

Battle Analysis: Covering Operations in the Loudon Valley, June 17-23, 1863: a Brief Assessment

by MAJ Christian Garner

The U.S. cavalry has maintained a history of executing reconnaissance and security (R&S) operations in support of higher-echelon formations. While this historical role remains unchanged, the U.S. Army's current transition to large-scale ground combat places increased emphasis on the reconnaissance function of cavalry to seek out enemy formations. Regardless of vehicle composition or echelon, cavalry formations are still required to perform collective missions that include zone, route, area and forceful reconnaissance or screen, guard and cover assignments.¹ Given these tasks to not only find the enemy but also protect friendly forces, the security function of cavalry formations remains and must not be forgotten.

Within the Army, and specifically the Armor Branch, there is much current debate on the future composition of cavalry units and the capabilities they would bring to the fight. While task-organizing existing cavalry squadrons is seen as a current measure to achieve successful R&S operations, there is likely value in creating permanent, standing organizations to reinforce training, establish habitual relationships and simplify the chain of command. However, regardless of structure or echelon, U.S. cavalry functions best in both its R&S roles when it is given direct command and control of enablers to assist the organic cavalry elements. By maximizing the rapid mobility of mounted formations with the unique capabilities brought to the battlefield by enablers, U.S. cavalry units have historically been able to successfully execute the variety of missions assigned to them.

While the history of American cavalry forces provides bountiful examples of successful reconnaissance operations, security operations are somewhat less well known, if not more elusive. During the Battle of Gettysburg, much attention continues to be given to BG John Buford's defense along the ridgelines west of town during the morning of July 1, 1863. Immortalized in Michael Shaara's *The Killer Angels* and the actor Sam Elliot's role as Buford in the movie *Gettysburg*, the current version of Field Manual (FM) 3-98 uses Buford's defense as a textbook example of the dual R&S roles cavalry provides.²

While a worthy example, a lesser-known security operation occurred just a few weeks prior to Buford's action on the western approaches around McPherson's Ridge and the Chambersburg Pike.

The absence of MG J.E.B. Stuart's Confederate cavalry until the third day from the Battle of Gettysburg is often a point of contention that is brought up in any analysis of the campaign and subsequent battle. Out conducting a raid deep into Pennsylvania and Maryland, Stuart's absence leading up to July 1, 1863, led to a climactic meeting engagement which arguably changed the course of the Civil War. Absent during most of the Battle of Gettysburg itself, the contributions of the Confederate cavalry were nonetheless important, as they allowed the Army of Northern Virginia to disengage from a numerically superior force and move undetected into enemy territory. Although failing in its reconnaissance role, Stuart's cavalry performed admirably in its exemplary execution of its covering operation as GEN Robert E. Lee moved his army north into Maryland and Pennsylvania.

Lee moves north

Following his defeat of the Union Army of the Potomac at the Battle of Chancellorsville in May 1863, Lee consolidated and resupplied his forces in preparation for an invasion north. Starting June 3, 1863, he began to shift his forces from their positions outside Fredericksburg, VA, to the west to begin the planned invasion. To mask his movement north, the operational plan called for the Army of Northern Virginia to follow the Shenandoah Valley north into enemy territory. By using the Shenandoah, Lee intended to exploit the neighboring Bull Run and Blue Ridge Mountains to form a natural screen line to help conceal his army's movements from detection. Between the two mountain ranges lay an area known as the Loudoun Valley, which contained a series of mountain passes that allowed passage in and out of the mountain ranges. This land became contested terrain June 17-23, 1863, as each side conducted R&S operations in the fight to find or protect Confederate forces.³

