

THRILLING BUT POINTLESS: GENERAL "JO"
SHELBY'S 1863 CAVALRY RAID

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Military History

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ABSTRACT

THRILLING BUT POINTLESS: GENERAL “JO” SHELBY’S 1863 CAVALRY RAID,
by Major Patrick F. Feild, USA, 133 pages.

Numerous confederate cavalry raids into Missouri occurred during the American Civil War as part of the fight for Missouri. These raids were the result of multiple failed campaigns by conventional rebel forces to seize and hold Missouri for the Confederate government. Beginning in December 1862, Confederate cavalry forces operating from central and southern Arkansas, launched periodic raids into Missouri. These raids varied in size and geographic objective. Joseph Orville “Jo” Shelby was one of the more imaginative and flamboyant Confederate cavalry commanders to operate west of the Mississippi River. He rose from Captain of his homegrown “Shelby’s Rangers” to Brigadier General and command of a cavalry division by war’s end. Shelby earned this rank upon completion of his 1863 cavalry raid into Missouri. Shelby led this raid into central Missouri to recruit, prevent Missouri troops from reinforcing the eastern theater, and provide a short-term victory for the rebels in Arkansas, demoralized by recent Federal successes. This thesis explores Shelby’s abilities as a cavalry commander and explains how Shelby’s raid, although executed utilizing enduring principles of war, did little to advance the strategic and operational goals of the Confederate Army in the Trans-Mississippi Department.

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CHAPTER 1

INTRODUCTION

Joseph Orville “JO” Shelby is arguably one of the most colorful figures in the Civil War. A Southerner to his core, he is celebrated nearly 150 years after the Civil War as perhaps the greatest cavalry commander the Confederacy possessed. This persona first took root in the hero worship of the “Lost Cause” mentality after the surrender of Robert E. Lee in Virginia and the publication of *Shelby and His Men* by John Newman Edwards in 1867. Major Edwards served in Shelby’s Iron Brigade as the Brigade Adjutant and received a promotion to colonel upon Shelby’s promotion to brigadier general. Not satisfied with the surrender of the Confederacy in 1865, Edwards accompanied Shelby on the famous expedition to Mexico that attempted to establish a Confederate colony. Edwards was a loyal friend of Shelby’s until Edwards’ death in 1889. His work on Shelby is as much a romantic recollection of the Lost Cause as it is a historical narrative from his perspective on Shelby’s exploits. His efforts to glorify the Southern cause did not end with the publication of his book. Edwards used his occupation as a newspaper editor in Kansas City, Missouri, as a further platform to drive his opinions of the Southern Rebellion. Edwards was able to collectively glorify not only the cause to which he fought but also his idol, JO Shelby.¹

Shelby was born December 12, 1830, in Lexington, Kentucky, to a prominent and well-connected family with a strong military background. His great-uncle, Isaac Shelby, commanded a regiment at the Battle of King’s Mountain in 1780, was the first governor

¹W. L. Webb, *Battles and Biographies of Missourians or The Civil War Period in Our State* (1900; repr., Springfield, MO: Oak Hills Publishing, 1999), 326-328.

of Kentucky, and a close friend of President Andrew Jackson. Shelby's grandfather, David Shelby, participated at King's Mountain under the command of his cousin, Isaac Shelby. Shelby's father, Orville Shelby, was a wealthy plantation owner and prospered in the hemp business.² Shelby's father died when he was five years old, and after his mother remarried during his 13th year, his stepfather, Benjamin Gratz, raised him. Gratz was a personal friend of Henry Clay and heir to "one of the first great American fortunes, that of the Gratz family of Philadelphia." This marriage brought four stepbrothers into Shelby's life, including Howard Gratz, who would partner with Shelby in the hemp and rope business in Missouri.³ Shelby's cousin Francis Blair was also from another prominent family. This childhood playmate of Shelby's would view the slavery issue differently. Blair would become a Congressman from Missouri and stood firm against any break-up of the Union.

Shelby attended school in Pennsylvania, "probably to Mr. Wilson's School at Hartsville, Pennsylvania, where Howard Gratz had finished in 1840," then college at Transylvania University in Lexington, Kentucky, but did not graduate. Shelby migrated to Lexington, Missouri at the age of nineteen to learn the hemp and rope business. This rich farmland along the Missouri River was settled mainly by slaveholders with Southern leanings.⁴ These settlers came from Kentucky, Tennessee, Virginia, and North

²Daniel O'Flaherty, *General Jo Shelby, Undefeated Rebel* (Chapel Hill, NC: University of North Carolina Press, 1954), 9-12.

³Ibid., 14.

⁴Louis S. Gerteis, *The Civil War in Missouri, A Military History* (Columbia, MO: University of Missouri Press, 2012), 8.

Carolina.⁵ Here Shelby used slave labor to raise hemp for rope manufacturing, a vital asset to the South who needed the rope to bind their cotton bales. Shelby prospered in this venture but soon hostilities began to smolder then boil into open violence in Missouri and Kansas over the very slave labor Shelby utilized.

Shelby's activities prior to and service during the Civil War was diverse. He raised a small contingent of men to ride into Kansas to vote in the tumultuous environment after the passage of the Kansas-Nebraska act. He later raised a company of volunteers for service to the Missouri secessionist government and Confederate Army and subsequently a regiment for similar service. Shelby's reputation as an excellent cavalry commander earned him a brigadier general's commission and a provisional Division Command during Sterling Price's 1864 raid into Missouri. This honor was conferred upon him based on the exploits of his 1863 raid into Missouri.

Missouri entered the Civil War as a border state with a strongly divided citizenry. Through the end of 1862, her fate was contested decided through a series of conventional battles. Though small in numbers when compared to battles in Virginia, these engagements were significant in the Confederate government's strategy to bring Missouri into the possession of the Confederacy. By the end of 1862, the fight for Missouri became a recurrent series of raids. Shelby's command was an essential component of these raids and he would use his experiences from these raids to plan his 1863 raid.

Shelby's aims for his raid were to prevent Missouri troops from reinforcing Major General William Rosecrans at Chattanooga, Tennessee, raise recruits, and cause as much

⁵Donald L. Gilmore, *The Civil War on the Missouri-Kansas Border* (Gretna, LA: Pelican Publishing Company, 2005), 36.

damage to Federal infrastructure as was possible. Furthermore, he wanted to raise the fighting spirit of the Confederate Army in the Trans-Mississippi West after a series of setbacks. For the first time, Shelby was in command of his own force operating independently.

Was Shelby's raid successful? Did he meet the aims he intended to achieve? Did Shelby's raid contribute to the strategic and operational goals in the Trans-Mississippi Department? What principles of war did Shelby best utilize in the conduct of this raid? These questions will be answered as part of this assessment of Shelby's Raid.

Missouri's Unofficial Civil War

The American Civil War began officially April 12, 1861 with the Rebel attack on Fort Sumter, South Carolina. However, a divisive conflict was ongoing along the Missouri-Kansas border since the passage of the Kansas-Nebraska Act in 1854. The national agitation over slavery began with the Missouri Compromise of 1820. Missouri's desire to draft a constitution that allowed slavery and gain admission as a state was complicated by the fact that the number of slave states and free states were equal once Alabama was admitted into the Union in December 1819. This equal number of slave to free states established a balance of representation within the United States Senate. Allowing Missouri into the Union as a slave state would disrupt this delicate balance, as the free states already controlled the population-based House of Representatives.

The debate in Congress was highly contentious concerning Missouri's admission to the Union. Northern representatives and Senators wanted to keep the west open to free labor. New York Congressman Henry Tallmadge "decided to make Missouri's admission to the Union a test case." He proposed a gradual emancipation scheme for Missouri,

which would require a slave to be freed upon their twenty-fifth birthday and abolish the importation of any more slaves into Missouri. The proposal was defeated in the Senate.⁶ However, a compromise, proposed by Henry Clay, allowed Missouri to enter the Union as a slave state. This episode demonstrated the increasing polarity of the slavery issue.

The Missouri Compromise of 1820 succeeded in maintaining the balance of slave-to-free states in the Union, allowing Missouri's admission as a slave state on August 10, 1821, with Maine formed from land formally belonging to Massachusetts and admitted as a free state. The compromise further limited the expansion of slavery into the Louisiana Territory north of the 36'30" north parallel with the exception of the proposed southeast portion of Missouri now known as the "boot heel."⁷ Approximately two-thirds of the future continental United States was off limits to slavery expansionists once this parallel was identified as the northern-most boundary.⁸

Slavery expansionists and abolitionists maneuvered to gain political and literal ground in the quest to settle the slavery issue. The Wilmot Proviso, named after its author Pennsylvania Congressman David Wilmot, sought to abolish the expansion of slavery into any territory acquired from Mexico after the Mexican War ended in 1848. Although this proposal failed, it once again established the fact that the slavery proved a contentious and enduring issue. The Compromise of 1850 enabled California to enter the Union as a Free State while allowing the expansion of slavery into what later became

⁶Silvana R. Siddali, ed., *Missouri's War: The Civil War in Documents* (Athens, OH: Ohio University Press, 2009), 7.

⁷Ibid.

⁸Elmo Ingenthron, *Borderland Rebellion, A History of the Civil War on the Missouri-Arkansas Border* (Branson, MO: The Ozark Mountaineer, 1980), 27.

Arizona and New Mexico. The continued clash of politicians over slavery, along with continued compromises as the United States expanded west, only delayed the impending conflict. The full advent of Manifest Destiny, truly seeing the United States expand “from sea to shining sea,” gradually pushed the nation to a point where the morality of slavery and further compromise split the nation.

The Missouri Compromise stood until the Kansas/Nebraska Act was passed by Congress and signed by President Franklin Pierce on May 30, 1854. Senator Stephen A. Douglas of Illinois proposed this act to organize open territory west of Missouri and Iowa. This act hinged on his desire for a northern terminus of a potential transcontinental railroad, linking the East with California.⁹ The continued maneuvering between northern and southern states as to the route of the railroad failed to gain a consensus within political circles. Senator Douglas, no doubt seeing benefit for Illinois should a Northern route be chosen, proposed the territorial formation of Kansas and Nebraska and the authorization for settlers and farmers to populate the land.

In order to gain Southern support for the bill, he needed an approach that would not alienate anti-slavery advocates but would also gain Southern support. The Missouri Compromise had prohibited even the possibility of slavery’s expansion into these two new territories. Senator Douglas’ solution was to introduce the idea of Popular Sovereignty. “Quit discriminating against slaveholding pioneers; open all territories to settlers from both North and South, and let them decide by vote whether to exclude or

⁹Jay Monaghan, *Civil War on the Western Border. 1854-1865* (Lincoln, NE: University of Nebraska Press, 1955), 4.

countenance slavery. What could be fairer than that”?¹⁰ The populations of Kansas and Nebraska would vote whether or not slavery would exist within the boundary of their own territory. This vote of the population within each territory would determine the fate of slavery in the territory’s constitution as it sought statehood.

The Kansas-Nebraska Act ignited the divisive slavery issue into an inferno. Senator Douglas, in a speech delivered on July 9, 1858, defended his idea of popular sovereignty when he stated, “My object was to secure the right of the people of each State and of each Territory, North or South, to decide the question for themselves, to have slavery or not, just as they chose.”¹¹ However, Abraham Lincoln, not yet a major political figure outside his home state of Illinois, was emphatically against the very idea of the introduction of slavery into these new territories. His objection to the 1854 act was based on his negative views of the very practice of slavery, made clear in a speech delivered in Peoria, Illinois on October 16, 1854. “I think, and shall try to show, that it is wrong – wrong on its direct effect, letting slavery into Kansas and Nebraska; and wrong in its prospective principle, allowing it to spread to every other part of the world where men can be found inclined to take it.”¹² He further maintained in the same speech that the very practice of slavery was at best hypocritical, making a mockery of the principles written in the Declaration of Independence. These two men from the same state yet opposing views

¹⁰Monaghan, 3.

¹¹*Political Speeches of Abraham Lincoln and Stephen A. Douglas, 1854-1861* (Chicago, IL: Scott, Foresman & Company, Chicago, IL, 1896), <http://ia600507.us.archive.org/10/items/politicalspeeche2774linc/politicalspeeche2774linc.pdf> (accessed June 21, 2013), 65.

¹²*Ibid.*, 8.

demonstrated what was happening nationwide, two opposing views from men that would debate each other in the national spotlight from 1854 until 1860.

Once the Kansas/Nebraska Act passed, it was a foregone conclusion that Nebraska would become a free territory. However, Kansas shared a border with Missouri, a slave state. Missouri's fears of a free Kansas were only multiplied by fears of anti-slavery emigration into Kansas. "Newspapers reported Ohio River steamboats packed with emigrants from Pennsylvania, Ohio, and Kentucky."¹³ Abolitionist-leaning organizations, such as the New England Emigrant Aide Society formed in 1854, aided free-soilers to settle Kansas. Eli Thayer of the Massachusetts Emigrant Aide Society assisted 700 settlers in 1854 as they staked claims in Kansas.¹⁴ Although relatively few New Englanders actually emigrated from the northeast, Missouri slaveholders still viewed this migration as a potential threat and began to stake claims of their own in Kansas. Kansas abolitionists claimed these Missouri residents were not eligible voters. The Missourians claimed the abolitionists had no more eligibility or claim to vote than the Missourians.¹⁵ Thus was the argument back and forth, as to who had the right to vote. Much was at stake from the slave-holding Missourian's perspective. If Kansas became a free state, slaves from Missouri could escape to freedom into Kansas. Furthermore, Missouri would be surrounded on three sides with free states.

¹³Monaghan, 5.

¹⁴Pearl T. Ponce, ed., *Kansas's War: The Civil War in Documents* (Athens, OH: Ohio University Press, 2011), 6.

¹⁵James McPherson, *Battle Cry of Freedom* (Oxford: Oxford University Press, 1988), 145.

By 1854, “the entire country had gone mad about Kansas.”¹⁶ Missouri slaveholders and politicians kept their eyes on Kansas with a keen awareness of the implications of a free Kansas. Pro-slavery Missourians lived with the hope of electing a government that allowed slavery in Kansas. Ballot-box stuffing, claims and counter-claims of voter fraud, voter intimidation, and open violence marred any aspirations of Douglas’ idea of popular sovereignty and the true will of the people prevailing. “At the time, Missourians constituted a majority of Kansas’s residents, and the fraudulent voters only increased the margin of the proslavery victory.”¹⁷ These “fraudulent voters” were members of organizations such as the Self-Defensive Association and the more secretive Blue Lodge, of which Jo Shelby was possibly a member. “Jo Shelby closed his ropewalk and with forty men – some recruited in the Blue Grass – rode to Lawrence to vote.”¹⁸ The sole purpose of these organizations was “to send armed bands westward to vote in Kansas elections.”¹⁹ Despite the obvious voter fraud in Kansas, the cross border violence between Free State and slave state proponents, numerous draft constitutions and legislative fights with the United States Congress, Kansas was finally admitted as a free state in January 1861.

¹⁶Monaghan, 5.

¹⁷Stanley Harrold, *Border War: Fighting over Slavery Before the Civil War* (Chapel Hill, NC: University of North Carolina Press, 2010), 165.

¹⁸Monaghan, 18.

¹⁹*Ibid.*, 165.

Missouri's Three Factions

Consensus on slavery in Missouri was as impossible to achieve as in Kansas. The population of Missouri fell into three categories. Each group had spokespersons, powerful and influential men to further their cause, when it came to the impending conflict and any talk of secession. The loudest, though by no means the majority faction among Missourians, were the Secessionists. Claiborne Fox Jackson, a staunch secessionist, won the 1860 governor's election in Missouri. Jackson was a native of Kentucky, and had served Missouri in several capacities to the State Legislature, State Senate, and delegate to the State convention. Although not as overt as others in his initial rhetoric, he waited for the proper political time to move Missouri towards secession. Governor Jackson "had leagued himself with the secession plot, though still concealing his purpose with outward professions of loyalty."²⁰ Jackson's strategy was to wait for the actions of the newly elected Republican president Abraham Lincoln, should he attempt to either coerce Missouri or demand troops from the state to coerce another state. Furthermore, knowing the demographics of Missouri, he knew that the citizens of Missouri "were not quite prepared as yet for such a drastic step."²¹ In his inaugural address on January 3, 1861, Jackson masterfully presented a case that laid the blame for the present conflict on the shoulders of the free states. However, he did shroud his true intentions within a call for the Union to let the Southern States leave in peace and not to force any state to remain in the Union. Jackson said:

²⁰John G. Nicolay, *The Outbreak of the Rebellion* (1883; repr., Harrisburg, PA: The Archive Society, 1992), 115.

²¹Albert Castel, *General Sterling Price and The Civil War in the West* (1968; repr., Baton Rouge, LA: Louisiana State University Press, 1996), 9.

We hear it suggested in some quarters that the Union is to be maintained by the sword. Such suggestions, it is to be hoped, have sprung from momentary impulse, and not from cool reflection. The project of maintaining the Federal Government by force may lead to consolidation of despotism, but not to Union . . . That stands upon basis of justice and equality, and its existence cannot be prolonged by coercion . . . The first drop of blood shed in a war of aggression upon a sovereign State will arouse a spirit which must result in the overthrow of our entire Federal system, and which this generation will never see quelled.²²

Governor Jackson was not alone in his secessionist proclivities. The newly elected Lieutenant Governor, Thomas C. Reynolds was a zealous secessionist. Born in South Carolina of a Virginian family, it was no surprise that his loyalty rested with the slaveholding South and those states that chose to separate from the Union. Upon his election to lieutenant governor, he immediately set his sights on positioning the state politically with the recently seceded states and on January 5, 1861, called for a State Convention to vote upon the very question of succession. His hardline stance was outlined in a letter he sent to the Missouri State Legislature, published on the very day of Governor Jackson's inauguration. In that letter, he clearly stated his intentions and what direction he wanted Missouri to take. "In our system a State is its people, citizens compose that people, and to use force against citizens acting by State authority is to coerce the State and to wage war against it. To levy tribute, molest commerce, or hold fortresses, are as much acts of war as to bombard a city."²³ Reynolds further set into motion the process to equip the state militia to face any Union coercion. His ultimate goal was quite clear: Missouri "should

²²Thomas L. Snead, *The Fight For Missouri* (New York, NY: Charles Scribner's Sons, 1886), 23.

²³*Ibid.*, 33.

not permit Mr. Lincoln to exercise any act of government within her borders.”²⁴

Governor Jackson had found his bulldog to counter his own veiled loyalties to the Union.

The second political category within the population of Missouri was the Conditional Unionists. These men were more moderate in their stance. Their position was simple: allow the Southern States a constitutional guarantee to their slave-holding traditions. However, if the Federal government was unwilling to allow such concessions, allow the Rebel States to leave the Union peacefully and do not coerce them in any fashion back into the Union. One of the most prominent spokesperson for this position was the outgoing governor, Robert. M. Stewart. In his last speech before the Missouri General Assembly just prior to Governor Jackson’s inauguration, Stewart stated that,

If South Carolina and other Cotton States persist in secession she will desire to see them go in peace, with the hope that a short experience at separate government and an honorable readjustment of the Federal compact, will induce them to return to their former position. In the meantime, Missouri will hold herself in readiness, at any moment, to defend her soil from pollution and her property from plunder by fanatics and marauders, come from what quarter they may. The people of Missouri will choose this deliberate, conservative course, both on account of the blessings they have derived from the Union, and the untold and unimagined evils that will come with its dissolution.²⁵

Governor Stewart held a position that reflected the vast majority of Missourians.

A significant believer in the Conditional Unionist stance was another former governor of Missouri, Sterling Price. Price was also a former representative from Missouri to the United States Congress, as well as a prosperous slaveholder. His career had seen him in the world of politics at the state and national level, as a prosperous plantation owner, and a veteran of the Mexican War, appointed a colonel of Missouri

²⁴Snead, 33.

²⁵Ibid., 16.

Volunteers. In 1861, Price was in the forefront of the secession question as he held the post of state bank commissioner. In February 1861, he was elected to the state convention called by Lieutenant Governor Reynolds. This convention was called to address the question of Missouri secession. When the convention met in Jefferson City and later in St Louis, “by almost unanimous vote it named Price president, a tribute to his prestige and proof that the conditional Unionists were in control.”²⁶ Secessionists like Governor Jackson and his deputy Reynolds were dealt a severe blow when, by a nearly unanimous vote, the convention voted for the state to remain in the Union.

The third and smallest political group within Missouri was the Unconditional Unionists. This group of men, primarily located in the St Louis area, stood for unconditional loyalty to the Federal Government whatever course of action it may take, whether it is coercion of the secessionist states, monetary support of the Federal government, or even the supply of Missouri troops for Federal service. This group was led primarily by Congressman Francis P. Blair, a highly vocal Free-Soiler and ardent supporter of the Republican President-Elect Lincoln. Blair’s brother, Montgomery Blair, was soon to be President Lincoln’s Postmaster General, which gave Francis Blair more access to the President than would be expected of a Congressman. Blair viewed the election of Lincoln and the subsequent Southern response in a very disturbing light and began almost immediately to ensure that Missouri was prepared for any internal strife. Blair needed an ally and a like-minded man. He found both in Captain Nathaniel Lyon.²⁷

²⁶Castel, 11.

²⁷Christopher Phillips, *Damned Yankee: The Life of General Nathaniel Lyon* (Baton Rouge, LA: Louisiana State University Press, 1990), 147.

Lyon was a resolute Unconditional Unionist and the perfect ally for Francis Blair. Lyon's service at Fort Riley, Kansas after the passage of the Kansas-Nebraska Act allowed him to see firsthand the coming violence and helped fuel his antipathy towards the secessionists. He is quoted as saying in 1855 "preparations are now in progress to resist the arrogant and insolent imposition of Missourians. Whether they will prove effective may be seen in the result. Indeed it is fully apprehended that the aggressions of the pro-slavery men will not be checked till a lesson has been taught them in letters of fire and blood."²⁸ By the election of 1860 and the subsequent secession of Rebel states, Lyon's fury reached a full boil towards the slaveholders and Missouri's aspirations to follow the Rebel path. Countless letters and other official correspondence attest to Lyon's fiery temper, his disdain for anything he viewed as remotely disloyal to the Union, or any shred of incompetence. Blair recognized in Lyon a man who could ensure that the Unconditional Unionist cause would be pursued passionately.

Lyon arrived in St Louis in February 1861, to confer with Blair. Blair was focused on the St Louis arsenal and viewed it vulnerable to secessionist attack. With Blair's political connections, he secured the command of the arsenal to Lyon along with an eventual promotion to brigadier general once Lincoln was inaugurated as President. Blair now had his man in position to carry out the further training of the Home Guards, and to bolster the defenses of the St Louis Arsenal and its vast storehouse of weapons and ammunition.

The situation in Missouri worsened once President Lincoln took office. The Conditional Unionists and the Secessionists politically maneuvered to lend appropriate

²⁸Snead, 122.

support to Rebel states as they left the Union one-by-one. Once rebels attacked Fort Sumter on April 12, President Lincoln called upon each loyal state, including Missouri, to provide ninety-day volunteers to suppress the rebellion and coerce the rebel states back into the Union. This was just the scenario Governor Jackson needed to openly advocate Missouri's secession.

