



Figure 1. The Battle of Pea Ridge, AR. The 3rd, 6th, 9th and 27th Texas Cavalry Regiments, Texas Cavalry Brigade, all participated in this engagement. (Art by Kurz and Allison, public domain, created late 1800s. Image is available from the Library of Congress' Prints and Photographs Division under the digital ID cph.3b52835)

Shaping the Fight: Operational-Level Cavalry in the Civil War

by MAJ Nathan Jennings

The U.S. Army adopted brigade combat team (BCT) modularity and began to divest itself of forceful reconnaissance and security (R&S) capabilities at division and corps levels in 2003. While each BCT now organically owns a light, Stryker or armored-cavalry squadron designed to enable fire and maneuver in close areas, commanders at higher warfighting echelons – where intermediate commands connect tactical actions to strategic aims – have realized the emerging need to fight for information and facilitate freedom of maneuver with increased operational reach.¹

This realization, harkening back to powerful cavalry formations that shaped battlefield conditions with specialized capabilities in the Civil War, World War II and the Persian Gulf War, has catalyzed exploration of ways to mitigate the pressing capabilities gap.²

Given the current realities of the Army's fiscal constraints, options for enhancing the abilities of divisions and corps to proactively and forcefully influence operational outcomes have centered on doctrinal solutions rather than on creating new organizations. According to Field Manual (FM) 3-98, *Reconnaissance and Security Operations*, potential mitigations must "provide flexibility, adaptability and depth to the maneuver commanders" while "synchronizing and integrating lethal combined-arms teams to seize, retain and exploit the initiative based on relevant understanding of the situation."³

Commands at the operational level, which are once again focusing on deterring and defeating peer threats in large-scale combat operations, are accordingly experimenting with options for creating tailored combined-arms task forces to meet the increasingly urgent requirement.

This dilemma finds ready precedent in previous American wars of mass and scale that required development of specialized forces to enable a modernizing scope of fire and maneuver across large areas of operation and even entire theaters. The creation and outsized impact of the Texas Cavalry Brigade in the Civil War in particular offers a compelling example where engaged field commanders identified a pressing capabilities gap in the Confederate Army's order of battle and created a powerful mounted formation specifically to conduct R&S functions at the operational level. Comprising four aggressive and well-armed cavalry regiments under a mobile brigade headquarters, the Texan horsemen fought from 1862 to 1865 as a vanguard, rearguard and strike force for several Confederate field armies as they vied for control of the strategically vital Trans-Mississippi region.⁴

The Texas Cavalry Brigade consequently conducted an array of tactical enabling functions surprisingly similar to their motorized and mechanized counterparts in the 21st Century. Assessed in the context of the rising of great-power competition, the brigade's actions as an operational level R&S force – both mounted and dismounted – remain relevant as senior U.S. Army commands embrace the requirement to proactively shape battlefield conditions through echeloned and multi-domain information collection.

As described by GEN Mark Milley, 20th Chairman of the Joint Chiefs of Staff, it means once again creating capabilities that can “think, direct and act at speeds the enemy cannot match” while aiming to “disrupt, penetrate, disintegrate and exploit the enemy's anti-access systems and bring their fielded forces to operational paralysis.”⁵

Modernizing cavalry

The cataclysmic Civil War evolved as an epic proving ground for the rapidly modernizing role of horse cavalry in 19th Century warfare. As the North and South each mobilized armies across multiple theaters to decide the political issue of secession, unprecedented requirements for contested information collection, distributed security operations and even shock assault created an operational dilemma for senior commanders: should they disperse cavalry regiments to provide individual infantry brigades with close-support capability or consolidate them into larger mounted brigades and divisions to act as corps and field army-level reconnaissance and strike assets? This question reflected an enduring discussion on cavalry employment that had vacillated since antiquity between decentralized and massed employment of expensive horse units.⁶

Not surprisingly, given the U.S. Army's antebellum prioritization of the infantry, artillery and engineer branches, Union and Confederate commanders initially adopted the first option. They generally regarded cavalry as an expensive, time-intensive development that required exceptional resources to train into a robust force. GEN Winfield Scott, as the most influential flag officer prior to the Civil War, had cultivated the belief that American cavalry should be economized and limited.

