

GCAS Review

Shackleton's Leadership Skills as seen on the Nimrod Expedition, and the Achievements of the Nimrod Expedition 1907-9.

Jane Ellis

Review of Aspects of the 1907-9 Nimrod Expedition

The centenary of one of the lesser known of the 'Heroic Era' Antarctic expeditions, Ernest Shackleton's *Nimrod* Expedition is in 2007-9. The intention of this review is to consider two aspects of this expedition: the leadership skills displayed by Shackleton, and the achievements of the expedition. It has become very fashionable to see Shackleton's leadership style as a role model for successful leadership today; even being looked at as a leadership model in current Canterbury University texts for courses on business management. This review, however, will look at the opinions of those who worked with Shackleton along with the views of various historians, and attempt to come to a more objective conclusion regarding his leadership ability. Shackleton is often seen as the Antarctic explorer who achieved little, and became a 'hero' anyway. This review will examine the validity of these claims in the context of the *Nimrod* Expedition.

Background/Overview of the Nimrod Expedition

Shackleton was a key member of R.F.Scott's *Discovery* Expedition of 1901-3, but he had contracted scurvy on the Southern Journey and was sent back to England early on the grounds of ill health. He was devastated at this, and decided to lead his own expedition to Antarctica. He called this expedition, the British Antarctic Expedition and had the primary aim to be the first to the South Pole. When he announced his intentions in February 1907 he said:

"I do not intend to sacrifice the scientific utility of the expedition for a mere record-breaking journey, but say frankly, all the same, that one of my great efforts will be to reach the south geographical pole."

Shackleton had only limited resources, and thus was only able to purchase a £5000 Dundee sealer, the *Nimrod*, that was more than forty years old and needing repair.

The next difficulty was dealing with Scott's claim of 'priority' in the McMurdo Sound area. Scott asked Shackleton for his word that he would base his expedition elsewhere, leaving the McMurdo area for any future exploration of Scott. Shackleton reluctantly agreed.

Shackleton selected fourteen members for his shore party and the *Nimrod* left Britain captained by England in August 1907. Shackleton joined the *Nimrod* in December, and after loading final stores, the ship left Lyttelton on New Year's Day 1908, being towed to the Antarctic Circle by a tramp steamer, the *Koonya*, supplied by the New Zealand Government, and the Union Steamship Company.

Shackleton intended to build his base at an area known as the Barrier Inlet, but after fruitless searching and attempts at finding other possible landing spots, he reluctantly broke his word to Scott and landed his shore party at Cape Royds in the McMurdo Sound. After various disagreements with Shackleton, Lt Rupert England left the shore party and captained the *Nimrod* back to New Zealand on February 22 1908. By the time the *Nimrod* collected all the men of the shore party on March 4 1909, many 'firsts' had been achieved. Mount Erebus had been climbed, the South Magnetic Pole had been claimed for Britain, and the way to the South Pole had been found. However, the South Pole itself remained elusive. Many scientific experiments had been carried out and the first motor car in the Antarctic had been trialled. Shackleton returned to England on June 14 1909 to a rapturous welcome.

Shackleton's Leadership Skills as Evidenced by the Nimrod Expedition

“Men either liked Shackleton or they loathed him. Few were indifferent to the brash, gregarious showman.” (Mortimer, 1990 p32)

Mc Kellar, a strong supporter of Shackleton, on meeting him commented,
“ the opinion I formed then, and at once, of Shackleton was as the ideal leader...I never waivered...and I was fully justified in my belief.” (Riffenburgh, 2004 p137)

Lt Jameson Adams, one of the shore party on the Nimrod Expedition said,
“ He was the greatest leader that ever came on God's earth.” (Riffenburgh, 2004 p223)

However, not all of those who worked with Shackleton thought so highly of his leadership ability. Dr Eric Marshall. The second surgeon on the Nimrod Expedition, called him,“ a very attractive crook....he is incapable of a decent action or thought.” (Riffenburgh, 2004 p189)

From all accounts, Ernest Shackleton was a man whom it was not easy to ignore. He was a man with ‘presence’, but was he a great leader?

For the purposes of this review I will attempt to evaluate Shackleton's leadership skills by looking at aspects of his planning of the expedition, his ability to gain the loyalty of the expedition members, and his decision- making ability.

Shackleton's Planning of the Expedition

Financial problems.