Blair and Lyon were alarmed by a series of events. On April 20, 1861, secessionists captured the Federal arsenal at Liberty, Missouri where they obtained 1,500 arms and a few cannons. These weapons were distributed to the citizens of Clay County along the Missouri River, part of the slave holding, and secessionist part of Missouri.²⁹ Blair and Lyon's fears were further amplified in late April when an armed contingency of 600 Missouri Militia encamped in St Louis, later named Camp Jackson. Rebels then seized the Federal storehouse in Kansas City, Missouri on May 3, 1861.³⁰ Although not as significant concerning the number of weapons seized, it nonetheless fed the fears of Lyon and Blair in St. Louis that the rebels would soon move to seize the St. Louis Arsenal.

The fears of Missouri's secession were not baseless. Governor Jackson received a letter from Secretary of War Simon Cameron on April 16, 1861. Cameron issued "a call for four thousand Missouri Troops to be made available for service under the authority of the United States."³¹ Jackson replied on April 17, now a man unimpeded by a political

²⁹*The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol. 1 (Washington, DC: Government Printing Office, 1880-1901), 649-650 (hereafter cited as *OR*).

³⁰*Ibid.*, 652.

³¹Gerteis, 16.

campaign and able to refrain from mincing words. “Your requisition is illegal, unconstitutional, and revolutionary; in the object inhumane and diabolical. Not one man will Missouri furnish to carry on any such unholy crusade against her Southern sisters.”³² This contemptible response, filled with overtly unrestrained secessionist attitude and coupled with the seizure of two Federal facilities, severely heightened the tensions.

Seeing the seriousness of the situation, Blair requested military assistance from the State of Illinois. Lyon and Blair had long questioned the ability of the Federal Army to maintain control of the arsenal and further questioned the loyalties of some officers serving at the arsenal and Jefferson Barracks. However, much to Lyon and Blair’s satisfaction, on April 20, “Two or three regiments of Illinois militia” were ordered to the Arsenal for its defense by Secretary of War Cameron. In exchange, 10,000 stands of arms were ordered issued to “the authorized agent or agents of his excellency the governor of Illinois.”³³

President Lincoln, through the War Department, in a highly “irregular” move, ordered Lyon to “enroll in the military service of the United States the loyal citizens of Saint Louis and vicinity . . . for the purpose of maintaining the authority of the United States; for the protection of the peaceable inhabitants of Missouri.” The order further authorized the option to proclaim martial law within the city, use weaponry at the arsenal to arm these loyal citizens enrolled into military service, and to remove the remaining arms in the arsenal to Illinois. In a final word of urgency and resolve, General Winfield

³²Claiborne Fox Jackson, “Letter to Secretary of War Simon Cameron, April 17, 1861,” The State Historical Society of Missouri, <http://shs.umsystem.edu/historic-missourians/name/j/jackson/index.html> (accessed May 28, 2013).

³³*OR*, series 1, vol. 1, 669.

Scott endorsed the order by asserting, “It is revolutionary times, and therefore I do not object to the irregularity of this.”³⁴

The pressure, which steadily increased since the passage of the Kansas-Nebraska Act in 1854, had reached the point where open hostility was inevitable. Camp Jackson buzzed with rebel activity. Illinois supplied troops to assist the Federal Forces in St Louis and the Governor of Missouri drew line in the sand with his sharply worded reply to President Lincoln’s call for troops. When coupled, these activities, with personalities of polar opposites, Blair and Lyon firmly Unionist with Jackson and Reynolds firmly Secessionists, the stage was set for a fight for Missouri.

³⁴*OR*, series 1, vol. 1, 675.

CHAPTER 2

THE CONTEST FOR MISSOURI

The situation in Missouri quickly unraveled in May 1861 as the rebels strategized for control of the state. Secessionists seized the Kansas City and Liberty arsenals and its goods were now at the disposal of Jackson's government. Governor Jackson sent his letter of defiance to the Secretary of War refusing to raise troops to quell the Southern States' rebellion. Groups of rebels openly drilled in camps across "Little Dixie," the rich fertile farmlands along the Missouri River. The remaining Federal stronghold was St Louis and its arsenal. The Commander of the Department of the West, Brigadier General William S. Harney, did not prepare the arsenal's defense to Frank Blair and Captain Lyon's satisfaction in light of the recent secessionists' activities.

After a special session of the Missouri Legislature on May 2, 1861, elements of the Missouri State Militia mustered at Camp Jackson. Their purpose was twofold: drill and prepare for any potential assault upon the arsenal and the defense of Missouri from any impending Federal "invasion." Lyon was quite adamant that this militia at Camp Jackson be disbanded.³⁵ Lyon had long sought to punish the secessionists that caused so much havoc in Kansas in the preceding six years and the secessionists at Camp Jackson was his first opportunity to demonstrate Federal resolve.

Lyon had at his disposal approximately 7,000 armed men which consisted of his own regular Army forces and the additional enrolled militia from the citizens of St Louis

³⁵Monaghan, 130.

as authorized by President Lincoln.³⁶ Lyon received word on May 8 the steamer *J.C. Swan* had arrived from Baton Rouge, Louisiana, with weaponry captured from the Federal arsenal in that city, and destined for Jackson's Missouri State Militia at Camp Jackson. "Lyon was cognizant of the whole proceeding, and had a strong notion to seize the boat at the levee before she could unload; but after conversing with Mr. Blair, he agreed with the latter, and concluded to allow the material to be received in the camp, thus furnishing additional evidence of the treasonable nature of the camp."³⁷ Jefferson Davis, President of the Confederate States, wrote a letter to Governor Jackson and approved the Governor's assertion to seize the arsenal. Davis wrote, "After learning as well as I could, from the gentlemen accredited to me, what was most needful for the attack on the arsenal, I have directed that Captains Greene and Duke should be furnished with two 12-pounder howitzers and two 32-pounder guns, with proper ammunition for each. These, from the commanding hills, will be effective against the garrison and to break the enclosing walls of the place."³⁸ Lyon mobilized his army seeing the Confederate move as a direct threat to the security of the St. Louis arsenal and of Federal authority in that city. Lyon was intent on the capture of Davis' military firepower sent by the *Swan*, now at Camp Jackson, as well as the Missouri Militia training there. Lyon exclaimed, "Their extraordinary and unscrupulous conduct, and their evident design, and

³⁶Snead, 166.

³⁷James Peckham, *GEN Nathaniel Lyon, and Missouri in 1861* (New York, NY: American News Company Publishers, 1866), 136.

³⁸Snead, 168.

of the governor of this State, to take a position of hostility to the United States, are matters of extensive detail and of abounding evidence.”³⁹

Lyon set plans into motion to capture the camp. Upon hearing of Lyon’s plan to capture the camp, Brigadier General Daniel M. Frost, Commander of the Missouri State Militia at Camp Jackson, sent a note to Lyon. In that letter, he asserted his belief, from a Constitutional standpoint, to be in camp, to drill, and to train a militia to defend the state. Frost wrote,

I am constantly in receipt of information that you contemplate an attack upon my camp, whilst I understand that you are impressed with the idea that an attack upon the arsenal and United States troops is intended on the part of the militia of Missouri. I am greatly at a loss to know what could justify you in attacking citizens of the United States who are in the lawful performance of duties devolving upon them under the Constitution in organizing and instructing the militia of the State in obedience to her laws.⁴⁰

Lyon responded to Frost’s inquiry in an unwavering tone and expressed his reasons for the imminent attack on the camp should Frost refuse to surrender. Clearly, Lyon saw the Missouri Militia in league with the rebellion, not simply training for the defense of the state as Frost had stated. Lyon wanted no more time wasted and at the end of his response to Frost, gave him thirty minutes to surrender upon receipt of the message.⁴¹

Lyon’s men immediately marched on Camp Jackson on May 10. His massed command captured the rebels without firing a shot. The “victory” would have been recognized for a small, unremarkable affair had it not been for its aftermath. While

³⁹*OR*, series 1, vol. 3, 4.

⁴⁰*Ibid.*, 5-6.

⁴¹*Ibid.*, 7.

Lyon's troops marched the rebel prisoners through the streets of St. Louis, a crowd of civilians with various intentions lined the streets. Secessionists in the crowd threw insults, rocks, and paving stones at the Federals. Then a shot rang out. Whether it was a drunk⁴² or an over-zealous 14-year-old boy,⁴³ the reply from the Federals had significant repercussions. Wherever the first shot originated is not nearly as important as the results: fifteen to twenty "innocent by-standers and several Soldiers were killed" and an undetermined number wounded. The war had reached Missouri.⁴⁴

Shelby was in St Louis during the Camp Jackson Affair to purchase musket caps for his long-time friend in Kentucky, another cavalryman whose name would long be remembered, John Hunt Morgan.⁴⁵ Upon witnessing the disaster in the streets of St. Louis, Shelby met with his childhood friend and cousin, Frank Blair. Blair offered him a command in the Federal Army to suppress the rebellion. Shelby "denounced him. He would have nothing to do with anyone, family or not, who would use powder and shot on Southern men and women."⁴⁶ Shelby was determined to fight the abolitionists in Missouri just as he had in Kansas. After this heated exchange, Shelby immediately returned to Lafayette County, Missouri, to raise a company of cavalry for service in

⁴²Monaghan, 132.

⁴³Harold Holzer and Craig L. Symonds, eds. "Highly Important From Missouri," in *New York Times, The Complete Civil War: 1861-1865* (New York, NY: Black Dog & Leventhal Publishers, 2010), 82.

⁴⁴Nicolay, 119.

⁴⁵O'Flaherty, 51-52.

⁴⁶*Ibid.*, 58.

defense of Missouri. It had been nearly three years since he had been in the service of the pro-slavery faction within Missouri.

Shelby had raised a company of “border ruffians,” and operated in Kansas from 1856-1858. Their purpose was to intimidate anti-slavery or abolitionist settlers and ensure a free-state Kansas, often through violence. Shelby would denounce these activities in later years by stating,

I was in Kansas at the head of an armed force about that time. I went there to kill Free State men. I did kill them. I am now ashamed of myself for having done so, but then times were different from what they are now, and that is what I went there for. We Missourians all went there for that purpose if it should be found necessary to carry out our designs. I had no business there. No Missourian had any business there with arms in his hands. The policy that sent us there was damnable and the trouble we started on the border bore fruit for ten years. I ought to have been shot there and John Brown was the only man who knew it and would have done it. I say John Brown was right. He did in his country what I would have done in mine in like circumstances. Those were the days when slavery was in the balance and the violence engendered made men irresponsible. I now see I was so myself.⁴⁷

Shelby now had a new company to offer in Missouri’s defense. It would be six years before he laid down his arms again.⁴⁸

The governor immediately enlisted the services of Sterling Price, a now avowed secessionist. Price, the former governor of Missouri, received a brigadier general’s commission and command of the Missouri State Guard. Price’s experience in the Mexican War, his political influence, and his popularity in the state made him the perfect

⁴⁷Daniel O’Flaherty, quoted in William Elsey Connelley, *Kansas City Star*, February 7, 1897.

⁴⁸Deryl P. Sellmeyer, *Jo Shelby’s Iron Brigade* (Gretna, LA: Pelican Publishing Company, 2007), 25.

choice from Jackson's viewpoint. Confederate President Jefferson Davis agreed and the commission was approved on May 12, 1861.⁴⁹

The news from Camp Jackson in St. Louis polarized Missouri. Those aligned with the "armed neutrality" or "conditional Unionists" faction now aligned themselves with either the Unconditional Unionists or the Secessionists factions. Neutrality became nearly impossible. Sterling Price, for example, once a conditional Unionist, was now a firm secessionist, and took up arms against the Federal government. Enlistments for the Federals or the Secessionists increased across the state according to how one viewed the Camp Jackson Affair. Governor Jackson called a special session of the legislature and passed the Jackson Militia Bill, which called upon every able-bodied man in the state to enlist for the defense of Missouri. It furthermore granted Jackson sweeping new powers over the militia and civilian commerce for impressment into state service.⁵⁰

Brigadier General William S. Harney, Commander of the Department of the West, absent from St Louis during the Camp Jackson Affair, returned to St Louis and saw the mayhem created by Lyon's actions. Harney, on his way to Washington D.C., had given Lyon very little latitude to exercise any initiative of his own. Harney instructed Lyon "the accommodation of the troops at the arsenal and for the defense of the place will not be disturbed without sanction of the commanding general to whom you will present any considerations touching those subjects you may think worthy of adoption."⁵¹ Upon Harney's return, he immediately attempted to ease the now deteriorated situation.

⁴⁹Castel, 14.

⁵⁰O'Flaherty, *General Jo Shelby*, 61.

⁵¹OR, series 1, vol. 1, 689-659.

Even though Harney viewed the Jackson Militia Bill as contemptible, he agreed to meet with Price at St Louis in an attempt to broker a compromise. The resulting compromise, known as the Price-Harney Agreement, earned Lyon a promotion to brigadier general, command of the Department of the West after Harney's relief of command in the Department of the West, and set Lyon on a ninety-day countdown to his own death.

The Price-Harney Agreement did nothing more than tie the hands of the Federal Army in St. Louis, enable Price and the Missouri State Guard, and implicitly recognize Missouri's "neutrality." Price "undertook, with the Governor's express sanction, to maintain order within the State, among the people thereof; and General Harney declared that if this were done he could have no occasions (as he had no wish) to make any military movements within the State."⁵² This agreement infuriated both Lyon and Blair, and caused them to question Harney's loyalty. Since the Camp Jackson Affair, Harney undermined Lyon's near martial-law rule of St Louis, which further demonstrated to Blair that Harney was disloyal to the Federal government. Through Blair's political connections and Lincoln's concern of Missouri's position in the Union, Harney was relieved and Lyon placed in command, complete with the rank of brigadier general, effective May 16. Harney and Lyon were notified on May 30, 1861.⁵³

Lyon was determined to assert Federal authority in Missouri. As he bolstered the defenses of St Louis and organized an army with augmentation from Illinois and Iowa troops, Lyon agreed to meet with Jackson at the Planter's House in St Louis. Lyon,

⁵²Snead, 187.

⁵³Phillips, 206-207.

however, had no illusions about his demands and would take no less than the full disarmament of the Missouri State Guard, a hostile force in Missouri. The attendees at the Planter's House were Lyon and Blair, the latter representing the Federal Government. Representing Missouri were Jackson, Price, and the governor's private secretary, Thomas Snead. However, Lyon's conduct was "too much in earnest, too zealous, too well-informed, too aggressive, and too fond of disputation to let Blair conduct the discussion on the part of the government."⁵⁴ After nearly 6 hours of negotiations, where neither side was willing to make real compromise or trust their opposites, Lyon stated in a particularly deliberate tone:

Governor Jackson, no man in the state of Missouri has been more desirous of preserving peace than myself. Heretofore Missouri has only felt the fostering care of the federal government, which has raised her from the condition of a feeble French colony to that of an empire state. Now, however, from a failure on the part of the chief Executive to comply with constitutional requirements, I fear she will be made to feel its power.⁵⁵

Lyon's voice then became hostile:

Rather than concede to the State of Missouri the right to demand that my Government shall not enlist troops within her limits, or bring troops into the State whenever it pleases, or move its troops at its own will into, out of, or through the State; rather than concede to the State of Missouri for one single instant the right to dictate to my Government in any matter however unimportant, I would [rising as he said this, and pointing in turn to everyone in the room] see you, and you, and you, and you, and you, and every man, woman, and child in the State dead and buried.' Then turning to the Governor, he said: 'This means war. In an hour one of my officers will call for you and conduct you out of my lines.'⁵⁶

⁵⁴Snead, 199.

⁵⁵Phillips, 214.

⁵⁶Snead, 199-200.

Lyon whether this was within Blair's intent or not, had just declared war on the state of Missouri. Blair, although a staunch Unconditional Unionist, might not have escalated the hostilities to a point of no return that quickly. However, due to Lyon's years in Kansas witnessing Bleeding Kansas, he resolved that no secessionist faction would survive within the state.

Jackson's Government Flees

Lyon's first plan was to occupy Jefferson City, Missouri.⁵⁷ Jackson anticipated this move and ordered bridges burned behind him as he and his entourage returned to the state capital. Jackson, in his first order of business upon his return, directed Price to take the field with the Missouri State Guard to defend Missouri and defeat any Federal forces. Jackson, on the other hand, fled the capital before the approaching Federals. Lyon, commanding the newly organized Second U.S. Division, captured Jefferson City, Missouri on June 13, and moved upon Boonville. The strategically important Boonville was chosen by Jackson as the location for the armory, recently removed from the capital. Price trusted he could hold Boonville from a Federal assault for two week in order to allow a decisive force to organize at Lexington.⁵⁸ Lyon accomplished a quick rout of the Missouri State Guard on June 17, 1861.⁵⁹

⁵⁷O'Flaherty, *General Jo Shelby*, 64.

⁵⁸Paul Rorvig, "The Significant Skirmish: The Battle of Boonville, June 17, 1861," in *Missouri Historical Review*, in *A Rough Business: Fighting the Civil War in Missouri, An anthology of articles from the Missouri Historical Review*, ed. William Garrett Piston (Columbia, MO: State Historical Society of Missouri, 2012), 42.

⁵⁹*OR*, series 1, vol. 3, 11-12.

Shelby recruited a cavalry company in Saline and Lafayette Counties while Lyon, Blair, and Price maneuvered for control of Missouri. He was elected captain and Shelby's Company of Rangers was born. As the Federals moved west, captured the capital with little resistance, and moved on Boonville, Shelby was occupied with the birth of his second child. Once he was assured that, his wife and new son were well, he joined his unit in Independence, Missouri. Shelby received orders from Price to move to Lamar, Missouri, and report to Brigadier General James S. Rains, Commander of the Second Division of the Missouri State Guard.⁶⁰ Shelby's war had begun.

After the Federal victory at Boonville, Jackson, Price, and the Missouri State Guard fled southwest. Lyon's pursuit was slowed awaiting reinforcement by a regiment of Iowa Infantry and Federal Regulars from Fort Leavenworth, Kansas. He directed all forces to concentrate at Clinton, Missouri for a push south to close on and defeat Jackson, Price, and the Missouri State Guard.⁶¹ Lyon believed Springfield, Missouri to be the rendezvous point for the Missouri State Guard and Jackson's government.⁶² Jackson and Price's rapid movement was attributed to their desire to join forces with Confederates from Arkansas under the command of Brigadier General Ben McCulloch. Price and Jackson saw this additional force as vital to securing Missouri and adding the state's star to the Confederate banner.⁶³

⁶⁰*OR*, series 1, vol. 3, 66.

⁶¹Gerteis, 43.

⁶²*OR*, series 1, vol. 3, 14.

⁶³Gerteis, 36.

Lyon ordered Colonel Franz Sigel and his brigade to deploy into southwest Missouri with orders to cut off the retreating Rebels. Sigel was a German-born, military-educated schoolteacher with unconditional Unionist beliefs.⁶⁴ Sigel marched into Springfield and took control of that city on June 24.⁶⁵ While there, he learned of the Rebel concentration near Lamar and another force in Neosho. Sigel marched towards Mt. Vernon to prevent the two forces from joining and moved on to Neosho only to find it abandoned. Sigel moved north towards Lamar to intercept the fleeing rebels who were now alerted of Sigel's presence. Sigel had interrogated two captured civilians who convinced Sigel of their loyalty to the Federal Government and upon their release fled straight to Jackson's men south of Lamar.⁶⁶ Shelby and his Rangers would soon see their first action in the coming days.

Shelby's cavalry was the advance guard for Rains' Second Division as they marched south. At approximately 7:00 A.M., Shelby sent word that the Federals were less than three miles from the Confederate column. Rains ordered Shelby to reconnoiter the Federal position and while he executed this order, experienced his first "baptism of fire in the Civil War."⁶⁷ Shelby "positioned his troopers to oppose the head of Sigel's column from across Buck's Branch Creek" which diverted the attention of Sigel's

⁶⁴Gerteis, 34.

⁶⁵William Garrett Piston and Richard W. Hatcher III, *Wilson's Creek: The Second Battle of the Civil War and the Men Who Fought It* (Chapel Hill, NC: University of North Carolina Press, 2000), 77.

⁶⁶Stephen D. Engle, *Yankee Dutchman: The Life of Franz Sigel* (Fayetteville, NC: University of Arkansas Press, 1993), 62-63.

⁶⁷O'Flaherty, *General Jo Shelby*, 68.

Federals out of view of Rains' main body. "The rattle of their small arms, fired for the first time in anger, reached the ears of the men forming into a line of battle."⁶⁸ Rains unlimbered his own artillery in an expedient manner and formed his line for battle. Shelby was ordered to retreat once Rains was in line of battle. Rains ordered Shelby to the right flank to locate a creek crossing near the Federal left where timber and a cornfield could screen Shelby's movement. Rains augmented Shelby with two more companies of cavalry. Rains later wrote in his report, "This movement, conducted in the face of both armies, was executed with a precision worthy of the parade ground."⁶⁹ The Missouri State Guard pushed Sigel's forces south.

The rebel victory at Carthage was partially enabled by Shelby's rangers. Shelby's men forded Dry Fork Creek on the Federal left, crossed through heavy timber, destroyed a fence, crossed a cornfield, and enabled the balance of Rains' cavalry brigade to flank Sigel. Sigel ordered a retreat into Carthage once he saw cavalry flanking his line.⁷⁰ Shelby proved that even though he lacked any formal military education, he understood the role of cavalry. Although Rains did not call out Shelby specifically in his battlefield accolades in his report, Shelby's cavalry began to build a reputation within the Missouri State Guard.

Price and Jackson consolidated forces with Brigadier General Benjamin McCulloch's Arkansas Confederates after their victory at Carthage. McCulloch and Price

⁶⁸David C. Hinze and Karen Farnham, *The Battle of Carthage, Border War in Southwest Missouri, July 5, 1861* (Gretna, LA: Pelican Publishing Company, 1997), 113.

⁶⁹*OR*, series 1, vol. 3, 21.

⁷⁰O'Flaherty, *General Jo Shelby*, 69-71.

encamped in an area in extreme southwestern Missouri called Cowskin Prairie. This location was chosen to refit and rearm the travel-weary Missouri State Guard in preparation for a massed invasion into the heart of Missouri. While encamped there, Shelby requested and received permission from Price, to conduct a recruiting mission to his hometown of Waverly, Missouri. Shelby knew that a Provisional pro-Union government was elected and inaugurated in Jefferson City, Missouri, with Unionist Hamilton R. Gamble elected as governor on July 30.⁷¹ Shelby could possibly recruit any men with southern leanings annoyed with the questionable procedures involved with new pro-Union Missouri government. Little was accomplished in this cavalry ride to Waverly. However, it foreshadowed two aspects of Shelby up to this point unseen: his propensity to despise idle camp life and his audacity in moving rapidly in hostile territory. His men learned how to survive as they foraged the countryside and return to more friendly territory relatively unscathed.⁷²

Battle of Wilson's Creek

Shelby's next test of his capability took place less than a month after Carthage. Once again assigned to Rains' Division of Price's Army, Shelby moved from Cowskin Prairie towards Springfield, Missouri with Price's and McCulloch's combined force of nearly 15,000 men. Lyon, on the other hand, knew of this combined force and marched southwest out of Springfield on the early morning of August 10, 1861. Lyon was greatly

⁷¹Marguerite Potter, "Hamilton R. Gamble, Missouri's War Governor," *Missouri Historical Review* 35, no. 1 (October 1940): 35.

⁷²Gerteis, 49.

outnumbered and decided a surprise attack upon the rebel army would enable him to retreat to Rolla, Missouri.

Lyon's intent was to attack and destroy the Confederate Army, then retreat northeast from Springfield towards Rolla, Missouri. Lyon needed a location conducive to address his logistical problems as well as his recruitment issues. Lyon was miles from the end of the rail line in Rolla where his supplies originated. In addition, a portion of his outnumbered command was 90-day recruits whose enlistments would soon expire.⁷³ Lyon's strategy would instigate one of the bloodiest engagements of the entire Civil War about casualty rates.

