

NOTES AND DOCUMENTS

Instructions Concerning the
Occupation of California, 1769

Translated and Edited

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INTRODUCTION

José de Gálvez had labored assiduously for over eight months preparing the four expeditions that were to make their rendezvous at San Diego for the permanent occupation of California. He had conferred with Fray Junípero Serra, President of the Baja California missions, concerning the new ones to be founded. He had sent the SAN CARLOS¹ and the SAN ANTONIO² on their way from southern ports, and he had dispatched Fernando Rivera y Moncada³ over the desert trails northward. Now, at the tip of Baja California, he gave his final orders to the governor, Gaspar de Portolá, to set in motion the final arm of the expedition which Serra was to accompany.⁴

The translated document to follow, describing Gálvez' final thoughts on the manner and method to be observed for the happy outcome of the expeditions, was composed at Cape San Lucas, February 20, 1769, and is preserved in the Archive of the Indies, Seville.⁵ It is interesting and instructive from several standpoints. First of all, it shows very definitely that the inspector-general wanted the conquest of California to be a bloodless one, and urged upon the over-all commander to use consummate care, prudence, and sagacity in carrying it out. Certainly, the instructions he gave Portolá are redolent of a Christian approach to conquest in his consideration for the natives. There was nothing ruthless about it nor did it offer material for the creation of another "Black Legend."

As in the case of other documents he composed at this period, Gálvez carefully concealed the political aims of the conquest—the containment of Russia for the purpose of protecting New Spain. According to him, in his writings, the principal object of

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the expedition and conquest was to implant the Catholic Faith. Historians, of course, will not agree with him in this, for the principal reasons were precisely those expressed above. Would Gálvez have sent the expeditions northward had there been no political or military threat? I, for one, do not believe it. History, therefore, rewords the statement of Gálvez by stating that Spain's principal object in conquering California was to thwart Russia and defend New Spain by taking the offensive, and once in California her chief concern would be the civilization and Christianization of the natives through the mission system, which, while it would bring new members into the Christian fold, would also augment the number of loyal vassals of the king.

Very clear in this document too is the exercise of the royal patronage by a layman in the person of the inspector-general in the external affairs of the Church. By HIS decision, the Franciscans were chosen to be the missionaries of the spiritual conquest and agents of the state for the reduction of the Indians; by HIS decision, Mission Santa María on the frontier⁸ was to be abandoned and a new one, San Fernando de Velicatá⁷ was to be founded. By HIS decision missions were to be founded at San Diego and Monterey, their very names chosen by HIM; by HIS decision—though not actually mentioned in this particular document—church goods from Baja California were to be taken for use in the new missions.

While definite orders were given to Portolá, Rivera and Costansó, the engineer, as to procedures and methods, Gálvez had the good sense of allowing them to use their judgment in carrying them out or disregarding them should circumstances so warrant. Neither he nor the military men responsible for the success of the expeditions were personally acquainted with the territory, and consequently things might turn out very differently than they had been planned. Quite interesting is the anticipated fear about crossing the Carmel River,⁸ giving it an unwarranted importance. Had he been talking about the Salinas, then called el Río de Monterey, the precautions and orders given would have made more sense. The fact is that the very Bay of Monterey was not recognized and San Diego was almost abandoned. Just how the measures of Gálvez were carried out, ignored, or changed will be apparent from the notes accompanying this translation.

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TRANSLATION

Instruction which the Captain of Spanish Dragoons, Don Gaspar de Portolá, Governor and Commander-in-Chief, of this Province of California, must observe on the expedition, an overland journey, to the ports of San Diego and Monterey situated along the coast of the South Sea respectively in latitudes 33 and 37.⁹

1. In consideration of the fact that the principal purpose of this expedition is to extend religion among the pagans who live to the north of this peninsula by the peaceful means of establishing missions to effect the spiritual conquest in the said ports of San Diego and Monterey and their intervening territory—now to be explored—and to make these areas more productive by establishing reductions and by introducing the dominion of Our Lord, the King, I hereby notify the said governor to set forth as soon as possible with a small detachment and in company with the Very Reverend Father President of the Missions, for the frontier of Santa María.¹⁰ After strengthening his escort at Villacatá¹¹ with part of the forces the Captain, Don Fernando de Rivera, has gathered there, the governor is to continue his marches to the said port of San Diego, traveling through the same territory and following the same route used by the captain who will have preceded him.¹²