Shackleton's planning of the *Nimrod* Expedition did show certain weaknesses. Finances, or the shortage of them, were a constant issue. Lack of sufficient funds resulted in the purchase of the *Nimrod*, not an ideal vessel for the expedition being too small for such an undertaking, and requiring a major overhaul. Yet, the *Nimrod* did carry out the duties required of her.

Financial concerns and mismanagement of funds strained relationships. Beardmore provided Shackleton with a loan of £1200, but this was never repaid. Furthermore, many of his expedition were never fully paid. Adams commented, "I think they thought they were hardly treated on the money side of the business....Shackleton didn't know the meaning of the word money except spending it."

(Riffenburgh, 2004 p301)

This situation was not helped by the fact that Shackleton had several successful lecture tours both before and after the expedition to raise funds, and then donated most of this to charities. This happened in both Australia and New Zealand before the expedition and in London, Liverpool, and Manchester afterwards. However, he did win the public's heart.

Yet despite this weakness in his handling of money, Shackleton was able to gain financial support from the Australian and New Zealand Governments for his expedition. Also, the New Zealand Government subsidised the use of the steamer *Koonya* to tow the *Nimrod* to the icepack when it became obvious that the *Nimrod* was so overloaded that

she was unable to carry sufficient coal for the return journey. These contributions show the confidence of these governments in Shackleton's ability to successfully lead the expedition.

Shackleton ignored Nansen's advice.

Shackleton sought Fridtjof Nansen's advice in the early stages of planning. Many polar explorers did this as the Norwegian Nansen was a respected, experienced polar explorer. Shackleton then ignored this advice. Nansen told Shackleton not to repeat Scott's error of not using the dogs effectively. (Mortimer, 1990 p31) Shackleton decided to use Manchurian ponies which he thought were 'hardy, sure-footed and plucky'. Within a month of landing on the ice, however, five of the 12 ponies were dead. This choice caused extra work for his men as ponies sweat when they stop, and the sweat freezes so they then had to be rubbed down. This poor decision also meant that food for the ponies had to be carried on the *Nimrod* contributing to it being overloaded. To compound this problem, Shackleton chose not to take a skilled horseman with him.

Shackleton also ignored the advice to use animal fur for clothing and sleeping bags, opting instead for the Burberry windproof clothing used by Scott with detached hoods. This decision resulted in discomfort for the men, making them more prone to frostbite on the face. (Huntford, 2002 p31) He also ignored Nansen's advice to take skis. Later Shackleton said that if he had had skis he would have made it to the South Pole. (Mortimer, 1990 p30)

Choosing the right men for the job is another essential leadership skill. Shackleton wrote:

“the personnel of an expedition of the character I purposed is a factor on which success depends to a very large extent. The men selected must be qualified for the work..... and they must be able to live together for a long period without outside communication..”

(Chidsey, 1967 p34)

Although Shackleton understood the importance of choosing the right men, he frequently had quite unorthodox ways of selecting them. Only two of the men from the *Discovery* Expedition went on the *Nimrod*, Frank Wild and Ernest Joyce. The others appeared to have been chosen by intuition: one was asked if he could sing and another if he could recognise gold. (Chidsey, 1967 p34) In the case of Adams, Shackleton had met him only once and a year later he received an invitation to join the *Nimrod* Expedition completely out of the blue. (Mortimer, 1990 p40) Philip Brocklehurst at nineteen was the youngest member and selected largely because of his mother’s financial contribution to the expedition. Selecting personnel in this haphazard manner demonstrates that Shackleton was ignoring his own counsel in that “the men must be qualified for the work..”

Financial planning was a weakness in the overall planning of the expedition, and Shackleton’s failure to take Nansen’s advice was unwise causing unnecessary hardships for his men. But, his unorthodox methods of choosing men was mostly successful, and the fact that Shackleton was able to get a major polar expedition organised between March and August 1907 was a remarkable feat indicating outstanding management skills. This required a major refitting of the *Nimrod* which did not begin until June 1907, the construction of a prefabricated hut, selecting and loading stores and equipment all indicating the necessary organisational and management skills for successful leadership of such an expedition. Also, Shackleton was an outstanding public speaker with the

ability to persuade others that he could lead a successful expedition. This culminated on August 4 1907 in King Edward VII and Queen Alexandra coming on board the Nimrod at Cowes and presenting him with the Victorian Order and a Union Jack to carry on the southern journey.

Shackleton's ability to gain the loyalty of team members.

Shackleton shone as a leader during the winter of 1908 when he and his fourteen men were based in the hut at Cape Royds. He kept the men happy and content.