Lyon devised a risky plan: split his already outnumbered force in the face of the enemy. Lyon send Sigel's brigade south from Springfield while Lyon took his force southwest down the Wire Road. Sigel was to envelop the allied Missouri State Guard and Arkansas Confederate force and attack from the south while Lyon held the rebels from the north. Lyon met the combined forces of Price and McCulloch at Wilson's Creek approximately ten miles southwest of Springfield, Missouri along the main telegraph road between Springfield and northwest Arkansas. Lyon's force took position on a prominence later named "Bloody Hill" and achieved surprise in the attack. Price's men were repelled as they attacked Lyon's forces in three major assaults upon Lyon's position. However, McCulloch's forces routed Sigel at their flank and rear, which allowed the rebels to squarely focus on Lyon's forces. The Federal situation worsened when at approximately 9:30 A.M., Lyon was killed by a single shot through the chest. Lyon attempted to lead the 2nd Kansas into a gap in the Federal lines when "a murderous sheet of fire erupted from

⁷³OR, series 1, vol. 3, 58.

the thick brush in Lyon's immediate front." A large caliber bullet entered the left side of Lyon's chest and as he attempted to dismount, fell dead from his horse.⁷⁴ With Sigel routed and Lyon dead, the command fell to Major Samuel D. Sturgis. The battle continued for another hour but Sturgis realized the battle's outcome was a foregone conclusion. The Federals were low on ammunition and Sturgis' only option was a retreat to Springfield.

Shelby's actions at the Battle of Wilson's Creek were not to the significance as Carthage. Rains directed Shelby's cavalry to the left flank with orders to flank Lyon's right. Unlike Carthage, this was not flat, wide-open ground. The trees, uneven terrain, and underbrush made it slow going for Shelby's men. Shelby's men were without artillery support and found the fighting more difficult. Although Shelby's cavalry actively sought Lyon's flank, Rains' report does not mention any decisive cavalry action on the Federal right. Shelby's actions were not critical to the outcome of Wilson's Creek as they were at Carthage.

The only reference in the *Official Records* to cavalry action on Lyon's right flank was noted by Capt James Totten, 2nd U.S. Artillery, in his report dated August 19, 1861. In that report he stated,

The enemy tried to overwhelm us by an attack of some 800 cavalry, which, unobservable, had formed below the crests of the hills to our right and rear. Fortunately, some of our infantry companies and a few pieces of artillery from my battery were in position to meet this demonstration, and drove off their cavalry with ease. This was the only demonstration made by their cavalry, and it was so *effete* and ineffectual in its force and character as to deserve only the appellation of child's play. Their cavalry is utterly worthless on the battle-field.⁷⁵

⁷⁴Phillips, 255.

⁷⁵*OR*, series 1, vol. 3, 74.

What Totten no doubt observed was not the worthlessness of Shelby's cavalry on the battlefield, but the effects of the harsh terrain on the employment of the cavalry. Shelby had proven his effectiveness at Carthage but learned a valuable lesson at Wilson's Creek. "At Carthage he had seen what cavalry could be made to do, and at Wilson's Creek he saw what it could not be made to do."⁷⁶ His Wilson's Creek experience no doubt made him reassess how his cavalry could best be utilized. He had seen how easily he could move from southwest Missouri to the Missouri River and back on a recruitment mission, using speed as his ally. He saw how flat terrain had been to his advantage in maneuvering at Carthage. Here he saw, for the first time, how unforgiving terrain took away his speed and surprise, which were his best tools.

Price Returns to Central Missouri

After the Confederate victory at Wilson's Creek and their discovery of Lyon's death, Price determined to capitalize on the two recent victories. He believed an attack into the heart of Missouri would ensure Missouri's place in the Confederate States. Price and McCulloch parted ways in Springfield, as McCulloch was not interested in taking his forces into the heart of Missouri. Price then directed Shelby to ride with his cavalry company back to the Missouri River Valley for further recruitment. Shelby must have been more than eager to show his mettle after a mediocre showing at Wilson's Creek.⁷⁷ His orders from Price were to "recruit, and annoy the enemy in every possible manner, and keep alive the spirit of resistance by constant and unceasing efforts." This raid north

⁷⁶O'Flaherty, *General Jo Shelby*, 85.

⁷⁷John Newman Edwards, *Shelby and His Men* (1867; repr., Waverly, MO: General Joseph Shelby Memorial Fund, 1993), 41.

to his old stomping grounds would foreshadow his raid made in the fall of 1863 as he fought minor skirmishes all along the way.⁷⁸

Price's next move was on Lexington, Missouri, deep in the heart of Little Dixie. The Federal Army, severely crippled by Wilson's Creek, retreated to Rolla, Missouri. However, not all was one-sided. The Federals established a garrison in Lexington in July 1861, which by mid-August consisted of the 23rd Illinois Regiment of Volunteers under Colonel James A Mulligan and two regiments of Illinois and Missouri Volunteers – about 3,500 total strength. Price initially commanded roughly 4,500 armed men and seven pieces of artillery, veterans of Wilson's Creek.⁷⁹ Price no doubt received numerous recruits while on his march north and in the heart of Little Dixie. Price's new volunteers, coupled with reinforcements, swelled his command to roughly 10,000 men.⁸⁰ Price arrived with his advanced guard on September 11, 1861, but did not commence his main assault until September 18.⁸¹ After a three-day assault upon the Federal entrenchments, the secessionist force utilized an irregular tactic. The rebels soaked hemp bales in water and rolled this ingenious barrier ahead of their lines. The Missouri State Guard forced the unconditional surrender of the Lexington, including Colonel Mulligan.⁸² Casualties were relatively light in what one of Price's division commanders called a "bloodless

⁷⁸O'Flaherty, *General Jo Shelby*, 89.

⁷⁹John C. Moore, *Confederate Military History, Missouri. Volume XII*, ed. Clement A. Evans (1899; repr., Wilmington, NC: Broadfoot Publishing Company, 1987), 64-65.

⁸⁰Castel, 51.

⁸¹Monaghan, 190-191.

⁸²OR, series 1, vol. 3, 191.

victory.”⁸³ For his part of the Battle of Lexington, Edwards simply commented that, “Shelby was distinguished for his untiring energy and intelligence during the investment, and furnished General Price valuable information in regard to the movements of various detachments marching to relief of Lexington, and also in watching and guarding the neighboring ferries on the Missouri River.”⁸⁴

Price now had access to the recruiting grounds north of the Missouri River. However, he was unable to capitalize on this advantage or the recent victory. Price did not have the luxury of robust supply lines from Arkansas. Furthermore, he faced a building threat from massed Union Forces, which ruled out any resupply opportunities from the Missouri River. Price retreated south towards Springfield in the face of the overwhelming federal threat from St Louis under Major General John C. Fremont and the Federal force mobilized at Fort Leavenworth, Kansas. Shelby was employed in the traditional manner of guarding the supply trains as Price moved south.⁸⁵

The Jackson government was now situated in the remote southwestern corner of Missouri, far from the capital in Jefferson City. An article of secession was passed by the exiled pro-secession Missouri legislature in Neosho, Missouri on October 31, 1861. Although controversial as to whether it was valid, or the Neosho legislature had the power to do this, the Confederate government recognized Missouri’s secession. With the secession question now resolved in the mind of Governor Jackson, Missouri could now send representatives to the Confederate national government in Richmond. Now Price’s

⁸³OR, series 1, vol. 3, 194.

⁸⁴Edwards, 43.

⁸⁵O’Flaherty, *General Jo Shelby*, 93.

Army could be used in the service of and receive support from the Confederate government.

In late autumn of 1861, with Price encamped at Osceola, Missouri, Shelby conducted his third recruitment trip to the Missouri River Valley, focusing on Lafayette County.⁸⁶ Though nothing remarkable outside the normal recruitment speeches and benign harassment took place, one humorous mention by Major George C. Marshall, 2nd Missouri Cavalry, was reported on December 14, 1861. On December 9, 1861, while in camp less than 2 miles from Waverly, “Joseph Shelby brought his company down that night to try to annoy us by firing at our pickets and to try to scare us by bombarding us with a 10-inch mortar loaded with mud. Lieutenants Kelly's and Gordon's companies were called out, and soon scattered them and silenced their formidable battery.” The next day, Marshall’s cavalry moved into Waverly and underneath floorboards in Shelby’s store, located nine kegs of powder and the mortar used the previous night.⁸⁷

Pause must be made to describe the conditions Shelby’s men endured while campaigning with him. Major Joseph Mills Hanson gave a quite lengthy yet relevant description of Shelby’s travels. These conditions undoubtedly would be magnified by Shelby’s raid in the fall of 1863. Hanson wrote,

In the intervals between battles Shelby and his company returned three times to Lafayette County in the hope of recruiting a regiment . . . Few men were gathered, but every one of these expeditions to the Missouri River was a nightmare of danger and exertion which none but the hardiest could endure. For days and nights the raiders marched, almost without rest, hunted on every side by hostile columns; snatching a few brief moments with kindred and friends when the home country was reached, and fighting there to wrest from the enemy the arms,

⁸⁶Edwards, 46.

⁸⁷*OR*, series 1, vol. 8, 35.

equipment, and ammunition to replenish exhausted stocks and supply recruits. Then by similar nerve-straining marches, they made their way back over rough and obscure roads, beset by foes still more thoroughly aroused, to arrive in Arkansas on their last ounce of strength.⁸⁸

Shelby was honing his traveling, foraging, and skirmishing skills on these three recruiting trips to central Missouri. Each trip gave him more awareness of the terrain, roads, river crossings, foraging locations, as well as those friendly to his cause. Shelby's men gained priceless experience and knowledge. Shelby's escape from central Missouri in 1863 was partially enabled by these rehearsals.

The disposition of troops did not differ considerably since the beginning of hostilities. Price was encamped in southwest Missouri with a growing Army and the Federals were massed in St. Louis, Missouri and Fort Leavenworth, Kansas. Fremont received mounting pressure from Washington to expel for good the Confederate forces and to quell the growing guerilla activity. The bushwhacker style of fighting primarily confined to the Missouri/Kansas border prior to 1861 now manifested itself statewide.

Decisive Campaign Against the Rebels

Following the death of Lyon, command of the Department of the West was given to Major General John C. Fremont. In January 1862, President Lincoln relieved Fremont and placed General Henry Halleck in command with Brigadier Samuel Curtis given command of the Army of the Southwest, a new district encompassing southwestern Missouri. Halleck envisioned a winter campaign to drive Price and his rebels permanently out of Missouri and prevent Arkansas Confederates from threatening Missouri. Curtis established his headquarters in Rolla. "Curtis' mission was simple: to

⁸⁸O'Flaherty, *General Jo Shelby*, 95-96.

launch an offensive and defeat, disperse, or destroy Price's Missouri army." Price retreated into Arkansas once he received word of Curtis' massed forces in Rolla.⁸⁹

Halleck pressed upon Curtis an unorthodox strategy to launch a winter campaign. This required long logistics trains over rough Ozark terrain past Rolla, the end of the railroad line. Price, however, set in motion the as of yet unapproved winter campaign by moving his Missouri forces from Osceola to Springfield. Halleck ordered Curtis to pursue Price fearing Price would join McCulloch's army in Arkansas and have an opportunity to resupply his army.⁹⁰

On February 13, 1862, Curtis' Army of the Southwest recaptured Springfield and the next day pursued Price down the Telegraph Road, through the battlefield along Wilson's Creek where the two armies bloodied each other the previous August. Curtis pushed as far south as Sugar Creek east of Bentonville, Arkansas. Curtis ordered a defensive position facing south along Sugar Creek, which had a two-fold effect. Curtis did not want to outrun his already overstretched supply lines. The Army of the Southwest was over 200 miles from their supply depot at Rolla, further than both Curtis and Halleck had anticipated. He further saw Sugar Creek as a suitable location to establish a formidable defense against any attempted Confederate push back towards Missouri. "Curtis had been impressed by the valley's defensive properties" and would tell his brother "at this place I knew I could make the best fight."⁹¹

⁸⁹William L. Shea and Earl J. Hess, *Pea Ridge: Civil War Campaign in the West* (Chapel Hill, NC: University of North Carolina Press, 1992), 5

⁹⁰*Ibid.*, 9.

⁹¹Shea and Hess, 52.

Major General Earl Van Dorn, Confederate Commander of the Trans-Mississippi District, marched his combined force including McCullugh, Price, and Indian forces under General Albert Pike from Elm Springs, Arkansas to the northwest. Van Dorn's first objective was Bentonville, Arkansas, in an attempt to outflank the Federals and in the process cut Curtis' supply lines leading back to Rolla.⁹² Upon discovery of this movement, Curtis turned his army 180 degrees to meet this threat and fought a divided Rebel force at Pea Ridge on March 7-8, 1862. Curtis held his position, but the Confederates remained between him and Rolla, on his line of communications astride the Telegraph Road. Unable to defeat the Federal forces on the 7th due to the loss of two key commanders, including McCulloch, Van Dorn planned to attack on March 8. Van Dorn successfully cut Curtis' supply lines when he placed his force north of Curtis, between the Federals and Missouri. However, in doing so Van Dorn also cut himself from his own supply trains and his lines of communication to the south. When Curtis attacked Van Dorn's forces on the morning of the 8th, the rebel force had nearly exhausted their ammunition, most importantly artillery ammunition, needed to defeat the Federals. In the face of Curtis' attack across a nearly mile-wide front, the Rebels fled. The Federals were victorious in arguably the most important battle to decide the fate of Missouri. The defeat at Pea Ridge, combined with Van Dorn's forces redeployed to the east bank of the Mississippi River, secured Missouri for the Union.⁹³

⁹²John M. Herrell, *Confederate Military History Extended Edition, Arkansas*, vol. 14, ed. Clement A. Evans (1899; repr., Wilmington, NC: Broadfoot Publishing Company, 1988), 71.

⁹³Herrell, 270.

At Pea Ridge, Shelby was utilized in the more traditional cavalry role, one that he had probably grown to hate in comparison to his raids into central Missouri. In Rains' after-action report, he stated that, "Captain Shelby acted with his well-drilled company during the day with Colonel Gates, on the extreme left, where he was much exposed and did efficient service. In the evening his men were dismounted and served under Lieutenant-Colonel Bowman in the gallant charge across the field."⁹⁴ Edwards would only add that on Van Dorn's retreat eastward from Elkhorn Tavern, Shelby's cavalry maintained the rear-most position, "turning suddenly during the day to drive back frequent dashes of Federal cavalry."⁹⁵ Shelby was now on the retreat southward into Arkansas, Missouri having been firmly ripped from any reasonable hope of Confederate control.

Price's army was also redeployed east of the Mississippi river. Shelby agreed to accompany Price to Corinth, Mississippi. However, this meant they were to give up their horses and his company became infantry. "He agreed to take his company to Corinth, but with the proviso that they be allowed to return to Missouri whenever they saw fit."⁹⁶ His time across the Mississippi was quite uneventful but he saw an opportunity to return to the cavalry. A colonel's nomination was sitting on the desk at the Confederate War Department. If approved, the only proviso was Shelby had to return to Missouri to recruit a regiment.⁹⁷

⁹⁴OR, series 1, vol. 8, 328.

⁹⁵Edwards, 50.

⁹⁶O'Flaherty, *General Jo Shelby*, 103.

⁹⁷O'Flaherty, *General Jo Shelby*, 104.

The situation in Missouri went from bad to worse after the defeat of the Confederate Forces at Pea Ridge. Guerilla warfare became the order of the day as bands of Confederate sympathizers, or “bushwhackers,” continued to loot and burn any suspected Union supporter. Kansas “jayhawkers,” on the other hand, whether in Federal service or not, used the situation as an excuse to conduct the same activities of looting, burning, arbitrarily freeing slaves, and generally causing as much mayhem as the bushwhackers.⁹⁸ In this environment, something had to be done.

General Halleck issued an order in December 22, 1861, stating that insurgent rebels were “guilty of the highest crime known to the code of war and the punishment is death. Anyone caught in the act will be immediately shot, and any one accused of this crime will be arrested and placed in close confinement until his case can be examined by a military commission, and, if found guilty, he also will suffer death.”⁹⁹

Further setting a perfect stage for Shelby to recruit a regiment, Major General Halleck issued General Order No. 2 on March 13, 1862. In that order, Halleck made no mistake as to how guerillas would be treated.

Evidence has been received at these headquarters that Maj. Gen. Sterling Price has issued commissions or licenses to certain bandits in this State, authorizing them to raise “guerrilla forces,” for the purpose of plunder and marauding. General Price ought to know that such a course is contrary to the rules of civilized warfare, and that every man who enlists in such an organization forfeits his life and becomes an outlaw. All persons are hereby warned that if they join any guerrilla band they will not, if captured, be treated as ordinary prisoners of war, but will be hung as robbers and murderers. Their lives shall atone for the barbarity of their general.¹⁰⁰

⁹⁸Sellmeyer, 29.

⁹⁹*OR*, series 1, vol. 3, 464.

¹⁰⁰*OR*, series 1, vol. 8, 612.

Then on July 22, 1862, Major General John M. Schofield, in conjunction with the Pro-Union Missouri Governor Gamble, issued General Order Number 19, which “required every able-bodied man capable of bearing arms and subject to military duty” to report for duty in the Enrolled Missouri Militia. The original intent, to clean guerrillas out of Missouri, had the reverse impact because it drove fence-sitting neutrals to become guerillas.¹⁰¹ Between these two orders, a Missourian had to decide where their loyalty lay. It was no longer legal to remain “neutral” and if they did, it was at their own peril. The entire state would soon be blanketed with Missouri Militia troops, loyal to the Federal government. For the remainder of the war, Missourians would have to deal with occasional battles or skirmishes but also “less threatening, but more frequent and disruptive minor encounters with three ill-defined groups: guerrillas, bushwhackers, and jayhawkers. These marauding Southern independents and Radical Unionists frequently kept Missouri in a state of unrest and for Missourians, I fear for their lives and property.”¹⁰²

Shelby saw his opportunity to return to the cavalry. He was not content to be an infantryman east of the Mississippi River and he knew his captain’s commission expired in June. Longing for Missouri and his family west of the Mississippi, Shelby requested and was granted permission from the War Department to return to Missouri and raise a regiment of cavalry.¹⁰³ He set out for Missouri by way of Arkansas.

¹⁰¹Sellmeyer, 29.

¹⁰²James A. Hamilton, “The Enrolled Missouri Militia, Its Creation and Controversial History,” *Missouri Historical Review* 69, no. 4 (July 1975): 414.

¹⁰³Edwards, 56.

Shelby's experiences would change dramatically from his years as a captain versus his commission of a colonel. Now Shelby would be granted much more autonomy and would not see his cavalry utilized simply to flank a line on a battlefield or guard supply trains. Shelby would now demonstrate his raiding skills and show that he was every bit the cavalryman in the Trans-Mississippi theater, establishing parity with John Hunt Morgan in Tennessee and J. E .B. Stuart in the Virginia.

CHAPTER 3

SHELBY'S IRON BRIGADE

The summer of 1862 revealed Missouri's solid footing as a Union stronghold with little hope for any decisive conventional action to bring the state into the Confederacy. The Confederate Army in Arkansas was not of any assistance as it was virtually non-existent with the exception of "a handful of cavalry regiments and a few hundred irregulars."¹⁰⁴ This scant force was all Major General Thomas C. Hindman Jr., newly appointed interim commander for the Confederate Trans-Mississippi Army, had available in Missouri, Arkansas, and the Indian Territory. Hindman worked furiously to raise an army to replace what Van Dorn had taken east of the Mississippi after his defeat at Pea Ridge.

Shelby's men were east of the Mississippi, where he believed military glory was not to be found. Shelby's dismounted company was relegated to guarding a bridge along the Tuscumbia River near Corinth, Mississippi, "the only thin line of wakeful and vigilant sentinels between the enemy and the sleeping army."¹⁰⁵ Shelby no doubt viewed this duty as a bore compared to his visions of the future once his commission as colonel returned from Richmond. "With the stars of a Confederate colonel not upon his collar but in front of his eyes, Shelby bade farewell to the eastern theater of the war as soon as he

¹⁰⁴William L. Shea, *Fields of Blood: The Prairie Grove Campaign* (Chapel Hill, NC: University of North Carolina Press, 2009), 2.

¹⁰⁵Edwards, 55.

received his authority from the War Department to return to Missouri and recruit a regiment.”¹⁰⁶

Shelby and his company departed Mississippi for Arkansas by way of the river crossing at Helena. Anxious to depart for Missouri he intended to embark toward Little Rock via the Arkansas River to begin his recruiting raid into Missouri. Shelby reached Van Buren, Arkansas, with Shelby’s Rangers, the core of his future Iron Brigade. Shelby received the long-awaited permission from Brigadier General James Rains who also sent Colonel Jeremiah V. Cockrell into Missouri with the same recruiting mission. Shelby outfitted his men with whatever accouterments the meager quartermaster stores could provide, which ranged from saddles to sheepskins for saddles, and leather to rope for bridles.¹⁰⁷

Two hours before departing for the Missouri River valley, Shelby mustered his company into Confederate service for the duration of the war, should it take 20 years.¹⁰⁸ Departing from Van Buren, Arkansas, Shelby led his men through Cane Hill, Arkansas, skirmished against Major Hubbard of the First Missouri Cavalry at Newtonia, and then proceeded north toward Lafayette County, Missouri.¹⁰⁹ Shelby and Cockrell separated at the Grand River, presumably in Bates County, Missouri.¹¹⁰ Shelby proceeded to Waverly, Missouri, where Shelby reported he recruited 1,000 men in four days, although

¹⁰⁶O’Flaherty, *General Jo Shelby*, 105.

¹⁰⁷Ibid., 111.

¹⁰⁸Edwards, 70.

¹⁰⁹O’Flaherty, *General Jo Shelby*, 112.

¹¹⁰Edwards, 71.

Shelby's adjutant, Major John Edwards, reported only one day.¹¹¹ Shelby's rousing speech to the local population resonated with those who viewed themselves as subjugated because of the controversial General Orders organizing the Enrolled Missouri Militia. Shelby passionately declared in the usual rhetoric and enthusiasm of the day.

Through the providence of an Almighty and all-seeing God, I have reached here to alleviate in some measure your great distress. I am duly commissioned by the Confederate Government to recruit a cavalry regiment for the war and to make all arrangements necessary in connection with my government as one of its officials. Too long you have bowed your heads in quiet submission. Too long you have remained silently watching the red wing of revolution sweeping over your state. Too long have you waited for something to turn up, for the war to cease, for foreign intervention. Those who would be free must strike the first blow. We missed you at Carthage, we missed you at Springfield, we missed you at Elkhorn, when death's gathering gloom was spreading its dark wings, and the blood of your blood and flesh of our flesh went down on the sod, their backs to the field, their feet to the foe.¹¹²

Shelby met a highly receptive cluster of potential recruits in Waverly as southern sentiment ran high in the Missouri River valley. Lizzie Brannock, in a letter to her brother, said, "In some cases, women were more ideologically committed than their male friends and kin whom they pushed into the war." Brannock's letter expressed this sentiment and disdain for the Republicans who were "abolitionist rebels who had captured and destroyed the dear old government with all its rights and privileges." Her husband later enlisted under Shelby's command on August 15 and had done so "rather than submit to an oath and enlist in the local Union militia."¹¹³

¹¹¹OR, series 1, vol. 13, 979.

