

UNITED STATES ARMY COUNTER PARTISAN OPERATIONS IN NORTHERN
VIRGINIA DURING THE AMERICAN CIVIL WAR

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MASTER OF MILITARY ART AND SCIENCE
Military History

by

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ABSTRACT

UNITED STATES ARMY COUNTER PARTISAN OPERATIONS IN NORTHERN VIRGINIA DURING THE AMERICAN CIVIL WAR by Major Nicholas B. Taran, 76 pages.

The American Civil War was similar to other wars in America's history in that both sides employed irregular warfare during operations. Confederate partisan units utilized irregular warfare to interdict Union Army operations in northern Virginia and the Shenandoah Valley for the duration of the conflict. These partisan units were hybrid organizations that conducted independent raids, small skirmishes, and reconnaissance in support of the larger Confederate Army. Union Army operations to counter these partisan units achieved differing levels of success throughout the war. However, the Union Army developed and employed unique "counter partisan" organizations during 1864 with increased success. This thesis examines the 43d Virginia Cavalry and the 1st Virginia Partisan Rangers of the Confederate Army, and the Union Army's response to counter the irregular partisan units. The thesis adds specific emphasis on the Union Army's development and employment of hybrid "independent scout" organizations. Enhanced capabilities, specifically in the domains of leadership, personnel, training, and material, enabled these "independent scouts" to employ irregular warfare in countering Confederate partisan operations. Examination of these counter partisan units demonstrates the importance of understanding an adversary's capabilities, tactics, and other aspects of the operational environment.

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ACRONYMS

ANV Army of Northern Virginia

USA Unites States Army

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CHAPTER 1

INTRODUCTION

Historical Background

The conflict between the Union and the Confederacy, also known as the American Civil War, was similar to other wars in America's history in that both sides utilized irregular warfare tactics during operations. Both used the irregular tactics to augment conventional military methods associated with mid-19th Century military operations. Although the belligerents used a range of irregular warfare methods, the capabilities and tactics used by Confederate Partisan units in the northern and western Virginia regions of the Eastern Theater augmented standard military operations.

Although the United States Army (USA) employed various tactics in counter partisan operations, with differing levels of success throughout the war, the specific capabilities and tactics counter partisan units used during 1864 had more success than in other regions. While historians have examined partisan warfare and tactics during the larger Civil War, few have addressed why the Union Army was more effective in Virginia. The primary focus of this thesis is to answer the following primary research question: How did the US Army's counter partisan operations change during the 1864 campaign in northern and western Virginia?

This thesis focuses on the United States counter partisan strategy localized to the Eastern Theater in 1864. Counter partisan operations continued for the duration of the conflict in the Eastern Theater, which allowed for a more in depth analysis of changes in those operations over time. The Confederate irregular partisan unit's hybrid capabilities served a particular role in enabling the regular Confederate forces to engage significantly

degraded, however larger and better-equipped, United States units. The thesis focuses primarily on the Union Army's responses to partisan forces in 1864 and emphasizes the differences from the earlier Union responses to this threat.

Confederate Irregular Warfare Unit Definitions

The following are definitions intended to add clarity for the reader and enable a common understanding of words whose meaning have differed over time. Differences outlined by the Partisan Ranger Act of 1862 of General Order No. 30 are the basis of these definitions.¹

Partisan

Partisans, also referred to as "Partisan Rangers," were "officially sanctioned guerilla fighters during the Civil War . . . authorized by the Confederate Congress in 1862 through the Partisan Ranger Law."² Partisans differed from guerrillas as the Confederate Government sanctioned the partisans. The sanctioned partisans supported the operational objectives of the larger Confederate Army.

Partisan Operations

Partisan operations are the military operations of uniformed Confederate units conducted under the auspices of the Confederate Partisan Ranger Act of April 1862. These operations supported the larger operational objectives of the Confederate Army. It does not include guerrilla operations conducted by civilians against Union military units

¹ Reference Appendix A for the *Partisan Ranger Act of 1862*.

² Terry L. Jones, *Historical Dictionary of the Civil War: Volume 1*, 2nd ed. (Toronto: The Scarecrow Press, 2011), 1078.

or against other civilians. It also does not include the employment of deep raids by larger Cavalry formations since standard military formations conducted these types of operations during the Civil War.

Guerrilla

“Guerrillas were small groups of “soldiers” who operated behind enemy lines, independent or semi-independent of main armies, and conducted hit-and-run raids.”³ Guerrillas conducted paramilitary, and often criminal, operations under the auspices of nationalism, but personal self-gain also inspired their actions.

Guerrilla Operations

Guerrilla operations are irregular operations conducted by civilians or ad hoc militias with varied structures and organizations. The Confederate Congress specifically prohibited the establishment of guerilla unit's other than sanctioned Partisan Rangers in General Orders No. 30. Civilian guerrillas conducted operations to include acts of intimidation, physical violence, and looting against both United States and Confederate Soldiers and civilians. The most famous or infamous of these operations was Quantrill's Raid on Lawrence, Kansas in August, 1863. There was no parallel to Quantrill's activities in the Virginia Theater.

³ Jones, 628.

General Warfare Definitions

The following are definitions of military specific terms used in contemporary military operations. These terms are intended to add clarity and insight into today's equivalents of counter partisan operations.

Shaping Operation

A shaping operation is “an operation that establishes the conditions for the decisive operation through effects on the enemy, other actors, and the terrain.”⁴

Raid

A raid is “an operation to temporarily seize an area in order to secure information, confuse an adversary, capture personnel or equipment, or destroy a capability with a planned withdrawal.”⁵

Economy of Force

Economy of force is “the judicious employment and distribution of forces so as to expend the minimum essential combat power on secondary efforts in order to allocate the maximum possible amount of combat power on primary efforts.”⁶

⁴ Headquarters, Department of the Army, Army Doctrine Reference Publication (ADRP) 1-02, *Terms and Symbols* (Washington, DC: Department of the Army, 2015), 1-82.

⁵ Ibid., 1-75.

⁶ U.S. Department of Defense, Joint Publication (JP) 1-02, *Dictionary of Military and Associated Terms* (Washington, DC: United States Department of Defense, 2013), 85.

Introduction to Civil War Partisan Operations

The Confederate government sanctioned Confederate partisan units to conduct hybrid military operations that represented both regular and irregular warfare. These Partisan Rangers primarily engaged in the latter. Although not specifically trained for irregular operations, the partisans possessed similar attributes of the regular Cavalry during the Civil War. Confederate partisan units contained individually selected soldiers and officers. Partisan commanders personally selected the officers of their small units. In traditional volunteer fashion, these units voted on and confirmed the company grade officers. This allowed for the selection of individuals to leadership positions based on merit and esteem, thus increasing the overall quality of leadership in the uniquely smaller partisan ranks.⁷

Partisan irregular warfare used raids, ambushes, reconnaissance, small-scale skirmishes, and capture of enemy prisoners and equipment to achieve limited and specific Confederate objectives. The unconventional nature of their tactics and small size allowed the partisans to limit their opponent's mobility and interrupt his lines of communication without engaging Union regulars. Confederate partisan units served as force multipliers in today's doctrine. They used irregular organizations and tactics to prevent the enemy from engaging conventional Confederate organizations. Partisan leaders succeeded by employing a variety of irregular tactics depending on the operational situation.

⁷ Michael D. Pyott, "The Gray Ghost and His Featherbed Guerrillas: A Leadership Analysis of John S. Mosby and the 43d Virginia Cavalry" (Master's thesis, United States Army Command and General Staff College, 1988), 59-60.

Confederate partisan units operating in northern Virginia had several unique characteristics that facilitated their operations. Partisan units usually conducted operations in elements of 20-80 soldiers, but each regiment totaled up to 600 soldiers.⁸ This increased their stealth and made it more difficult for enemy scouts to identify them. This permitted quick dispersal if needed. Partisans also conducted operations detached from the major Confederate commands in the Eastern Theater. Although the partisan officers reported to the Confederate of the Army of Northern Virginia (ANV), the partisans operated relatively independently as they supported the larger intent of the higher command with decentralized control.⁹

The partisans were usually familiar with the terrain in which they conducted their operations. This knowledge aided their ability to disengage when necessary and to evade the Union pursuit during most of their operations.¹⁰ This also limited the casualties of the relatively small force. Terrain familiarity allowed the partisans to cultivate support from the local civilian populace, which provided much needed assistance to the partisans who

⁸ National Parks Services, *Mosby's Regiment, Virginia Cavalry (Partisan Rangers)*, United States National Parks Service History e-Library, accessed May 11, 2016, <https://www.nps.gov/civilwar/search-battle-units-detail.htm?battleUnitCode=CVAMOSBRC>. The 43d Virginia Cavalry was comprised of eight companies in 1865. Commanders employed their companies in squadrons when large formations were required.

⁹ Jeremy B. Miller, "Unconventional Warfare in the American Civil War" (Master's thesis, United States Army Command and General Staff College, 2004), 42.

¹⁰ J. Marshal Crawford, *Mosby and His Men: A Record of the Adventures of that Renowned Partisan Ranger* (New York: Carleton, 1867), 111.

often bivouacked in local farmhouses.¹¹ The unique combination of equipment utilized by the partisan also enabled their operations.

The Partisans units usually operated mounted, which increased their speed and the distance they could travel. The majority of partisans carried at least two pistols that allowed them engage a large number of targets in a short time. This facilitated the partisan operational tempo. A limited numbers of partisans often carried rifles for missions that required accuracy at longer ranges.¹² The Partisan Ranger Act authorized partisans to use captured enemy equipment. This facilitated logistical needs to replace losses and enabled sustainment of their operations. Confederate partisans also wore differing attire to augment their reconnaissance and scouting techniques.

The partisans often used the civilian clothing to evade capture from Union pickets or scouts. Many considered this tactic unlawful.¹³ Reports of guerrillas and partisans conducting ambushes while dressed in Union uniforms became a contentious matter as well. They considered these attacks as criminal acts of murder outside the realm of acceptable combat. Capture in civilian clothing carried a high risk: if captured, a partisan likely faced a death sentence. The effectiveness of these extreme methods for deterring irregular operations is questionable. The partisans continued operations, until the war's

¹¹ James J. Williamson, *Mosby's Rangers*, 2nd ed. (New York: Sturgis and Walton Company, 1909), 18, accessed November 15, 2015, https://archive.org/stream/mosbysrangers00willrich/mosbysrangers00willrich_djvu.txt.

¹² Jeffery D. Wert, *Mosby's Rangers: The True Adventures of the Most Famous Command of the Civil War* (New York: Simon and Schuster Paperbacks), 34.

¹³ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*: series 1, vol 43, chapter 45, accessed January 12, 2016, <http://ebooks.library.cornell.edu/m/moawar/text/waro0060.txt>.

end, despite receiving threats that included: “[execution] would be the fate of [the partisans].”¹⁴ The Confederates, however, considered the partisan as a legitimate combatant even though they employed irregular warfare methods.

A partisan soldier was a combatant, “as long as [he] was paid, officered, uniformed, and subordinated to proper authority.”¹⁵ The Confederate States Congress established the Partisan Ranger Act of 1862 with the understanding that partisan soldiers would receive all of the same benefits the laws of conflict afforded any other soldier as long as they maintained their civility.¹⁶ Civility implied that the partisans would maintain the discipline and bearing expected of normal soldiers. Many well-known partisan units operated in smaller autonomous elements and were often confused with guerillas.