2. The governor shall take with him for the march to Villacatá only the supplies that are necessary. From there to San Diego, he will use the abundant provisions which I sent by launch and canoe to the Bay of San Luís de Gonzaga located in the interior of the Gulf [of California] in latitude 31.¹³ These are now making their second trip, the goods being sent to Captain Rivera for the overland expedition. Moreover, the two royal packet-boats, the *San Carlos* and the *San Antonio*, which are going by way of the South Sea, are bringing a large quantity of food of every kind in order that nothing will be wanting to those who travel by land. I surmise that the first ship at least is already at the port of San Diego.¹⁴

In my orders and instructions I have made known that the first place of union with the maritime expedition is to be set at the same port of San Diego. Also I have ordered Captain Rivera to take from the provisions sent by the packet-boats, all that he might consider necessary for the journey to Monterey. And as a matter of course, as a result of what I have laid down, both expe-

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ditions are to inform me of their arrival. The governor will see to it, if he meets the mail couriers that the messages are delivered to me wherever I may be and with all possible speed.¹⁵

3. Among the obligations calling for the governor's full attention as leader of an expedition whose purpose is so commendable, is the exercise of prudence so that the outcome may neither fall short of its objectives nor fail in its success. Wherefore I rely on his zeal and vigilance to see to it that the soldiers and muleteers of his company observe a most exact discipline especially after leaving the frontier missions. He shall point out to them as an inviolable regulation the need for treating the Indians well and he shall punish them as for an irremissible crime any molestations or violence towards the native women for, besides being offenses against God which they would commit by such excesses, they could also endanger the success of the expedition.¹⁶

4. If as a result of my previous orders and of the instructions I recently brought to his attention in dispatching the packet-boats, Captain Fernando de Rivera shall have advanced with a small column to explore and examine the country between San Diego and Monterey, the governor with his division is to wait in the first of the said ports until the captain returns or send him reinforcements from his soldiers in order that he may continue his expedition. And while the governor remains at San Diego he shall endeavor by his presence and positive aid to promote the founding of the mission. The guard is to remain posted there to serve as a point of contact for the packet-boats on their return voyage as well as for the soldiers who return by land from Monterey.

5. If on the contrary, the said captain has not yet left San Diego, both divisions are to start out on the march for Monterey¹⁷ the governor always going with the last division, the captain with the first, a distance of a day or two apart according to what will be judged more convenient.¹⁸ In view of what might occur and what cannot be foreseen and for which rules cannot be laid down, I leave the final judgment to the governor as well as to the said captain in matters relative to his assignment. For he is to go ahead and be the first explorer of the country through which the expedition is to pass and both are to decide and resolve what to do and what seems more conformable to the circumstances in which they find themselves. Above all, they must always exercise the great-

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est care not to exasperate or alienate the natives, rather they must do everything possible to attract them, to obtain their good will in dealing with them through gifts such as knick-knacks or provisions but so as not to diminish the necessary subsistence for the soldiers of both expeditions.¹⁹

6. These divisions are always to unite when circumstances call for it for there are founded fears of some opposition on the part of the pagan Indians in almost any area or place of passage.²⁰ They shall always observe the invariable and safe rule among pagans and in unknown lands, of traveling with great caution. They are not to be trustful of proffered amity or unwary of indifference which the Indians manifest for their actions may be only apparently what they seem to be or when they are sincere they may not be long-lasting owing to the natural inconstancy of Indians in all their dealings.

7. I have given special instructions to the engineer-draftsman, Don Miguel Costansó, who is arriving on the packet-boat, *San Carlos*, that he shall order a reconnaissance of the areas that are most convenient and safe through which the land expedition can cross that river [Río Carmelo]. In the event that such safe and convenient passage cannot be found he is to prepare launches for the soldiers and floating stages for the animals. Before reaching Monterey, at a distance of two or three leagues where the Carmel River enters the sea, which both ancient and modern accounts regard as wide and rapid, the governor is to see to it, with these facts in mind, that Captain Rivera be informed about the matter at least on arriving at the banks of the said river. And having ascertained the findings of the engineer they shall look for the mouth of the river and give the signs of their safe arrival or others they may deem more appropriate, to members of the sea expedition thus apprizing them of their arrival.²¹ [This is to be done] in case they do not find beforehand a group of soldiers, guards or scouts posted in the immediate area of Carmelo which is the regular procedure for leaders of maritime expeditions to place, as well as in fulfillment of the instructions and guidelines I have given them.²²