Most commanders at the brigade, division and corps echelons consequently employed their mounted capacity in detail to support infantry brigades and regiments. Though there were early exceptions of “brigaded” cavalry such as Henry Sibley's brigade in New Mexico and James McIntosh's brigade in Arkansas, most mounted units throughout 1861 and most of 1862 maneuvered as attached companies and regiments.⁷

However, by 1863 the strategic perception, and appreciation, of the operational utility of more powerful mounted formations had evolved. Confederate GEN Thomas Hindman, commanding forces in the Trans-Mississippi Theater, initiated fundamental changes in his R&S organization in October 1862 when he created a corps of 6,600 soldiers comprised of mounted and dismounted units.

Field commanders across the South and North soon embraced the concept of highly mobile strike, reconnaissance and guard brigades consisting of two to six mounted regiments. By the close of the second year of the war, LTG Nathan Bedford Forrest, one of the Confederacy's most effective cavalry commanders, had demonstrated the tactical utility of cavalry brigades during the Confederate retrograde from Shiloh, which built on the tactical success of his audacious raid on Union-held Murfreesboro.⁸

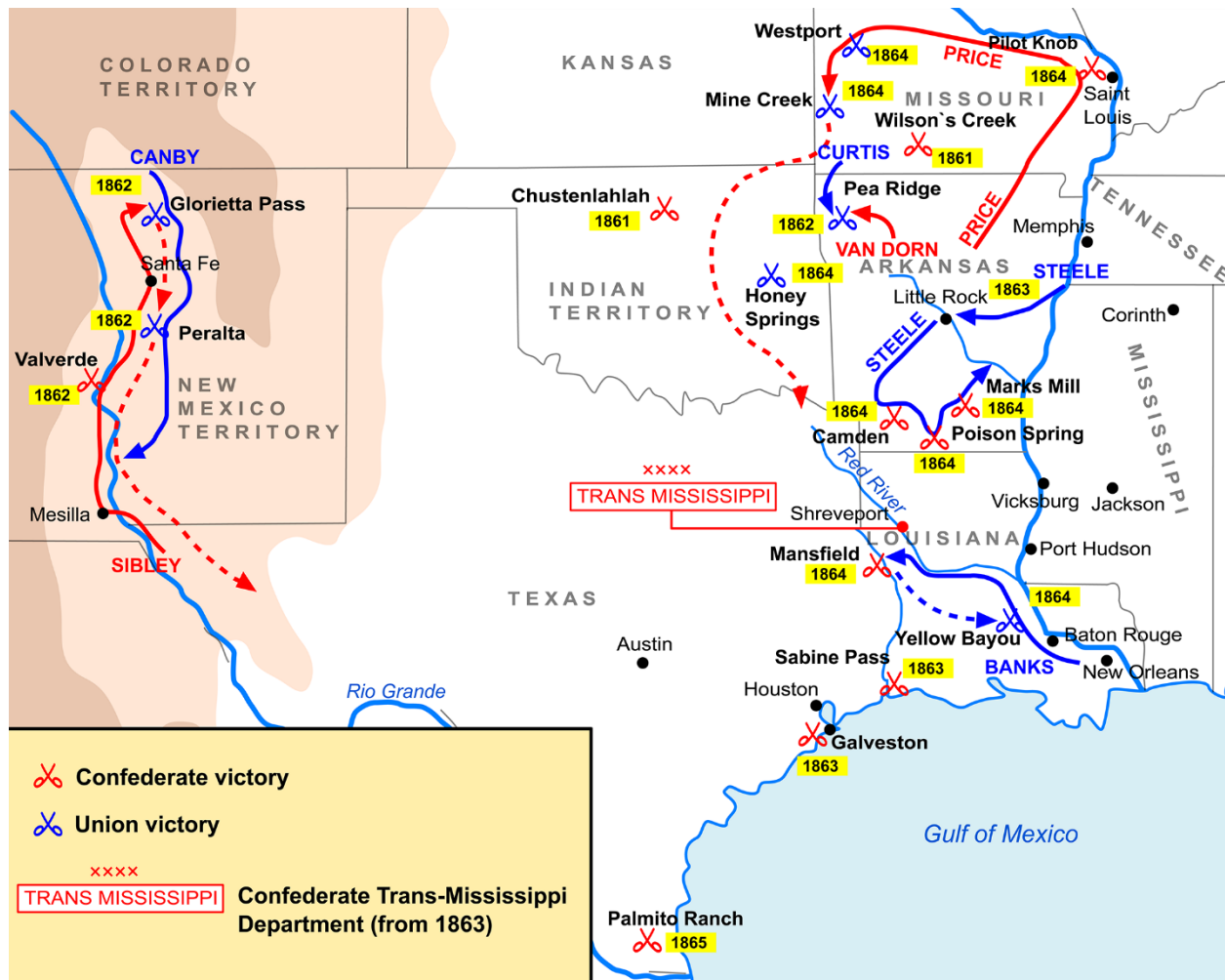


Figure 2. Map of the Trans-Mississippi Theater during the U.S. Civil War, featuring major battles. (Public-domain map by Andrei Nacu)

In the Continental East, a similarly inspired realignment of cavalry resources eventually culminated in the formation of the Army of the Potomac's massive and initially underemployed corps of cavalry, consisting of three divisions, 40 regiments and more than 12,000 cavalrymen. Benefiting from the massive resources of the industrialized Northern states, this corps operated as perhaps the single largest consolidated mounted-arms organization in North American history at that time.