¹¹²O'Flaherty, *General Jo Shelby*, 114-115. No citation for this quotation is given by O'Flaherty nor is there any record discovered anywhere of its authenticity. The text of Shelby's speech is also absent in John Newman Edwards' highly romanticized memoirs.

¹¹³Michael Fellman, *Inside War: The Guerilla Conflict In Missouri During the Civil War* (New York, NY: Oxford University Press, 1989), 194.

Shelby reached his recruiting goals in Waverly and departed central Missouri on 18 August 1862.¹¹⁴ However, Cockrell had engaged the 6th Kansas Cavalry in Lone Jack, Missouri, on August 16, once again stirring Federal troops. Cockrell's command forced the Federals from the town, captured two Federal cannon, but once again was unable to capitalize on the victory. The Confederates were significantly outnumbered once the Federals moved forces from central Missouri towards another Rebel incursion.¹¹⁵ Major General James G Blunt, Commander of the Department and Army of Kansas, marched his command "day and night" from Fort Scott, Kansas to Lone Jack, Missouri in order to defeat the Rebel force massed at that location only to discover that he was a day late.¹¹⁶

Shelby's men also marched day and night following Cockrell "with speed as great and anxiety as heavy."¹¹⁷ Federal forces were on full alert. Blunt, with the 6th Kansas Cavalry and 3rd Wisconsin Infantry, pursued the Rebels from Lone Jack and skirmished with Shelby's forces near Lamar, Missouri, at Coon Creek on August 24. Shelby sustained no casualties save valuable horses, putting many of his men on foot on their escape to Arkansas. Blunt's command sustained eleven casualties and retreated from the field.¹¹⁸

¹¹⁴OR, series 1, vol. 13, 979.

¹¹⁵Ibid., 236; Gerteis, 147.

¹¹⁶Wiley Britton, *Memoirs of the War of the Rebellion, 1863* (1882; repr., Lincoln, NE: University of Nebraska Press, 1993), 137.

¹¹⁷Edwards, 75.

¹¹⁸OR, series 1, vol. 13, 258.

In six days, Shelby's men travelled approximately 125 miles from Waverly to Lamar, a great distance considering the presence of Federal cavalry from Fort Scott, Kansas, and Springfield, Missouri, searching for the rebels. Shelby "had wisely determined to leave nothing to chance that might be accomplished by energy."¹¹⁹ This hard riding took its toll on both horses and men and was typical of Shelby's movements. This incursion into Missouri foreshadowed an even more difficult raid one year later. Edwards wrote an articulate description of what it was like to ride with Shelby:

To those unacquainted with the effects produced by loss of sleep, the sensations would be novel and almost incredible. About the third night an indescribable feeling settles down upon the brain. Every sound is distinct and painfully acute. The air seems filled with exquisite music; cities and towns rise up on every hand, crowned with spires and radiant with ten thousand beacons. Long lines of armed men are on every side, while the sound of bugles and harsh words of command are incessantly repeated. Often, upon almost boundless prairies, destitute of tree or bush, the tormented dozer turns suddenly from some fancied oak, or mechanically lowers his head to avoid the sweeping and pendent branches. Beyond the third night stolid stupor generally prevails and an almost total insensibility to pain. Soldiers in Shelby's division have been known to go incurably mad, and not a few cases of hopeless idiocy have resulted from his terrible raids. On the march men have dropped from the saddle unawakened by the fall, while on more than a dozen occasions his rear guard has pricked the lagging sleepers with sabers until the blood spouted, without changing a muscle of their blotched, bloated faces.¹²⁰

A similar indication was expressed by Blunt to Schofield in his report on the skirmish at Lamar. Blunt wrote, "So hard were they pursued that we passed many of their horses lying dead by the road-side, the men taking to the brush when they could not obtain other horses to mount. The road was strewn with hats and caps, which the rebels

¹¹⁹Edwards, 75.

¹²⁰Ibid.

had dropped from their heads while sleeping in the saddle.”¹²¹ Perhaps no voice spoke as loudly as the common cavalryman in Shelby’s command when Jacob Stonestreet stated, “No man could ride with Shelby for four years and be worth his salt at anything afterward. I did it and I know.”¹²² Despite a skirmish with Blunt’s forces at Coon Creek and complete exhaustion, Shelby’s newly recruited regiment escaped south of the Missouri/Arkansas line.

Shelby’s regiment arrived in Arkansas but was ordered back north into Missouri to report to General Hindman on Elkhorn Creek near modern day Goodman, Missouri. While in camp on Elkhorn Creek, Hindman placed three regiments, Shelby’s, Colonel Upton Hays’ Missourians, and Colonel John T. Coffee’s new recruits, under the command of Colonel Shelby.¹²³ Hays had less than a month to live, as he would not survive the upcoming engagement at Newtonia. Shelby now commanded a brigade with a total strength at 2,319 men.¹²⁴

Shelby’s Brigade is Formed

The Shelby Brigade, as it was initially called, was formed and fought for the first time as a unit at Newtonia, Missouri, during the last week of September 1862.¹²⁵ However, before his brigade became effective, Shelby had to solve the difficult task of

¹²¹OR, series 1, vol. 13, 258

¹²²O’Flaherty, *General Jo Shelby*, 107; Jake Stonestreet to a reporter, *Kansas City Star*, February 14, 1897.

¹²³OR, series 1, vol. 13, 979

¹²⁴Ibid., 980.

¹²⁵O’Flaherty, *General Jo Shelby*, 123.

supplying his newly formed unit with everything from food to clothing and forage for their horses. Each regiment under Shelby's command remained active nearly day and night as they escaped from Missouri. As a result, the need for equipment, horses, and a steady supply of food plagued Shelby for the near future.

On the morning of September 30, 1862, two brigades of Federals from Blunt's Division from Fort Scott moved toward Newtonia under the command of Brigadier General Frederick Salomon. He received information the day prior from a captured cavalryman from Shelby's Brigade that the Confederates intended to occupy the town.¹²⁶ The nearby flourmill at Newtonia and lead mines near Granby were vital to both armies. However, Shelby's brigade was in more desperate need of these two vital assets.¹²⁷ The Federal forces engaged the Rebels from two directions at Newtonia at 7:00 AM. After three hours of fighting no clear advantage was achieved by either force. However, Shelby was able to flank the Federal position and send them into a twelve-mile retreat.¹²⁸ To Shelby, his only report of the action was rather un-descriptive when he stated "on the 30th we fought General [Frederick] Salomon at Newtonia, defeating him very badly."¹²⁹

Shelby's actions during the last week of September 1862, demonstrated his abilities as a cavalry commander and his natural aptitude to maneuver a brigade. Shelby had been utilized by Colonel Douglas H. Cooper, Confederate Commander of the 1st Chickasaw and Choctaw Rifles and overall Confederate Commander at Newtonia, to

¹²⁶OR, series 1, vol. 13, 287.

¹²⁷Ibid., 289.

¹²⁸O'Flaherty, *General Jo Shelby*, 126.

¹²⁹OR, series 1, vol. 13, 978.

conduct cavalry tasks such as screening movements, reconnaissance, flanking, and rear guard. Shelby gained the notice of Confederate generals Marmaduke and Hindman who would utilize his Brigade in the coming weeks at the battles of Cane Hill and Prairie Grove in Arkansas.

Just like most other Confederate victories in Missouri, the Confederates were unable to either maintain momentum or hold the territory gained in the aftermath of Newtonia. As the Confederate force retreated south into Arkansas, Shelby covered the retreat. With the Federals once again on full alert to a potential Confederate invasion of Missouri, Cooper took his Indian brigade back into the Indian Territory (modern day Oklahoma) and the Confederate forces retreated to Cross Hollows, Arkansas.¹³⁰

Shelby's men camped at Cross Hollows for nearly four weeks as they shod horses, foraged for supplies and food, and prepared to meet the rumored Federal movements into northwest Arkansas. Union cavalry conducted reconnaissance and probed the Rebel defenses almost daily. Shelby sent detachments to either scatter or capture Federal troopers in hopes of gaining information on the enemy's disposition and troop strengths.¹³¹ During this time, Shelby's command intersected with a notorious figure in the struggle for Missouri, William Clark Quantrill and his Missouri Bushwhackers. This force numbered 150 men, with Lieutenant William H. Gregg in command.¹³² Quantrill was in Richmond, Virginia, pleading with the Confederate

¹³⁰O'Flaherty, *General Jo Shelby*, 126.

¹³¹Edwards, 91.

¹³²O'Flaherty, *General Jo Shelby*, 133.

government for a commission as a partisan ranger. Quantrill stood on his reputation for his actions at Lone Jack and the assistance he gave in the Confederate victory.¹³³

The Prairie Grove Campaign

Shelby's brigade once again took the field in late November 1862 at the head of Brigadier General John S. Marmaduke's column. Marmaduke, commander of cavalry in Arkansas, was ordered to find and engage Blunt's Federals in northwest Arkansas while Major General Thomas Hindman attacked Brigadier General Francis J. Herron's Federals to the east. Hindman was fearful of a link-up between Blunt's forces near Fayetteville and Herron's force near Yellville. Shelby sent Gregg, in command of Quantrill's partisans, in a feint towards Missouri to screen the cavalry's movements.¹³⁴ Unbeknownst to Hindman and Marmaduke, Blunt's forces were further south than expected and Blunt's advance guard encountered Shelby's cavalry near Cane Hill.¹³⁵ Edwards relayed that "a young and beautiful girl, Miss Susan McClellan, a fair rebel living four miles west of Cane Hill, came tripping into camp, bareheaded and en dishabille, to inform Colonel Shelby that six hundred Federal cavalry, from the direction of Fort Smith had just passed her father's house to surprise him."¹³⁶ Shelby's cavalry was uncharacteristically caught off guard. Shelby later reported that "I must confess (though it may reflect somewhat upon myself), that the enemy, by his skillful management, fell upon me sooner than I

¹³³OR, series 1, vol. 13, 33.

¹³⁴Stephen B. Oates, *Confederate Cavalry West of the River* (Austin, TX: University of Texas Press, 1961), 92.

¹³⁵O'Flaherty, *General Jo Shelby*, 135-136.

¹³⁶Edwards, 96-97.

would have desired, considering that a portion of our division was encamped some distance to my rear and I had but little time to give them the notice required.”¹³⁷

What transpired over the next twenty-four hours at Cane Hill would solidify Shelby’s reputation as a gifted and unconventional cavalryman. A running fight ensued once Marmaduke realized he could not hold while outnumbered and outgunned against Blunt’s 5,000 men and their longer-range artillery. Marmaduke ordered Shelby conduct a rear-guard action to protect the retreat south towards the Boston Mountains. The rugged and steep terrain was not conducive for Shelby’s men to form line of battle to face Blunt and enable Marmaduke’s retreat. Shelby decided on a rather unorthodox method to hold off Blunt long enough to safely escape. Shelby reported:

The enemy pushing us about this time with all the force he could urge on, and the ground being of such a nature as not to allow us to form by regiments or squadrons, I was compelled to detach companies and form them on both sides of the road, receive and fire on the enemy, load, form, and reform, using in that manner every company in the regiments of this brigade. We fought them in this manner about three hours, never once allowing them to reach our rear in sufficient numbers to capture any of the men.¹³⁸

Shelby deployed and orchestrated the thirty companies of his regiment in a brilliant maneuver that no doubt prevented the defeat or capture of Marmaduke’s cavalry. Shelby proved his abilities and value to Marmaduke, proved his colonel’s commission was well deserved, and foreshadowed unconventional moves that would serve him well in his Missouri raids.

Marmaduke dispatched a courier to Blunt’s lines at the end of the day’s engagement in order to tend to dead and wounded. Blunt, concerned that the Rebels

¹³⁷*OR*, series 1, vol. 22, part 1, 55.

¹³⁸*Ibid.*, 57.

would kill any wounded on the battlefield, agreed although he thought it a trick to allow the clean escape of Marmaduke's command.¹³⁹ Marmaduke and Shelby retreated to Dripping Springs, Arkansas, and dispatched a message to Hindman, requesting permission to retreat further to Fort Smith. Hindman refused the request and ordered Marmaduke to hold his current position at the north side of the Boston Mountains. Blunt, on the other hand, retreated north to the vicinity of Cane Hill, having advanced south approximately twelve miles in his running fight with Shelby. Hindman did not intend to allow Blunt and Herron to remain in Arkansas and sent a dispatch to Marmaduke requesting information about road networks. However, Hindman was ignorant of Herron's retreat from Yellville, Arkansas, to Springfield, Missouri.

Hindman departed to reinforce Marmaduke, push Blunt out of Arkansas, and if possible, invade southwestern Missouri.¹⁴⁰ The Arkansas government, on the other hand, was not as optimistic as Hindman. The Arkansas legislature passed a resolution on December 1 that authorized the destruction of public property in Arkansas, should the governor of the state deem it necessary, to prevent it from falling into the hands of the "public enemy."¹⁴¹

Hindman once again ordered Marmaduke to move north from Dripping Springs, attack Blunt, and keep his attention so Hindman could flank Blunt from the east. Hindman changed his plan while on the march, keeping his army consolidated with Shelby's cavalry once again in the lead. The only known possible answer to Hindman's

¹³⁹*OR*, series 1, vol. 22, part 1, 46.

¹⁴⁰*Ibid.*, 900.

¹⁴¹*Ibid.*, 901.

change of mind was a dispatch sent to him dated December 6. This dispatch notified Hindman of Herron's departure from Springfield, Missouri, south along the telegraph road, to reinforce Blunt. No doubt, Hindman received this dispatch but whether in time to adjust his plan for the engagement at Prairie Grove on December 7 is questionable.¹⁴²

Blunt received word that Hindman and Marmaduke were consolidating forces. A local paper in White Cloud, Arkansas published a dispatch from Blunt on December 4, which announced he knew the location and disposition of Hindman's combined force.¹⁴³ Blunt requested reinforcement from Herron as he estimated Hindman's combined force to be 25,000.¹⁴⁴

Hindman proceeded north up the Wire Road to attack Blunt. While in the advance, Shelby encountered Captain Samuel Crawford's battalion from the First Kansas Cavalry in Blunt's Division on December 5.¹⁴⁵ Shelby's advance "drove him back in great confusion"¹⁴⁶ However, Blunt no doubt was now aware the Confederates were on the move up the Wire Road.

Hindman formulated a plan to prevent a consolidation of Heron's and Hindman's forces. Hindman ordered Marmaduke to maneuver to the northeast up the Maysville Road on Blunt's left, turn his lines, dislodge him from Cane Hill and proceed northeast in

¹⁴²OR, series 1, vol. 22, part 1, 902.

¹⁴³Robert Collins, *General James G. Blunt: Tarnished Glory* (Gretna, LA: Louisiana: Pelican Press, 2005), 92.

¹⁴⁴OR, series 1, vol. 22, part 1, 70.

¹⁴⁵Shea, 117.

¹⁴⁶OR, series 1, vol. 22, part 1, 148-149.

order to prevent Heron from reinforcing Blunt.¹⁴⁷ On December 7, Shelby's Brigade departed at 3 a.m. with orders to find Herron and attack him. First contact occurred just before sunrise when Shelby made contact with the Seventh Missouri Cavalry Volunteers near the Illinois River, north of the Prairie Grove Church.¹⁴⁸ A sharp, three-mile running fight ensued as Shelby routed Herron's advance. Shelby travelled with a less than adequate escort and was temporarily captured by Major Hubbard and a small contingent of cavalry. This predicament was temporary as Major Benjamin Shanks, commander of Shelby's advance guard, encountered the Federals and took Major Hubbard and his cavalry prisoner along with several Federal wagons full of food, ammunition, and clothing.¹⁴⁹ Shelby's brigade once again demonstrated their propensity for surprise. With the exception of the temporary capture of Shelby, and Shanks' quick subsequent action, the assignment was as near perfect as could be expected. Shelby realized any further pursuit of Herron's advance guard would be "not only imprudent but dangerous" and retreated southwest to find Hindman.¹⁵⁰

Hindman deployed his main body on an east-west ridge south of Crawford's Prairie and faced the approach of Herron's command from Springfield. Shelby's men, minus four companies, were dismounted into line of battle on the eastern flank, Hindman's right.¹⁵¹ They remained at this location during Huron's three assaults upon

¹⁴⁷O'Flaherty, *General Jo Shelby*, 151.

¹⁴⁸*Ibid.*, 153.

¹⁴⁹Edwards, 117-118.

¹⁵⁰*OR*, series 1, vol. 22, part 1, 150.

¹⁵¹*Ibid.*, 147.

the Confederate position, at times near hand-to-hand.¹⁵² Blunt's force from the southwest near Cane Hill arrived at 2:00 p.m. and the focus became a contest between Blunt and Hindman's left. Only the late hour and long shadows ended the fierce engagement.¹⁵³ Although Blunt and Herron were unable to dislodge the Confederates from their defensive position, Hindman's location was unsustainable.

Hindman's men were nearly out of ammunition and were without rations. Captured commissary wagons were sent too far south to resupply and feed the men. Hindman had no choice but to retreat south with Shelby, remounted, once again tasked as the rear guard. Shelby's men lit fires on the ridgeline to indicate the Confederates were still in camp. However, Hindman removed the majority of his command under cover of darkness and quiet enough to complete the illusion.¹⁵⁴ Only burial details remained from Hindman's command.

Burial parties were organized after a conference under a flag of truce on December 8. As Confederate and Federal soldiers buried the dead from the previous day's engagement, a detachment from Shelby's brigade utilized the battlefield as a quartermaster store. Blunt did not approve as noted in a dispatch to Hindman on December 10, demanding that Shelby's actions, namely removing weapons left lying on the battlefield, cease.¹⁵⁵ This scavenging provided Shelby's men with "400 to 500 stands

¹⁵²Oates, 108.

¹⁵³Shea, 238.

¹⁵⁴Ibid., 71.

¹⁵⁵OR, series 1, vol. 22, part 1, 80.

of arms” used to augment scant Rebel resources.¹⁵⁶ Shelby’s men retreated from Prairie Grove by way of Dripping Springs, over the same route they traveled just days prior and then went into winter camp near Lewisburg in the Arkansas River Valley.¹⁵⁷ Blunt and Herron moved south, taking Van Buren, Arkansas, further pushing the Confederates towards Little Rock, Arkansas.

Shelby Raids with Marmaduke

In Little Rock, Hindman and Lieutenant General Theophilus Holmes, Commander of the Trans-Mississippi Department, discussed a cavalry raid into Missouri to remove pressure from the Confederate forces in Arkansas.¹⁵⁸ Marmaduke was ordered to take Shelby’s Brigade as well as Colonel James C. Monroe’s Arkansas cavalry, Colonel Emmett MacDonald’s Missouri Cavalry, and Colonel White’s Missouri Cavalry under the command of Colonel Joseph Porter.¹⁵⁹ Collins’ two-gun battery accompanied Marmaduke on this first raid but was not mentioned in the initial order of battle and only received a cursory mention in Marmaduke’s expanded report of February 1, 1863.¹⁶⁰

Marmaduke departed on December 31, 1862, from Lewisburg, in a northwestern direction. His orders were simple: “to strike the enemy in the rear or flank.”¹⁶¹ He determined to move in two columns to increase foraging opportunities for his nearly

¹⁵⁶OR, series 1, vol. 22, part 1, 153.

¹⁵⁷O’Flaherty, *General Jo Shelby*, 160.

¹⁵⁸Oates, 115.

¹⁵⁹OR, series 1, vol. 22, part 1, 196.

¹⁶⁰Ibid., 198.

¹⁶¹Ibid., 195.

2,400-man division. Upon reaching the Boston Mountains, Shelby and Marmaduke continued west while MacDonald and Monroe moved north, with instructions to rendezvous at Hartville, Missouri. It was nearly impossible for Marmaduke to communicate with his divided column given the terrain and primitive roads in northern Arkansas and Southern Missouri.

Marmaduke's column was engaged in two minor skirmishes during its march towards Springfield, an objective Marmaduke determined to attack due to its quantity of Federal supplies.¹⁶² His plan to surprise and attack Springfield was lost when Captain Milton Burch, Company H, 14th Missouri State Militia Cavalry captured two of MacDonald's men. Burch had requested permission to scout south of Ozark in search of guerillas when he encountered MacDonald's raiders. Burch notified the Federals of Marmaduke's approach towards Springfield with 6,600 men. The Federals were on alert and any chance of capturing Springfield was doubtful now that the 4th Enrolled Missouri Militia, under General Egbert Brown, had nearly twenty-four hours advance warning. "It would be hard to find a better example of reconnaissance or of initiative on the part of a junior officer than on this occasion."¹⁶³ The element of surprise was lost but Shelby and Marmaduke were unaware of this fact.

Marmaduke sent word to Porter to move towards Springfield to support the attack but Porter would not receive the dispatch until January 10. On the morning of January 8, Marmaduke, Shelby, and MacDonald attacked Springfield, Missouri from the south and a

¹⁶²*OR*, series 1, vol. 22, part 1, 196.

¹⁶³Paul M. Robinett, "Marmaduke's Expedition Into Missouri: The Battles of Springfield and Hartville: January, 1863," *Missouri Historical Review* 58, no. 2 (January 1964): 158.

“steady and determined” fight raged from around 10:30 a.m. until nightfall with the Federals gradually retreating on their right and center, burning buildings as they went.¹⁶⁴ The Federals took every possible precaution in the defense of the town as they utilized improved fortifications around the city present since August 1862. The Federals further armed every able-bodied individual and even armed those in a local hospital, earning that unit the nickname the “Quinine Brigade.” These units as well as soldiers from the 18th Iowa Volunteer Infantry, the 3d, 4th, and 14th Missouri State Militia Cavalry Regiments, and the 74th Missouri Enrolled Militia successfully defended the fortifications in the center of the city to meet the Rebel threat.¹⁶⁵

In Major General Samuel Ryan Curtis’ report to Major General Henry W. Halleck on the evening of January 8, Curtis reported that at nightfall the Confederates held the southwest portion of the town and with great perception stated, “They fight for bread.”¹⁶⁶ Marmaduke failed to take control of the Federal storehouses in Springfield and with Federal forces no doubt on the move to reinforce Springfield, decided to forego an attack on January 9. The next morning, Marmaduke assembled his command and marched towards Hartville, his original objective, to find Porter.¹⁶⁷

On January 9, Shelby led a column to the northeast up the Rolla Road. He, for once, was not relegated to covering a retreat. On January 10, Marmaduke’s command arrived at Marshfield and met Porter, who informed him that 2,500 Federal troops were

¹⁶⁴*OR*, series 1, vol. 22, part 1, 197.

¹⁶⁵Robinett, 159.

¹⁶⁶*OR*, series 1, vol. 22, part 1, 178-179.

¹⁶⁷Oates, 118.

on alert at Hartville.¹⁶⁸ MacDonald and Porter burned the fort in Marshfield, something Shelby became accustomed to on raids.¹⁶⁹ In addition, a welcome sight to Marmaduke, MacDonald's cavalry captured a Federal supply depot where it found much-needed shoes, clothing, and more importantly 1,600 pounds of flour.¹⁷⁰

The attack on Hartville on January 11 was not unlike the attack on Springfield with Collins' Battery utilized to soften the Federal garrison under command of Colonel Samuel Merrill. His force of approximately 700 men included his own 21st Iowa Infantry and elements of the 99th Illinois Infantry, 3d Iowa Cavalry, 3d Missouri Cavalry, and Battery L, 2d Missouri Artillery.¹⁷¹ Marmaduke's assault upon Hartville lasted several hours and ended with the Federals in full retreat. However, this outcome came at a great cost as MacDonald was killed and Porter severely wounded. Marmaduke realized these demoralizing losses and Federal forces on alert in Lebanon and Springfield left him no option but to retreat. His division arrived in Batesville, Arkansas, on January 25 with nothing to show for their actions.¹⁷²

The retreat from Hartville to Batesville was a familiar endeavor for Shelby's troopers. "The retreat was one of acute suffering. A raging storm on January 19 lasted ten hours, leaving ice and huge snowdrifts. Many wounded, unable to endure the grueling march, dropped off one by one." The men traveled with no supply trains, no cooking

¹⁶⁸O'Flaherty, *General Jo Shelby*, 167.