8. As soon as the governor reaches Monterey with his expedition and joins the one arriving by sea which has gone with the packet-boats, he must take formal possession of the land in the name of His Majesty and compose the corresponding docu-

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ment.²³ This he shall then forward at the first opportunity to His Excellency, the viceroy, sending thereafter a duplicate together with the diary of the trek he is to keep as well as a report of whatever may have occurred and of which he considers proper to inform His Excellency.²⁴

9. While a presidio and mission are being established at Monterey with provisional buildings in conformity with the instructions I have given on this point to the engineer²⁵ the governor shall remain at that port together with all the men of his expedition as well as those under Captain Don Fernando de Rivera. During his stay there he shall try to attract the Indians of that province and its immediate area with affability, sagacity, and prudence. He shall try to make them understand in some possible way the great good that will accrue to them by living in brotherhood with the Spaniards and under the sovereign protection of the King, Our Lord, without violating, of course, any arrangement of vassalage with others of that province, a point that might be brought up because of the novelty of the proposal. Rather he shall propose to them reciprocal dealings and friendship, drawing up a document to that effect as can be done in case an agreement or a sort of formal treaty with them is made.

10. Since the means most proper towards obtaining the commendable and just ends—the purposes of both expeditions of sea and land—are certainly, the treatment of the Indians with sweetness and love without however allowing the impression to take hold in their minds that we are afraid of them, the governor is to make special efforts and take particular care in conciliating both extremes. The others are to follow his example. The natives are not to be given any just motive for aversion or disgust. However, if after all prudent measures have been exhausted, rancherías or towns in any of the provinces through which the expedition has to pass, offer obstinate opposition to its passage, then the governor will have to employ a show of force in such a way that the natives will learn of the superiority of our arms but without causing bloodshed despite their opposition.²⁶ However, once they cede to us or those who show themselves inimical, surrender, they are to be pardoned with facility and good relationships are to be fostered.

In such cases that might occur, the reverend missionary fath-

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ers are to treat with the natives to undeceive them [concerning our motives] and attract them according to every way charity, love, and apostolic zeal may dictate. Never are the missionaries to be permitted to expose themselves among the barbarians, impelled by their fervor and ardent desires.²⁷

11. When passing through the Mission of Santa María located in unfortunate and sterile country the governor in accord with the Reverend Father President of the Missions, who is to accompany him, is to bring it about that the mission and guard of soldiers there be changed provisionally²⁸ and as soon as possible proceed to the place called Villicatá where Captain Rivera has been with his detachment and where he has left another guard in accordance with my orders for it is not proper that during this expedition said guards be duplicated without necessity, the soldiers not being usefully employed. Neither can the Mission of Santa María remain where it is especially since the terrain of Villicatá is fertile and has abundant water and hence is a fit place in which to establish a mission.²⁹

12. As soon as the reduction of the natives is accomplished and the presidio is secured with probable safety the governor will order that section of the soldiery of the Company of this Peninsula not precisely necessary [at Monterey] to make the return journey with Captain Rivera.³⁰ He will then hand over the military and political command of Monterey and of the other immediate new establishments to Don Pedro Fages, Lieutenant of the Company of Volunteers of Catalonia, who has command of the veteran troops who have gone with the maritime expedition, until such time as His Excellency, the viceroy, after hearing the news of all that has taken place, may decide to do what is according to his pleasure. The said governor shall return to Loreto by the same route by which he is now to enter upon his expedition or by another route he may judge better at that time, always inspecting both in going and returning those sites most fitting and fertile for the establishment of missions.³¹

Cape San Lucas, February 20, 1769
Don Joseph de Gálvez.

NOTES

¹The *San Carlos*, otherwise called *El Toyson* (The Golden Fleece), was the flagship and sailed from La Paz, January 9, 1769. Vicente Vila was its captain, Fray Fernando Parrón, O.F.M., the chaplain. On it were Lieutenant Pedro Fages, his Catalonian volunteers, and Miguel Costansó, military engineer. Serra blessed the ship and its flags. Gálvez was the orator of the day.

²The *San Antonio*, also called *El Principe*, was captained by Juan Pérez and had as chaplains Fray Juan Vizcaíno, O.F.M., and Fray Francisco Gómez, O.F.M. It sailed from Cape San Lucas, February 15, 1769.