Southern guerillas and locally organized militia groups also conducted irregular attacks on Union Soldiers during the Civil war under the auspicious of supporting partisan operations. The Union Army referred to these civilian guerillas as “partisans” even though they were not acting in the service of the Confederate Government. These “guerrillas” operated on local and increasingly personal interest. The Confederate Army did organize some of these civilian elements as independent Partisan Ranger companies

¹⁴ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*;, series 1, vol 43, chapter 45, Colonel John S. Mosby, commander 43d Virginia Cavalry acknowledges Federal threats against his command, accessed March 16, 2016, <https://ehistory.osu.edu/books/official-records/091/0920>.

¹⁵ Andrew J. Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine: 1860-1941* (Washington, DC: Government Printing Office, 1998), 33.

¹⁶ Cowardin and Hammersley, “Partisan Rangers,” *The Daily Dispatch*, June 5, 1862, accessed November 15, 2015, <http://www.perseus.tufts.edu/hopper/text?doc=Perseus%3Atext%3A2006.05.0493%3Aarticle%3Dpos%3D45>.

for cavalry and scouting operations under General Orders No. 30 in support of the regular army units. However, the lack of oversight provided to these new organizations allowed their wanton actions, including theft and murder, to continue against northern and southern civilians. Confederate leadership, including General Robert E. Lee, began to contribute partisan operations as a cause for the lawless behavior. The incorporation of sanctioned and unsanctioned civilian guerrillas in support of Confederate Army units is credited for being the cause for the movement to repeal of the Partisan Ranger Act.

The Confederate Government rescinded the Partisan Ranger Act in 1864, however, it is important to note that some of the partisan elements became regular army cavalry units. This provided improved oversight and discipline since the units were no longer acting independently, but they were also under the command of Confederate Army leadership.

Units that were not converted to regular units disbanded and no longer served in the Confederate Army. Some of these units, such as the Amick Partisan Rangers, continued to operate as independent guerrilla units in western Virginia.¹⁷ The Confederate Government could not trust undisciplined units to act independently. The government wanted to disassociate itself from units that committed criminal acts against northern and southern civilians and Union Soldiers. This initial induction of civilian guerrilla units into the Confederate Army complicated operations for the Union Army. The Union Army did initially differentiate between uniformed partisan soldiers and civilian guerrillas under the articles of war as described in the Lieber Code. The inability

¹⁷ David J. Emmick, *The Amick Partisan Rangers* (New York: iUniverse, 2007), 294.

or unwillingness to differentiate between the two types of southern irregulars and their actions and the limitation on reprisals against uniformed Soldiers caused the distinction between both to cease as the conflict progressed.

Partisan Operations in Virginia in 1864

The Confederate Congress repealed the Partisan Ranger Act in February of 1864. After disbanding almost all of the Partisan Ranger units, the Confederate Secretary of War, James A. Seddon, reserved the right to exempt the 43d Virginia Cavalry and the 1st Virginia Partisan Rangers because of each unit's discipline and the military necessity to maintain their irregular capability.¹⁸ Those units continued operations under the command of Colonel John Singleton Mosby and Captain John Hanson McNeill respectfully.¹⁹ Union leadership saw these units as not only more than a general nuisance, but also as illegal formations. The partisan's ability to confuse, delay, and conduct harassing attacks increased in western and northern Virginia as Union forces attempted to interdict key terrain and various sources of supply and support in the Shenandoah Valley. An example of these harassing attacks occurred on August 13, 1864 when the 43d Virginia Cavalry attacked an Army of the Shenandoah (USA) supply train at Berryville, Virginia. The attack resulted in the "entire destruction of the reserve brigade's [supply]

¹⁸ Walter Coffee, *The Civil War Months: A Month by Month Compendium of the War Between the States* (Bloomington: AuthorHouse, 2012), 247.

¹⁹ Jesse McNeill, John H. McNeill's brother, took command of the 1st Virginia Partisans after his brother's wounding near Mount Jackson, Virginia, on November 3, 1864. Jesse McNeill remained in command until the unit surrendered in 1865 at the war's end.

train” and served to delay the Army of the Shenandoah’s movement in to the Shenandoah Valley.²⁰

General U.S. Grant’s “Overland Campaign” was the Union Army’s decisive operation in Virginia in 1864. The Union also renewed sustained operations in the Shenandoah Valley corridor in order to protect the western approaches to the United States capital of Washington DC and limit the Confederacy’s ability to distribute supplies from the key agricultural regions in the valley. The Confederate leadership understood that the valley was “second in importance only to Richmond, the supply for Lee’s army coming in great measure from the valley, and that if the commissary stores there were seized, the bridges burnt, and railroad torn up, so as to sever communication, it would be fatal.”²¹ These Union operations, if successful, would potentially draw in additional Confederate forces that were essential in supporting operations in central Virginia. The ANV used partisan units to monitor Union army troop movements in these areas. After Major Generals Franz Siegel and David Hunter failed to pacify the Confederate forces in the valley, and Confederate raids north into Maryland and northern Virginia increased, General Grant sent two Corps under the command of Major General Philip Sheridan to

²⁰ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 45, Major William Beardsley’s report of Mosby raid on the 6th New York Cavalry, accessed January 12, 2016, <http://ehistory.osu.edu/books/official-records/090/0484>.

²¹ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 45, Captain W. M. Boone to Brigadier General J. C. Sullivan, accessed January 12, 2016, <http://ebooks.library.cornell.edu/m/moawar/text/waro0060.txt>.

the valley to oversee Union operations.²² Chapter 3 of this thesis provides further details of Union military operations in the Shenandoah Valley, and western and northern Virginia in 1864.

Confederate Partisans initially conducted reconnaissance operations in the northern Virginia counties of Louden and Fauquier to determine Union troop dispositions and to conduct raids as necessary. Their area of operations expanded to include the majority of northern Virginia (see figure 1). General Robert E. Lee, ANV commander, described the results of partisan operations near the northern entrance to the Shenandoah Valley:

Attention is invited to the activity and skill of Colonel Mosby, and the intelligence and courage of the officers and men of his command, as displayed in this report. With the loss of little more than 20 men, he has killed, wounded, and captured during the period embraced in the report about 1,200 of the enemy, and taken more than 1,600 horses and mules, 230 beef-cattle, and 85 wagons and ambulances, without counting many smaller operations. The services rendered by Colonel Mosby and his command in watching and reporting the enemy's movements have also been of great value.²³

The Confederacy used partisan operations as an economy of force in 1864 to entice the Union to transfer additional troop strength away from central Virginia and key terrain in the Shenandoah Valley district to protect Union lines of communication. Confederate

²² Daniel Davis and Phillip Greenwalt, *Bloody Autumn: The Shenandoah Valley Campaign of 1864* (El Darado Hills, CA: Savas Beale, 2013), accessed December 18, 2015, <https://books.google.com/books?id=uq-mAwAAQBAJ&printsec=frontcover&dq=Bloody+Autumn:+The+Shenandoah+Valley+Campaign+of+1864&hl=en&sa=X&ved=0ahUKEwjO8Jqilb7KAhVLSyYKHfc4B-UQ6AEIHDAA#v=snippet&q=sheridan&f=false>.

²³ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 55, General R. E. Lee to Brigadier General J. C. Sullivan, accessed December 18, 2015, <http://ebooks.library.cornell.edu/m/moawar/text/waro0090.txt>.

troops under Major General Jubal Early also utilized the partisan's independent operations to support attempts to threaten Washington from the west. The 1st Virginia Partisan Rangers and 43d Virginia Cavalry interdicted Union troop movement into the valley in support of both General Early's command and the ANV. These actions included the destruction and disruption of sections of the Baltimore and Ohio Railroad. The 1st Virginia Partisan Rangers attacked other key intersections and infrastructure, including bridges, to limit the passage of Union troops into and through the Shenandoah Valley. The partisan raids and disruption operations caused Union commanders to dedicate an increasing number of their cavalry forces to protect vulnerable locations and prevent further damage by Confederate irregular operations. Although the partisan units did suffer tactical defeats, they continued operations for the duration of the 1864 valley campaign.

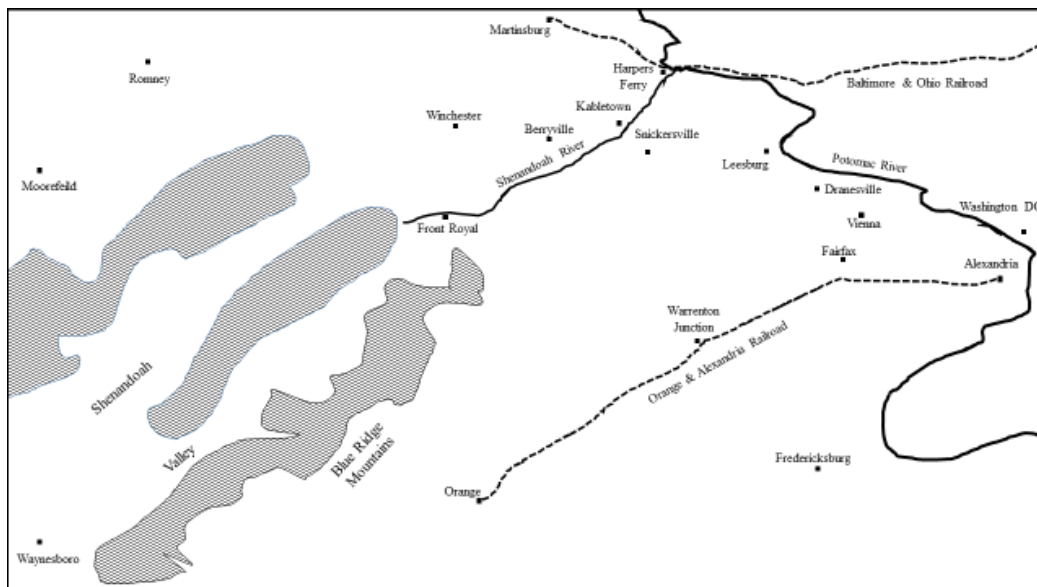


Figure 1. Confederate Partisan Area of Operations

Source: Created by Author

The remainder of this thesis focuses on how the Union Army applied various counter partisan tactics in the Shenandoah Valley and northern Virginia. It discusses why many traditional tactics used to counter unconventional warfare were largely unsuccessful. It also assesses why the Union Army's counter partisan tactics used in 1864 were more effective. Finally, this thesis examines commonalities between the more successful counter partisan Union forces and provides a correlation between those elements.

CHAPTER 2

UNION COUNTER PARTISAN OPERATIONS: 1861-1864

Counter Partisan Operations Overview

The Union Army conducted operations against irregular units prior to the American Civil War. These engagements included operations against smaller Mexican guerilla forces during the course of the American occupation of Mexico in the Mexican-American War (1846-1848) and against Native American tribes between 1830 and 1860.²⁴ The tactical and technological advantages possessed by the United States at the time of these conflicts shaped the defensive and offensive tactics in the operations the Army employed to combat the irregular organizations. The Union Army would continue to engage the irregular units during the Civil War, both proactively and reactively, attempting to defeat the partisans and guerrillas. The Union also utilized indirect approaches to disrupt the partisan support structure and intimidate partisan leadership. Initially, the Union Army used these approaches in operations against Confederate government sanctioned partisans and civilian guerrillas due to confusion and difficulty differentiating between these two types of irregular units.²⁵

The Union Army's primary methods to counter the partisans were defensive and offensive operations. These counter partisan operations focused on a variety of

²⁴ Stephen A. Carney, *The Occupation of Mexico: May 1846-July 1848*, The U.S. Army Campaigns of the Mexican-American War. U.S. Army Center for Military History, accessed February 10, 2016, http://www.history.army.mil/html/books/073/73-3/CMH_Pub_73-3.pdf.