¹⁶⁹*OR*, series 1, vol. 22, part 1, 203.

¹⁷⁰Robinett, 163.

¹⁷¹*Ibid.*, 165.

¹⁷²*OR*, series 1, vol. 22, part 1, 197. Porter did survive.

utensils, no tents, or a change of clothing. Shelby's Iron Brigade could well have received their nickname for enduring these conditions, not for their fighting.¹⁷³

Marmaduke considered his campaign a success in that he forced Blunt to counter-march from northwest Arkansas toward Springfield thereby relieving pressure on Confederates in Arkansas. He further concluded that the number of forts burned in Missouri, though arguably negligible, cost the Federals much needed resources. Perhaps it is more appropriate to view Marmaduke's perceived success as the "heart of the people revived again at the presence of Confederate Troops."¹⁷⁴ However, "the physical condition of the command, the inadequate planning, and preparation, the lack of adequate information of the terrain and the enemy, the possibility of severe weather, lack of communications, poor logistical support, and indefinite objectives seemed to doom the operation from the very beginning."¹⁷⁵ Regardless of the outcome, Marmaduke, and more notably Shelby, obtained an increase of appetite for this style of fighting verses simply guarding divisions and covering rear guards. Shelby's personality fit a fighting style more independent than traditional cavalry roles could fill.

Upon arrival at Batesville, Shelby's men entered winter quarters for two months in a place dubbed Camp Nannie Wilson, named for a local woman who ensured no shortages of dinner parties. The winter quarters were a welcome rest for the men who now had steady food, solid living structures, and much needed time to care for overused

¹⁷³Oates, 120.

¹⁷⁴OR, series 1, vol. 22, part 1, 197.

¹⁷⁵Robinett, 156-157.

horses.¹⁷⁶ However, as springtime 1863 arrived, the rest and relaxation for Shelby's Brigade was over.

After a shake-up of the Confederate commanders in the Trans-Mississippi Department, the new commander was now Major General Edmund "Kirby" Smith. Holmes was demoted to command the district of Arkansas, and Hindman was ordered to Vicksburg with Price as Commander of First Corps, Trans-Mississippi Army, in Hindman's place.¹⁷⁷ Missouri was still in Marmaduke's and Shelby's sights and with approval from Holmes, Marmaduke departed for southeastern Missouri on April 19, 1863. Marmaduke's mission for his second raid was not quite as simple as before. His goal was to destroy the Federal depot at Cape Girardeau, Missouri, but not before, he cut telegraph lines and destroyed forts and bridges.¹⁷⁸

Marmaduke's force was more robust than he had taken on his Springfield/Hartville expedition. This force was over twice the size, consisted of four brigades, with eight artillery pieces, two of which were Parrot guns attached to Bledsoe's Battery of Shelby's Brigade. The other three brigades consisted of Colonel Colton Greene, commanding MacDonald's old brigade, Colonel George Washington Carter's Texas Cavalry Brigade, and Colonel John Q. Burbridge's Missouri Brigade. Of the 5,086 men now assigned to Marmaduke's division, 1,200 were unarmed and 900 were without horses. Of those that were armed, all manner of arms were carried, from shotguns to

¹⁷⁶O'Flaherty, *General Jo Shelby*, 169.

¹⁷⁷Oates, 121.

¹⁷⁸*Ibid.*, 123.

squirrel guns, Mississippi Rifles and Enfield Rifles.¹⁷⁹ Marmaduke chose to take the entire division, no matter how ill fitted, for fear of desertion if they were left behind.¹⁸⁰

Captured supplies were needed for this expedition.

Marmaduke had grandiose goals for this second raid. They included a demonstration toward St Louis or Jefferson City to draw Federal forces into northeastern Missouri for fear of a raid into that part of the state. He further desired to set conditions for a 50,000 man Confederate army to reconquer Missouri. Where Shelby or Marmaduke, who agreed on this idea, thought the Confederacy was going to get 50,000 men for this full-scale invasion is a mystery. Smith had just over 45,000 troops in the field in the entire Trans-Mississippi Department.¹⁸¹

Shelby's task for this raid was to drive straight north into Missouri from Batesville, Arkansas, in a feint to divert Federal forces away from Marmaduke's objective, Cape Girardeau. With forage and foodstuffs, in short supply, it was not possible to move Marmaduke's entire division to Rolla and the badly needed Federal supplies housed at the end of this rail line. Instead, a move towards Patterson was ordered to defeat the garrison of 2,000 Federals, with a subsequent attack upon the cavalry force under Brigadier General John McNeil at Bloomfield.¹⁸²

¹⁷⁹*OR*, series 1, vol. 22, part 1, 285.

¹⁸⁰Oates, 124.

¹⁸¹Robert L. Kirby, *Kirby Smith's Confederacy: The Trans-Mississippi South 1863-1865* (Tuscaloosa, AL: University of Alabama Press, 1972), 53.

¹⁸²Sellmeyer, 94.

By April 20, Shelby's force, including Burbridge's brigade, was within striking distance of Patterson. Carter and Greene's brigades, with Marmaduke, surprised 400 Federal cavalry returning from a night patrol. The Federals, alerted to the Confederate presence, set fire to the storehouses and retreated towards Bloomfield.¹⁸³ Carter and Greene's forces extinguished the flames and saved meager provisions for the division.¹⁸⁴ Shelby's column arrived in Patterson the next day and rejoined Marmaduke's main column after a successful demonstration towards Thomasville and Houston.

Marmaduke ordered Carter's brigade to seize Bloomfield and any potential Federal supplies in that city. However, Carter's brigade was delayed by swampland, which gave McNeil's cavalry an opportunity to burn the supplies and retreat towards Cape Girardeau. Shelby's column rode to Fredericktown to intercept McNeil's cavalry. Unable to locate McNeil, Shelby's brigade took the opportunity to destroy one railroad bridge and wreck several miles of the St. Louis Railroad. Marmaduke's column continued to Cape Girardeau when his scouts reported a sizable force in garrison, including McNeil. Marmaduke ordered Shelby to move with all speed to his location four miles from Cape Girardeau to enable an attack with his entire force. Shelby marched his command thirty miles during the night of April 25-26, a rapid movement that Shelby had become accustomed to even if his men never did.¹⁸⁵

¹⁸³Stephen B. Oates, "Marmaduke's Cape Girardeau Expedition, 1863," *Missouri Historical Review* 57, no. 3 (April 1957): 242.

¹⁸⁴Sellmeyer, 95.

¹⁸⁵OR, series 1, vol. 22, part 1, 285-287.

Marmaduke was only four miles from Cape Girardeau but the roads were in such deplorable condition that moving cannons and wagons down roads rain had turned to swamp was nearly impossible. Upon consolidation of his entire division, Marmaduke sent a message to McNeil in Cape Girardeau to surrender and gave him thirty minutes to consider this. McNeill rejected this call and Marmaduke realized an assault on the city would not be possible given the strength of the Federal position. Marmaduke decided against an attack and ordered a retreat to the previous evening's bivouac site. As Marmaduke prepared to retreat, Shelby drove in the enemy pickets and skirmished to distract McNeil, who thought this an attack and deployed a sizable force. Shelby deployed his entire brigade and a large-scale engagement commenced, unintended by Marmaduke. Marmaduke deployed Carter's brigade to support Shelby and after a four-hour fight, the two brigades suffered 325 casualties.¹⁸⁶ Marmaduke's Division was forced to disengage.¹⁸⁷

With Shelby once again as the rear guard, Marmaduke's column burned the White River Bridge to slow the Federal pursuit. The Confederates utilized a log bridge across the St Francis River at Chalk Bluff where Marmaduke's division went into one final defensive position and successfully defeated an attack against the rear guard. One by one, the Brigades crossed the log bridge and the last Rebel cut the moorings, denying the Federals the use of the bridge.¹⁸⁸ Marmaduke's final obstacle to a successful retreat was the swampy roads along the Cache River. The Federal pursuit ended but a more

¹⁸⁶Gerteis, 155.

¹⁸⁷Oates, *Confederate Cavalry West of the River*, 127.

¹⁸⁸*Ibid.*, 129.

exhausting activity lay ahead. The raiding-weary cavalrymen spent the next three days moving wagons and cannons manually through the swamps, and left numerous horses mired in the mud.

After seventy-two hours of sleepless nights, of attacks by swarms of mosquitoes, of alternate rain and sticky head, of squirming through miles of oozing mud, the men emerged from the sloughs, looking more like an army of denizens of a semi-amphibious subterranean world than one of men and animals.¹⁸⁹

Marmaduke's division arrived at Jacksonport, Arkansas on May 31 for their much-needed rest.¹⁹⁰

To assess Marmaduke's second raid as a failure is an understatement. Marmaduke's objective, Cape Girardeau, became subordinate to the capture of McNeil's forces and the Confederate's lack of daily sustainment for horses and men. Marmaduke lost the element of surprise on Cape Girardeau due to these diversions. Furthermore, the size of Marmaduke's raiding force, the associated logistics challenges, and his complete obliviousness to the terrain or enemy troop strength made any likelihood of success impossible.

Kirby Smith was much more diplomatic in his endorsement of Marmaduke's report. He simply stated, "The expedition under General Marmaduke into Missouri was made more particularly [difficult] on account of the scarcity of forage in Arkansas, it being deemed probable that he would be able to sustain himself."¹⁹¹ Shelby no doubt learned a great deal of what not to do while raiding with Marmaduke. Logistics, time of

¹⁸⁹Oates, *Confederate Cavalry West of the River*, 130.

¹⁹⁰Sellmeyer, 102.

¹⁹¹OR, series 1, vol. 22, part 1, 288.

year, weather, and size of force were important considerations if any incursion into Missouri were to be undertaken again. With these lessons learned on his mind, Shelby would demonstrate his own raiding ability in a few short months.

CHAPTER 4
FOR THE BUFF SASH OF A BRIGADIER

July 4, 1863 was a miserable day for the Confederacy. Major General George Gordon Meade and the Federal Army of the Potomac defeated General Robert E. Lee's Confederate Army of Northern Virginia at Gettysburg. Major General Ulysses Grant accepted Lieutenant General John Pemberton's rebel force surrender at Vicksburg. Major General Benjamin Prentiss and his Federals in Helena, Arkansas defeated a frontal assault from Confederate Lieutenant General Theophilus Holmes on the river city. The Mississippi River was firmly in the hands of the United States and Arkansas was now in a perilous position. In the East, the Army of Northern Virginia never recovered. However, it must be noted the defeat of the Confederate force at Helena was overshadowed by the much larger Confederate defeats at Gettysburg and Vicksburg.¹⁹²

“On July 4, 1863, while Grant's soldiers were cheering victorious ‘Old Glory’ in the streets of Vicksburg, the three columns of cavalry, Major General Sterling Price's, Brigadier General John S. Marmaduke's, and Brigadier General James F. Fagan's, all unconscious of the events on the lower river, moved against the fortifications at Helena.”¹⁹³ Shelby's cavalry in Marmaduke's division attacked Helena from the north as part of a three-pronged attack on the river city. The order from Holmes to attack “at daylight” was ambiguous enough to cause the failure of the three columns to achieve mutual support. The Federals in Helena were aware of the Confederate advance upon

¹⁹²Castel, 150.

¹⁹³Wilfred R. Hollister and Harry Norman, *Five Famous Missourians* (Kansas City, MO: Hudson-Kimberly Publishing Co., 1900), 363.

Helena and had many opportunities to improve defensive positions around the city. Helena was garrisoned by 4,129 Federals while Holmes' force numbered 7,646.¹⁹⁴ After the failed Confederate assault, the Confederate loss was reported at just over 1,700 of which 52 were from Shelby's Brigade.¹⁹⁵ Major General Benjamin Prentiss, Federal commander of the District of Eastern Arkansas at Helena, reported Confederate losses at 1,200 captured and 500-600 dead and wounded.¹⁹⁶ Federal losses were reported on July 9th at 239 dead and wounded.¹⁹⁷ These numbers do not seem outside the realm of possibility given the strength of the Federal position, prior knowledge of the Confederate advance, and the erratic coordination of the Confederate attack. This little noticed attack resulted in disaster upon the numerically insufficient Confederates.

Shelby would long remember the attack upon Helena for here, while waving his saber; he received a wound from a minie-ball, which entered his right wrist and exited near his elbow.¹⁹⁸ He believed this wound severe enough to report to Marmaduke on July 13, "I think it extremely doubtful whether I will ever assume command again."¹⁹⁹ Shelby's pessimistic outlook did not last long. Shelby longed to raid Missouri again after the passage of General Order #11, Ewing's response to Quantrill's burning of Lawrence

¹⁹⁴Herrell, 191.

¹⁹⁵Ibid., 183.

¹⁹⁶OR, series 1, vol. 22, part 1, 385.

¹⁹⁷Ibid., 391.

¹⁹⁸Sellmeyer, 109.

¹⁹⁹OR, series 1, vol. 22, part 2, 924.

on August 21, 1863. This order completely displaced all civilians in Jackson, Cass, Bates, and Vernon counties in western Missouri.

The Confederate District of Arkansas was in a precarious position after Little Rock fell on September 10, 1863. The Federals controlled the Arkansas River valley from the Mississippi River to Fort Gibson, Indian Territory. Lieutenant General E. Kirby Smith, Commander of the Trans-Mississippi Department, placed Major General Sterling Price in command of the District of Arkansas and the First Corps while Holmes recovered from an extended illness. Price retreated from central Arkansas with his army and encamped near Arkadelphia, Arkansas. To boost morale, Shelby approached Governor Reynolds, with a daring proposal.

In mid-September 1863, Shelby proposed a raid into Missouri. Shelby hoped to accomplish three things. First, a raid into Missouri would provide an opportunity for further recruitment. There was tremendous angst over General Ewing's General Order No. 11., "the most drastic action against civilians until Sherman's march through Georgia."²⁰⁰ Second, he believed a raid into the heart of Missouri would provide the catalyst to bolster the fighting spirit of the demoralized Confederates west of the Mississippi. Third, Shelby aimed to prevent the transfer of Federal troops from Missouri to reinforce Major General William Rosecrans near Chattanooga, Tennessee.²⁰¹ Shelby also had a personal reason for his raid. Shelby learned his wife and children were

²⁰⁰Nicole Etcheson, *Bleeding Kansas: Contested Liberty in the Civil War Era* (Lawrence, KS: University of Kansas Press, 2004), 241.

²⁰¹Oates, *Confederate Cavalry West of the River*, 132.

banished from the state by Federal authorities after his participation in Marmaduke's two raids.²⁰²

Shelby launched a political campaign to gain approval for his raid. There is little doubt that his men were ready for the challenge but to gain approval Shelby needed Reynolds' consent. Shelby received a quick approval from Reynolds and was promised a promotion to brigadier general should he be successful. "You must not fail; the buff sash of a Confederate Brigadier awaits the successful issue."²⁰³ Marmaduke, initially opposed to the idea, forwarded his consent to Holmes who finally agreed after a tense argument with Shelby that bordered on insubordination.²⁰⁴ Whether Shelby would have conducted the raid without official approval from Holmes is possible, given the tone of the exchange. Holmes and Price officially gave consent and forwarded the proposal to Price, and ultimately to General Kirby Smith. Smith was focused on other regions within his vast department yet gave consent to Shelby's proposition without any thought to the military necessity of such a raid.²⁰⁵ Furthermore, no one was prepared to overrule Reynolds and alienate Missouri troops serving the Confederacy.²⁰⁶ Therefore, Shelby received orders for his raid six days after proposing his ride into Missouri. It is questionable if anyone in the chain of command put a great deal of thought into this raid.

²⁰²Gerteis, 157.

²⁰³Castel, 160.

²⁰⁴For a transcript of the entire Shelby/Holmes exchange, see O'Flaherty, *General Jo Shelby*, 191-192.

²⁰⁵Kirby, 234.

²⁰⁶O'Flaherty, *General Jo Shelby*, 188.

The hesitant, yet eventual consensus among the generals was a passive consent coupled with a belief that the mission would fail and end in Shelby's capture or death.²⁰⁷ Raids had not been successful for Marmaduke when he attacked Federal positions in Missouri. Marmaduke achieved nothing of significance and the escape from Missouri to Rebel Arkansas was a flight for the very existence of his command.

Shelby's Raid

Shelby departed Arkadelphia, Arkansas on September 22, 1863; on a raid, that would last 36 days and cover over 1,500 miles, all while Shelby held his wounded right arm in a sling. Shelby's initial force included "detachments from the three regiments composing my Brigade, [Benjamin] Elliott's battalion of scouts, and a section of two pieces of artillery, under Lieutenant [David] Harris, of [Joseph] Bledsoe's battery, the entire force numbering about 600 men, rank and file."²⁰⁸ Captain George Gordon commanded the detachment from the 5th Missouri Cavalry Regiment, also known as the Lafayette County Regiment, Major David Shanks the detachment from the 12th Missouri Cavalry Regiment, known as the Jackson County Regiment, and Lieutenant Colonel James Hooper the detachment from the 6th Missouri Cavalry Regiment, known as the Southwest Missouri Regiment. Shelby picked Captain W.N. Thorp to command Elliot's Scouts, the detachment of the 1st Missouri Cavalry Battalion. First Lieutenant David Harris commanded the detachment of Bledsoe's Battery with its rifled Parrot gun and

²⁰⁷John C. Moore, *Confederate Military History, Missouri, Volume XII*, ed. Clement A. Evans (1899; repr., Wilmington, NC: Broadfoot Publishing Company, 1987), 140.

²⁰⁸*OR*, series 1, vol. 22, part 1, 671.

brass Six-Pounder captured at Springfield the previous January.²⁰⁹ Shelby's brigade was primarily Confederate regulars but new unaffiliated recruits would join the column near the Missouri border. Marmaduke reported 306 men from Shelby's Brigade left in Arkansas.²¹⁰

Shelby chose a small raiding force to facilitate rapid movement. To maximize the column's speed, Shelby planned for captured weapons, horses, uniforms, and food to sustain his raid. Shelby took great risk in this sustainment plan, which would tax his men and horses to their limits. This sustainment plan produced the eventual result of Shelby's men dressed predominately in Federal uniforms. Shelby ordered his men to wear red-leaved sumac in their hats to identify themselves as Shelby's men.²¹¹

Once in Missouri Shelby would primarily face Missouri Militia, widely scattered into small outposts to combat roving bands of guerillas. These lightly manned garrisons, though marginally effective against bushwhackers, were completely ineffective against a 1,200 man raiding force. The combined cavalry forces throughout Missouri outnumbered Shelby's men. However, it would take time for these forces to mass their effects, decisively engage Shelby, and expel him from the state.²¹² The task to locate Shelby and consolidate forces rested on the shoulders of three district commanders.

²⁰⁹Sellmeyer, 201.

²¹⁰Oates, *Confederate Cavalry West of the River*, 83.

²¹¹Scott Hosier, "Jo Shelby Goes Home to Missouri," *America's Civil War* 15, no. 6 (January 2003): 36.

²¹²Hamilton, 417.

Brigadier General McNeil commanded the southwestern district of Missouri from the Arkansas line north to the Osage River. Brigadier General Egbert Brown's district included the counties north of the Osage River, south of the Missouri River, and west of Jefferson City, with the exception of Jackson, Cass, Bates, and Lafayette counties on the Missouri-Kansas Border. Brigadier General Thomas Ewing, the architect of General Order #11, commanded these four counties from his headquarters in Kansas City. For the defense of Missouri, Major General John Schofield, commander of the Department of Missouri, headquartered in St Louis, controlled these district commanders.²¹³ Although a precarious balance existed between the Federal commander and the state governor who retained the authority to activate militia when a threat appeared, McNeil, Brown, and Ewing would maneuver, unencumbered by the governor, to defeat Shelby.²¹⁴

Shelby departed Arkadelphia, Arkansas, toward Mount Ida, through the Caddo Gap near the Ouachita Mountains. Upon arrival on September 26, Shelby's advance guard encountered approximately 200 "partisans" under the command of Captain McGinnis. These men, described as "Confederate deserters and Union jayhawkers," were engaged, which resulted in seventy-nine killed and thirty-four taken prisoner. Shelby had all but three of the prisoners executed the next morning, including Captain McGinnis. This incident is not mentioned in Shelby's official report but was reported in detail by Edwards in his imaginative and poetic account of Shelby's Brigade. The description of

²¹³Geroge S. Grover, "The Shelby Raid, 1863," *Missouri Historical Review* 6, no. 3 (April 1912): 108-109.

²¹⁴Hamilton, 417-418.

the crimes committed by those executed ranged from murder, theft, marauding, and multiple derogatory and resourceful terms.²¹⁵

About mid-day on the September 27, Shelby's advance guard, led by Captain Thorpe, encountered Captain Parker and roughly seventy-five soldiers from Companies H and I of the 1st Arkansas Federal Infantry near Moffat's Store, in Franklin County, Arkansas.²¹⁶ Shelby had hoped to cross the Arkansas River before he encountered any Federals. However, twelve miles south of the Arkansas, Shelby found himself in contact with the very forces capable of notifying the Federals his movements and force composition. Shelby ordered skirmishers to engage this small force until Shanks and Gordon could flank and subsequently scatter them. Shelby reported Federal losses at ten killed, twenty wounded, and fifty taken prisoner.²¹⁷ Included in the prisoner count was what Edwards referred to as "Negros" who were "thrashed soundly." Shelby's men identified some prisoners as deserters from Confederate conscription and executed them. The regular federal soldiers were paroled upon crossing the Arkansas River.²¹⁸

Federal control of the Arkansas River required Shelby's men to cross undetected, which he accomplished near Roseville without incident. Shelby then deployed scouts to Clarksville, Dardanelle, and Ozark to screen for Federals. The next three days passed without incident and gave Shelby ample time for periodic rest for his horses and men.

²¹⁵Edwards, 199.

²¹⁶Frank Moore, ed., *The Rebellion Record, A Diary of American Events* (New York, NY: D. Van Nostrand, 1864), 56

²¹⁷*OR*, series 1, vol. 22, part 1, 671

²¹⁸Edwards, 200.

Passing through Huntsville and Bentonville, where the telegraph wire on the Fayetteville Road was destroyed, Colonel DeWitt C. Hunter joined Shelby's column with 200 newly recruited cavalymen from southwest Missouri. Shelby's report annotated this event on September 31, but he no doubt meant October 1. Shelby moved north from McKinssick's Springs, Arkansas to Pineville, Missouri on October 2nd where Colonel John T. Coffee and 200 additional cavalymen completed Shelby's ranks. Coffee would be an asset to the raid as he was a long-time resident of southwest Missouri and knew the area best. Coffee provided valuable information to Shelby on Federal troop dispositions and the best possible routes.²¹⁹ North of Pineville Shelby halted for the night to consolidate his force.²²⁰ Shelby's men travelled 250 miles in eleven days.