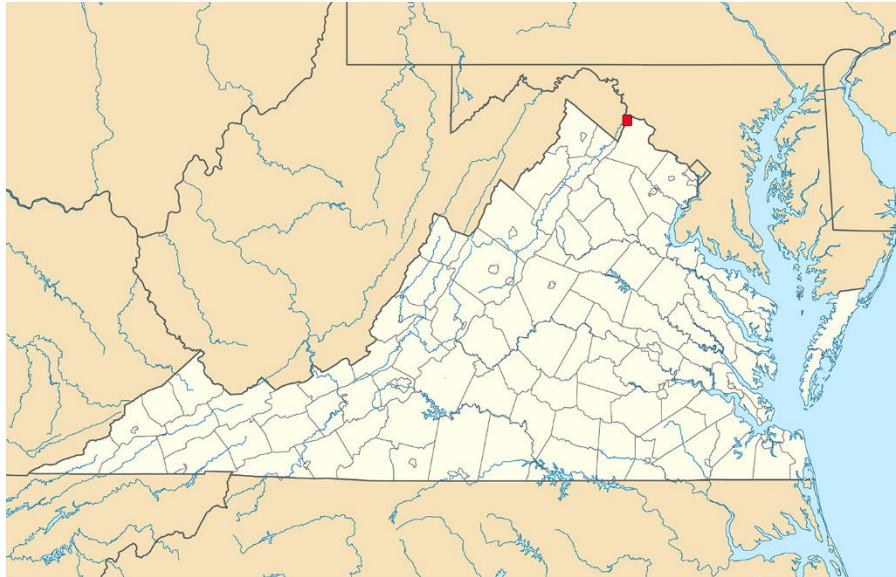


Figure 1. The red area marks the Loudoun Valley's location.



Figure 2. Looking east across the Loudoun Valley, as seen from the foot of the Blue Ridge Mountains near Bluemont, VA.

By June 5, 1863, Union MG Joseph Hooker – commander of the Army of the Potomac – realized that Lee had abandoned his position in Fredericksburg, and he tasked his cavalry force under the command of BG Alfred Pleasonton to ascertain the enemy's intent as Hooker prepared the Union army for movement. To achieve this mission, Pleasonton ordered his two divisions under the commands of Buford and BG David Gregg to mass their brigades and force the passes in the Loudoun Valley to determine the Confederate dispositions. Countering Pleasonton's reconnaissance efforts, Stuart placed his six brigades of Confederate cavalry directly west of the gaps that pass through the Bull Run Mountains to cover the Confederate main body as it moved north into Maryland.

In addition to the six brigades of cavalry under Stuart's direction, he also commanded a formation of horse artillery, consisting of six batteries, and a task force commanded by BG John Imboden, containing two regiments of cavalry, a company of partisan rangers and one battery of artillery.⁴ With six brigades of mounted cavalry and six batteries of artillery, Stuart had the ability to dedicate a battery to each brigade. By doing so, he created habitual relationships between the brigade and regimental commanders with their respective battery of artillery and its leadership. Stuart would put this command relationship to good use in the coming days in the multiple engagements fought across the Loudoun Valley in the middle of June 1863.

Although almost numerically the same size as the Union force, Stuart found himself at a disadvantage. While the defense is generally considered the stronger form of warfare, the Confederate cavalry found themselves

defending the many gaps bisecting the Loudon Valley and neighboring mountain ranges. Conversely, Pleasonton had the advantage by being able to mass his cavalry forces at the division level, thus achieving local numerical superiority at a time and place of his choosing. To counter this threat, Stuart relied on his enablers, specifically his field-artillery formations, to help his organic cavalry formations conduct their covering operation for the main body of the Army of Northern Virginia.

Forcing the gaps

On June 16, Hooker ordered Pleasonton's two divisions of Union cavalry to the town of Aldie, an important crossroads town, to find Lee's army. Defended by part of a dismounted brigade of Confederate cavalry under the command of COL Thomas Munford, June 17 found the lead Union cavalry brigade under the command BG Judson Kilpatrick of Gregg's Division slamming into the Confederate positions astride the two turnpikes leading west to Ashby's Gap and northwest to Snickers Gap. Blunting the initial Union assault, Munford's dismounted troopers were aided by enablers in the form of CPT James Breathed's battery of four three-inch rifled cannon from 1st Virginia Horse Artillery.