²⁵ Robert R Mackey, "The Uncivil War: Irregular Warfare in the Upper South: 1861-1865" (M.A. diss., Texas A&M University, 2000), 245.

engagement methods ranging from static defensive positions, such as outpost and blockhouses, to offensive counter partisan patrols. The size and scope of these operations was contingent on terrain, materials available, size of the Union elements, and the specific mission assigned to a Union commander. The nature of the partisan's capabilities and tactics discussed in chapter 1 of this thesis influenced and limited the extent of the success the Union's initial counter partisan operations could achieve. Concurrently, the Union Army also employed several indirect methods to combat Confederate partisans.

The Union Army also utilized indirect methods to neutralize their partisan enemies. The first method attempted to pacify the local populace's support of the partisan units. Union commanders directed retaliatory action against civilians that supported partisans in an attempt to limit the partisan's internal lines of communication. A second indirect method Union commanders used on a limited number of occasions was employing executions as a form of lethal reprisal against partisan prisoners. The purpose of this tactic was to intimidate partisan leadership and deter further partisan operations. Much like the direct tactical approaches, these indirect tactics achieved limited success as the partisans were "more adulated than ever by the local population [and] viewed as the sole force for good and justice after all of the Federals' wanton destructions."²⁶ The partisans also continued to conduct irregular operations despite the Union Army's execution of captured partisan soldiers as noted previously.

²⁶ Paul C. Jussel and Christian B. Keller, "We Had to Burn Out the Entire Country: Irregular Warfare in the American Civil War and its Modern Implications," *The Small Wars Journal* 11, no. 8 (August 2015): 8, accessed April 19, 2016, <http://smallwarsjournal.com/jrnl/art/we-had-to-burn-out-the-entire-county-irregular-warfare-in-the-american-civil-war-and-its-mo>.

The Union Army used the same tactics against both Confederate sponsored civilian guerrillas and partisan units between 1861 and late 1864. Historians have argued that the majority of Union commanders, at both the tactical and operation levels, did not fully understand the partisan's organization or capabilities.²⁷ For example, the 43d Virginia Cavalry took advantage of the Brigadier General Benjamin Franklin Kelley's understanding of partisan operations in October 1864. The partisans simply bypassed Kelley's defenses along the Baltimore and Ohio Railroad in Jefferson County, West Virginia, and attacked an "exposed position" of the railroad Kelley was supposed to protect.²⁸ The Union Army's lack of prescribed methods for countering partisan operations provided the sanctioned partisans with an advantage. Both the direct and indirect operational approaches, however, changed as the conflict continued into 1864.

Defensive Tactics

Fixed Sites and Outposts

The nature of partisan operations behind the front lines and within Union held territory created operational security issues. The partisans routinely operated in areas secured by Union forces and attacked vulnerable lines of communication. One of the primary methods to protect these exposed locations was the fixed site or outpost. These outposts varied in size and location depending on the troops available and the local commanding officer's discretion. The Union Army used this tactic to prevent

²⁷ Mackey, 113.

²⁸ The Washington Times, "Greenback Raid Builds Mosby's Legend," *The Washington Times*, November 12, 2004, accessed February 9, 2016, http://www.washingtontimes.com/news/2004/nov/12/20041112-081506-3157r/?feat=article_related_stories.

Confederate partisans from interfering with lines of communication in occupied Confederate territory and in Union rear areas. Union commanders positioned these sites to control key terrain and to protect other areas deemed to be of military advantage. This removed the requirement for a commander to station a large maneuver force where a commander did not feel the situation warranted, but still provided force protection. The Union did not always man these outposts with experienced Soldiers or provide sufficient weapons and ammunition. The Union often established hasty and deliberate sites. Both required routine resupply which in turn offered lucrative targets for partisan operations. All of these factors made the sites vulnerable to a partisan attack. Lastly, partisan soldiers could avoid these outposts, or even pass them entirely before Union Soldiers could respond.²⁹

Partisan operations against Union outposts took advantage of the stationary nature of these positions. Operations were both carefully planned and hastily developed depending on the partisan commander's objectives. These operations were primarily harassing raids with the purpose of confusing the enemy on the actual size and location of Confederate troop formations. The partisans used their scouting ability when conducting reconnaissance on an outpost to determine if it was feasible to attack. If the location was well-manned, armed, and alert, the partisans avoided the outpost and looked for more susceptible targets. The partisans attacked the more vulnerable outposts, often in succession.³⁰

²⁹ Gordon B. Bonan, *The Edge of Mosby's Sword* (Carbondale: Southern Illinois University Press, 2009), 64.

³⁰ Bonan, 64-67.

Union commanders often emphasized the importance of being prepared for an attack despite being behind the front lines. Following a partisan raid on the Orange and Alexandria Railroad at Warrenton Junction, Virginia, Major General Samuel Heintzelman, Department of Washington commander, responded by issuing General Order No. 26 in May 1863. He stated, “the necessity is urged upon all troops, and especially parties on distant and detached service, to establish their guards and pickets on every occasion in such a manner to render a surprise impossible.”³¹ Regardless of whether or not the Union posts were alert, the partisans waited for favorable conditions before bypassing or raiding an outpost.³² Partisans conducting attacks and raids on Union fixed positions utilized reconnaissance to verify the size of the defending element prior to commencing an attack. It is notable that there are instances of partisan leaders making decisions to change the operation and identify a secondary objective after the initial plan’s objective became unachievable. For example, upon discovering that the Orange and Alexandria Railroad’s Springfield Station was too well defended during a raid in Fairfax, Virginia, of June 1863, Mosby modified his objective from raiding to intelligence collection.³³ A second Union defensive tactic was the blockhouse.

³¹ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 25, chapter 38, General Order No. 26 (May 1863) issued by Major General Samuel P. Heintzelmen, accessed January 10, 2016, <https://ehistory.osu.edu/books/official-records/039/1105>.

³² Crawford, 242.

³³ John Scott, *Partisan Life with Colonel John S. Mosby* (London: Sampson, Low, Son, and Marston, 1867), 232. Mosby reorganized his command to conduct reconnaissance in support of the ANV after deeming his primary objective of securing a Federal train became untenable.

Blockhouses

Much like small fortresses, the Union Army established heavily fortified bastions and positions along key routes of communication. The Union positioned blockhouses to provide a more defensible position that could observe key terrain or vulnerable areas. The size of these emplacements depended on the location. Areas in close proximity to railroad culverts and trestles became a primary location to build blockhouses and included enough room to position men and artillery.³⁴ Their design allowed them to defend against a well-armed enemy of up to a company in strength. Although the blockhouses were well prepared for an attack, their stationary nature limited their ability to protect the surrounding areas outside the general field of view. This was very disadvantageous because it allowed the partisans to take advantage of their knowledge of the terrain.

The partisan's mobility and their knowledge of the terrain provided ways to mitigate the effectiveness of a Union blockhouse. In order to do more than deter Confederate soldiers and fire upon them from their stationary location, Union Soldiers had to leave the blockhouses' covered position to patrol in the local vicinity of their fortification. This limited their ability to conduct counter-reconnaissance. For example, in 1863 a Union blockhouse patrol outside of Vienna, Virginia, met horse-mounted partisans "halted, gazed for a minute at the approaching Cavalry, and then broke and fled with precipitation, pursued by the Rangers."³⁵ This was too often the case as Union

³⁴ Mackey, 217.

³⁵ Scott, 454.

blockhouse commanders found it difficult to ascertain and develop situational understanding beyond visual range. This limited the time available for commanders to effectively position their Soldiers to interdict or ambush any identified partisans soldiers.

As with the other static positions, the partisans avoided Union blockhouse strong points when attacking Union railroads systems and infrastructure. Captain John McNeill's partisan company exploited this lack of mobility when conducting raids against the Baltimore and Ohio Railroad in Piedmont, West Virginia, and Cumberland, Maryland in May 1864.³⁶ McNeill's command struck the vulnerable areas outside the visibility and weapons range of the blockhouse positions to seize materials and damage infrastructure. This limited the trafficability of this important supply route and delayed trains until the repair of the damaged sections of rail was completed. Brigadier General Benjamin Franklin Kelley made it evident that he was both aware of McNeill's movements and anxious about the potential for additional damage and losses. He reported, "McNeill is doing a great deal of damage [and] I have no cavalry to follow after him."³⁷ This demonstrated that even when Union commanders intended to interdict or respond to partisan attacks, the effectiveness of a blockhouse was limited due to its location and the limited capabilities of the unit occupying it. Partisans also took direct

³⁶ Simeon Miller Bright, "The McNeill Rangers: A Study in Confederate Guerrilla Warfare," *West Virginia History* 12, no. 4 (July 1951): 338-387, accessed February 10, 2016, http://www.wvculture.org/history/journal_wvh/wvh12-1.html. *The McNeill Rangers* provides a concise history of the McNeill Partisan Ranger Company's operations against the Baltimore and Ohio Railroad in northern Virginia and Maryland.

³⁷ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 36, chapter 49, Brigadier General B. F. Kelley to Major General Hunter, accessed January 19, 2016, <http://ebooks.library.cornell.edu/m/moawar/text/waro0071.txt>.

offensive actions against blockhouses despite the use of the later to deter offensive action. McNeill's partisan company used artillery to suppress blockhouses on occasions when their attacks on railroad infrastructure was observable from a nearby blockhouse.³⁸ Union commanders also used offensive operations to attempt to defeat the partisans before future attacks could occur.

Offensive Tactics

Patrols and Sweeps

Union forces used a variety of patrolling operations in areas with reported partisan activity. Union patrol size varied from small company sized patrols up to full divisions, but the majority were conducted with less than a regiment in size.³⁹ Union Army division contained 8000 Soldiers, regiments contained 800 Soldiers, and companies contained an average of 100 Soldiers. Many of these patrols ended with limited contact with partisan forces. The partisan unit's smaller size and ability to disperse quickly made a decisive confrontation difficult to orchestrate without a Union element locating the partisans in mass and maintaining surprise. Major General Julius Stahel, Washington District Union Cavalry commander, noted an example of similar results in a northern Virginia patrol report from April 1863. He observed that the patrol "searched diligently through that whole section of country without meeting any enemy in force, or ascertaining definitely the whereabouts of Mosby . . . small detachments of rebels, however, were occasionally

³⁸ Joseph V. Collins, *Battle of West Frederick, July 7, 1864: Prelude to the Battle of Monocacy* (Bloomington: Xlibris, 2011), 126.

³⁹ Birtle, 42.

seen, but scattered on the approach of our troops.”⁴⁰ It was not a simple process for Union patrols to find partisan units.

The partisan’s ability to disperse quickly into even smaller elements and evade their pursuers made it difficult for Union patrols to react with enough speed and coordination to engage the partisans decisively. Partisan units, including McNeill and Mosby’s commands, actively scouted during their operations. Both commanders dispersed their commands if a large body of Union troops was unexpectedly located in their vicinity. The fading partisan target was difficult for a Union patrol to locate and even more difficult to track once it made initial contact with a partisan unit.

The ability of a patrol to locate its partisan objective and effectively destroy or capture it depended on the patrol leader reacting quickly and decisively to accurate and timely reports. The leader’s initiative to gain and maintain surprise was the primary advantage required by a patrol to combat the partisans effectively. Since the patrols were in the Union rear behind the front lines, Soldiers let their guard down and did not always maintain situational awareness, both before and after initial contact with the enemy.