The Federal transition developed belatedly, in part, as a response to the confounding effectiveness of GEN J.E.B. Stuart's Cavalry Corps of the Army of Northern Virginia, which peaked at 9,000 men across seven aggressive mounted brigades. Throughout 1862 and 1863, the famed Southern cavalry influenced campaign outcomes at iconic places like Bull Run, Antietam, Fredericksburg, Chancellorsville and Gettysburg as the outnumbered Confederates sought to outmaneuver and defeat Northern opponents.

COL Wesley Merritt, a New Yorker who commanded the Army of the Potomac's reserve cavalry brigade during the Gettysburg Campaign of 1863, recalled the North's seminal transition after enduring two years of Southern cavalry superiority: "It was then that we commenced practicing the lessons which the enemy had taught us. From the day of its reorganization under [MG Joseph "Fighting Joe"] Hooker, the cavalry of the Army of the Potomac commenced a new life."

Confrontations between Confederate and Union cavalry formations subsequently culminated at the chaotic Battle of Brandy Station June 9, 1863, when 11,000 Union cavalrymen defeated 9,500 Confederate mounted soldiers in a

massive engagement.⁹ The inconclusive battle, where Union cavalry demonstrated their growing confidence and skill, ended as the largest purely cavalry confrontation of the Civil War.



Figure 3. Famed Civil War-era photographer Mathew Brady took this shot of Union GEN Joseph “Fightin’ Joe” Hooker in his campground. (*Public domain, photograph taken in 1863. Image is available from the Library of Congress’ Prints and Photographs Division under the digital ID ppmsca.19394*)

In the Trans-Mississippi Theater to the West, a similar transition occurred, albeit on a lesser scale, as Southern and Northern armies vied for control of vital waterways and rail networks across the expansive Western Theater. Throughout Autumn 1862 and early 1863, the Confederate Army organized many of its disparate horse regiments into unified cavalry brigades to allow increased capacity to shape battlefield conditions ahead of main-body elements. The newly “brigaded” units included four Texas brigades commanded by Sul Ross, William Parson, William Bradfute and Tom Green respectively; an Arkansas brigade led by William Carroll; and two Missouri brigades under officers named Joseph Shelby and M.J. White.