Checking Kilpatrick's continued charges, the Confederate cavalymen and artillerymen continued to hold the important crossroads throughout the day. Frustrated by the delay, Gregg committed a second brigade of Union cavalry to Aldie in an attempt to force the task-organized Confederates to cede the important terrain. Although eventually forced to retire due to growing Union strength, Munford successfully delayed the initial Union reconnaissance effort and prevented the enemy from gaining knowledge of Lee's movements.⁵

After hearing of the action at Aldie and recognizing Stuart's covering operation, Hooker ordered Pleasonton to "find out what was behind [the Confederate cavalry]," which resulted in increased Union cavalry commitment June 18.⁶ Though hard-pressed by a numerically superior force, Stuart considered it his "duty to mask the movements of Lee's infantry" by "checking the enemy's reconnaissance" efforts as far away from the main force as possible.⁷

Not to be denied, Pleasonton continued his aggressive reconnaissance efforts June 19 in the vicinity of Middleburg, five miles to the west of Aldie. Again leading with a Union cavalry brigade, this time under the command of COL J. Irvin Gregg from Gregg's Division, Pleasonton attempted to achieve local numerical superiority against the two dismounted partial Confederate cavalry brigades under the command of BG Beverly Robertson and COL John Chambliss. Still needing to cover the main body of Lee's advance northward, Stuart ordered Robertson and Chambliss to conduct a delaying action by trading space for time.

With the initial Confederate skirmish line driven in, Stuart established a position around Mount Defiance, a neighboring ridgeline, to the west of Middleburg. In addition to the troopers of Robertson's and Chambliss' commands, Stuart supplemented the defenses with two batteries of attached artillery, the Lynchburg Rifles under CPT Marcellus Moorman and 2nd Virginia Horse Artillery commanded by CPT William McGregor. Combined, these two batteries provided three Napoleon smoothbore cannons and five three-inch rifled cannons to support the embattled Confederate troopers.

With the initial advance of his cousin COL J. Irvin Gregg stopped, Union BG David Gregg once again brought his second brigade up in an attempt to force the Confederate position. Also, a brigade from Buford's division moved south in an effort to flank the defensive position. Realizing the tenuous nature of the Mount Defiance position, Stuart withdrew his forces behind the Kirk's Branch Creek farther west. Although forced away from Middleburg, Stuart's combined cavalry and artillery force once again successfully stopped the Union reconnaissance efforts and protected Lee's main body from detection.⁸ In his official report to Hooker, Pleasonton reported, "We cannot force the gaps of the Blue Ridge in the presence of a superior force."⁹

In a final effort to dislodge Stuart's covering force, Pleasonton asked Hooker for a division of infantry as reinforcements to once and for all "cripple [the Confederate cavalry] up."¹⁰ Leaving two infantry brigades to secure his lines of communication and baggage, on June 21 Pleasonton committed his two divisions of cavalry and an infantry brigade under the command of COL Strong Vincent – including 20th Maine, later to gain fame for its defense of Little Round Top during the Battle of Gettysburg – to engage Stuart and his cavalry around the small settlement of Upperville further west in the Loudon Valley. Using its infantry attachments, the Union force

initially pushed back the dismounted Confederate cavalymen of BG Wade Hampton and the supporting battery of CPT James Hart's Washington Horse Artillery.

Although initially forced to retreat, Stuart reformed his defensive line to the west of Goose Creek in an effort to halt the numerically superior force. Calling for reinforcements, Stuart ordered the cavalry brigades of BG William "Grumble" Jones and Chambliss to converge west of Upperville to establish a secondary defensive position and protect his flank from Buford's enveloping brigades. Supporting this secondary defensive position, the Ashby Horse Artillery under the command of CPT Roger Preston Chew unlimbered and deployed its one three-inch rifle and one howitzer.

By pouring enfilading fire into the flank of 8th Illinois Cavalry, the battery helped check the Union cavalry from reaching the Confederate supply wagons attempting to escape through Ashby's Gap. Able to re-establish his defensive lines, Stuart's troopers continued to fight a delaying action the rest of the day, though eventually ceding the town to enemy control.¹¹

Battle analysis

Although being forced to cede control of the Bull Run Mountains and the Loudon Valley to Union cavalry, Stuart and his force retrograded to the west and continued covering the passes of the Blue Ridge Mountains for the next three days. After several days of intense combined-arms actions, Pleasonton confirmed that Lee and the Army of Northern Virginia were not in the Loudon Valley, but the Union cavalry still could not actually determine the location of the Confederate main body. The Confederate cavalry and artillery under Stuart's command had succeeded in their mission to provide security for the movement of the Army of Northern Virginia in its invasion north.

Although often a footnote or afterthought to Gettysburg, the sharp series of battles still took a deadly toll on its participants. In total, from June 17-23, the Union forces lost 883 men and Stuart's cavalry had 510 casualties, reflecting the nature and importance of the R&S operations as both sides fought to gain or protect information.¹² To highlight the importance of Stuart's covering effort, on June 22 – the day after the Battle of Upperville – MG Robert Rodes' division of LTG Richard Ewell's corps crossed into Pennsylvania, the first Confederate force to reach the state.