An example of this squandering of an opportunity occurred when the aforementioned Washington District Cavalry patrol received intelligence on the location of a partisan unit near Dranesville, Virginia, in April 1863. The patrol was successful in locating and ambushing a partisan element of the 43d Virginia Cavalry. The patrol did not successfully maintain the initiative, quickly lost momentum, and fell into disarray

⁴⁰ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 25, chapter 38, Report of General Stahel on Partisan Actions at Dranesville, Virginia, accessed January 12, 2016, <http://ebooks.library.cornell.edu/m/moawar/text/waro0039.txt>.

when the partisans rallied.⁴¹ The partisans massed fire with their pistols which facilitated their escape. General Stahel reported that Union forces dispatched to surprise the partisans “missed so good an opportunity to capture the rebel guerrilla” and “it is only to be ascribed to the bad management on the part of the officers and the cowardice of the men.”⁴²

Mosby noted in his report following the engagement, “the force of the enemy was six companies of the First Vermont Cavalry, one of their oldest and best regiments and the prisoners informed me they had every available man with them.”⁴³ This report indicated that the Union took the partisan threat behind their front lines seriously, and that they would employ forces to counter that threat.

There are other examples of both the 43d Virginia Cavalry and McNeill’s rangers avoiding direct contact with larger Union patrolling elements and minimizing casualties

⁴¹ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 25, chapter 37, Report of General Stahel on Partisan Actions at Dranesville, Virginia, accessed January 12, 2016, <http://ebooks.library.cornell.edu/m/moawar/text/waro0039.txt>. The Union Cavalry headquarters received a report of the chaos of the patrol’s hasty retreat and dispatched an additional patrol to defeat the partisans. That patrol was also unsuccessful. Although it is not determinable if the negative outcome for the Union in this example is the result of failed leadership, it demonstrates that even a numerically superior Union force was unable to capture or defeat a smaller partisan force due to failure to maintain the initiative.

⁴² War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 25, chapter 37, Report of General Stahel on partisan actions at Dranesville, Virginia, accessed January 12, 2016, <http://ebooks.library.cornell.edu/m/moawar/text/waro0039.txt>.

⁴³ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 25, chapter 37, Report of Lieutenant Colonel Mosby on actions at Dranesville, Virginia, accessed January 12, 2016, <http://ebooks.library.cornell.edu/m/moawar/text/waro0039.txt>.

and losses when surprised.⁴⁴ In September 1864, while preparing to conduct an ambush of a Union ambulance train in the vicinity of Berryville, Virginia, Companies C and D, 43d Virginia Cavalry found themselves surprised and outnumbered by a larger reserve brigade of the 2d Cavalry (USA) to their rear.⁴⁵ As reported by the 1st Cavalry Division commander, the two partisan companies engaged the Union brigade and quickly dispersed, managing to limit the number of partisan casualties to 18 of 140 men.⁴⁶ The partisans suffered casualties; however, the Union engagement was not decisive.

The success of Union counter partisan patrolling operations required the patrolling unit to decisively engage a massed partisan element, while maintaining both surprise and the initiative. The Union command's inability to maintain consistent pressure on their partisan target and the decentralized nature of partisan operations created conditions unfavorable for offensive patrols to achieve a decisive victory against the partisans in the early years of the Civil War. This encouraged Union leaders to turn to auxiliary techniques to counter Confederate partisan's operations.

⁴⁴ Bonan, 70-72. The partisan's primary weapon system, the colt six shot .44 pistol, allowed them to quickly mass close range fires against an attacker and mitigate the duration and effects of an ambush.

⁴⁵ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 55, Report of Colonel J. Mosby reference operations in the vicinity of Berryville, Virginia, September 1864, accessed January 12, 2016, <http://ebooks.library.cornell.edu/m/moawar/text/waro0090.txt>.

⁴⁶ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 55, Report of Brevet Major General Wesley Merritt reference operations in the vicinity of Berryville, Virginia, accessed January 12, 2016, <https://ehistory.osu.edu/books/official-records/090/0441>.

Indirect Counter Partisan Tactics

Retaliation Against Southern Civilians

Retaliation against civilians who provided support to Confederate partisan soldiers was the Union Army's most utilized method to indirectly counter the partisans. The leadership of both the United States government and the Army initially disapproved of this tactic; it would alienate civilians who would potentially reintegrate into United States society at the conclusion of the conflict.⁴⁷ The Union leadership's negative opinion of the tactic subsided as the tactic gained more popularity between the outbreak of the war and 1864. They grew to see the southern civilians as aiding criminals since the Union leaders believed the partisan's irregular operations were no longer following the articles of war. The logic for employing this retaliatory tactic was that action against civilians, those providing direct or indirect assistance, would hinder or reduce partisan operations.

Retaliatory attacks on civilian partisan supporters could potentially remove a portion of the partisans support base in a specific area. Union leaders now found this tactic as a viable method to disrupt the partisan's ability to sustain their operations in those areas of Virginia under Union control. The strategy aimed at degrading the will of the civilian populace to provide support to partisans in their area for fear of reprisal. The severity of this retaliatory tactic varied depending on how much restraint a commander was willing to apply. It also depended on how much freedom he would allow his subordinates in the punishment of civilians who were sympathetic to the partisans.

⁴⁷ The United States government also saw the tactic as reinforcing the arguments of Jefferson Davis and the Confederate government. The Union thought the tactic would provide evidence that the United States was continuing to violate the property rights of Southern civilians.

Some Union commanders employed simple intimidation and verbal threats to ensure the Confederate civilians understood supporting the partisans was unacceptable. Other commanders, however, turned their focus to techniques such as destroying crops and burning homes and barns. These increasingly drastic techniques were justified as denying the partisans both much needed supplies and sanctuary.⁴⁸ Union commanders justified the tactic as a military necessity. Union Army Chief of Staff, Major General Henry Hall explained that “anything that may serve as supplies to us or the enemy’s armies could be taken or destroyed in good conscience,” but disapproved of “uselessly destroying private property.”⁴⁹

An example of USA retribution against civilians occurred on August 21, 1863, when following an ambush on a Union picket site, Brevet Brigadier General George A. Custer issued an order that “whenever a picket-post was fired on, the nearest house should be burned.”⁵⁰ The severity and number of examples of the more extreme retaliation techniques continued to increase in Virginia during 1864.

The Confederate partisans and other civilian guerrillas conducted ambushes and attacks on Union Soldiers and supply trains during the 1864 Shenandoah Valley campaign. Although the partisans were only responsible for a limited number of these attacks, General Sheridan dispatched the United States 1st Cavalry Division, under the

⁴⁸ Anthony J. Joes, *America and Guerrilla Warfare* (Lexington: University of Kentucky Press, 2004), 55.

⁴⁹ Stephen C. Neff, *Justice in Blue and Grey: A Legal History of the Civil War* (Cambridge: Harvard University Press, 2010), 99.

⁵⁰ Megan K. Nelson, *Ruin Nation: Destruction and the American Civil War* (Athens: University of Georgia Press, 2012), 67.

command of Brigadier General Wesley Merritt, to Loudoun County, Virginia, to disrupt the flow of material support to the partisans.⁵¹ Elements of the 1st Cavalry Division successfully conducted retaliatory operations whereby civilians “saw their homes and livelihoods reduced to ashes, and their husbands and fathers placed in Union prisons.”⁵² The partisans responded to the actions of the Union Cavalryman by conducting more attacks, with neither side achieving their desired results.⁵³

Despite the Union Army’s best efforts to use this method in part to quell partisan support, the achievement of the desire affect was questionable.⁵⁴ Records indicate that as the retaliatory actions increased in both quantity and brutality, there was no immediate inverse correlation of civilian support to the Confederate partisans. Additionally, northern newspapers reported that these “vandal acts” of retribution were not effective in deterring the partisans, nor gaining civilian sympathy or support for the United States government or the Union’s cause.⁵⁵ The Washington Daily *National Intelligencer* provided an

⁵¹ Jack H. Lepa, *The Shenandoah Valley Campaign in 1864* (Jefferson: McFarland, 2003), 215-216.

⁵² Wert, 12.

⁵³ Marshal Andrews et al., *Article One: Grant orders Union General Sheridan to Retaliate Against Mosby’s Raids*, ed. Fitzhugh Turner, The Virginia Civil War Centennial Commission, accessed January 10, 2016, <http://www.loudounhistory.org/history/loudoun-cw-mosby-burning-raid.htm>. This article incorporates localized references and additional details on Merritt’s 1864 retaliatory burning raids in Loudoun County, Virginia. The union reacted to the partisan reprisal attacks with additional retaliation on Confederate citizens.

⁵⁴ Mackey, 243-244. There are some instances of the retaliatory action increasing the local’s support of partisans in the following months.

⁵⁵ Nelson, 68.

example when it noted the paper was “opposed all barbarianism and vandalism in the prosecution of this present war” and that “the war could and should be won without such measures.”⁵⁶ A limited number of Union commanders employed an even more extreme reprisal to indirectly deter partisan operations.

Prisoner Execution Reprisals

Union commanders began permitting and directing the execution of Confederate partisan prisoners as a form of reprisal in 1864. The number of instances of this type of reprisal is limited for various reasons. First, the articles of war did not permit the execution of captured uniformed Soldiers. This stipulation applied only to prisoners of war who were in uniform at the point of capture. Union Army General Order 100, also known as the “Lieber Code,” published in April 1863 at the direction of President Lincoln, provided specific guidance outlining the treatment of captured partisans. Article 81 of Section 4: “Partisans” specifically states that “partisans are soldiers armed and wearing the uniform of their army, but belonging to a corps that acts detached from the main body for the purpose of making inroads into the territory occupied by the enemy. . . if captured they are entitled to all the privileges of the prisoner of war.”⁵⁷ The perceptions of senior Union leadership on partisan prisoners changed in 1864 when General Grant

⁵⁶ Mark Grimsley, *The Hard Hand of War: Union Military Policy Towards Southern Civilians, 1861-1865* (Cambridge: Cambridge University Press, 1995), 180.

⁵⁷ Francis Lieber, *General Orders 100: Instructions for the Government of Armies of the United States in the Field* (Washington, DC: Government Printing Office, 1898), section 4, article 81, accessed February 9, 2016, http://avalon.law.yale.edu/19th_century/lieber.asp#sec4. The capturing command was required to have evidence of the prisoner previously violating the articles of war in order to modify the stipulation outlined in Article 81.

instructed General Sheridan that “when any of Mosby’s men are caught, hang them without trial.”⁵⁸ This modification to the previously established General Orders affected the partisans, but not completely as intended.

Following a partisan attack in September 1864, Union Soldiers executed seven partisan soldiers from Mosby’s command in Front Royal, Virginia. The historical records are unclear on who specifically gave the order for the executions, but reports indicate that the soldiers were in uniform at the time of capture. Colonel Mosby received reports indicating that Brigadier General Custer was present during the executions. The executions caught the personal attention of Mosby, who wanted to retaliate in kind, although there was not confirmation of who actually attended the executions. He requested permission from General Lee to execute Union prisoners from General Custer’s command, the United States 2d Cavalry. With the approval of General Lee and the Confederate Secretary of War, James Seddon, Mosby called for the execution of seven prisoners. Mosby also wrote to General Sheridan on November 11, 1864 in regards to the events stating:

Since the murder of my men not less than seven hundred prisoners, including many officers of high rank captured from your army by this command, have been forwarded to Richmond; but the execution of my purpose of retaliation was deferred in order, as far as possible, to confine its operation to the men of CUSTER and POWELL. Accordingly, on the 6th inst., seven of your men were, by my order, executed on the Valley pike--your highway of travel. Hereafter any prisoners falling into my hands will be treated with the kindness due to their condition, unless some new act of barbarity shall compel me, reluctantly, to adopt a line of policy repugnant to humanity.⁵⁹

⁵⁸ R. A. Brock, *Southern Historical Society Papers* 26 (Richmond: Virginia Historical Society, 1876), 279.

⁵⁹ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 55, Letter from

Following this exchange there are not additional reports indicating that the threat of executions or their actual employment continued as a method of deterring partisan operations.