“Shackleton's extraordinary force of leadership shone through.” (Huntford, 2002 p97)

He kept the men busy with the production of the book, ‘Aurora Australis’, a major undertaking. Shackleton understood the importance of keeping them busy and had taken a complete printing press down with him. He also recognised the importance of food and provided lavish supplies with much variety; not just to prevent scurvy, but also to maintain morale. Elaborate cakes and breads were baked. (Landis, 2001) Any excuse was made for a party, informal singing competitions or dog derbies. (Chidsey, 1967 p53)

Shackleton also ensured that the men had a modicum of privacy by dividing the hut into cubicles.

“Shackleton set great store by the comfort of his men”. (Fisher, 1957 p177)

There was tension and stress at times but according to Brocklehurst

“Shackleton was very tactful and genial...he had a facility for treating each member..as though he were valuable to it.” (Riffenburgh, 2004 p185)

Shackleton demonstrated a different leadership style to Scott; all were required to help out when necessary as well as doing their specific tasks. He helped out with most jobs from digging to dog training, although Dr Eric Marshall frequently complained that he did it for show.

He also showed great care for the men as individuals. When Aeneas Mackintosh lost his eye in an accident on board ship, he wrote, "I am occupying the best apartment on the ship which the skipper has so unselfishly placed at my disposal."

On the Southern Journey, Shackleton gave a very weak and starving Frank Wild his biscuit. Wild wrote, "Shackleton privately forced upon me his breakfast biscuit.... I do not suppose that anyone else in the world can thoroughly realise how much generosity and sympathy was shown by this: I do and by God I shall never forget."

Such acts of kindness ensured the loyalty of his men. Wild was Shackleton's man for life. (Mortimer, 1990 p31)

Shackleton also kept a careful eye on the two youngest members of the party, Brocklehurst and Priestley to ensure they were settled. (Fisher, 1957 p185) Fisher, who wrote a major biography wrote:

"To each man...he gave constant encouragement...this gave him an exceptional hold over the men he led." (Fisher, 1957 p186), while Adams wrote in his diary:

"This amalgam of somewhat strangely assorted men was made possible by Shackleton's particular form of control, based on his almost supernatural intuition for selecting men who believed in him implicitly.. I never heard an angry word spoken." (Fisher, 1957 p179)

However, this account of life in the hut that winter seems too rosy. One of the expedition members who did not see things the same way was Dr Marshall. He was increasingly disenchanted with Shackleton's leadership, possibly feeling letdown that he had not been

made second-in-charge as Adams had. (This may also explain Adams exceedingly rosy view of Shackleton) Marshall said,

“I thought I should be under a man. I was soon disillusioned... (Shackleton) was a liar, easily scared, moody and surly, a boaster.” (Riffenburgh, 2004 p172)

But, apart from an incident when Shackleton threatened to shoot the surgeon, Mackay, for attacking the cook (Mortimer, 1990), most writers would concur that the winter spent in Cape Royds hut was happy. Over the winter months Shackleton had forged a strong team, perhaps with the exception of Marshall, whom he was wise enough to take with him on the southern journey. This seems to support the view that in this role, Shackleton displayed strong leadership, exuding confidence and optimism making his men trust him.

Shackleton and decision making

One measure of leadership is the ability to make sound decisions in difficult situations. I will consider three decisions made by Shackleton to evaluate his leadership in this area.

Firstly, his decision to ‘sack’ the captain of the *Nimrod*, England. From the time the ship had entered the pack ice there was tension between the captain, England, and the expedition leader Shackleton. Hillary, in his forward to Mackintosh’s diary said that this was probably inevitable given that England’s role as captain was to ensure the safety of the vessel and those in it, while Shackleton was anxious to get ashore and begin preparing for the expedition, especially getting the hut built well before winter. (Mackintosh et al., 1990)

England was concerned at the strong winds close to shore, and was reluctant to sail too close. Finally, Shackleton coaxed England in to shore after several occasions when

England approached the shore and then backed out. But, even then, the vessel was not close to shore which made unloading the ship difficult. In Shackleton's eyes this was a mixture of disloyalty and cowardice on England's part.

Shackleton's decision was to send a letter with H.J.Dunlop, the chief engineer, back to Lyttelton with the *Nimrod*, to be delivered to Kinsey, Shackleton's agent. The letter stated that England was to retire due to ill health, and another captain to return with the *Nimrod* the following season. England objected to this, but didn't debate it in public.

"My resignation was not of my choosing, it was Mr Shackleton's request and demand...it was his own statement that I resigned through illness and I have merely consented to that without comment." (Riffenburgh, 2004 p170)Shackleton made a clear decision in a way which allowed England to keep his dignity.