The organization of the Confederate force to conduct its covering operation in the Loudon Valley serves as a textbook example of enablers supporting cavalry formations. With six batteries of organic artillery already at his disposal, Stuart made the wise decision to attach a battery to each of his brigades. Tasked with covering a series of gaps and passes connecting the Loudon and Shenandoah Valleys, the Confederate cavalry could not mass its forces; instead, it had to fight in disparate brigade-sized elements. The enabler support provided by its artillery batteries proved their utility in helping the Confederate troopers fight off numerically superior forces.

While the technology of the 21st Century makes the battlefield of today look little like those of the American Civil War, the principles of R&S operations have not changed. Enabler support has and will continue to provide cavalry formations unique capabilities in support of these missions.

Stuart's controversial departure June 25, 1863, to begin his raid deep into Union territory continues to dominate the narrative of the usage of Confederate cavalry during the Gettysburg campaign. Though Stuart's operation from June 25 to July 2 can be called into question, his covering operation beginning June 17 against a numerically superior force is a textbook example of the use of cavalry and enablers to protect the disposition and intent of the main force.

Hooker, the Union commander, gave the most telling assessment of Stuart's operation and the efforts of his troopers. Writing President Abraham Lincoln to keep him abreast of current operations, Hooker wrote that the Confederate horsemen and artillery had "hitherto prevented me from obtaining satisfactory information as to the whereabouts of the enemy. They have masked all of their movements."¹³ For the opposing commander to candidly admit such frustration, there can be little doubt to the effectiveness of the Confederate covering operations in the Loudon Valley in the summer of 1863.

MAJ Christian Garner is the brigade S-2 for 17th Field Artillery, Joint Base Lewis McChord, WA. Previous assignments include assistant professor, Department of History, U.S. Military Academy (USMA), West Point, NY;

commander, Headquarters and Headquarters Company, 513th Military Intelligence Brigade, Fort Gordon, GA; S-2, 2nd Battalion, 12th Cavalry, 4th Brigade Combat Team (BCT), 1st Cavalry Division, Fort Hood, TX, and Kirkuk, Iraq; and platoon leader, 2-12 Cav, 4th BCT, 1st Cavalry Division, Fort Hood, TX, and Nasiriyah, Iraq. MAJ Garner's military schooling includes Command and General Staff Officer College, Military Intelligence Captain's Career Course, and Military Intelligence Basic Officer Leader Course. He holds a bachelor's of science degree in history from USMA and a master's of arts degree in history from the University of North Texas.

Notes

¹ Headquarters Department of the Army, FM 3-98, **Reconnaissance and Security Operations**, Washington, DC; Government Printing Office, June 2015.

² Ibid.

³ Edwin B. Coddington, **The Gettysburg Campaign: A Study in Command**, New York: Simon and Schuster, 1968.

⁴ Stephen W. Sears, **Gettysburg**, New York: Houghton Mifflin Harcourt, 2003.

⁵ Ibid; Philip Laino, **Gettysburg Campaign Atlas**, Gettysburg, PA: Gettysburg Publishing, 2009.

⁶ MG Joseph Hooker to MG Henry Halleck, June 18, 1863, in **The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies**, Washington, DC: Government Printing Office, 1880-1901, Ser. I, 27 (1) [book on-line]. Cited as OR [on-line]), available from http://collections.library.cornell.edu/moa_new/waro.html. Accessed April 16, 2020.

⁷ Coddington; MG JEB Stuart to GEN Robert E. Lee, Aug. 20, 1863, OR [online], Ser. 1 27 (2).

⁸ Laino.

⁹ BG Alfred Pleasonton to BG Seth Williams, June 20, 1863, OR [online], Ser. 1 27 (3).

¹⁰ Coddington; BG Alfred Pleasonton to MG Joseph Hooker, June 20, 1863, OR [online], Ser. 1 27 (1).

¹¹ Sears; Laino.

¹² Sears.

¹³ Harry W. Pfanz, **Gettysburg: The First Day**, Chapel Hill: The University of North Carolina Press, 2001; MG Joseph Hooker to President Abraham Lincoln, June 21, 1863, OR [online], Ser. 1 27 (1).