The threat of the use of executions as a reprisal failed to provide adequate motivation to compel Confederate partisans to discontinue their irregular operations. Surprisingly however, this tactic does appear to have secondary effects on partisan operations. Mosby understood that senior Union leaders were ignoring both published general orders and the accepted articles of war. This caused him to focus his attention on avenging what he considered as the unjustified killing of soldiers from the 43d Virginia Cavalry and ensuring his opponents understood the severity of their actions. Although limited, Mosby's actions indicate that the executions of his captured men temporarily distracted his command. This included the only occasion that he requested and received permission to perform and carry out executions, as well as, informing the Union command of the incident. The deliberate nature of the operations of the 43d Virginia Cavalry to carry out these actions indicated that the Union command had attracted the attention of the Confederate partisans. The Union Army was able to elicit a response and temporarily distracted the partisan's leadership from their primary operations for a short duration.

Colonel John Mosby to Major General P. H. Sheridan, accessed January 12, 2016, <http://ebooks.library.cornell.edu/m/moawar/text/waro0091.txt>.

Conclusion

The Union Army applied many of the tactics discussed in this chapter during the early years of the Civil War with varying results. The hybrid nature of the Confederate partisan units and their capabilities made it difficult to achieve success although opportunities presented themselves to Union commanders. The underlying issue with stopping partisan operations does not appear to be the result of a shortage of personnel or the lack of a specific capability. As noted above, the Union Army did have limited success, but the majority of operations did not focus solely on the destruction of the partisans in mass. The units conducting the Union Army's initial counter partisan operations did not synchronize similar capabilities or tactics as those employed by the Confederate partisans. The partisan leaders' ability to position themselves out of the direct and definitive reach of Union's offensive operations and capabilities was a limiting factor on the amount of results the Union could achieve on the battlefield. The Union's defensive tactics employed to counter the partisan problem allowed the Confederates to determine the conditions of engagements so that the conditions were in the partisan's favor. The outcome of the initial operations, both direct and indirect, was limited because the U.S. Army not fully understand the nature of its partisan target.⁶⁰ Union commanders would have to modify their tactics once they better understood their partisan enemy to develop operations to effectively counter the partisans.

⁶⁰ Bonan, 77-78.

CHAPTER 3

UNITED STATES ARMY COUNTER PARTISAN UNITS

Counter Partisan Units Overview

After initial counter partisan operations achieved limited results between 1861 and 1864, the Union Army reevaluated its partisan target. Union commanders modified their tactics once they better understood their partisan enemy and developed units specifically for counter partisan operations. Various Union Army commanders, including Colonels George Crook and Henry Lazelle, used their experiences and knowledge from previous engagements with Native American tribes, such as the Oregon Territory's Rogue River War in 1853, to develop the initial specialized units to counter Confederate irregular operations.⁶¹ The Union first used these units between 1861 and 1863 during engagements with civilian guerillas in portions of western Virginia.⁶² Although not always successful, senior Union commanders took notice and later decided to employ them against the sanctioned Confederate partisans. Major General Philip Sheridan, Commander, Army of the Shenandoah, specifically began to employ specialized "counter guerrilla" units against their partisan nemesis in 1864.

⁶¹ Birtle, 43. Major General Samuel Curtis also utilized his personal experiences during the Mexican-American War in choosing specific counter guerilla tactics for use in the Western Theater. Darl L. Stephenson, *Headquarters in the Brush: Blazer's Independent Union Scouts* (Athens: Ohio University Press, 2001), 42.

⁶² Stephenson, 42. Operations occurred in "some of the most spectacular and rugged terrain in the eastern United States," here the Gauley and New River's converge north of Fayetteville, West Virginia.

Colonel Crook directed Colonel Car White of the 2d Brigade, 3rd Division, 8th Corps (USA) of the 2d Brigade, 3rd Division, 8th Corps (USA) to develop an “Independent Scout” element in 1863.⁶³ This command became known later as “Blazer’s” Scouts. Another example is Major Henry H. Young’s “Jessie Scout” command.⁶⁴ Sheridan personally selected Blazer’s and Young’s scouts in 1864 for operations against the Confederate partisans. They actively engaged both Colonel Mosby’s 43d Virginia Cavalry and Captain McNeill’s Partisan Rangers in northern Virginia and the Shenandoah Valley. This chapter examines the development and counter partisan operations of these scout units.

Initial Counter Partisan Unit Development

Colonel Crook established an early example for counter partisan unit development by preparing the Soldiers of his command, the 36th Ohio Volunteer Infantry, for counter partisan operations in the rugged West Virginia terrain. Crook kept his Soldiers busy, with drill up to four times a day, in order to eliminate boredom and instill discipline. This discipline better prepared the leaders of the scouts to react to a guerrilla ambush.⁶⁵ These

⁶³ Stephenson, 22-30. This unit was a company sized unit (100 Soldiers) that was initially commanded by Captain John White Spenser. It was comprised of portions of men from the 9th West Virginia, 12th Ohio, and 91st Ohio Infantry Regiments. Captain Richard Blazer would eventually take command of the “Scouts” and the unit would become known as “Blazer’s Independent Scouts.”

⁶⁴ Eric J. Wittenberg, *Little Phil: A Reassessment of the Civil War Leadership of General Philip H. Sheridan* (Washington, DC: Brassey’s, 2002), 141. This command was made up of elements of the 2d Rhode Island Infantry. Emmick, 229. General John C. Freemont initially created the “Jessie Scouts” to conduct scouting and spying operations behind Confederate lines. They often wore Confederate Army uniforms.

⁶⁵ Stephenson, 11-17.

Soldiers were “exempt from normal infantry duty” and “instead . . . devoted themselves exclusively to reconnaissance, escort, and counter guerrilla work.”⁶⁶ The selection process required the scouts to be “experienced woodsman and good shots,” which provided better-prepared Soldiers for operations in the terrain that the partisans occupied.⁶⁷ Although many of the counter partisan units possessed similar characteristics to the cavalry, they were actually “handpicked” mounted infantry.⁶⁸ The Union Army often referred to mounted infantry as “dragoons.” This increased the scout’s speed and mobility. The unit’s focus on countering southern irregular operations, both guerrilla and sanctioned partisans, allowed these units to consistently pressure the southern irregular forces. Union military leaders would also continue to develop and employ these specialized units until the end of the Civil War to counter the guerilla “bushwhackers.”

Colonel Crook later used the newly created “Independent Scouts” in 1864 to counter Confederate partisans operating in northwestern Virginia after he assumed command of the Department of West Virginia.⁶⁹ Crook understood his “Independent Scouts” would be well suited to conduct operations against the Confederate Army’s sanctioned agents of irregular warfare.⁷⁰

⁶⁶ Birtle, 44.

⁶⁷ Stephenson, 22.

⁶⁸ Birtle, 44.

⁶⁹ Emick, 229.

⁷⁰ Wittenberg, 140; Wert, 203.

Union Counter Partisan Scouts

Blazer's Independent Scouts

After numerous failed attempts during the 1864 Shenandoah Valley Campaign, General Sheridan ordered Crook, who was now Sheridan's subordinate, to employ the scouts of Blazer's independent command to defeat the Confederate partisan opposition.⁷¹ Sheridan determined that employing a small element, Blazer's Command was comprised of 80 to 200 soldiers, that used similar tactics and possessed comparable capabilities as those of the partisans was best for engaging the enemy.

To provide a technological advantage, Sheridan armed the scouts with the Spencer seven shot rifle.⁷² This rifle gave the scouts a capacity to mass fires that was equal to the partisan's capabilities. In their interaction with the Confederate populace in the Shenandoah Valley and northern Virginia, records indicate the scouts respected local citizens and private property.⁷³ The decrease in negative interactions with civilians reduced the potential for alienation and anti-Union sentiments of southern civilians in their operational areas. A Confederate soldier captured the effect of this approach. It "disarmed our citizens that instead of fleeing on [the Union] approach and notifying all soldiers, [and] thus giving them a chance to escape, little notice was taken of [them]."⁷⁴

⁷¹ Paul Ashdown and Edward Caudill, *The Mosby Myth: A Confederate Hero in Life and Legend* (Wilmington: Scholarly Resources, 2002), 84.

⁷² Wert, 203; Bonan, 139.

⁷³ Crawford, 286. This prevented the civilian population from being increasingly hostile toward the small element of Union counter partisans.

⁷⁴ Birtle, 46.

All of these characteristics of Blazer's command facilitated effective counter partisan operations in this region.

Historical records support the success of this Union counter partisan element. For example, on September 4, 1864, only a month after assignment to defeat Mosby, Blazer's command surprised a group of resting partisans and routed them on the banks of the Shenandoah River near Myers Ford, Virginia.⁷⁵ Following the engagement General Sheridan reported that "Captain Blazer's company of mounted men, of General Crook's command, had a fight with Mosby yesterday [and] killed two officers and eleven men and captured six men; also a number of horses and equipment."⁷⁶ Blazer directly credited the scouts' Spenser rifle following the victory.⁷⁷ This rifle gave the scouts a capacity to mass fires that was equal to the capability of the partisan's pistols.

The start of Blazer's operations could not have begun at a more opportune time for the Army of the Shenandoah. Mosby had reported less than a month earlier that the 43d Virginia had "attack[ed] the enemy's supply train near Berryville [Virginia] on the 13th, captured and destroyed 75 loaded wagons, secured 200 prisoners, including several officers, between 500 and 600 horses and mules, upward of 200 beef-cattle, and many

⁷⁵ Ashdown and Caudill, 84.

⁷⁶ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 55, Major General Sheridan to Major General Halleck referencing Blazer's route of elements of the 43d Virginia Cavalry, accessed March 17, 2016, <https://ehistory.osu.edu/books/official-records/090/0023>.

⁷⁷ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 55, Captain Blazer's Report following the rout at Myers Ford, accessed March 17, 2016, <https://ehistory.osu.edu/books/official-records/090/0615>.

valuable stores.”⁷⁸ Blazer’s interdiction of the partisans limited Mosby’s operations to interfere with Sheridan’s lines of communication for three months and enabled Sheridan to continue his campaign down the Shenandoah Valley against Jubal Early’s Army of the Valley.

Blazer’s actions in disrupting Mosby’s operations no doubt grabbed the 43d Virginia Cavalry’s attention. Initially, J. Marshal Crawford of the 43d Virginia Cavalry reported that Mosby “bided his time,” but his command was aware that “Blazer with his men, with a degree of boldness and daring unprecedented in the cavalry of the Army of the Potomac (USA), made frequent forays into *our* Confederacy and scoured the Blue Ridge Mountains.”⁷⁹ On November 16, 1864, Blazer’s command ambushed the partisan soldiers of Company D in Berryville, Virginia, during the company’s return from a raid in the Shenandoah Valley.⁸⁰ Following three months of consistent harassment, the scout’s actions significantly distracted Mosby enough to cause him to mass a squadron of the 43d Virginia Cavalry to neutralize the scouts permanently. The Unions previous counter partisan operations in northern Virginia had not required Mosby to seek a

⁷⁸ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 55, General Lee’s report to Secretary of War Seddon following Mosby’s raid at Berryville, Virginia. (August 16, 1864), accessed April 17, 2016, <http://ehistory.osu.edu/books/official-records/090/0633>.

⁷⁹ Crawford, 285-286.

⁸⁰ *Ibid.*, 297-298. Confederate reports indicate the company suffered seven casualties and lost the previously captured supplies from the previous raid on the Union in the ambush. Although this battle was a meeting engagement, Blazer’s scouts maintained the initiative with the partisans after initial contact occurred and pursued Captain Montjoy’s company to the Shenandoah River. Bonan, 139. Blazer was able to gain a numerical advantage during the ambush of three to one.

decisive battle. Although Mosby preferred to conduct operations in smaller groups, he needed a larger element to defeat Blazer.