Hindman, seeking to expand Confederate capability at the operational level, also formed 1st Cavalry Division, Army of the West, under GEN John Marmaduke, which included mounted brigades from Texas, Arkansas and Missouri.¹⁰

Texas Cavalry Brigade

Of all the mounted units that fought in the Civil War, the Texas Cavalry Brigade, consisting of the 3rd, 6th, 9th and 27th Texas Cavalry Regiments, attained one of the most instructive combat records of the conflict as they enabled critically needed maneuver at higher echelons. The unit first organized in November 1862 with the first three

regiments comprising 10 companies each, and the last regiment fielding 12. The men, who arrived with various degrees of previous U.S. Army, Texian Army, Texas Ranger and local militia experiences from across the volatile Southwest frontier, hailed from 23 predominantly rural counties across central and northern Texas.

Known for its most famous commander, former Texas Ranger and future Texas governor Lawrence “Sul” Ross, the brigade would demonstrate a unique tactical versatility on both sides of the Mississippi River throughout a series of exacting campaigns.¹¹



Figure 4. Lawrence Sullivan “Sul” Ross, commander of Texas Cavalry Brigade, in the 1860s. (*Unknown photographer, public domain; original photograph is in the Texas Collection at Baylor University*)

The requirement for the establishment of the Texas Cavalry Brigade in the Trans-Mississippi Theater arose in Autumn 1862 as Union successes catalyzed demand for a mobile mounted division. The Confederacy’s Army of the West, after suffering a devastating defeat at Corinth, MS, Oct. 4, 1862, directed MG Earl van Dorn, a former officer of 2nd U.S. Cavalry Regiment, to unite several mounted brigades in a desperate effort to cover the army’s northern flank. The command also hoped that such a fleet, powerful mounted force could execute deep raids against Northern infrastructure to disrupt Union plans to invade the South.

Described in modern Army doctrine as “a brigade-level, force-oriented mission that protects the division or corps main body from detection or engagement by enemy forces,” this assignment would include the Texas Cavalry Brigade and showcase its mobility and firepower.¹²

On Dec. 21, 1862, Van Dorn’s mounted division, now including the Texan horsemen, conducted a daring raid against the Union Army depot at Holly Springs, MS. As a central logistical distribution point for the North’s advance, the destruction of the town’s rail infrastructure and much-needed provisions delayed GEN Ulysses S. Grant’s impending attack on Vicksburg.

1LT George Griscom, adjutant for the Texas Brigade’s 9th Regiment, described how they “charged the town with a long wild yell and took the garrison by surprise.” He then recounted how Federal cavalry offered the only resistance and “the 9th being in front of (the) brigade was ordered to charge them.”

The Texans then decisively won the engagement when they dismounted and charged the defenders. The audacity of the attack resulted in the capture of 75 trained mounts with critically needed cavalry equipment.¹³

This action catapulted Texas Cavalry Brigade to national fame. In military terms, it demonstrated the potential of massed horsemen possessing an unmatched combination of mobility, firepower and operational reach to cover its parent army’s flanks and, if need be, conduct lightning raids against vulnerable points along enemy lines.

As veterans of their state's volatile Rio Grande Frontier and students of Comanche raiding methods, Texan officers often proved adept at planning and executing audacious cavalry actions.¹⁴ Similar to how volunteer Texas Rangers had enabled the U.S. Army's invasions of Mexico between 1846 and 1848 with enhanced information-collection ability, Texas cavalry in the Civil War proved adept at conducting reconnaissance, screen, raid and attack actions in support of larger Confederate Army maneuvers.

The Texans distinguished themselves again March 5, 1863, after conducting a year of hard-fought R&S activities in Mississippi. Again working under Van Dorn's direction, they executed a series of deep raids into Union-held Tennessee intended to relieve pressure on the Confederate flank. In one particularly successful instance where they again proved their value, the brigade attacked, and eventually defeated, a large U.S. cavalry force at Thompson's Station, TN.