Acronym Quick-Scan

BCT – brigade combat team

FM – field manual

R&S – reconnaissance and security

USMA – U.S. Military Academy

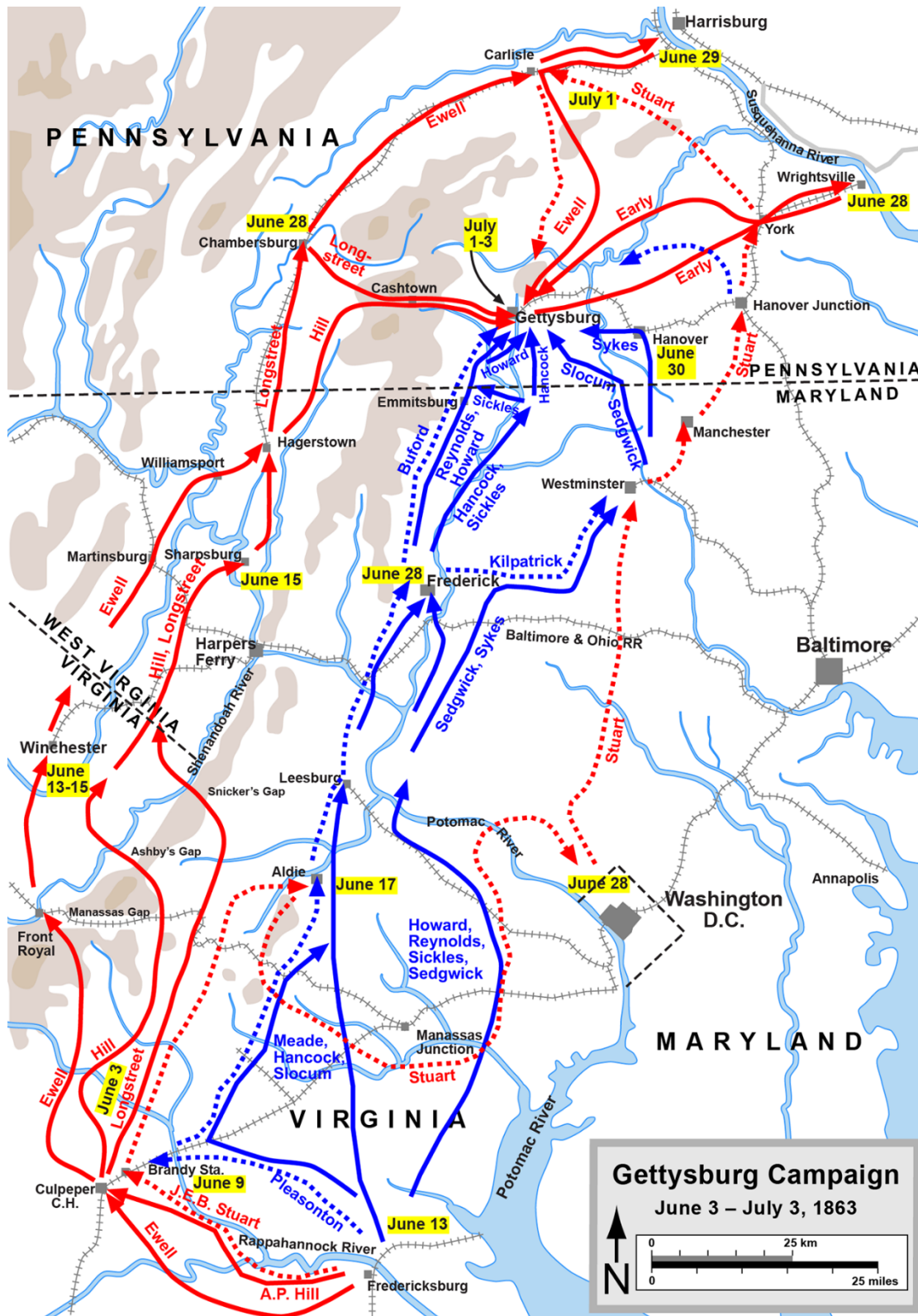


Figure 3. Stuart's ride (shown with a red dotted line) during the Gettysburg Campaign, June 3-July 3, 1863. (Map by Hal Jespersen)