On November 17, 1864, Mosby ordered a partisan cavalry Squadron to find Captain Blazer and his scouts to rid them from “Mosby’s Confederacy.” The following day, the 1st Squadron, 43d Virginia Cavalry engaged the scouts in the vicinity of the Shenandoah River’s Myers Ford.⁸¹ Although inconclusive, official reports indicate “that Mosby, with a superior force, attacked Captain Blazer’s command near Kabletown, West Virginia, killing and capturing most of the command and leaving the dead and wounded on the ground.”⁸² The partisans captured Captain Blazer during the engagement and his command ceased to exist as an operational unit following the battle. Having defeated the intervening scouts, Mosby’s command was able to “return to the almost daily tasking of raiding into the Shenandoah Valley.”⁸³ General Sheridan did not praise Blazer’s actions following the defeat; however, his creation of additional counter partisan units demonstrated that Sheridan endorsed the advantages that Blazer’s command’s success had provided the Army of the Shenandoah.

⁸¹ Stephenson, 165-175. This engagement is referred to as the Kabletown Battle. Although there are differing reports of the actual size of both the Union and Confederate elements at the battle, records indicate the partisans had a two or three to one advantage on the scouts smaller command.

⁸² War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 55, Special Order No. 94 (November 19, 1864) issued by Brigadier General Stevenson, Headquarters, Military district of Harpers Ferry, accessed March 1, 2016, <https://ehistory.osu.edu/books/official-records/091/0648>.

⁸³ Bonan, 139.

Young's Jessie Scouts

General Sheridan created an additional group of scouts, called "Jessie Scouts" based on Colonel Crook's "independent scout" model in November 1863. He named his aide de camp, Captain Henry Young, as the unit's Chief of Scouts.⁸⁴ Young's Scout Command resembled Blazer's command. Young's scouts tracked and found Confederate units because they occasionally "dressed in Confederate uniform, spoke with southern accents, and could infiltrate rebel camps to gain firsthand knowledge of strengths and movements."⁸⁵ This was a violation of the law of war and the Lieber Code; the unit's members would be considered spies if caught. Young was most likely aware of the potential risk of such operations, but saw the benefit of employing a tactic similar to the partisans.⁸⁶

As a "Jessie Scout," Henry Young conducted almost daily reconnaissance operations in the northern Shenandoah Valley. This enabled him to become familiar with

⁸⁴ William A. Spicer, *Colonel Henry H. Young in the Civil War: Sheridan's Chief of Scouts* (Providence: E. A. Johnson, 1910), 5, accessed March 10, 2016, https://books.google.com/books?id=v7ZIAQAAMAAJ&printsec=frontcover&dq=Major+Henry+H.+Young&hl=en&sa=X&ved=0ahUKEwjwuM_vnNLLAhUDyyYKH YCcBtcQ6AEIHDA#v=onepage&q=mcneill&f=false.

⁸⁵ National Parks Services, *Sheridan's Scouts*, National Parks Service Civil War Series: The Campaign to Appomattox, United States National Parks Service History e-Library, accessed March 10, 2016, http://www.nps.gov/parkhistory/online_books/civil_war_series/6/sec2.htm.

⁸⁶ Francis Lieber, *General Orders 100: Instructions for the Government of Armies of the United States in the Field* (Washington, DC: Government Printing Office, 1898), Section 4, Article 81, accessed May 1, 2016, http://avalon.law.yale.edu/19th_century/lieber.asp#sec4. Article 88 states: "A spy is a person who secretly, in disguise or under false pretense, seeks information with the intention of communicating it to the enemy [and] the spy is punishable with death by hanging by the neck, whether or not he succeed in obtaining the information or in conveying it to the enemy."

the physical topography as well as with the surrounding population. This cumulative experience mitigated the partisan's traditional advantage regarding knowledge of the northern Shenandoah Valley.⁸⁷ After receiving a promotion to major and his appointment as Sheridan's Chief of Scouts, Young personally selected the first 100 men of his command.⁸⁸ Young's well-armed command engaged the partisans with overwhelming fire as Young armed each Soldier with two double-barreled shotguns and two revolvers.⁸⁹ One large difference between Young's command and Blazer's was the element's size. Young's command grew in strength to a full battalion of over 300 men.⁹⁰ This limited the command's speed and ability to achieve the stealth of a smaller organization. This growth affected the unit's maneuvering, but it would not limit the command's success on the battlefield.

Young's command "kept an especial watch upon Mosby and other rangers and guerrillas that infested the mountains on either side of the valley" and it monitored the activities and location of the Confederate irregulars.⁹¹ Sheridan complimented Young's command. It "operated efficiently against the guerrillas infesting western Virginia."⁹²

⁸⁷ Spicer, 18.

⁸⁸ Ibid., 21.

⁸⁹ Ibid.

⁹⁰ This modification would effectively double the size of Young's command from 100 to 200.

⁹¹ Samuel C. Farrar, *The Twenty-second Pennsylvania Cavalry and the Ringgold Battalion, 1861-1865* (Akron: The New Werner Company, 1911), 448. Young's Scouts primarily monitored Mosby and McNeill's commands.

⁹² Wittenberg, 141.

Like Blazer, Young's operations prevented the partisans from affecting key lines of communication during late 1864, including the Baltimore and Ohio Railroad.

Although it never defeated McNeill's or Mosby's partisan commands completely, Young's scouts succeeded in their counter partisan campaign. For example, on February 4, 1865, Major Young personally caught Colonel Harry Gilmore, Commander, Confederate 2d Maryland Cavalry, in Moorefield, West Virginia.⁹³ The 2d Maryland was conducting irregular operations with McNeill's Ranger command at the time of his capture. This apprehension was significant because Gilmore had previously raided within four miles of Baltimore, Maryland, threatening Union lines of communication south to Washington, DC.⁹⁴ Gilmore was also cooperating with the 1st Virginia Partisans with the intent to attack the Baltimore and Ohio Railroad. Young and a squad of twenty Soldiers infiltrated Gilmore's camp and caught the colonel asleep.⁹⁵ Lieutenant Colonel James Forsyth, Sheridan's Chief of Staff reported to that:

On the 5th of February Harry Gilmore, who appeared to be the last link between Maryland and the Confederacy, and whose person I desired in order that this link might be severed, was made prisoner near Moorefield, his capture being very skillfully made by Colonel Young, my chief of scouts, and a party under Lieutenant-Colonel Whitaker, First Connecticut Cavalry, sent to support him.

⁹³ Joseph Wheelan, *Terrible Swift Sword: The Life of General Philip H. Sheridan* (Boston: Da Capo Press, 2012), 163. Ironically, McNeill's command captured Generals George Crook and B.F. Kelley two weeks later on February 21, 1865 in Cumberland, Maryland.

⁹⁴ Spicer, 46.

⁹⁵ Colonel John S. Mosby accomplished a similar feat on March 8, 1863, when Mosby and 29 partisan soldiers captured Brigadier General Edwin H. Stoughton asleep at his headquarters in Fairfax Courthouse, Virginia. See Crawford, 71.

Gilmore and Mosby carried on the same style of warfare, running trains off railways, robbing the passenger.⁹⁶

Papers discovered during Gilmore's capture provided General Sheridan with information on the partisan's disposition and this indicated critical command issues. Specifically, "they are in a state of mutiny, and had dispersed; that he [Gilmore] had arrested one of the commanding officers," but latter that officer refused to recognize his own arrest.⁹⁷ More importantly, however, the information established the initial conditions for the defeat of the Jubal Early's Confederate Army of the Valley at the Battle of Waynesboro, Virginia, on March 2, 1865.⁹⁸ After the Battle of Waynesboro, and the successful completion of the Shenandoah Valley campaign, General Sheridan ordered Young's command to support Sheridan's Cavalry in the pursuit of the retreating ANV south of Richmond.

Outcome of Counter Partisan Unit Operations

The Confederate ANV surrendered on April 9, 1865, ending the major battles of the American Civil War in Virginia. Colonel Mosby preferred to disband the 43d Virginia Cavalry rather than to surrender. Jesse McNeil's Rangers capitulated to Union forces in Romney, West Virginia on May 8, 1865. The two primary Union Army counter partisan

⁹⁶ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 55, Major General Sheridan to Brevet Major General John Rawlins, General U.S. Grant's Chief of Staff, referencing the Capture of Colonel Gilmore (September 5, 1864), accessed March 17, 2016, <http://ebooks.library.cornell.edu/m/moawar/text/waro0090.txt>.

⁹⁷ Farrar, 448.

⁹⁸ Spicer, 47.

unit's operating in northern Virginia and the Shenandoah Valley between late 1864 and April 9, 1865, achieved varying levels of success.

Blazer's small command significantly interfered with the 43d Virginia Cavalry's operations to a point that Colonel Mosby demanded the destruction of the Independent Scouts. Although Mosby defeated Blazer's command, its operations caused the 43d Virginia to dedicate two squadrons to engage and defeat the Independent Scouts at the Battle of Kabletown. Blazer's command was too small to stand against Mosby's larger force. The unit possessed the necessary characteristics and capabilities to pursue the 43d Virginia for over three months.

Young's Scouts possessed similar characteristics and capabilities that facilitated their pursuit and interdiction of the Confederate partisans. After the defeat of the Confederate Army of the Valley at the Battle of Waynesboro, Young's Scouts received new orders and they no longer pursued the Confederate partisans. The "Jessie" Scouts had demonstrated the ability to counter partisan operations in northern Virginia. Major Young's scouts were clearly poised to continue their counter partisan operations when they received their new orders.

COUNTER 4

COUNTER PARTISAN OPERATIONS ANALYSIS & CONCLUSION

Counter Partisan Operations Transformation

The USA transformed its counter partisan operations in northern Virginia significantly in late 1864. As noted in chapter 2, the Army initially conducted both offensive and defensive operations against both civilian guerrillas and the Confederate Army's partisan units. The Union Army did not differentiate between the two types of irregular formations. This allowed the Union to deter and defeat the majority of guerrillas, but limited the Union's ability to counter the organized partisans successfully. The irregular tactics and capabilities of the Confederate hybrid units provided the partisans with a distinct advantage from 1862 until 1864. By 1864 Union Army leaders better understood their partisan adversary and the environment in which Confederate irregulars operated.

Although the Union Army had conducted operations against irregular units less than 20 years earlier, no formal guidelines existed on how to conduct operations to counter, or defeat, irregular units. Army drill manuals of the mid-19th century did not provide guidance on the engagement of an enemy conducting irregular warfare. This prevented leaders from receiving training, formal or informal, focused on irregular operations. The primary irregular warfare experience prior to the war came from persistent conflicts with Native American tribes. Union Army leaders in the Army of the Shenandoah Valley, such as Colonel Crook, utilized their own experiences from previous conflicts, such as the Rogue River War, to conduct effective operations against the civilian guerrillas and Confederate partisans

Chapter 3 discussed how Union leaders developed independent scout units with the specific mission of defeating the Confederate partisans. The Union created the scouts from existing Army formations and provided the counter partisan units with readily available equipment. The acknowledgement of an existence in the difference between partisans that supported the Confederate Army and civilian guerrillas who operated in their own interest was essential in the Union Army's successful creation of these more effective counter partisan units. The differentiation between the two variants of irregular units allowed Colonel Crook and Major General Sheridan to establish the independent scout units with specific organic capabilities. These capabilities enabled the scouts to limit the partisan's advantage and to conduct aggressive offensive counter partisan operations.