First Actions in Missouri

Shelby's first target, Neosho, Missouri, eighteen miles north of Pineville, was garrisoned by a force of approximately 180 men of the 6th Missouri State Militia Cavalry and a "few Enrolled Missouri Militia," commanded by Captain Charles B. McAfee. McAfee had departed Neosho south down the "Buffalo Road" with wagons of provisions bound for Arkansas. He encountered Coffee's men from Shelby's command approximately two miles south of town. McAfee retreated to Neosho and left the baggage wagons in place. Shelby ordered Coffee to encircle the town from the rear with Gordon on the right and Shanks on the left, to encircle the town. Shelby remained with Hooper, Hunter, and the artillery and attacked north towards Neosho in order to drive the Federals

²¹⁹John K. Hulston and James W. Goodrich, "John Trousdale Coffee: Lawyer, Politician, Confederate," *Missouri Historical Review* 77, no. 3 (April 1983): 276.

²²⁰*OR*, series 1, vol. 22, part 1, 671.

back into town and the courthouse in the center. The plan worked as conceived. After an exchange of small arms fire with the defenders of the 6th Missouri in the courthouse, Shelby ordered cannon fire on the brick structure. Two shots were fired before Shelby demanded the unconditional surrender of the garrison. After initial resistance to such call, McAfee surrendered and Shelby paroled each of the defenders. McAfee's losses were reported at two killed and two wounded. Shelby did not report individual numbers killed in each individual engagement but only the aggregate of the raid. One must rely on the Federal reports in the *Official Record* to ascertain rebel losses. McAfee reported Shelby's losses at five killed and nine wounded. McAfee admitted in his report that the baggage trains he guarded prior to the engagement were lost and gave Shelby's men much needed food, ammunition, and clothing.²²¹ Although initially armed with everything from shotguns to Enfield rifles, Shelby's men now had 400 Sharps Carbines and 460 Navy revolvers.²²²

This episode not only foreshadowed Shelby's tactics for these small Federal garrisons but also demonstrated Shelby's sustainment plan for this raid. Shelby had no desire to be bogged down by large supply trains as Marmaduke had been on his two raids. On the raid Shelby's men obtained fresh mounts when needed and rested when militarily viable. Shelby's men rested along Jones Creek for five hours before they rode forward.²²³

²²¹OR, series 1, vol. 22, part 1, 657, 672.

²²²Oates, *Confederate Cavalry West of the River*, 71.

²²³Sellmeyer, 128.

Shelby's men, now rested and resupplied, traveled rapidly northeast through Sarcxie, burned Bower's Mill, described as a "notorious pest spot for the militia," then north towards Greenfield, Missouri. He reached the town at daylight on the October 5.²²⁴ Major Wick Morgan commanded a company of the 7th Provisional Enrolled Missouri Militia in garrison at Greenfield. Surrounding the town as he had done at Neosho, Shelby soon sent the small force on the run into the brush and took the town without a shot fired.²²⁵ Shelby then "appropriated the contents of several stores, captured a quantity of arms and destroyed a strong fort."²²⁶ Shelby's logistical strategy paid off once again. However, the "strong fort" was the courthouse where Coffee had once practiced law. Coffee ordered a detachment to remove the county records from the courthouse and deliver them to a local judge before the courthouse was burned.²²⁷ By the end of that evening, Shelby's men had moved beyond Greenfield, burned Stockton's courthouse, once again used as a fort by Missouri Militia, and camped ten miles beyond Stockton. Shelby did not report any significant action at Stockton but Edwards reported twenty-five defenders were killed or captured.²²⁸

Shelby dispatched small patrols of men to burn Caplinger Mills and Crow Mills while he continued his route towards Humansville. They passed through Humansville on the 6th of October with only minor skirmishing. As with Stockton, Shelby reported little

²²⁴*OR*, series 1, vol. 22, part 1, 672.

²²⁵Sellmeyer, 128.

²²⁶*OR*, series 1, vol. 22, part 1, 672.

²²⁷Hulston and Goodrich, 288.

²²⁸Edwards, 204.

more than the name of the town. Edwards, however, wrote in his memoirs that “Gordon, swinging around to its rear, cut off the retreat of one hundred and fifty Federal cavalry, and they surrendered after losing seventeen killed.”²²⁹ Shelby’s tactics were based on one simple plan: surround a town to cut off any retreat, fire upon the courthouse with artillery, burn the structures upon surrender of the small garrisons, then resupply his men with loot from the stores, both military and civilian. As Shelby perfected this tactic at Humansville, he sent Lieutenant Thomas Keithley and ten scouts to Osceola. Shelby reported Keithley forced a Federal garrison of fifty-three men to flee, promptly set fire to the Federal fortifications, and then rejoined Shelby at Humansville without losing a man.²³⁰

Federal resistance had yet to organize and remained confused as to Shelby’s intentions by the time he had moved beyond Humansville. On October 4, Schofield notified Ewing in Kansas City that Shelby’s raiders were possibly moving towards Fort Scott, Kansas, or perhaps come further north.²³¹ By this time, Shelby was already well past Pineville, Missouri, as the dispatch stated and was near Greenfield on the date of the report. Federal leaders no doubt had William Quantrill’s Lawrence Raid on August 21 on their mind as Shelby’s raid progressed. What would later be called the Baxter Springs Massacre on October 6th not only played a role in Federal thinking but was thought to be related to Shelby’s movements.

²²⁹Edwards, 205.

²³⁰*OR*, series 1, vol. 22, part 1, 674.

²³¹*Ibid.*, 603.

The Federals were unnerved by the events at Baxter Springs, which possibly fed their uncertainty ascertaining Shelby's destination. On October 6, three separate dispatches revealed this uncertainty within the Federal command. Colonel John Edwards, Commander of the District of Southwestern Missouri at Springfield, believed Shelby's objective to be Jackson County on the Missouri/Kansas border yet Ewing in Kansas City believed Shelby would demonstrate towards Fort Scott, Kansas, and then disperse.²³² General Schofield in St Louis, aware of Shelby's movements to the northeast, did not indicate Shelby's suspected objective but believed Shelby's retreat into Arkansas would follow a route east of Springfield.²³³

Initial reports came into Schofield's headquarters just as rapidly as he could send orders to his field commanders. Schofield sent orders to commanders in Missouri with instruction not to press too hard in pursuit of Shelby in order to save the strength of his men and horses and enable a successful intercept of Shelby. It was not yet a foregone conclusion in the minds of the Federals that Shelby would strike deep into the heart of the Missouri River valley. However, just in case, Ewing reported he would concentrate a force in Butler, Missouri, to intercept Shelby in the event of a Jackson County incursion.²³⁴

Colonel John Edwards departed Springfield with a 1,250-man force, and arrived in Greenfield on the 7th. Edwards continued the pursuit once he found Greenfield sacked and burned, then halted at Quincy, Missouri. Schofield ordered Edwards to halt and

²³²*OR*, series 1, vol. 22, part 2, 609, 611.

²³³*Ibid.*, 608.

²³⁴*Ibid.*, 609-611.

remain south of the Osage River in order to set a trap for Shelby's men when they made their attempted escape back into Arkansas.²³⁵

On the morning of October 7, Shelby reached Warsaw from the south. Shelby ordered Gordon to cross the Osage River down river to the east and attack Warsaw from behind. Elliot's battalion crossed the Osage River to the west of the town while Shelby crossed the river opposite the town and conducted a frontal assault against a determined defense. The garrison at Warsaw consisted of Company E of the 7th Missouri State Militia commanded by Captain Abraham Darst. Darst's command fought for nearly thirty minutes until Gordon made his presence known behind the Federals. The defenders of the 7th were routed and fled with unknown losses. Once again, at Warsaw, as with previous actions upon small garrisons, Shelby reported, "vast quantities of all kinds of stores were captured here, with some arms and prisoners, and a strong and well provisioned fort."²³⁶ Shelby's men had travelled 145 miles in three days. Shelby would need horses soon.

Federal Pursuit

Brigadier General Bazel Lazear, commander of the 1st Missouri State Militia Cavalry, departed Warrensburg on the October 7 bound for Clinton to intercept Shelby near Osceola. In a letter to his wife, Lazear stated he disobeyed his orders from Brown to march to Osceola once he learned Shelby had already seized that town. Lazear instead marched east from Clinton, through Calhoun, and picked up Shelby's trail near Cole Camp on the 8th. In Calhoun, Lazear picked up the remainder of the Darst's command

²³⁵Wiley Britton, *The Civil War on the Border*, vol. 2 (1899; repr., Dodge City, KS: Kansas Heritage Press, 1990), 171.

²³⁶OR, series 1, vol. 22, part 1, 673.

from Warsaw who had escaped Shelby's three-pronged assault. Lazear was the first command to determine Shelby's real time location.²³⁷

Brigadier General Brown was in Sedalia, Missouri, inspecting the outposts in his district when he received word of Shelby's actions at Stockton. Brown, Shelby's opponent at Springfield, Missouri the previous January, "took eight hundred men, under Colonel John F. Philips, Seventh Missouri State Militia Cavalry, and a section of the First Battery Missouri State Militia Light Artillery, under Captain Charles H. Thurbur."²³⁸ Brown and his command rode thirty miles to Osceola and camped along the Osage River when he received word of the attack on Warsaw. Brown at once detached Major Foster, who the previous summer had received what was thought at the time to be a mortal wound through his right lung at Lone Jack, Missouri, southeast of modern-day Kansas City, on August 16, 1862. Foster was sent with 200 men to pursue Shelby and report any updates. Foster's command consisted of Companies B and G under Captain Ferguson and Lieutenant Love.²³⁹ Brown then returned to Sedalia with his remaining 600 men. Shelby now had two separate forces, Lazear and Foster, on his trail. Although Shelby's speed had kept the Federals off balance for the first five days of his presence in Missouri; the Federals were closing in fast.

On October 8, Shelby entered Cole Camp, Missouri, a town whose German inhabitants kept the town flourishing in produce and much needed horses. Shelby's men,

²³⁷Bazel F. Lazear, "Letter to his wife, October 22, 1863," Western Historical Manuscript Collection, University of Missouri-Columbia, Columbia, MO.

²³⁸Britton, *The Civil War on the Border*, 173.

²³⁹Grover, 109-110.

with most dressed in Federal uniforms captured from Neosho to Warsaw, helped themselves to fresh mounts and a resupply of food. Here also was a most unfortunate event for a local who lay in wait for Shelby's forces. Not realizing the federally clad raiders were indeed the very men he sought, he identified himself as a Union man and part of a self-appointed militia to kill rebels in the area. Shelby ordered the man executed after identifying himself.²⁴⁰ From Cole Camp, Shelby's men moved further north to Florence where the inhabitants had hastily abandoned the town. "Everything had been left behind. Doors were left open, furniture in place, stores were left stocked. One peculiarity of the place, which struck everyone with surprise, was "the vast quantities of eggs in every house, store, barn and tenement...The raiders feasted on hundreds of omelets for supper."²⁴¹

Foster's pursuing 200 men reached Warsaw on the morning of the 9th and learned that Shelby had departed towards Sedalia along the Cole Camp road. Foster pursued to the northwest and rode clear of Shelby's main body in order to get between Shelby and Sedalia. Foster dragged tree branches behind horses to raise a cloud of dust to demonstrate a larger force, thus deceiving Shelby. Foster's men captured a few of Shelby's rear guard and in order to continue the ruse, let the prisoners overhear a false report that Brown's force was not far to the rear. The prisoners were then allowed to "escape." This information no doubt kept Shelby's men moving rapidly north with no

²⁴⁰O'Flaherty, *General Jo Shelby*, 196-197.

²⁴¹*Ibid.*, 198.

rest.²⁴² Foster fulfilled his orders and departed for Sedalia and arrived on the afternoon of the 9th to report Shelby's movements to Brown.

Shelby hastened towards Tipton at daylight on the 10th where he again surrounded and captured the town. Prior to attacking Tipton, Shelby sent a detachment of scouts to reconnoiter the town. A locomotive had just departed Tipton on its way west. Unbeknownst to the raiders, Lieutenant Colonel Thomas Crittenden, Commander of the 7th Missouri State Militia Cavalry, was on board with his staff. Upon seeing the scouts, Crittenden ordered the train reversed and escaped back to the east, through Tipton, and on towards Jefferson City.²⁴³ This was a missed opportunity for Shelby to capture this high-ranking Federal officer. Crittenden, a fellow Kentuckian, had been a guest at Shelby's wedding and Shelby "viewed his present affiliations as a disgrace to their native state."²⁴⁴

After Shelby's main force captured Tipton, Shelby sent Captain James Woods and 100 men towards Otterville to destroy the Lamine railroad bridge, a main hub for the Pacific Railroad. "A detachment of twenty-eight men, under Captain M. D. Berry, of the Fifth Regiment Missouri Enrolled Militia, was stationed in a blockhouse at the bridge as a guard."²⁴⁵ Woods attacked the defenders at the bridge before the small garrison could fire a shot. Brown reported Berry's actions with disdain and accused "the guard

²⁴²Grover, 110.

²⁴³OR, series 1, vol. 22, part 1, 644.

²⁴⁴O'Flaherty, *General Jo Shelby*, 198.

²⁴⁵Britton, *The Civil War on the Border*, 176.

abandoned it without firing a gun. They could have protected the bridge and defended themselves if they had made the effort.”²⁴⁶

Within five minutes Woods set the bridge and blockhouse, built as a guardhouse for the bridge, on fire, then camped that night on the grounds to ensure the destruction was complete. While the bridge and blockhouse burned, Shelby ordered other raiders to the east and west to “do their worst upon both telegraph and railroad.” By late afternoon, Shelby was on his way towards Boonville.²⁴⁷

The Federals began to consolidate a force to mass against Shelby. Major George Kelly, under orders from Brown, departed Sedalia on the 10th, moved east with Companies A, B, E, and F, of the Fourth Missouri State Militia Cavalry, and 60 men of the Fifth Provisional Enrolled Missouri Militia, under Major William Gentry and Captain Brown. They were ordered “down the Pacific Railroad, to find the whereabouts of General Jo. Shelby and his raiders, and to annoy him if found, and form a junction with Lieutenant-Colonel Lazear, of the First Missouri State Militia Cavalry.” Kelly and Gentry encountered Shelby's pickets near Syracuse.²⁴⁸ Shelby mistakenly thought he had encountered Crittenden, and formed into line for an engagement. Shelby charged with his men and scattered the Federals.²⁴⁹ Kelly and Gentry circled wide around the northbound raiders and “formed a junction with Lieutenant-Colonel Lazear, same evening at 11 p.m.,

²⁴⁶*OR*, series 1, vol. 22, part 1, 623.

²⁴⁷*Ibid.*, 673.

²⁴⁸*Ibid.*, 635.

²⁴⁹*Ibid.*, 673.

at Tipton, Mo.”²⁵⁰ Lazear had departed Clinton with his force and pursued Shelby through Calhoun and Cole Camp. This combined force of 1,000 men nearly matched the size of Shelby’s raiders, the first time a near-peer competitor threatened Shelby. On the morning of the 11th, the combined force under Lieutenant Colonel Lazear marched towards Boonville and encountered Shelby’s rear guard four miles south of Boonville.

Shelby’s march to Booneville on the October 11 was not without delay. The axle of the rifled Parrot gun broke, delaying Shelby’s men a full three hours while the repairs were conducted. The inhabitants of Boonville were fully alerted of Shelby’s approach and sent a flag of truce informing Shelby that the town would submit. No doubt, word of how Shelby dealt with previous towns had reached the ears of the citizenry. By noon, Shelby’s men reached Boonville and the mayor surrendered the town without incident.²⁵¹ Shelby’s men rode seventy miles in four days from Warsaw to Boonville. The men had ridden nearly 500 miles.

Now firmly in control of Boonville, Shelby was rapidly running out of space to maneuver. Jefferson City, the capital of Missouri and the original physical objective of Shelby’s raid, was forty miles to the southeast. Shelby, or at the very least Edwards, believed that Jefferson City was garrisoned by 8,000 Federals.²⁵² Not only was the Missouri River a major obstacle, Major Reeves Leonard of the Ninth Missouri State Militia with two hundred men was opposite Boonville north of the Missouri River. Leonard attempted to cross the river but was warned of Shelby’s presence by citizens of

²⁵⁰ *OR*, series 1, vol. 22, part 1, 635.

²⁵¹ Sellmeyer, 131.

²⁵² Edwards, 213.

Boonville and remained north of the river. Lazear's force was on Shelby's trail south of Boonville. Brown, with his combined force of 800 men was on the move from Sedalia towards Boonville.

Lazear's command moved towards Boonville and "came up to the enemy's rear guard, skirmished all day, killing several and capturing some prisoners; joined part of General Brown's command at 9 p.m.; lay on arms in line."²⁵³ Shelby's men had pushed through Boonville and camped five miles west of town on the night of the 11th. Lazear, in the meantime camped that night four miles south of Boonville having skirmished the entire day with Shelby's rear guard. Shelby had experienced another delay leaving Boonville when the axle of the Parrot gun broke once again. Shelby dispatched Hooper to conduct a delaying action against Lazear's Federals to buy time to repair the broken axle. After the gun was successfully repaired Hooper quietly joined Shelby's main body west of Boonville.²⁵⁴

On the 11th Brown's men had departed Otterville and moved to the northwest while they attempted to ascertain Shelby's location. That night his men camped eight miles west of Booneville on the Georgetown Road. Unbeknownst to Brown and Lazear, they had Shelby boxed in.²⁵⁵ Brown believed Shelby's plan was to depart Boonville and continue east towards Jefferson City. Brown ordered a countermarch, moved off the

²⁵³*OR*, series 1, vol. 22, part 1, 635.

²⁵⁴Sellmeyer, 133.

²⁵⁵Hosier, 38.

Sedalia road, and joined Lazear's command, allowing Shelby's raiders to escape a potential trap.²⁵⁶

Lazear's command was on the move before daylight on October 12, marched through Boonville, turned west, and attacked Shelby's camp while the rebels were still eating breakfast. Shelby's men had little time but to get into the saddle and flee further west. Shelby's men formed a defense and waited for a main body attack from Lazear that did not come. Shelby then moved west towards Jonesborough, modern day Napton, crossed the Lamine River, and prepared an ambush at Dug Ford.²⁵⁷ The entire morning Lazear's advance guard was in almost continuous skirmishing with Shelby's rear guard.²⁵⁸

Lazear's command was joined by 120 additional men from the 9th Provisional Enrolled Missouri Militia under Captain W.D. Wear.²⁵⁹ Lazear now had a combined force of roughly 1,150 men, which consisted primarily of the First Missouri State Militia Cavalry, Major Kelley and the Fourth Missouri State Militia Cavalry, Major Gentry's Fifth Provisional Enrolled Missouri Militia, and the newly joined detachment of the 9th Provisional Enrolled Missouri Militia under Wear.

Brown, ten miles southwest of Boonville with 1200 men, in command of a force that consisted primarily of the First, Fourth, and Seventh Missouri State Militia Cavalry,

²⁵⁶Grover, 113.

²⁵⁷Ibid., 114.

²⁵⁸Sellmeyer, 133.

²⁵⁹Wiley Britton, *The Union Indian Brigade in the Civil War* (Kansas City, MO: Franklin Hudson Publishing Company, 1922), 325.

and elements of the 9th Enrolled Missouri Militia, and Captain Thomas Carr's battery from the First Missouri State Militia Light Artillery.²⁶⁰ Shelby now faced a combined Federal force twice his size, which maneuvered as two separate elements. Brown's "unfortunate blunder in moving east let Shelby out of Boonville via the Sedalia and Marshall Road. After thus escaping, Shelby turned west in the direction of Marshall in full and rapid retreat."²⁶¹

Lazear pushed Shelby's westward movement at a cost to Shelby of eight killed and four taken prisoner. Lazear's losses thus far were two killed and two wounded. Shelby's prepared ambush at Dug Ford on Lamine River was the delaying action he first perfected during the retreat at Cane Hill. Shelby ordered Major Gordon and 200 men to hold at the Lamine River while Shelby continued his movement west.

Gordon's ambush had the desired effect. At Dug Ford, Gordon allowed Lazear's advance guard, Company E of the Seventh Missouri State Militia Cavalry commanded by Captain Little, to approach the awaiting raiders on the east side of the river. After the rebels fired, they crossed the river in "apparent confusion," which was further bait for the Federals. The banks of the river were steep and precipitous, no doubt adding a bit of distraction for the pursuing Federals. Little's men crossed the river "up to the saddle skirts" and were allowed to get within ten feet of the second line of rebels on the west side of the river when a volley was fired.²⁶² The ambush had the intended effect, halting Little's Federal cavalry. Shelby reported fifty dead on the spot at Dug Ford. However,

²⁶⁰Britton, *The Union Indian Brigade in the Civil War*, 325.

²⁶¹Grover, 113.

²⁶²*Ibid.*, 114.

Brown reported only two killed and five wounded in Little's command. Shelby had bought some time, as Lazear did not press Shelby's raiders until that evening.²⁶³

While Lazear was pursuing Shelby west, Brown paralleled two miles south of Lazear's column in order to prevent Shelby from breaking to the southwest and escaping. The countryside was described by Brown as hilly and very dense with numerous narrow gorges, which impaired their movement yet helped screen their movement from Shelby's scouts. Brown pressed his command forward, crossed the La Mine River unopposed, south of Shelby's raiders, and avoided the deadly ambush Lazear had experienced. Brown turned north after he crossed the river and attacked Shelby's rear guard forcing a fight. Brown was now in the lead with Lazear's forces behind Brown's in this westward pursuit of Shelby. Shelby's men then took another stand on the west bank of the Salt Fork of the Blackwater River. Shelby and Brown exchanged musket and artillery fire in a drenching rain until dark. Brown reported one casualty in his command while reporting sixteen killed and a number wounded in Shelby's rear guard. The one casualty was a "poor fellow belonging to Thurber's battery [who] had both his legs taken off close to his body by a rebel cannon ball."²⁶⁴ Major Foster, just before dark, conducted one final mounted charge against Shelby's men, who broke and fled to the west, leaving a small rear guard. Brown's men remained on the east side of the Salt Fork and were ordered to

²⁶³*OR*, series 1, vol. 22, part 1, 630.

²⁶⁴Grover, 114.

rest on their arms while Brown and Lazear, now united, considered their next actions.²⁶⁵ Shelby's men fled to within six miles of Marshall and stopped for the night.²⁶⁶

Brown's combined force now consisted of the "Seventh Missouri State Militia, Col. J. F. Philips' detachment of the First Missouri State Militia, Lieut. Col. B. F. Lazear; Fourth Missouri State Militia, Maj. George W. Kelly; Fifth Provisional Enrolled Missouri Militia, Maj. William Gentry; Ninth Provisional Enrolled Missouri Militia, Capt. W. D. Wear, and four small guns of Thurber's First Missouri State Militia Battery, numbering about 1,600 men."²⁶⁷ It must be noted that there are numerous discrepancies within reports as to the strength of Lazear's and Brown's commands at different points throughout the pursuit of Shelby. Stephen Oates in his book *Confederate Cavalry West of the River* placed Brown's strength alone at 1600.²⁶⁸ Lazear reported his own strength at nearly 700 when he took up the pursuit of Shelby near Tipton and Brown reported his ultimate strength of 800 just prior to the Battle of Marshall.²⁶⁹ The ambiguity can only be the result of numerous changes to the task organization of the Federal forces when detachments were sent to different locations to scout or guard towns. Furthermore, various Missouri Militias would form resistance forces in various towns to meet rebel threats throughout the duration of the war. However, for the organized Federal forces, by

²⁶⁵OR, series 1, vol. 22, part 1, 627.

²⁶⁶Grover, 114.