Still with 9th Texas Regiment, Griscom recalled how the Federals repulsed their first assault when the brigade was "compelled to fall back." After regrouping behind a set of raised railroad tracks, the Texans "reformed and again advanced to the top of the hill in good order." However, the Confederates, who were attacking into well-aimed carbine and musket fire, once again stalled and fell back to the rail line.

Persistence pays off

The lieutenant then described how a third and final assault, now completely dismounted and fortuitously synchronized with a flanking attack under Forrest, overwhelmed the defenders.

Sensing victory, the brigade "reformed under galling fire and again advanced to the hill top when COL [John Wilkins] Whitfield in the rear of a battery asked if the 9th could go any further, to which the men with one voice replied in the affirmative."

With flanking forces under Forrest now attacking behind the enemy's position, the surrounded Union soldiers finally surrendered."¹⁵ Griscom noted that they captured "five regiments of infantry with their field and staff officers numbering about 2,300 prisoners." The 9th Texas, taking the brunt of the Union fire, suffered three killed, three mortally wounded and 15 wounded. As with so many previous Civil War contests, bloody persistence had won the day for the South.

These actions further emphasized the Texans' range of tactical versatility as a consolidated cavalry brigade with ability to fight dismounted. Whether fighting mounted or assaulting as shock infantry, they had demonstrated aptitude for employing superior mobility to outfight and outflank Union defenders.

The brigade's utility at Thomson Station resembled similar actions in previous conflicts along Texas's expanding borders. In those clashes, soldiers had typically ridden to the point of enemy contact and then dismounted for assault against highly lethal and fast-moving Comanche warriors. These maneuvers as dragoons or mounted infantry, while not new in post-Napoleonic warfare, maximized approach speed to unleash repeating and precision fire against unprepared defenders.

The culmination, and crucible experience, of the brigade's wartime service occurred in Summer 1864 in Georgia following five months of hard patrolling, screening and raiding throughout the Yazoo River Valley of Tennessee. From May 25 to June 5, Ross' men fought constantly and daily as they guarded the flanks of the Army of Tennessee, Confederate States of America, as it attempted to contest GEN William Sherman's fateful and destructive march on Atlanta. Throughout this trying period they averaged at least one skirmish per day, participated in several significant battles and generally attempted to preserve the beleaguered Confederate army's cohesion and freedom of maneuver. Unfortunately for the exhausted Texans, larger Union cavalry formations defeated them twice as their ranks suffered from severe attrition and logistical privation.¹⁶

The Texas Cavalry Brigade, after three years of continuous fighting against an improving Union adversary, completed its battle record in Tennessee by once again conducting raids, reconnaissance tasks and covering actions to allow the remaining Confederate forces in the region to avoid a decisive defeat by superior Federal forces. Throughout November and December 1864, now riding severely fatigued horses and suffering the effects of months of sustained combat, the Texans lost about 100 men while capturing more than 500 prisoners and nine Union battle standards. However, despite the hardships, the diminished brigade managed to destroy two logistical-rail trains and seize almost 50 supply wagons in a last, desperate attempt to slow the inexorable Union advance.

In a final action, the brigade covered the Confederate retreat from Nashville, TN, as the rebellion collapsed in defeat.¹⁷