This chapter examines the independent scouts from the domains of leadership, organization, training, and material. It discusses how changes in these domains during the unit's development created organizations that were comparable to the partisans and enabled the scouts to employ similar tactics when conducting offensive operations. Finally, this chapter concludes with a discussion on the Union Army's reaction to the Confederate partisan units and interprets lessons from counter partisan operations in 1864.

Independent Scout Leadership

The independent scouts conducted counter partisan operations in northern Virginia and the Shenandoah Valley in support of the Union Army of the Shenandoah. These decentralized operations required the scout commands to operate independently from the Army of the Shenandoah while pursuing the Confederate partisans. The active

pursuit of the partisan units made it necessary for the scouts to rapidly maneuver and transition to the offense, or defense, without immediate support from their adjacent units or higher headquarters. The leaders of the scouts needed to understand their partisan adversary and the terrain in which they operated in order to conduct effective irregular operations. Familiarity with combating irregular units was a required characteristic in selecting Union counter partisan leadership.

The lack of codified “doctrine” and specific training required the Union Army to identify experienced personnel to lead the scouts. The leaders of the independent scouts needed to understand how their opponent operated and have experience in independent operations against irregular units. Blazer had engaged civilian guerrillas in West Virginia during 1863 and early 1864. These operations attempted to establish order, quell lawlessness, and to pacify southern sympathy. Young participated with Blazer’s command during the independent scout’s initial operations in northern Virginia in 1864.

Additionally, as a “Jesse” scout in Sheridan’s Command, Young had infiltrated behind Confederate lines while conducting individual reconnaissance and receiving information on the location and movement of Confederate units from Union sympathizing southern civilians. This allowed him to understand the partisans’ civilian support base. Both leaders used their knowledge and previous experiences in battling irregular units to develop their operational approach. This combination of both regular and irregular warfare enabled them to pressure the partisans consistently in an effort to both defeat them and prevent them from interfering with the Union Army of the Shenandoah’s larger objective of capturing and laying waste to the Confederacy’s major remaining food producing region, destroying the ANV’s supply base. This objective

necessitated the defeat Jubal Early's Army of the Valley. Both Blazer and Young's understanding of the terrain allowed them to establish and maintain persistent interference with partisan operations in achieving the Union's overall operational and strategic objectives.

Captain Blazer's operations in West Virginia and Major Young's reconnaissance near Winchester and Berryville, Virginia, provided both with knowledge of the terrain in the Shenandoah Valley and northern Virginia. This knowledge allowed them to anticipate partisan travel routes and likely partisan camp locations. That knowledge facilitated each leader's ability to establish ambushes, infiltrate partisan camps, and direct the pursuit of the partisan elements after making initial contact. Captain Blazer described his pursuit of the 43d Virginia in September 1864:

On the 18th, learning that a party of Mosby's guerrillas were in the vicinity of Myerstown, I proceeded to that place and overtook them near the Shenandoah River, and after a chase of three miles, I drove them across the river, capturing one prisoner . . . The army having again advanced to Berryville, on the night of the 3rd of September I learned that Mosby with a considerable force was at Snickersville. Early on the morning of the 4th I crossed the river at Backus' Ford and moved up the river to where I could get up the mountain through the woods. I struck the pike east of the top of the mountain and moved on their camp. Finding that he had left during the night in the direction of Charlestown, I determined to follow. I crossed the mountain through Lewis' Gap, and by a forced march I overtook them about 2 pm. at Myers' Ford, and after a spirited fight of several minutes I completely routed them.⁹⁹

It improved the independent scout's ability to maneuver by increasing speed and decreasing the likelihood of their detection during daylight movement. Most importantly,

⁹⁹ War Department, *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, series 1, vol 43, chapter 55, Captain Blazer reporting on his operations against Mosby's partisans in the Shenandoah Valley and northern Virginia (October 24, 1864), accessed May 5, 2016, <https://ehistory.osu.edu/books/official-records/090/0615>.

it mitigated the 43d Virginia and 1st Virginia Partisans Rangers advantage in freedom of movement.

From the leadership perspective, Crook and Sheridan selected knowledgeable and experienced officers to lead organizations during aggressive counter partisan operations. In doing so, the leaders of the Army of the Shenandoah had drastically reduced the time necessary to prepare the individuals who led their hybrid independent scouts. Blazer and Young did not require additional leadership training or development prior to command. This also better prepared them to conduct proactive operations to counter the partisans while remaining independent from the Army of the Shenandoah. They maintained disciplined initiative and did not required additional guidance from their higher headquarters.

Independent Scout Organization

The independent scout units were unique from an organizational perspective. There was no standardized manpower structure for these units and they were organized separately from regular army units. Commanders selected the Soldiers for scout duty in Blazer or Young's units. The quality and skill of each Soldier mitigated these units' limited manning, which was similar to how Mosby and McNeill organized their partisan rangers. The size of the organizations changed as needed or as directed. For example, General Sheridan directed an increase in the numerical strength of Young's command from company to battalion following the defeat of Blazer's command. The ability of the independent scouts to tailor the size of their units depending on the situation allowed the hybrid formations to counter partisan interdiction attempts. Another essential scout

characteristic of the scout was the capability to operate as regular cavalry and “mounted infantry.”

Given the character of irregular warfare, the independent scouts required the capabilities of various Union Army units. The Union used scouts in the traditional reconnaissance role of the cavalry as well as the foot soldier role of the infantry. This was not unique to the independent scouts; other Union and Confederate units used similar means for maneuver and combat. It was, however, an important aspect of the scouts since it allowed the units to adapt organizationally to a model that provided the capability to maneuver to a battle position rapidly, dismount, and engage the partisans with additional firepower compared to a standard cavalry unit.

This capability also allowed the scouts to quickly transition from dismounted to mounted operations in the event a Confederate attack surprised a scout commander, or to provide the scouts an advantage should the scouts encounter a Confederate force in a meeting engagement. In most instances, this prevented the destruction of a scout unit if ambushed by a Confederate force. This also allowed the scouts to seize, and more importantly maintain, the initiative, which was a significant problem for the Union Army prior to the development of the independent scout units.

Finally, by establishing an organization designated specifically to conduct operation against irregular Confederate units, the Army of the Shenandoah had allowed the scouts to focus solely on its mission. These units did not perform normal Army duties such as guard duty and picketing. It improved the discipline and reduced the potential for an opposing patrol to catch the scouts off guard. By creating the scouts with a similar organization to the Confederate partisans, the Union now had a unit to counter partisan

operations. Together, these characteristics of the scout's organization prevented the partisans from operating completely unhindered behind the Union Army's front lines in northern Virginia and the Shenandoah Valley and limited their effectiveness.

Independent Scout Training

USA Soldiers did not receive any instruction on irregular warfare prior to, or during, the Civil War because of the lack of published tactics or doctrine. Union leaders lacked sufficient time to develop specific training for hybrid operations against the Confederate partisans. Colonel Crook completed the development of the initial independent scout organization in a similar manner to that of the 43d Virginia Cavalry. Commanders selected Soldiers for service in the independent scouts based on their past military and civilian experiences and unit commanders required demonstrated ability to conduct specific tasks. As mentioned in chapter 3, the Soldiers were required to be marksmen who had experience in restrictive terrain such as the rugged forests and mountains of western Virginia.

The Army of the Shenandoah Valley and its supporting commands, such as the Department of West Virginia, fielded scout units manned with Soldiers capable of conducting counter partisan operations. By specially selecting the Soldiers for these units, the Union Army commands did not require a formalized or even hasty training process to generate trained Soldiers for the independent scout units.

Independent Scout Material

The Union Army of the Shenandoah's independent scouts required a diversified combination of material capabilities to conduct irregular operations as a hybrid cavalry

and mounted infantry unit. Blazer and Young's commands utilized distinct weapon, uniform, and transportation capabilities during counter partisan operations. Colonel Crook, General Sheridan, and Major Young identified the requirement for these material capabilities during the independent scouts' initial development and during actual operations. Although the two commands were not identical in their capabilities, each unit utilized their unique combination of equipment to improve their effectiveness. None of the employed capabilities utilized were new or untested. Both the senior and junior leaders mentioned previously viewed these capabilities as required for conducting operations to engage in irregular warfare based on their understanding of the partisan's capabilities and tactics.

Weapons

The soldiers of the 43d Virginia Cavalry and 1st Virginia Partisan Rangers possessed the capability to mass fire quickly. This capability was essential to employ raid and ambush tactics against Union forces and to prevent a larger Union Army formation from overwhelming the smaller partisan force. The counter partisan units needed a material capability to counterbalance the partisan's weapons. The commander of the Union Army of the Shenandoah, General Sheridan, issued guidance to make Blazer's independent scouts more effective in combating the partisans by providing the scouts with a specific weapon capability. Young's command also possessed unique weapons capabilities. These weapons capabilities neutralized the partisan's ability to mass fire rapidly.

General Sheridan issued Spencer repeating rifles to Captain Blazer's independent scouts prior to them conducting operations. Although the Union Army had previously

displayed the capabilities and advantages of the repeating rifle at the Battle of Chickamauga, this decision is significant for other reasons. It demonstrated commitment to a weapon system for the independent scouts to provide them with the capability to rapidly mass fires during partisan engagements. As demonstrated in Chapter 3, Blazer's acknowledgment of his unit's success demonstrated the importance of the repeating rifle's capability as a force multiplier. Young's independent scouts also required an increased weapons capability similar to that of Blazer's unit.

Major Young realized his command of 100 soldiers required additional weapons capabilities during the initial development of his scout organization. His requirement for each soldier to carry two shotguns and two pistols amplified his scout's ability to engage both partisans and regular Confederate army units. Young's decision to augment his unit with this combination of weaponry not only provided for increased lethality, it also gave the unit a means to respond to the diverse range of potential situations that would arise from irregular operations. Examples include establishing ambushes and reacting to unanticipated contact with a large Confederate Army force. This scenario occurred in November of 1864 when Young led 100 of his scouts, dressed in Confederate uniforms, on a night ambush against a Confederate cavalry brigade that was traveling between Winchester and Harrisonburg, Virginia. The ambush was "so sudden and unexpected by the [Confederates], so paralyzed them that Young took his command safely through them, dealing death as he went, and he lost but one man."¹⁰⁰ This attack demonstrated the criticality of the Scout's lethal capabilities.

¹⁰⁰ Spicer, 22.

Civilian Clothing and Confederate Uniforms

Young's scouts wore civilian clothing and captured Confederate Army uniforms in addition to issued Union Army uniforms. Soldiers wearing civilian clothing during military operations was illegal. But it allowed small detachments of Soldiers to penetrate the southern civilian population if Young required timely information on the partisans or regular Confederate Army units. It also minimized the potential for civilians to feel threatened by the sight of Union Soldiers who tended to report the location of the Union troops to Confederate forces. Civilian clothing also decreased the probability of detection by Confederate cavalry during reconnaissance missions. Young used Confederate Army uniforms during operations to infiltrate past Confederate picket lines in order to gain access to even more detailed information on Confederate disposition and intentions. An example of this technique occurred when Young and his squad of scouts infiltrated past Confederate troops at Mooresville, West Virginia, to capture Colonel Harry Gilmore.¹⁰¹

This tactic is significant for two reasons. First, it provided the scouts with an information collection, stealth, and tracking capability. The capability also partially negated potential risks caused by the unit's smaller size and the types of irregular operations the unit conducted independent of adjacent Union Army forces. Second, this capability allowed the scouts to model their irregular operations similar to the partisan's approach. Major Young's deliberate operation to infiltrate McNeill's partisan command and capture Gilmore in the early morning of February 4, 1865, is an example of how the independent scouts employed the partisan's own tactics against them.

