 legions, 2,000-3,000 light troops, and 2,000 Celtic cavalrymen.³⁷

The legionaries of the Marian legion were similar to the *principes* of the Camillan or "Polybian" legion. Each legionary would be issued *lorica hamata*, a *Montefortino* or *Imperial-Gallic* helmet, and a *scutum*. Arms would include a *pugio* (dagger), *gladius*, and two *pila*. These legionaries were more disciplined than their predecessors and better trained. They also carried much of their gear while marching 15-20 miles a day, earning the nickname "Marius' Mules."³⁸

Auxiliaries in the first century were non-Romans, most coming from the frontier, yet others were transplanted from various regions to serve as specialists. Auxiliary soldiers in this period could be equipped differently and little is known about equipment. Auxiliaries were recruited more as local troops than as an actual units paid by the Roman government. Likewise, cavalry was provided by regional allies and no Roman cavalry force was created, except small bodyguard units. Auxiliary cavalry could be armoured with a Celtic version of *lorica hamata* or none at all.³⁹

The Marian legions still lacked fixed commanders, but it did become commonplace for a governor's deputy (a legate) to be placed in charge. *The quaestor* was an elected magistrate, probably a senator at an early point in his career, appointed to manage finances in a province. The *legati* were chosen by the governor from amongst his peers and may have had previous experience. Tribunes were the same as they had been since the early Republic, but now held primarily staff positions. These positions were still appointed but held only nominal authority, whereas the professional junior officers were now in control.⁴⁰

A more important development under Marius occurred with the centurions, who ceased to be elected and instead became professionals. Each centurion led a century, and there were sixty centurions in each legion. These officers personally directed the legionaries and imposed harsh discipline⁴¹ and took high proportional casualties. Caesar himself gave them great praise in *The Commentaries*.⁴² The centurion would have equipment similar to the ordinary legionary, with the noticeable difference being a more prominent helmet in order to be seen more easily in battle.⁴³

The succession of warfare shows the natural ascendancy of the professional soldiers, as Roman history proves without doubt. The simple Roman farmers with little wartime experience thrived whenever an outstanding general would lead them, but this required a rare military mind. By contrast, the professional was drilled constantly to do little else but one thing: kill your foe.⁴⁴

Roman warfare began as disorganized tribes fought each other over food and land. This gave way to the Venetic system when more structured pre-hoplite armies started to dominate the mobs of warriors. Servius reformed the hoplite system into something more familiar to that of the Greeks', with classes based on property. Camillus took this one step further to form the legionary method. Finally, Gaius Marius crafted the Roman army into its most efficient state. Permanent garrisons could be stationed anywhere in the Republic and wars could be prolonged indefinitely. With restrictions lifted from the time and place legionaries could operate; Roman armies could now campaign anywhere in the known world and conquer every known nation. And they did.

ENDNOTES

¹ Henceforth, all dates are B.C.

² Adrian Goldsworthy, *In the Name of Rome* (London: Weidonfield & Nicholson, 2003), 18; Nicholas V. Sekunda, *Early Roman Armies* (Oxford: Osprey Publishing, 2000), 12.

³ *Ibid.*, 8.

⁴ *Ibid.*, 9.

⁵ *Ibid.*

⁶ *Ibid.*, 16.

⁷ *Ibid.*, 17.

⁸ *Ibid.*, 46.

⁹ Adrian Goldsworthy, *The Complete Roman Army* (London: Thames and Hudson Ltd., 2003), 21.

¹⁰ John Warry, *Warfare in the Classical World* (London: Salamander Books Ltd., 1980; reprint, Norman: University of Oklahoma Press, 1995), 35 (page citation is to reprint edition).

¹¹ Philip Sabin, "The Face of Roman Battle," *Journal of Roman Studies*, Vol. 4 (2000), 2.

¹² Victor Davis Hanson, *Carnage and Culture* (New York: Anchor Books, 2001), 35.

¹³ Sekunda, *Early Roman Armies*, 44.

¹⁴ *Ibid.*

¹⁵ Goldsworthy, *Roman Warfare* (London: Cassel & Co., 2000), 24.

¹⁶ Goldsworthy, *The Punic Wars* (London: Cassel & Co., 2000), 53.

¹⁷ *Ibid.*

¹⁸ Ibid.

¹⁹ Ibid., 54.

²⁰ Titus Livy, *Ab Urbe Condita*, trans. Richard Hunter (Cambridge: Cambridge University Press, 1994), 26.

²¹ Simon Northwood, *The Republican Roman Army 200 – 104 B.C.* (Oxford: Osprey Publishing, 2000), 73.

²² Quintus Ennius, *Annales*, trans. Otto Skutsch (Oxford: Oxford University Press, 1985), 57.

²³ Northwood, *The Republican Roman Army 200-104 B.C.*, 74

²⁴ Ibid., 85.

²⁵ Ibid.

²⁶To illustrate use of *triarii*, a famous Roman saying for a desperate situation goes, “It has come to the *triarii*.” Ibid., 86.

²⁷ Ibid., 88.

²⁸ Ibid., 90

²⁹ Warry, *Warfare in the Classical World*, 138.

³⁰ Ibid., 170.

³¹ Ibid., 113.

³² Ibid.

³³ Goldsworthy, *Complete Roman Army*, 43.

³⁴ Ibid.

³⁵ Some scholars dispute just how sudden the change in attitude towards the proletarii was, and that Marius’ reform was just widening an already accepted practice.

³⁶ Ibid., 47.

³⁷ Warry, *Warfare in the Classical World*, 153.

³⁸ Ibid.

³⁹ Simon Anglim and others, *Fighting Techniques of the Ancient World* (London: Amber Books, 2002), 107

⁴⁰ Goldsworthy, *Complete Roman Army*, 49.

⁴¹ This was expressed through a “swagger stick,” which is a tough vine used to beat the rank-and-file.

⁴² Julius Caesar, *Commentaries* (New York: Kessel Publishing, 2000), 36, 66, 86, 89-90, 138-39, 296.

⁴³ Warry, *Warfare in the Classical World*, 173.

⁴⁴ Ibid.

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