²⁶⁷OR, series 1, vol. 22, part 1, 627.

²⁶⁸Oates, *Confederate Cavalry West of the River*, 136.

²⁶⁹OR, series 1, vol. 22, part 1, 629.

the time the Battle of Marshall commenced, the likely combined Federal strength hovered between 1400 and 1600.

In the early morning hours of October 13, Brown ordered Lazear to take his command and bypass to the south of Shelby's camp, the turn north into Marshall, occupy a defensive position facing east, and prepare to cut Shelby off at Marshall. Lazear departed at 3 A.M. and was ready for Shelby as he entered Marshall.²⁷⁰ "This was a clear departure from the established military rule, not to divide your force in the face of the enemy; but the result vindicated the judgment of the officers who gave the order."²⁷¹

The Battle of Marshall

Shelby found himself between two sizable forces on the morning of October 13. Lazear was to his front as Shelby attacked west into Marshall and Brown was behind him and would soon press Shelby's rear guard. Shelby decided to attack the force to his front, destroy it, and then deal with the force to his rear. This tactic has been described as both "audacious and wreckless [sic] and appeared to be the act of a man trifling with fate."²⁷² This does seem a fair assessment. Shelby, in his official report, stated that he thought he was facing Ewing and 4,000 Federals in Marshall.²⁷³ To think his saddle-weary force of just over 1,000 men and what few fresh recruits had joined him could attack and defeat a

²⁷⁰OR, series 1, vol. 22, part 1, 627.

²⁷¹Grover, 115.

²⁷²Bennett H. Young, *Confederate Wizards of the Saddle* (1914; repr., Nashville, TN: J.S. Sanders & Company, 1999), 215.

²⁷³OR, series 1, vol. 22, part 1, 675.

force four times his own size lends credence to descriptions of Shelby as either a madman or a fool.

Shelby dispatched Major Shanks to destroy the bridge across Salt Fork, west of Marshall, and deny Brown's force use of the crossing.²⁷⁴ This tactic worked for Shelby in the past with masterful results, particularly on the Cape Girardeau Raid the previous spring. However, Shelby's men had never before faced a concentrated force from two sides at once. Brown ordered Major Houts, Seventh Missouri State Militia, with three companies and two pieces of Thurber's battery to engage Shank's delaying action. Brown then took his main force three-fourths of a mile south of Shank's position, crossed the river, to attack Shelby's left while Major Foster would cross the river north of Shelby to attack Shelby's right flank.²⁷⁵ Brown reported after the battle that nearly half his command was armed with Navy revolvers only.²⁷⁶ These small arms would have been of limited effect against any rifled muskets or carbines Shelby's men possessed. It is possible Brown ordered the flanking movement in an attempt to receive support from Lazear due to his own inferior firepower.

Meanwhile, upon seeing the approach of Shelby's advance scouts, Lazear ordered his command in line with Major McGhee, Second Battalion, First Missouri State Militia Cavalry, and Captain Wear, Enrolled Missouri militia ordered to defend a hill to the southeast of Marshall and "hold the hill at all hazards." Major Mullins, First Missouri State Militia Cavalry, was ordered to hold the center and Major Gentry with his Fifth

²⁷⁴*OR*, series 1, vol. 22, part 1, 675.

²⁷⁵*Ibid.*, 627.

²⁷⁶*Ibid.*, 624.

Provisional Enrolled Missouri Militia on the left. Major Kelly with the Fourth Missouri State Militia Cavalry was ordered in reserve with the artillery.²⁷⁷ In Shelby's attack upon Lazear, "Hooper held the left, Hunter and Coffee the right, and artillery and the battalion with Gordon in the center, the cavalry all dismounted."²⁷⁸

Shelby's battle report was not so much a report of actions to his left and right but more a description of the heroism and gallantry of his men. It is obvious from both Lazear and Shelby that the fight around Marshall was a hotly contested one. A veteran of Company E, Gordon's Regiment, recounted years later that his Richmond Rifle had to be laid on the ground periodically so it could cool. Shelby's men had been given sixty-five rounds prior to battle rather than the usual forty.²⁷⁹ However, it must be noted that by October 13 Shelby was not fighting for a piece of terrain or for any military objective. Shelby was fighting for survival and an escape from the Federal noose.

Hooper's men opened fire upon McGhee's column at 8 A.M. before he could fully organize on the hilltop position ordered by Lazear. However, by the time Hooper advanced in a full-scale attack, McGhee's battalion was able to withstand the attack forcing Hooper to retreat. While Hooper attacked McGhee's position, Gordon attacked the Federal center held by Mullins. Lazear reported that Mullins' battalion held off three separate charges. On the Federal left, Coffee and Hunter made "a most desperate charge," folding Gentry's command back into Marshall. For a time it looked to Shelby like he

²⁷⁷OR, series 1, vol. 22, part 1, 631.

²⁷⁸Ibid., 675.

²⁷⁹T. A. G. Scott, "Battle At Marshall, Mo," *Confederate Veteran* 8, no. 2 (February 1900): 58.

would take the town and destroy Lazear's command. Lazear countered this threat by committing his reserve force to his left to prevent any further flanking movement by Coffee and Hunter.²⁸⁰

The fight for Marshall had been going on for two hours when Shanks, who still fought to delay Brown's advance upon Shelby's rear at the Salt Fork, found his position untenable. Brown's flanking movement both north and south of Shanks' defensive position was a success. Colonel John Philips, Seventh Missouri State Militia Cavalry, had crossed the river and was within supporting distance of Lazear's right flank, the hilltop occupied by McGhee and Wear. Shanks withdrew from the river crossing and only stopped and attempted a small delay in Brown's overall advance upon Shelby's rear. Shelby's Parrot gun became disabled once again and the decision was made to destroy the gun in place rather than allow it to fall into Federal hands.²⁸¹

The terrain from east of Marshall to Shelby's rear was terrain that was quite unforgivable for either mounted or dismounted troops. The vegetation, coupled with the steep ravines and hollows, were both an asset and a hindrance for Shelby's men. Shelby himself described the terrain as "thick and matted, almost impassable for cavalry."²⁸² Any flanking movement by the Federals was well concealed due to the limited visibility. Only the sounds of muskets and artillery would guide any soldier on the field to the location of the battle. The steep ravines helped Shelby conceal a consolidated force prepared to charge upon the Federal positions just east of Marshall who had the

²⁸⁰OR, series 1, vol. 22, part 1, 631, 675.

²⁸¹Ibid., 675.

²⁸²O'Flaherty, *General Jo Shelby*, 203.

advantage of the high ground. However, to Shelby's rear and flanks, the difficult terrain no doubt prevented Shelby from attaining a clear understanding of the position and size of Brown's force. Shelby continued to believe that he was facing a force of several thousand and not one nearly twice his own size. This aspect of the battle was a limitation to Shelby. However, Shelby would use this same aspect of terrain to his advantage.

After nearly four hours of fighting, Shelby's position became life threatening. "In such an emergency there was only one course left open and that was to retreat."²⁸³ Shelby consolidated his forces once he saw that he was nearly surrounded and decided to break through a weak spot on the Federal left. Shelby rallied his men and stated:

If you want to surrender any of you, you can do so. However, remember that if you do, you surrender with our heads in halters for these are militia and you know what they are. Many of you have been captured before, and released on taking the oath of allegiance to the United States. You are no fighting in violation of that oath, and if captured, are liable to be shot down like dogs. At the best, you can only expect incarceration in northern dungeons for an indefinite period. Which would you rather do? Be shot like dogs or rot in northern dungeons, or cut your way out with Jo Shelby?²⁸⁴

The raiders rallied around Shelby and prepared to break to the northeast through thick brush and deep ravines.²⁸⁵ They first had to create a makeshift bridge to cross a major ravine with the supply wagons.²⁸⁶ However, a mounted Federal charge, led by Major

²⁸³Young, 216.

²⁸⁴Sellmeyer, 136-137.

²⁸⁵Ibid., 137.

²⁸⁶Wiley Britton, "Shelby's Raid Into Missouri," *National Tribune* 18, no. 4 (November 3, 1898): 1.

Kelly, spoiled Shelby's plan and the raiders "soon gave way, and, on being hard pressed, broke in every direction."²⁸⁷

Shelby Escapes To Arkansas

Shelby, with Coffee, Gordon, and Elliot, escaped to the northwest while Hunter, with Shanks and Hooper, escaped to the east with the brass 6-pound gun.²⁸⁸ Shelby's troops had escaped the snare for now, though his force was divided and the location of Hunter's detachment was unknown to Shelby. "The head of Hunter's regiment became entangled in the thick brush and did not keep well closed up. The Federal rally dashed in between him and the rear of Gordon and thus divided them."²⁸⁹ Shelby's flight through the Federal lines was complete as they "sheered through Ewing's (meaning Lazear's) lines as if it had been made of cheese instead of men and found themselves free on the other side."²⁹⁰ The Battle of Marshall cost the Federals five killed, 26 wounded, and 11 missing.²⁹¹ Wiley Britton attributed the light Federal losses to the fact that Lazear's men conducted their fighting lying on the ground.²⁹² Shelby's losses were fifty-three dead, ninety-eight wounded, and an unknown number captured.²⁹³ Any further offensive operations by Shelby's raiders would be futile.

²⁸⁷ *OR*, series 1, vol. 22, part 1, 627.

²⁸⁸ *Ibid.*, 676.

²⁸⁹ O'Flaherty, *General Jo Shelby*, 203.

²⁹⁰ *Ibid.*, 204.

²⁹¹ *OR*, series 1, vol. 22, part 1 628.

²⁹² Britton, "Shelby's Raid Into Missouri," 1.

²⁹³ *OR*, series 1, vol. 22, part 1, 624.

As Shelby escaped, elements of the Seventh Missouri State Militia Cavalry under Colonel John Phillips prepared to press Shelby's retreat. Shelby escaped a distance from Marshall when he paused to wait for Hunter to join him. After waiting approximately an hour, Shelby continued his retreat towards Waverly. Phillips' men pressed Shelby for eight miles but Shelby held him off with a similar maneuver that guarded Marmaduke's retreat at Cane Hill. Phillips pressed hard upon Shelby's raiders at Germantown but Shelby held his position and the Federals backed away. By 3 a.m., Shelby rode through his pre-war home of Waverly, Missouri. Shelby was in the flight for his life and his family was in Kentucky so little pause was made.²⁹⁴

On October 13, Shelby paused at Hawkins Mill to give his men and horses some much-needed rest. He decided to throw off an impediment to his rapid escape, namely the ammunition and supply wagons. Shelby ensured every man was properly clothes, armed, and supplied with what ammunition they could carry. He then ordered the wagons to be pushed over the bank into the Missouri River.²⁹⁵ Sleeplessness had overtaken one of Shelby's staff officers who had decided to sleep in one of these wagons during the halt. "Sleeping cozily in one of them were nestled Lieutenant Crittenden, a staff officer of Shelby. The cold waves woke his dreamy sleep, and he came swimming lustily to the shore, dripping from every angle and shivering from head to foot."²⁹⁶

On the morning of the 14th, the Federals again took up the pursuit of Shelby's men. Colonel Brutsche with 200 men of the 9th Provisional Regiment joined Phillips as

²⁹⁴*OR*, series 1, vol. 22, part 1, 676.

²⁹⁵*Ibid.*

²⁹⁶Edwards, 222.

they continued their pursuit west. They encountered Lazear's men who were on their way towards Lexington. Lazear's men were completely exhausted and had camped near a road south of Waverly. Scouts reported Shelby's presence to the West so Lazear gave chase until they reached Davis, then left Shelby's trail and took the road to Warrensburg. Lazear gave up any pursuit of Shelby as his men had been without rations for four days and the horses were completely worn down.²⁹⁷ General Ewing would relieve Lazear and begin his chase on relatively fresh horses.²⁹⁸

Shelby's men passed through Holden at 2:00 AM on October 15.²⁹⁹ General Ewing, who had been at Warrensburg on October 12, rightly understood that Shelby would attempt a retreat to the west or southwest. Ewing reported his favorable condition to Brown that evening, unaware of the major engagement now concluded at Marshall. Ewing picked up Shelby's trail ten miles southwest of Warrensburg at 10:30 on the 15th. "Ewing's force caught Shelby's rear guard at sundown near Johnstown in Johnson County. Shelby's command continued south, entered Cass County near Wadesburg and crossed the Grand River at Settle's Ford."³⁰⁰ Ewing continued to pursue Shelby and forced a minor engagement with his rear guard fifteen miles east of Butler in Bates County. Ewing eventually pursued Shelby to Carthage, Missouri, on October 18th,

²⁹⁷OR, series 1, vol. 22, part 1, 632.

²⁹⁸Grover, 120.

²⁹⁹Sellmeyer, 139.

³⁰⁰Tom A. Rafiner, *Caught Between Three Fires: Cass County, Mo., Chaos & Order No. 11, 1860-1865* (Bloomington, IL: Xlibris Corporation, 2010), 452-453.

always just behind Shelby, engaged in a running fight with Shelby's rear guard.³⁰¹ Ewing's biggest obstacle in catching Shelby's men was their ability to remain off roads.³⁰² Shelby's men had traveled this way numerous times in the unconventional fight for Missouri. Their knowledge of the terrain was superior to Ewing's.

At Carthage, a careless blunder led to the capture of thirty of Shelby's men. Major Pickler and his men from Coffee's command were allowed the opportunity to visit their families. Pickets were not posted and when Ewing arrived in Carthage on the morning of the 18th, Pickler and his men were captured. Pickler "suffered severely for his temerity."³⁰³ Although this might look like an unforgivable mistake on the part of a seasoned veteran of Shelby's command, one must remember Shelby's men had been riding for four days with little to no rest. The straight-line distance from Miami, Missouri, to Carthage, Missouri, is 170 miles yet Shelby's men had diverted considerably to the west of a straight-line distance. It is quite feasible that the distance traveled by Shelby's men since the Battle of Marshall was closer to 200 miles. The intense retreat no doubt degraded the cognitive ability of the best of Shelby's men. Fortunately, for Pickler, he was apparently paroled. "Pickler obtained a quick release from captivity, for in mid-December he and the battalion established winter quarters at the camp of Brigadier General Douglas H. Cooper in Indian Territory."³⁰⁴

³⁰¹ *OR*, series 1, vol. 22, part 1, 663.

³⁰² *Ibid.*

³⁰³ Edwards, 223-224.

³⁰⁴ James E. McGhee, *Guide to Missouri Confederate Units, 1861-1865* (Fayetteville, NC: University of Arkansas Press, 2008), 138.

During the pursuit of Shelby's column, Hunter's detachment, approximately 300 men, split from Shelby's command at Marshall, began their flight to the northeast. Hunter's men took a quick turn to the south with their egress route almost identical to their ingress route less than ten days prior. Major Houts with two companies of the 7th Missouri State Militia Cavalry initially pursued Hunter from Marshall. Hunter crossed the Pacific Railroad four miles west of Tipton and captured some much-needed supplies. Hunter then skirmished with a small garrison at Florence and camped for the night sixteen miles south of what was left of the Lamine River bridge that Shelby's men had burned just a few days prior.³⁰⁵ By the 16th, Hunter crossed the Osage River but soon skirmished with a small detachment of the Federal First Arkansas Cavalry under Captain Hopkins. After routing Hopkins' Federals, Hunter soon faced another threat from Major Austin King of McNeil's command near Quincy. Hunter fought a running fight with King's men until he lost the Federals by scattering his force into small groups who were then able to hide in the thick brush.³⁰⁶ The exhausted rebels camped the night of the 16th twelve miles southeast of Greenfield in Rock Prairie. Hunter was forced to abandon the remaining artillery piece of Shelby's command earlier in the day at Humansville due to exhausted horses.³⁰⁷ Shelby's men had captured this gun during their raid on Springfield under Marmaduke the previous January.³⁰⁸ The six pounder was spiked, its wheels and

³⁰⁵Sellmeyer, 140.

³⁰⁶Grover, 120.

³⁰⁷Sellmeyer, 140.

³⁰⁸*OR*, aeries 1, vol. 22, part 1, 624.

axles chopped into such small pieces as to make it useful for nothing but kindling, and the harness destroyed.³⁰⁹

On the morning of the 17th, Hunter's men continued south and met little to no organized resistance. They crossed the Wire Road on October 18th and camped on the 20th near Berryville, Arkansas. Unbeknownst to Hunter, he was five miles from Shelby's main force.

On the morning of the 18th, Shelby's men, minus Pickler and his unfortunate underlings, departed Carthage towards Diamond Springs under the renewed pursuit of Ewing's command. Shelby's men had reached the breaking point. Ewing's forces were taking stragglers as prisoners at a growing rate. "When thus taken, the rebels were in a pitiable plight, and many were demented, and in a dying condition from hunger, exposure, loss of sleep, and terrific, long marching without rest."³¹⁰ Thus was the condition of Shelby's "raiders," with nearly two weeks of hard riding, left before they were safe in Confederate territory. Ewing broke contact with Shelby's men at this point and General McNeil picked up Shelby's trail only twelve hours behind him.³¹¹ Ewing reported that McNeil, with his six hundred cavalry, 300 infantry, and four artillery pieces, declined any assistance from Ewing.³¹² Ewing then returned to Fort Scott, Kansas.³¹³

³⁰⁹OR, series 1, vol. 22, part 1, 677.

³¹⁰Grover, 120.

³¹¹Larry E. Wood, *The Civil War on the Lower Kansas-Missouri Border*, 2nd ed. (Joplin, MO: Hickory Press, 2003), 170.

³¹²Sellmeyer, 141.

³¹³Britton, "Shelby's Raid Into Missouri," 1.

Shelby's force turned to the southeast, crossed the Wire Road near Cassville, and destroyed the telegraph lines once again. His command rejoined Hunter's main near Berryville, Arkansas, on the banks of the Little Osage River, on October 20. He paused here, according to Edwards, to await news of Hunter's fate. While here, Shelby sent detachments in every direction to destroy telegraph and rail lines. While here, Shelby's scouts managed to procure some much-needed supplies. The composition of the plunder can only be ascertained by Edwards himself but is no doubt inflated, reported at "ninety-five horses, seventy-three Sharpe's rifles, one hundred and twenty navy revolvers, two six mule teams loaded with bacon and hard take, and any quantity of blankets and overcoats."³¹⁴

Shelby realized the broken condition of his now-joined command and "determined to march by easy stages to the Arkansas River."³¹⁵ Hunter discovered McNeil's Federals when he attempted to enter Huntsville and recruit men.³¹⁶ Not wanting an engagement with McNeil, Shelby pushed forward, reached the Boston Mountains on the 24th, and crossed the Arkansas River at Clarksville on the 26th. As they neared the Arkansas River, Shelby's worn-out rear guard repulsed a weak charge by Colonel Cloud, part of McNeil's cavalry, who pursued Shelby from Fayetteville. Shelby could not afford another large engagement due to a lack of ammunition.³¹⁷

³¹⁴Edwards, 225.

³¹⁵*OR*, series 1, vol. 22, part 1, 677.

³¹⁶John Moore, 148.

³¹⁷Webb, 186.

Shelby's men encountered one last hardship during the final stage of their retreat. A severe snow and ice storm surrounded Shelby's men as they made one final push and arrived at Washington, Arkansas, on November 3.³¹⁸ On November 4, Shelby sent a dispatch to General Price and requested his wagons and the remainder of his command previously left in Arkansas "so I can organize and get them in condition again."³¹⁹

Shelby's raid was complete but at what cost? Shelby reported his losses did not exceed 150 men. He claimed to have killed and wounded 600 Federals, captured and paroled 500 more, destroyed ten forts, and over two million dollars' worth of destruction to infrastructure and supplies destroyed or taken. His numbers of recruits, firearms, and horses taken seem equally inflated. He claimed 800 new recruits, 1,200 guns and revolvers captured, and 6,000 horses and mules captured. The raid lasted forty-one days and covered over 1,500 miles total.³²⁰

Shelby's success or failure on the raid hinged on his initial intent. He focused not on hard targets but instead chose to focus on railroad bridges, telegraph lines, and small "forts" in towns defended by the Enrolled Missouri Militia. The largest engagement Shelby encountered during his raid was the Battle of Marshall. However, the fact that Shelby was unable to defeat the Federal forces at Marshall demonstrated the cavalry's limitations when fighting as infantry. Shelby's specialty remained rapid movement against guard forces and outposts. Shelby's brigade specialized in speed and surprise throughout the raid, which gave him the advantage. Shelby's reputation as an audacious

³¹⁸ *OR*, series 1, vol. 22, part 1, 677.

³¹⁹ *Ibid.*, 670.

³²⁰ *Ibid.*, 678.

cavalry commander gave Missourians a romanticized figure of which to rally around in the same fashion and status of J.E.B. Stuart in the east.³²¹

As a reward, Shelby received his promised commission as a brigadier general, approved by the Confederate Congress and conferred upon Shelby on April 1, 1864.³²² Edwards, Shelby's adjutant, surely believed the reward was well deserved. John Edwards would write after the war, "Search the annals of the Confederate War for another such feat and the inquirer will surely go unrewarded."³²³

³²¹Floyd C. Shoemaker, "Missouri—Heir of Southern Tradition and Individuality," *Missouri Historical Review* 36, no. 4 (July 1942): 441.

³²²O'Flaherty, *General Jo Shelby*, 209.

³²³Edwards, 239.

CHAPTER 5

ASSESSING SHELBY'S RAID

By the time, Shelby conducted his famous raid into Missouri the conventional fight for Missouri was a memory. The battles of Wilson's Creek, Pea Ridge, and Prairie Grove had all but solidified Missouri's position as a federally held state by December of 1862. The war for Missouri was a series of raids. Marmaduke raided Missouri twice in early 1863 and Shelby raided the following fall. Shelby watched the continual rebel setbacks throughout early 1863 and was not immune to the mindset that he could reverse rebel setbacks by and could raid more successfully. Shelby's operational objectives for this raid were clear enough for his subordinates to accomplish at the tactical level, yet fluid enough to ensure a spirit of success upon his return. Strategically speaking, however, the raid was a failure.

General Kirby Smith's strategy was greatly hampered once the Federals controlled the Mississippi River. Federals pressed Smith's Trans-Mississippi department along the river from the east and the solid Union control of northern Arkansas, including Little Rock. Smith chose to focus his efforts on the Federal threat up the Red River. He had barely 25,000 troops in his entire department and rightly realized he was outnumbered nearly two to one.³²⁴ If Price chose to allow Shelby to conduct this raid, it would be conducted without reinforcements. Shelby definitely viewed Missouri as important but the raid was not in line with Smith's strategy. Shelby did, however, believe his objectives in Missouri would support the Confederacy.

³²⁴Castel, 173.

Shelby's first objective was the recruitment of loyal secessionists within Missouri. Shelby claimed the addition of 800 recruits within his ranks upon his return from his raid. However, Colonel C. Florence asserted not one single recruit was added to the ranks of the Confederate Army.³²⁵ The truth existed somewhere between these two extremes. In addition, it should be noted, any number of recruits Shelby might have gained can only be overshadowed by the numbers of Shelby's raiders that were killed, wounded, or captured as the Federal pursuit of Shelby became more organized.

Shelby's report indicated he recruited 800 men. Shelby expressed a sense of personal satisfaction to any skeptic in this report by his statement, "Hoping this report may prove satisfactory."³²⁶ However, when one looks at Shelby's force on September 22, his force upon arrival back in Arkansas in early November, and various casualty reports, this number is inflated.