¹⁰¹ Ibid., 13-14.

Transportation

The independent scouts required transportation to operate as a hybrid mounted infantry and cavalry unit. The unit used horses as the means for movement to engagements. As stated previously, this was not the first time that the United States or Confederate Armies employed mounted infantry during the Civil War. Colonel Crook initially identified this mobility capability as required for Blazer's scouts to conduct operations. It was also required since the partisan used horses for transportation. Although not all mounted infantry units used horses, some opted for mules; the Union Army outfitted the scouts with horses to maximize their maneuverability and speed. The Army of the Shenandoah continued to provision horses when developing Young's scouts as it was critical to continue to maintain the rapid transportation capability.

The United States Army's Reaction to Confederate Partisans in Northern Virginia

The United States Army's reaction to Confederate partisan operations in northern Virginia and the Shenandoah Valley varied between 1862 and 1864. As noted in chapter 2, initial counter partisan operations had limited success. However, the further employment of counter partisan units proved to be a positive development in United States counter partisan operations before the end of the war in 1865. The partisans never inflicted catastrophic damage or provided a decisive victory for the Confederacy during the war.

However, the partisan's operations were successful in fulfilling their role for the Army of Northern Virginia and the Confederate War Department. The 43d Virginia Cavalry and 1st Virginia Partisan Rangers attracted the Union Army's attention in

northern Virginia, and the Union Army responded. Partisan operations caused the redirection of personnel, equipment, and resources in an attempt to protect key Union lines of communication and infrastructure and to interdict and ultimately defeat the partisans. The Union Army's reaction to the sanctioned Confederate partisans during the Civil War validated important military lessons. These include the importance of understanding the enemy and the operational environment, determining potential solutions and capabilities required to combat a problem, and finally the rapid adaption and development of units with those specific capabilities.

The Union Army's initial response to the Confederate partisans demonstrated the importance of understanding the enemy and environment in a specific area of operations. Union commanders in northern Virginia did not initially differentiate between partisan soldiers and civilian guerrillas. This caused an inappropriate use of a combination of units and tactics to combat the partisans and protect Union interests. The Union used multiple tactics and organizations, up to a regiment, while simultaneously attempting to neutralize the 43d Virginia Cavalry and the 1st Virginia Partisan Rangers.

Union offensive and defensive operations conducted between 1862 and 1864 did not effectively protect lines of communication or secure Union occupied territory in northern Virginia because of the partisan's better capability. The partisans chose to attack Union targets when a target of opportunity arose, not when a Federal position was well defended or adequately prepared to repel a raid or ambush. The partisans also exploited their mobility and lethality advantages to prevent offensive Union patrols from exploiting compromised partisan units. Federal units in northern Virginia and the Shenandoah Valley began to modify the engagement of partisan units once insightful leaders, such as

Crook and Sheridan, understood their enemy's capabilities. The commanders of the counter partisan units also understood their opponent since their own tactics and capabilities were similar. These commanders had a solid understanding of the operational environment.

Colonel Mosby and the McNeill brothers were familiar with their operating areas in northern Virginia and the Shenandoah Valley. This allowed them to maximize the use of both the physical terrain and the human terrain. These leaders planned their operations where they could gain surprise to negate the advantage of a larger force, or elude a federal pursuit by dispersing into an area of dense vegetation or among the local civilian populace. The physical and human terrain provided the partisan soldiers with a means to position elements for reconnaissance and early warning. Blazer and Young understood the potential advantages of both and used the topography to their advantage. Blazer's scouts established ambushes along routes the 43d Virginia used to travel through the Blue Ridge Mountains to the Shenandoah Valley. Young also used his knowledge of the terrain, specifically near Winchester, Virginia, to prevent the discovery of small detachments of his scout command when gathering information on the partisans. The knowledge of the partisan's primary areas of operation allowed the independent scouts to track and engage their opponents with more efficiency than previous Union Army attempts. The independent scouts modified their interaction with southern civilians during operations as well.

Union Army units in the occupied territories of northern Virginia in which the partisans conducted operations displayed varying levels of hostility to the civilians living in those areas. This antagonism often increased the civilian population's support of the

partisans. The numerous methods of intimidation used in attempts to deter the civilians support of the partisans failed, or in some instances, actually increased local resolve to support Confederate war aims. The independent scouts employed alternate means when interacting with civilians. Blazer for example did not threaten the population, which decreased the probability that a distraught citizen would warn the partisans of the scout's location. Young's scouts wore civilian clothing, and Confederate uniforms on occasion, to prevent detection. This indicates that Blazer and Young better understood how their actions towards the citizens affected their ability to conduct operations. The scout's knowledge of both the physical and human terrain enabled them to employ different, and more successful, tactics than their predecessors. More importantly, leaders in the Army of the Shenandoah better understood the partisan's capabilities and tactics. This understanding allowed General Sheridan and his command to determine and employ suitable means to combat the partisans.

The United States Army's previous engagements to neutralize or destroy the 43d Virginia Cavalry and the 1st Virginia Partisan Rangers had demonstrated the partisan's capabilities in effectively conducting hybrid warfare in northern Virginia. They required an additional means for conducting counter partisan operations without dedicating a large body of troops and equipment to protect infrastructure and conduct counter partisan patrols. Colonel Crook initially offered the service of Blazer's unique command as it had up to 1864 had successfully conducted irregular operations against civilian guerillas in West Virginia. General Sheridan most likely understood that although the partisans were similar to the guerrillas, the partisans possessed advantages. Sheridan accepted Crook's offer and ordered Blazer's command to pursue the partisans, but he also ensured the

scouts had the Spencer repeating rifle. After receiving reports from Blazer validating the capabilities of the independent scout unit, Sheridan called for the creation of another independent scout element. This became Young's independent "Jessie" scout command. Sheridan believed the independent scouts to be an organization capable of neutralizing, if not defeating, the partisans. Sheridan wanted to increase capability to conduct irregular warfare within his command and to apply this capability against other objectives as well. This also demonstrated a lesson for the Union Army in identifying capability requirements to solve unanticipated problem sets. The rapid development of these hybrid organizations was required since the United States was in its third year of the war.

After identifying the specific requirements for a counter partisan unit, the Army of the Shenandoah created Captain Blazer and Major Young's independent scout commands. This development was swift because all of the necessary capabilities existed within the Army of the Shenandoah. Colonel Crook informed General Sheridan that Blazer's command already existed within his Department of West Virginia. Blazer's unit did not require additional or specialized leadership training, as it already possessed the required skill sets to conduct irregular warfare. General Sheridan provided Blazer with additional weapons capability from existing stocks.

Sheridan also organized Young's independent scouts with similar capabilities. Young initially conducted patrols with Blazer's command to ensure he had the knowledge to lead an irregular unit. This also allowed him to determine the organization of his new command. Young's personal selection of the Soldiers in his command ensured that each troop already possessed the individual capability to serve as an independent scout. Young's Soldiers did not require additional training, only practice with the new

Spencer rifles, which Major Young ensured his Soldiers received. The Army of the Shenandoah's combination of specific personnel and equipment that existed within the organization allowed for the effective creation of a unit with the required counter partisan capabilities. This is another useful insight from the United States Army's counter partisan operations in northern Virginia.

Conclusion

The Union Army faced unique challenges in combating Confederate partisans in northern Virginia and the Shenandoah Valley during the American Civil War. The Union Army's initial response between 1862 and early 1864 suppress the 43d Virginia Cavalry and the 1st Virginia Partisans Rangers was unsuccessful. This initial failure appears to have occurred because the majority of Union Army leaders did not fully grasp the partisans' capabilities, or the environment in which the partisans conducted irregular operations. General Sheridan created unconventional units in 1864 to counter the partisans.

Although the Confederate partisans were never completely defeated, there are important lessons from the development of the Union Army's independent scouts. These hybrid organizations proved capable of conducting counter partisan operations. The employment of the independent scouts against the partisan commands of McNeill and Mosby validated the importance of understanding an adversary's capabilities, tactics, and the operational environment. The creation of Blazer and Young's commands also provided an example of how the USA generated a unit with specific capabilities while actively engaged in war. All of these lessons were pertinent during the Civil War and are still valuable to the modern warfighter.

EPILOGUE

The USA has conducted operations against irregular units since its inception during the American Revolution, and it continues to do so today. Despite its significant experience against partisans and guerillas in the Shenandoah and other areas during the Civil War, the Army did not introduce specific doctrine for conducting operations against irregular units, such as Native Americans, immediately after the war. However, the “basic principles of the antebellum campaigns [were] passed down by experienced Soldiers [in] word, deed, and memory.”¹⁰² Noted Indian fighters such as Colonel and later General Crook used the experience gained during the Civil War to subdue those Native American elements that resisted US government control.

The employment of irregular units, similar to the “Independent Scouts,” proved invaluable to Crook’s operation in the American west throughout the 1880s. Crook employed various bands of Native American scouts from the “Snake” tribe to support his counter-irregular operations.¹⁰³ He also augmented his troops with Apache scouts to better pursue and engage tribes the US government deemed hostile.¹⁰⁴ Crook understood the requirement for specific capabilities in combating irregular formations, whether they are Confederate partisans or Apache warriors. The USA has since developed very detailed doctrine for combating and conducting irregular warfare in the 150 years since

¹⁰² Birtle, 60.

¹⁰³ Stephenson, 212.

¹⁰⁴ Ibid., 215-216.

end of the Civil War. There are still lessons from the development and employment of counter partisan units that are applicable to the contemporary operating environment.

The current operational environment produces a variety of hybrid threats that the Army, and the joint force, continue to combat. These threats present a wide diversity of capabilities and tactics. In order to counter these hybrid threats effectively and efficiently, the United States military will need to identify the threat, the threat's capabilities, and utilize experience and the available organic capabilities to develop viable solutions to defeat those threats. These challenges are not much different than those the Union army faced against Confederate partisans in Virginia. The environments may be different but the army's rich heritage and experience in irregular warfare offers much for current and future officers and soldiers involved in these types of irregular operations.

APPENDIX A

THE CONFEDERATE PARTISAN RANGER ACT OF 1862¹⁰⁵

Elements of the Confederate General Orders No. 30

I. An Act to Organize Bands of Partisan Rangers

SECTION 1. The Congress of the Confederate States of America do enact, that the President be, and he is hereby, authorized to commission such officers as he may deem proper with authority to form bands of partisan rangers, in companies, battalions, or regiments, as infantry or cavalry, the companies, battalions or regiments to be composed each of such numbers as the President may approve.

SECTION 2. Be it further enacted, that such partisan rangers, after being regularly received into service, shall be entitled to the same pay, rations, and quarters during their term of service, and be subject to the same regulations as other Soldiers.

SECTION 3. Be it further enacted, that for any arms and munitions of war captured from the enemy by any body of partisan rangers and delivered to any quartermaster at such place or places as may be designated by a commanding general, the rangers shall be paid their full value in such manner as the Secretary of War may prescribe.

¹⁰⁵ United States Congress, Executive Documents Printed by order of the House of Representatives during the Second Session of the 38th Congress 1864-1865 (Washington, DC: Government Printing Office, 1865), 851-855.

V. Additional Corps- Guerrilla Service.¹⁰⁶

12. Under the prohibition of this act against the organization of new corps, no further authority for that purpose can be given, except that specifically provided for in the act of Congress entitled “An act to organize bands of partisan rangers.” For this latter purpose applications must be made through the commanding generals of the military departments in which the said corps are to be employed.

¹⁰⁶ United States Congress, Executive Documents Printed by order of the House of Representatives during the Second Session of the 38th Congress 1864-1865 (Washington, DC: Government Printing Office, 1865), 855.

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