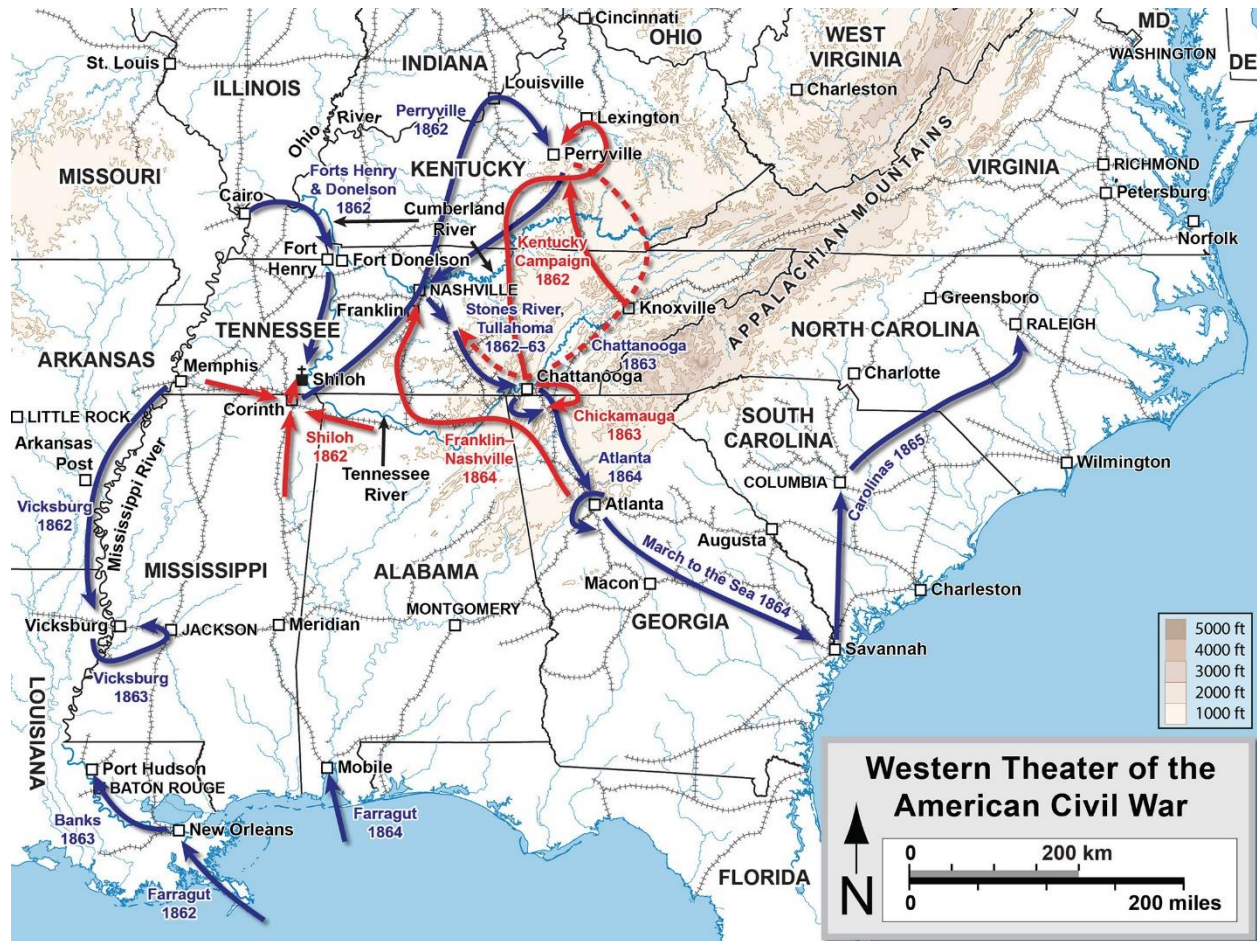


Figure 5. Western Theater overview, 1861-1865. Color key: red = Confederacy; blue = Union. The Texas Cavalry Brigade's action in the Western Theater was in battles such as Corinth, Franklin-Nashville and Atlanta. (Map by Hal Jespersen, www.cwmaps.com; licensed under Creative Commons Attribution 3.0 Unported license)

The battle-weary Texans surrendered to the Union Army May 4, 1865, at Jackson, MS, after three years of hard riding and fighting across the American South. With its commander, Sul Ross, away in Texas to recruit replacement soldiers, COL Dudley Jones of 9th Regiment supervised the ceremony and the signing of parole documents a week later. This final administrative action ended an instructive wartime performance that foreshadowed the potential for powerful, echeloned mounted forces to shape tactical outcomes on modernizing battlefields.