Federal reports gave a clear picture at Marshall, Missouri, Shelby's high water mark. Brigadier General Egbert Brown, commander of the Seventh Missouri State Militia Cavalry, reported Shelby's losses at Marshall alone at fifty-three dead and ninety-eight wounded. These wounded were left behind and left in houses and hospitals around Marshall.³²⁷ Brown's figures are no doubt quite accurate since his main force was not part of the main pursuit of Shelby's men and they were no longer under fire. Two days after the engagement at Marshall, Brown estimated Shelby's forces at 900 men.³²⁸ This

³²⁵*OR*, series 1, vol. 22, part 2, 1059.

³²⁶*Ibid.*, 678.

³²⁷*Ibid.*, 624.

³²⁸*Ibid.*

engagement alone cost Shelby 150 men not counting any number of captured rebels. Phillips' detachment in its pursuit of Shelby from Marshall, through Waverly, and south netted the Federals "29 or 30 known to have been killed outright in the several skirmishes." The number of wounded was not known.³²⁹

Federal reports are littered with numbers of known killed but only suppositions of wounded, with the exception of the Battle of Marshall. However, with numerous Federal engagements with Shelby's rear-guard during the retreat, the number of captured rebels dwindled the ranks. The men hard-pressed by Ewing suffered the bulk of the casualties. Ewing's men captured several raiders east of Butler on the 14th, occasional stragglers between there and Carthage, and then captured Pickler and his thirty men at Carthage.³³⁰

As Shelby approached the Arkansas River on his flight south, the numbers of stragglers increased. "On the expedition Ewing's forces picked up quite a number of Shelby's men who were pressed so closely that they were cut off, or who, by the hardships of marching day and night, had fallen out of the ranks near the road to get a little rest and sleep."³³¹ The condition of Shelby's men as they approached the Arkansas border was not unlike what Blunt had encountered in Shelby's 1862 recruiting trip and the skirmish at Coon Creek. Shelby's men ceased to be an effective fighting force. Shelby's report indicated he arrived at Washington, Arkansas, at the end of his raid, with 1,200 men. He further claimed a loss of 150 men, which does seem within the realm of possibility. By the time Shelby consolidated his raiding force with Coffee and Hunter in

³²⁹*OR*, series 1, vol. 22, part 1, 641.

³³⁰*Ibid.*, 663.

³³¹Britton, *The Civil War on the Border*, 192.

late September, Shelby reported a combined force of 1,200 men. New recruits were certainly a part of this number as two companies recruited in Missouri were added to the rolls of Colonel Robert Wood's 13th Regiment of Marmaduke's division.³³² Needless to say any number of men Shelby recruited more than likely stands around 200 to 300 men at the most. In all reality, Shelby did not accomplish his first objective.

Shelby's raid was also meant to bolster the fighting spirit of the Confederacy after its severe losses at Vicksburg and Helena. Any measure of success with regard to this aim is difficult to quantify. The spirit of the Confederacy west of the Mississippi River was pessimistic. Kirby Smith described his following the fall of Vicksburg as, "The possession of the Mississippi River by the enemy cuts off this department from aid from and communication with Richmond; consequently we must be self-sustaining and self-reliant in every respect."³³³ Smith's tone indicated a deep sense of anxiety coupled with his concern whether his department could survive. The Confederate Army west of the Mississippi certainly was in need of anything that resembled a "victory."

Although Shelby's Raid was viewed as madness by many prior to September 22nd, three days after Shelby arrived in Washington, Arkansas, at the conclusion of his raid, the locals "made magnificent preparations for a dinner to be given in his honor." Marmaduke and his staff were in attendance and drank numerous toasts to the exploits of Shelby's Raid. By the end of festivities, at nearly 2 a.m., Captain Hart recited a prepared poem entitled "Jo Shelby's Raid." The spirit of Shelby's Brigade and the opinions of

³³²McGhee, 103.

³³³*OR*, series 1, vol. 22, part 2, 936.

Marmaduke were certainly elevated.³³⁴ However, whatever jubilation Shelby's raid gave to his brigade and Marmaduke, it did nothing to advance the rebel strategy.

By late fall 1863, Smith ordered the further retreat of the Confederate forces further south in to Arkansas. In late October 1863, rebel irregulars failed in a renewed attempt to seize Fayetteville, Arkansas. Two weeks later Marmaduke attacked Pine Bluff, Arkansas, "but he suffered a similar humiliation." After witnessing the condition of the rebel Army in Arkansas, Smith made plans to move the entirety of Holmes' and Price's army into Northern Louisiana. When one considers these Confederate setbacks coupled with the loss of the Mississippi River, and the isolation Kirby Smith's army faced, it is safe to say that in its essence, Shelby's raid into Missouri was "thrilling but pointless."³³⁵ Yet the seeds for inspiration were ever present as his men loved to say, "You've heard of . . . Jeb Stuart's Ride around McClellan? Hell, brother, Jo Shelby rode around MISSOURI!"³³⁶

Any jubilation over Shelby's audacious raid most assuredly was overshadowed by the reports coming from the Burnt District, the counties affected by General Order No. 11. Shelby reported a country desolate of inhabitants. "In many places he traveled forty miles without encountering a residence. On the road to Arkansas he found 'delicate females fleeing southward', driving their teams 'barefooted, ragged, and suffering for even bread'."³³⁷ Even though Shelby had raided the state, he no doubt left it in a more

³³⁴Edwards, 240.

³³⁵Kirby, 236. This quote is also used as the title of this thesis.

³³⁶Oates, *Confederate Cavalry West of the River*, 139.

³³⁷Gerteis, 160.

destitute state than he found it, specifically as his command-looted stores and captured 6000 horses to support his rapid movement. The continued raiding of Confederates from Arkansas and guerrillas from within the state decimated Missouri. Any arousal of the fighting spirit within the Confederate Army after Shelby's raid was certainly more a product of fabrication and wishful thinking.

Shelby's third objective was a hope to occupy Federal forces in Missouri and prevent Rosecrans from being reinforced during the Chickamauga Campaign. Shelby was unaware of Rosecrans' defeat and retreat to Chattanooga, Tennessee when he departed Arkadelphia on September 22nd. However, in his report, Shelby indicated he kept 10,000 men from reinforcing Rosecrans and further believed that these 10,000 men were "on the eve of being sent to him, and held them in Missouri for two weeks."³³⁸

Throughout the raid, Shelby's men were opposed by Enrolled Missouri Militia, Provisional Enrolled Missouri Militia, and Missouri State Militia Cavalry. These forces were not able to leave the state. Major General Samuel Ryan Curtis, in a letter to General in Chief Henry W. Halleck on May 6th, 1863, expressed the unreliability of these militia groups. "The Missouri State Militia cannot be sent out of the State. The Enrolled Missouri Militia will not stay in the field during this season of corn planting. They will not turn out quick enough to resist a raid, as shown by the recent attack from Arkansas."³³⁹ Curtis' frustration stemmed from continued calls from Halleck to send troops to assist Grant's move towards Vicksburg and Rosecrans' activities in Tennessee. Furthermore, Halleck simply did not believe that any further rebel activity would take

³³⁸*OR*, series 1, vol. 22, part 1, 678.

³³⁹*Ibid.*, 270.

place in Missouri. “No serious demonstrations can be now made against your department.”³⁴⁰ Curtis found himself between calls for troops to be sent South and East, concerns of further rebel activity in Southern Missouri as demonstrated by Marmaduke’s two previous raids and unreliable militia to protect districts in Missouri.

After Schofield replaced Curtis on May 22, 1863, the continued calls from Halleck to reinforce other departments did not slow. Schofield complied with an order received on June 2nd and sent 8,000 regulars to assist Grant and 2,400 to Rosecrans. The forces sent to Grant returned to Arkansas after the fall of Vicksburg and were assigned to Steele’s command, which ultimately resulted in the Confederate loss of the Arkansas River from Fort Smith to Helena.³⁴¹ No further assistance was ever given by Schofield despite numerous calls from Halleck. Either Shelby was mistaken or, more appropriately, used this simply to encourage and rally his men and lead them to believe they prevented a reinforcement of Rosecrans. By the end of 1863, Schofield reported no such result of Shelby’s raid. His report reflected a total strength of 36,800 men in the Department of the Missouri, a territory over 60,000 square miles.³⁴² The success of Shelby’s Raid, based on his own desired goals, can be described as dubious, at best. However, despite the lack of operational success of Shelby’s raid, the conduct of the raid was not without its redeeming qualities.

³⁴⁰*OR*, series 1, vol. 22, part 2, 217.

³⁴¹*Ibid.*, 13-14.

³⁴²*Ibid.*, 17.

Shelby demonstrated a leadership ability that inspired his men to exert their last ounce of strength. His demeanor, although perhaps somewhat inflated here, was and is among the qualities identified in a good leader.

He was magnetic, and so drew men to him; his intuitions were correct, his perceptions clear, his judgments reliable, and so men believed in him. He was a youthful general. His seniors misinterpreted his ardor, never dreaming that his impetuosity was born of genius, not of youthful exuberance. His activity was ceaseless; he was never weary, never sick he was never incapacitated by loss of sleep.³⁴³

Shelby's inspiration came from a demonstration of resilience when he devised a plan, organized a raiding force, and led a 1,500 mile raid while his wounded arm was in a sling and generally useless. Just this picture alone lends credence to the amount of praise heaped upon Shelby by the men he led. "He was a born cavalry leader, one of those men of dashing courage who never ordered his troops in a charge, but always led them."³⁴⁴ This quality in Shelby made him one of the most inspirational and natural leaders in the Trans-Mississippi West. Had he been assigned east of the Mississippi River, there is little doubt that his name would appear with the names of Stuart, Forrest, or Custer. In 1894, George Grover, a Federal Captain who faced Shelby in this raid, stated, "Of all the cavalry commanders in the Confederate army west of the Mississippi River, Jo Shelby was unquestionably the best. There were others who excelled him in military education, but they were far inferior to him in natural military genius, as well as in that dash and personal magnetism so necessary in a leader of a large cavalry force."³⁴⁵

³⁴³Webb, 305.

³⁴⁴William F. Boreland, "General Jo O. Shelby," *Missouri Historical Review* 7, no. 1 (October 1912): 11.

³⁴⁵Grover,

Shelby's raiding methods are worth examination. Throughout the war, Shelby gained a reputation as a reliable man, able to cover rebel forces in the advance or the retreat, against numerically superior forces. Shelby's ability to operate with great speed, superior situational understanding, coupled with an audacious logistical plan made Shelby one of the more successful commanders at the tactical level.

Shelby's raid was conducted with a speed, which kept the Federals off balance. "As the raiding force was moving almost as rapidly as a mounted messenger, General Brown was unable to obtain any definite information as to its position or what point it was marching upon in time to make proper disposition of his troops for striking an effective blow."³⁴⁶ Federal dispatches reported Shelby's current location in error, always a day behind, due to Shelby's speed. Furthermore, difficulty in determining Shelby's objective made it extremely difficult to decisively engage him. Lazear was the first to correctly ascertain Shelby's location when he disobeyed Brown's order to march south. Had it not been for Lazear's initiative, the events of early October, 1863, would have certainly been different.

Part of Shelby's speed can be attributed to his unorthodox manner of feeding and resting his horses and men.

Shelby's method of marching was peculiar to himself. While his rear guard was moving, his advance guard slept and fed, so that one-third of his command was resting method to eat while the other two-thirds were moving. Another device he adopted, was that of taking oats in the bundle from the stacks in the fields near the road, and directing each man to carry a bundle of grain, with heads extended back of him, so that the horse behind him would eat it as he walked along, while his own horse was eating in the same manner from the bundle in front of him.³⁴⁷

³⁴⁶Britton, *The Civil War on the Border*, 172-173.

³⁴⁷Grover, 121.

Shelby's ingenuity coupled with the number of fresh horses his men commandeered throughout the raid kept his men one-step ahead of the Federals. With Shelby's ability to get the most from his men, "it was impossible for any troops to out-march them."³⁴⁸ Shelby's men "were adaptable and resourceful, willing to endure the hardships of a long march in any sort of weather."³⁴⁹

Shelby's speed was also attributed to his "travelling with a minimum of supplies."³⁵⁰ Marmaduke's second raid in particular had been slowed by supply wagons. However, Shelby's men on this raid were supplied by captured Federal quartermaster stores and whatever supplies as could be looted from civilian stores as they moved north. Before leaving, "Shelby supplied as many of his men as he could with fresh mounts, rifles, pistols, and clothing."³⁵¹ Neosho was their first opportunity to resupply. Edwards himself stated Shelby's raiders wore Federal blue and used the red sumac leaves to distinguish themselves from Federals. Shelby's men risked execution if captured, which no doubt motivated Shelby's men all the more.

Shelby's last major advantage in his raid over his previous experiences with Marmaduke was his intelligence-gathering and superior knowledge of central, western, and southwestern Missouri. Edward Longacre in *Mounted Raids of the Civil War* stated, "the scouts and guides needed a full, accurate comprehension of the country to be

³⁴⁸Young, 217.

³⁴⁹Edward G. Longacre, *Mounted Raids of the Civil War* (Lincoln, NE: University of Nebraska Press, 1975), 12.

³⁵⁰Oates, *Confederate Cavalry West of the River*, 140.

³⁵¹Gerteis, 157.

traversed, a knowledge of nearby enemy troops and hostile citizens, and a wealth of detail about back trails and blind roads to be used in event of emergency.”³⁵² Shelby lived in the Lafayette and Saline County area in the Missouri River valley prior to the war. The core of his brigade was recruits from the same area. Furthermore, Shelby had conducted multiple “raids” into this area throughout the first two years of the war, traversing western and southwestern Missouri. Each time Shelby retreated south under Federal pressure. This gave Shelby many opportunities to conduct quasi-rehearsals for his 1863 raid. Shelby’s recruiting trip into Waverly in 1862 and the subsequent return to Arkansas followed same general route with similar Federal pressure. By conducting these previous trips, Shelby retained the advantage of superior intelligence of the land and road networks, something Marmaduke did not have in his raids.

Shelby was rewarded for his actions from 1863. When Price invaded Missouri in 1864, Shelby commanded a division. “Price’s Raid” consisted a force ten times the size of Shelby’s 1863 raiding force. In 1867, Edwards expressed a sentiment from the rebel camp no doubt in Price’s mind as he prepared for his 1864 raid. “It might repay some philosophical writer in making hereafter an estimate of Shelby’s ability, to speculate upon what great results might have followed from the operations of eight thousand men instead of eight hundred.”³⁵³ After the war, the number would be inflated even more by old men remembering their dashing exploits. “Fifteen hundred miles to the Missouri

³⁵²Longacre, 12.

³⁵³Edwards, 239.

River and back again . . . with 800 men in thirty-four days . . . to the gates of Jefferson City! What if they had given us 10,000 men?”³⁵⁴

Even Shelby himself was not immune to a post-war romanticized version of his exploits. His reply to a letter from George Lankford, a fellow raider, in 1885 expressed, “The experiences therein contained is well calculated to cause one’s thoughts to revert to the good old days when we were battling against the world for our independence. We failed but, we, the South, have the satisfaction of knowing that no people on Earth endured or fought more from patriotic desires.”³⁵⁵ However, despite the pomp and braggadocio, Shelby’s Raid of 1863 was indeed thrilling but pointless.

³⁵⁴O’Flaherty, *General Jo Shelby*, 189.

³⁵⁵Joseph O. Shelby, “Letter to George Lankford, August 2, 1885,” Western Historical Manuscript Collection, University of Missouri, Columbia, MO.

APPENDIX A

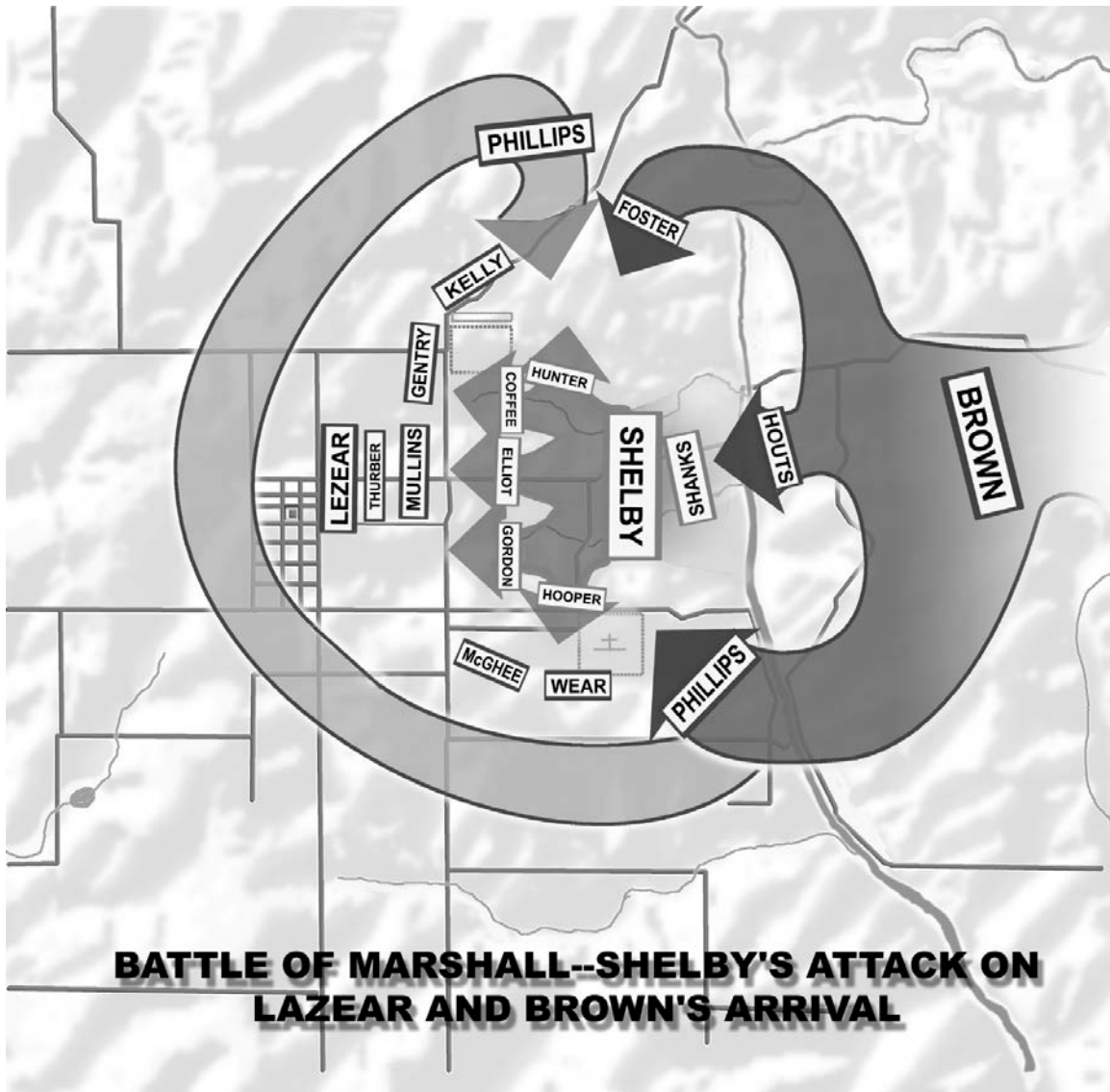
MAPS



1 Inch = 65 Miles

Figure 1. Shelby's Raid Route

Source: Maps obtained from Department of Natural Resources, Missouri State Parks Services, Jefferson City, MO, November 25, 2013.




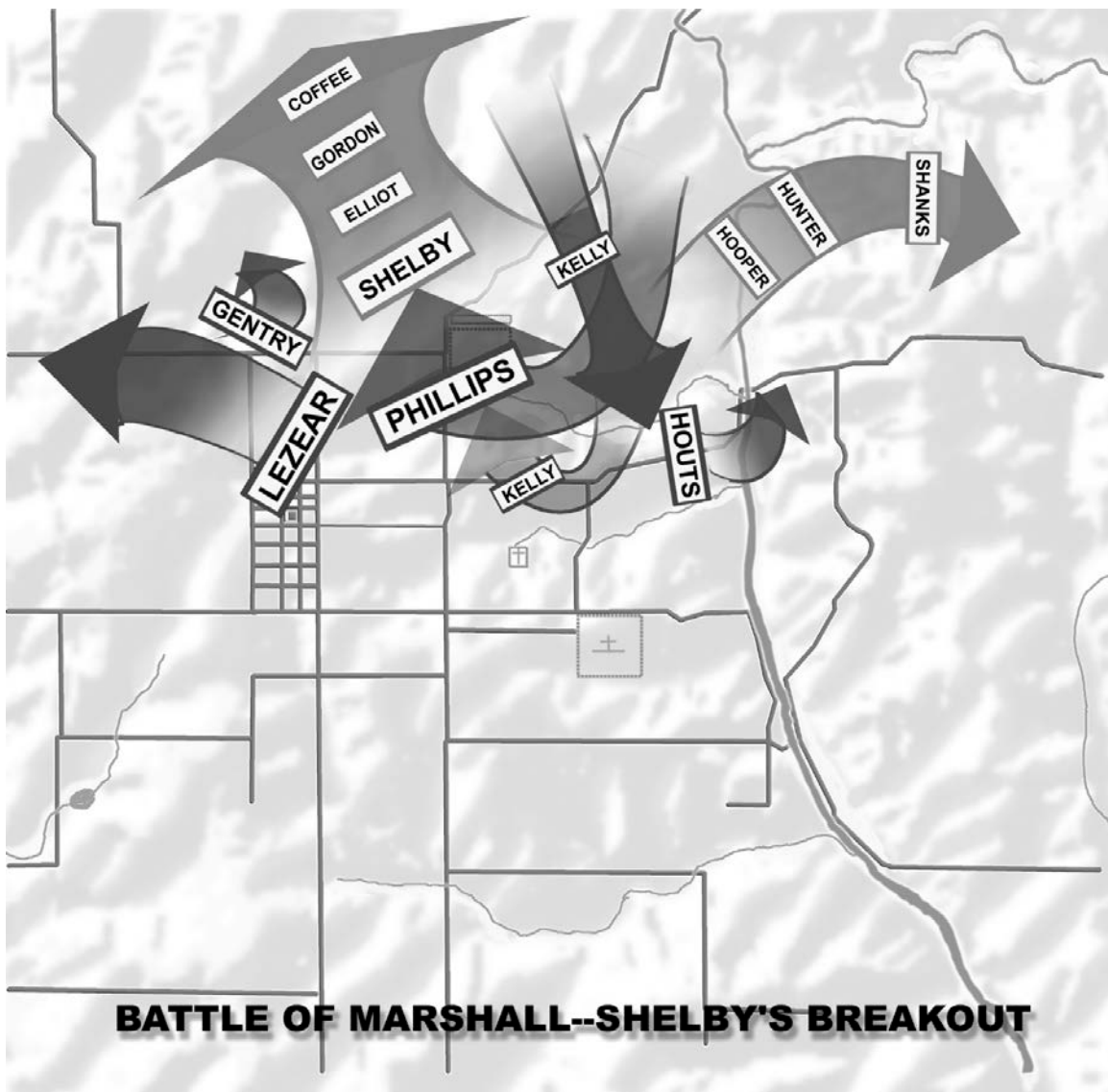

 1 Inch = .70 Miles

Figure 2. Battle of Marshall

Source: Maps obtained from Department of Natural Resources, Missouri State Parks Services, Jefferson City, MO, November 25, 2013.



1 Inch = .70 Miles

Figure 3. Battle of Marshall--Shelby's Breakout

Source: Maps obtained from Department of Natural Resources, Missouri State Parks Services, Jefferson City, MO, November 25, 2013.

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