A second very difficult decision that Shackleton made was to break his word to Scott and to establish his base at Cape Royds in McMurdo Sound. Shackleton had initially chosen the Barrier Inlet for his base because it was well away from McMurdo and closer to the South Pole. But when there was no sign of it after days of searching, England put pressure on him to go into the McMurdo area. Shackleton also looked at the Bay of Whales, but it was too iced-in. Finally, Wild persuaded him to go into McMurdo Sound. "Shackleton was loathe to return to McMurdo Sound and talked seriously of wintering over on the Barrier...I strenuously objected...and Shackleton reluctantly agreed."

(Mortimer, 1990 p45)

This was a painful decision for Shackleton. It cost him his friendship with Wilson as he feared. Wilson wrote,

“I am afraid that he has become a regular wrongun...I consider that he has dragged polar exploration generally into the mud of his own limited and rather low down ambitions.”

(Riffenburgh, 2004 p292)

But Shackleton had no choice given the circumstances. He was responsible for the safety of his men, and to those people who had sponsored the expedition to ensure that it was a success. To turn back would have been an obscene waste of money and resources. He had made the right decision.

The third significant decision was made on the Southern Journey to turn back just 7 miles from the Pole.

“The safety of his men was paramount to him, and the greater the danger they found themselves in, the better leader he became.” (Mortimer, 1990 p30) The Southern Journey began on October 29 1908 with the aim being to reach the South Pole. Within three weeks the four men, Shackleton, Marshall, Wild and Day, were complaining of hunger. As time went on and they lost their last pony, Sox, at the foot of the Barrier, it became obvious that they did not have enough food to get to the Pole and back. On January 2 1909, Shackleton said, “I must look at the matter sensibly and consider the lives of those who are with me.” (Landis, 2001) So, On January 9 Shackleton planted the Union Jack, took possession of the region for Great Britain naming it King Edward VII Plateau, and turned back. The party had reached the furthest south, but not the Pole. Adams stated, “If we’d gone one more hour, we shouldn’t have got back.” (Riffenburgh, 2004 p231)

This, perhaps was Shackleton's most famous decision, and one that showed the strength of his leadership and his commitment to his men. He was able to overcome the temptation of reaching the Pole and save the lives of his men.

Thus, in the areas of planning and administration of the *Nimrod* Expedition, of fusing the shore party into a team who trusted Shackleton and were loyal to him, and in being able to make difficult decisions, Shackleton displayed outstanding leadership.

However, there does need to be a word of caution added. Most historians do seem to be 'Shackleton converts'. Fisher admits in his preface: "When the writers of this book were children, Shackleton was a living hero...few of those who knew him can speak or write of him without emotion...possibly, the next generation may be able to reach a fuller objectivity about one of the greatest explorers the world has known." (Fisher, 1957) The period of the *Nimrod* Expedition was in many ways the apex of the British Empire. It was the age of imperial heroes such as Kitchener, Baden-Powell and Lord Roberts. The contemporary accounts surrounding Shackleton may be, in part, an expression of this worldview.

One area which would be worthy of future research in light of this is Marshall's diaries, and his version of the story. In the *Nimrod* Expedition, he was one member that Shackleton did not appear to win over. Marshall did admire Shackleton's determination and courage on the Southern Journey, but said that Shackleton's health was not up to it and that he had unnecessarily put their lives at risk. (Huntford, 2002 p100)

The Achievements of Shackleton's Nimrod Expedition

Shackleton failed to achieve the major purpose of his expedition. He did not reach the South Pole. He was acutely aware of this, and when he sent the first cable to London from Stewart Island reporting on the outcome of the *Nimrod* Expedition he said he had tried, but failed. (Huntford, 2002 p2)In the wake of Scott's successful, but tragic *Terra Nova* expedition to the South Pole, the achievements of the *Nimrod* Expedition faded into oblivion, in the popular mind.

Yet, on his return, Shackleton's achievements were heralded by the British public and other polar explorers. He was awarded a knighthood in 1909. Amundsen wrote to Keltie, the secretary of the Royal Geographic Society, "The English nation has by the deeds of Shackleton won a victory in Antarctic exploration that can never be surpassed." (Fisher, 1957 p240)

So, what did Shackleton's *Nimrod* Expedition achieve?