From Arkansas to Georgia, and despite costly attrition and hardship, the combined efforts of Texan horsemen in the 3rd, 6th, 9th and 27th Texas Cavalry Regiments had provided indispensable reconnaissance, security and assault capability to a succession of Confederate armies as they fought for an increasingly unattainable strategic victory.¹⁸

Shaping future fights

Though occurring in a different century and unique conflict setting, the example of how Civil War units like the Texas Cavalry Brigade performed at the operational level remains relevant almost 200 years later as the U.S. Army prepares for potential confrontations of larger scope and scale. As the institution trains, organizes and positions to deter and, if need be, fight near-peer adversaries in Eastern Europe, East Asia and the Middle East, its intermediate commands will likewise require echeloned information-collection and counter-reconnaissance ability to proactively shape battlefield conditions.¹⁹ Similar to how "brigaded" cavalry in the Civil War enabled higher commands by covering their movements and disrupting enemy initiative, contemporary divisions and corps will

need tailored and dedicated combined-arms teams to fight forward and facilitate their own freedom of maneuver.²⁰

In this expeditionary context, the creation and employment of dedicated R&S capability at higher echelons can incorporate insights from predecessors that conducted similar missions in past conflicts. In the example of the Civil War, the Confederate Army quickly realized the increased importance of shaping conditions in forward areas in an era of rapidly modernizing warfare that featured larger battlefields and interconnected theaters. Seeking to mitigate an unforeseen capabilities gap, Southern commanders allocated scarce resources to create specialized reconnaissance forces that could provide the time and space required to enable main-body maneuver. Building on success, they then maximized the unique capabilities of cavalry brigades by employing them as economy-of-force assets that allowed timely concentration of infantry and artillery at critical decisive points.

This type of echelonment, which enabled large-scale maneuver at the operational level, remains relevant as the U.S. Army explores the challenges of projecting control and influence against adversaries who are featuring increasingly effective standoff capabilities. As described in U.S. Army Training and Doctrine Command (TRADOC) Pamphlet 525-3-1, *The U.S. Army in Multi-Domain Operations*, the evolving operational environment requires the institution to create formations that “possess the capacity, endurance and capability to access and employ capabilities across all domains to pose multiple and compounding dilemmas on the adversary.”²¹

Similar to how both Confederate and Union armies devised solutions to maneuver problems in their time, senior commands in the 21st Century will likewise be required to create teams that are optimized to collect information, deny the same for adversaries and facilitate cross-domain convergence in forward areas.

This imperative reflects an enduring debate about how armies elect to resource, or mitigate against, the creation of dedicated R&S forces at the operational level. It represents familiar tension between organizing the order of battle for greater capacity to assertively shape deep areas, or increased availability of main-body forces to converge fire and maneuver at decisive points. However, regardless of resource distribution, U.S. Army divisions and corps will require access to powerful reconnaissance teams with advanced cross-domain capabilities as they seek to extend operational reach across expanding frontages and depths.²²

If units like the Texas Cavalry Brigade demonstrated the enabling impact of echeloned forces in past wars, continued adaptations in the 21st Century, born of necessity, will undoubtedly require similarly inspired shaping efforts to ensure future battlefield success.

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Notes

¹ David Barno and Nora Bensahel, *The Future of the Army: Today, Tomorrow, and the Day after Tomorrow*, Washington, DC: Atlantic Council, September 2016.

² Curt Taylor and Joe Byerly, “Raider Brigade White Paper – Fighting for Information in a Complex World: Lessons from the Army’s First Reconnaissance and Security Brigade Combat Team,” *Military Review*, Sept. 18, 2017.

³ FM 3-98, *Reconnaissance and Security Operations*, July 1, 2015.

⁴ Nathan Jennings, *Riding for the Lone Star: Frontier Cavalry and the Texas Way of War, 1822-1865*, Denton: University of North Texas Press, 2016.

⁵ Milley quoted by Sydney Freedberg, "'A Perfect Harmony of Violence': Army Chief Milley on Future War," *Breaking Defense*, Oct. 9, 2018.

⁶ Stephen Oates, *Confederate Cavalry West of the River*, Austin: University of Texas Press, 1961.

⁷ Ibid.

⁸ Oates, *Confederate Cavalry*.

⁹ Quoted in Swafford Johnson, *History of the U.S. Cavalry*, Greenwich: Bison Books Corps, 1985.

¹⁰ Oates.

¹¹ Harry Henderson, *Texas in the Confederacy*, San Antonio: The Naylor Company, 1955.

¹² FM 3-98.

¹³ George Griscom, *Fighting with Ross' Texas Cavalry Brigade, CSA: The Diary of George L. Griscom, Adjutant, 9th Texas Cavalry Regiment*, edited by Homer Kerr, Hillsboro, TX: Hill Jr. College Press, 1976.

¹⁴ Henderson.

¹⁵ Griscom.

¹⁶ Henderson.

¹⁷ Allen Ashcraft, *Texas in the Civil War: A Resume History*, Austin, TX: Texas Civil War Centennial Commission, 1962.

¹⁸ Samuel Barron, *The Lone Star Defenders: A Chronicle of the Third Texas Cavalry, Ross' Brigade*, New York: Neale, 1908; reprint, Waco, TX: Morrison, 1964.

¹⁹ *The U.S. Army Concept for Multi-Domain Combined Arms Operations at Echelons above Brigade 2025-2045: Versatile, Agile, and Lethal*, Version 1.0; Washington, DC: U.S. Government Publishing Office; September 2018; accessed July 5, 2019, <https://usacac.army.mil/sites/default/files/documents/ArmyEABConcept.pdf>.

²⁰ Nathan Jennings, "Fighting Forward: Modernizing U.S. Army Reconnaissance and Security for Great Power Conflict," *Military Review*, November-December 2019.

²¹ TRADOC Pamphlet 525-3-1, *The U.S. Army in Multi-Domain Operations*, Dec. 6, 2018.

²² Army Techniques Publication 3-91, *Division Operations*, October 2014.

Acronym Quick-Scan

BCT – brigade combat team

FM – field manual

R&S – reconnaissance and security

TRADOC – (U.S. Army) Training and Doctrine Command

Texas Cavalry Brigade Civil War engagements

3rd Texas Cavalry: Battle of Wilson's Creek (1861), Battle of Chustenahlah (1861), Battle of Pea Ridge (1862), Siege of Corinth (1862), Battle of Iuka (1862), Battle of Corinth (1862), Holly Springs Raid (1862), Battle of Thompson's Station (1863), Atlanta campaign (1864), Battle of Nashville (1864).

6th Texas Cavalry: Battle of Chustenahlah (1861), Battle of Pea Ridge (1862), Siege of Corinth (1862), Battle of Corinth (1862), Battle of Hatchie's Bridge (1862), Holly Springs Raid (1862), Battle of Thompson's Station (1863), Atlanta campaign (1864), Franklin-Nashville Campaign (1864).

9th Texas Cavalry: Battle of Round Mountain (1861), Battle of Chusto-Talasa (1861), Battle of Pea Ridge (1862), Siege of Corinth (1862), Battle of Corinth (1862), Battle of Hatchie's Bridge (1862), Holly Springs Raid (1862), Battle of Thompson's Station (1863), Atlanta campaign (1864), Battle of Franklin (1864), Third Battle of Murfreesboro (1864).

27th Texas Cavalry: Battle of Pea Ridge (1862), Siege of Corinth (1862), Battle of Iuka (1862), Battle of Corinth (1862), Holly Springs Raid (1862), Battle of Thompson's Station (1863), Atlanta campaign (1864), Battle of Franklin (1864), Battle of Nashville (1864).