On the Southern Journey Shackleton recorded the greatest advance ever made towards either Pole, discovered the Beardmore Glacier and the route to the Central Polar Plateau. He claimed to reach 88° 23' South, almost ninety seven miles from the Pole. Sir Clements Markham, the president of the Royal Geographical Society queried this claim, "I felt very strongly that Shackleton's observation ought to have been closely scrutinised and examined...before the Society was committed to them...and we ought not to have taken him at his own valuation.."

(Riffenburgh, 2004 p293)

Because Shackleton's party had left their theodolite behind at their last depot in the final run south, there was some dispute over the accuracy of this claim. Markham's comments spread these doubts in geographic circles. Later, Debenham called Markham "a scurrilous old man"! (Riffenburgh, 2004 p282) Markham's disappointment in Shackleton's failure to reach the Pole may have influenced him. However, all four men in the Southern Party agreed throughout their lives on the latitude and had recorded it in their journals. On this journey they had travelled 1,613 miles over the most difficult terrain manhauling. They had lived on rations calculated to last 91 days for 126 days- an enormous achievement. (Chidsey, 1967 p68) Shackleton had also left the way open for someone else to "capture the prize". (Rosove, 2000 p162)

Yet perhaps the greatest aspect of this achievement was to avoid martyrdom and turn back, ensuring the survival of the Southern Party.

The Northern Party also notched up a significant 'first' by reaching the South Magnetic Pole. Edgeworth David, Douglas Mawson, and Aliatair Mackay reached the South Magnetic Pole after manhauling 1260 miles, 740 of them extended by relaying. They reached the Pole on 16 January 1909 and raised the Union Jack. Edgeworth David announced, "I hereby take possession of this area now containing the Magnetic Pole for the British Empire."

For both the Southern and Northern Parties, their timing was an achievement in itself, both reaching Cape Royds and the *Nimrod* at the last possible moment.

The *Nimrod* Expedition was the first to climb Mt Erebus on 10 March 1908. This was summited by Mawson, Edgeworth David and Adams. They estimated that Erebus was 13,500' using a hypsometer. This was later found to be 1000' too high.

Further inroads into the Antarctic Continent were made. Priestley and two others explored the Western mountains investigating Butter Point, the Dry Valleys and the Ferrar Glacier doing significant geological work.

The *Nimrod* Expedition has been criticised for its focus on reaching the South Pole at the expense of scientific work. However, a massive amount of scientific work was done. This included geological work around Cape Royds and the Ferrar Glacier, taxidermy, meteorological observations, and observations of air currents at Ross Island. They observed a violent eruption of Erebus in January 1908. They conducted studies on the Great Ice Barrier, noting the disappearance of Balloon Bight which showed a recession since Sir James Ross's observation, suggesting that very large portions of the Barrier edge may calve off. They also noted the retreat of glaciers.

“The scientific memoirs will deal in detail with geology, biology, meteorology, magnetism, physics.... And other scientific subjects.” (Shackleton, 1909)

“Shackleton's expedition will...serve science not only by the richness of the harvest of specimens and observations brought home...”(Mill, 1909)

Other achievements were the production of ‘Aurora Australis’, the first book published in Antarctica-written, printed, illustrated and bound. Shackleton's care and forethought in diet prevented any occurrence of scurvy. (Fisher, 1957 p228)

This expedition also introduced three key figures to Antarctic exploration- Mawson who later led the BANZARE expedition and became involved in Antarctic research, Priestley who did

valuable geological work and David who helped guide future Antarctic science and became a powerful advocate of Antarctic research.

“Few expeditions in the history of exploration achieved more: the farthest south, the ascent of Erebus, the attainment of the Magnetic Pole, and the fulfilment of a diverse scientific programme.” (Riffenburgh, 2004 p309)

Conclusion

From reviewing literature on the *Nimrod* Expedition of Ernest Shackleton it is evident that many writers and most expedition members respected Shackleton as an exemplary leader. He showed leadership in planning and management, although not with finance; his care of the men and the trust that this engendered, his optimism, and his decision- making ability, especially in a crisis. However, it may be fruitful to research Marshall’s different viewpoint, and similarly, that of Markham’s.

The *Nimrod* Expedition failed to achieve its primary objective, the South Pole, but was still perhaps the most successful Antarctic expedition of the Heroic Era. By coming within 97 miles of the Pole Shackleton paved the way for Scott and Amundsen.

The last word is from Amundsen, “We did not pass that spot without according our highest tribute to the man...who planted his country’s flag so infinitely nearer to the goal than any of his precursors. Sir Ernest Shackleton’s name will always be written in the annals of Antarctic exploration on letters of fire.”

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