³Rivera was the leader of the first land expedition and was second in command under Portolá. He set out from Velicatá, March 24, 1769, accompanied by Fray Juan Crespi, O.F.M., as chaplain and diarist for the College of San Fernando, José de Cañizares, twenty-five leather-jacket soldiers, about forty Christian Indians, and three muleteers. Herbert E. Bolton (ed.), *Fray Juan Crespi, Missionary Explorer on the Pacific Coast, 1769-1774* (Berkeley, 1927), pp. 61-62.

⁴Portolá started out with his soldiers from Loreto, March 9, 1769, and from Velicatá, May 15, the day after the founding of the Mission San Fernando. Donald E. Smith and Frederick J. Teggart (eds.), *Diary of Gaspar de Portolá During the California Expedition of 1769-1770* (Berkeley, 1909), p. 11, and Maynard Geiger, *The Life and Times of Fray Junípero Serra* (2 vols., Washington, D.C., 1959), I, 211.

⁵The document is listed in Charles E. Chapman, *Catalogue of Materials in Archivo General de Indias* (Berkeley, 1919), p. 200, No. 1206. (There is a photostat copy in the Santa Barbara Mission Archives.)

⁶Mission Santa María had been founded by the Jesuits, October 16, 1766. Herbert E. Bolton (ed.), *Historical Memoirs of New California* (4 vols., Berkeley, 1926-1930), I, 208.

⁷This mission was founded by Serra on May 14, 1769. It was located eight leagues north of Santa María. Palóu mistakenly gives May 15 as the date. See, Bolton (ed.), *Historical Memoirs*, I, 215, and Antonine Tibesar (ed.), *Writings of Junípero Serra* (3 vols., Washington, D.C., 1955), I, 59-61.

⁸The Carmel River was so named in 1602 by the Carmelite friars accompanying Vizcaíno.

⁹The actual latitudes are respectively, 32° 40' and 36° 38'.

¹⁰Mission Santa María was the northernmost outpost of Christianity in Baja California.

¹¹The documents of the period spell Villicatá in various ways. In the text of the translation I retain the spelling of Gálvez. In my writings I follow the spelling of Serra. Palóu spells it, Vellicatá.

¹²This order was carried out. The Portolá party at various places noted where the Rivera contingent had passed before it. Crespi, who was with Rivera, compared his own diary with that of Serra, who was with Portolá, and identified the various places where both had been between Velicatá and San Diego and to which they had given different names.

¹³Palóu places the Bay of San Luís almost directly east of Santa María at a distance of five leagues. "At that point on the shore is the Bay of San Luís where the launches which carry the supplies for the frontier stop." Bolton (ed.), *Historical Memoirs*, I, 209.

¹⁴The *San Carlos* arrived at San Diego only on April 29 and the *San Antonio* on April 11.

¹⁵The first mail sent out from California from the port of San Diego was carried by the *San Antonio*, July 9, 1769. It reached San Blas in twenty-one days. Geiger, *Junípero Serra*, I, 232. Gálvez received the news of the safe arrival of the expedi-

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tions at San Diego while he was in Sonora. He commented on this in a letter to Palóu, from Petic, October 7, 1769. "I greatly esteem the good news you gave me concerning the arrival of the expeditions at San Diego." Doc. 50c of the Junípero Serra Collection, Santa Barbara Mission Archives. A photograph from the Biblioteca del Museo Nacional, Mexico.

¹⁶The diarists of the expeditions do not record any such violations nor is it likely they would have recorded them had they occurred. Fray Pedro Font, O.F.M., however, records along the Santa Barbara Channel the fear the Indians had of a certain Camacho for "the extortions and outrages" committed during the early expeditions. Herbert E. Bolton (ed.), *Anza's California Expeditions* (5 vols., Berkeley, 1930), IV, 252.

¹⁷That is precisely what happened. The two divisions started out from San Diego, July 14, 1769, two days before the founding of Mission San Diego.

¹⁸I have found no indication in the diaries of Portolá, Costansó or Crespí whether this order was carried out. It appears they stayed close together sending out rather a scouting party under José Francisco Ortega, a day or two ahead to examine the terrain and meet the Indians. Thus already on July 12, Portolá sent out six soldiers and a corporal from San Diego "to explore the country for a distance of the first two days marches." Frederick J. Teggart (ed.), *The Portola Expedition of 1769-1770: Diary of Miguel Costanso* (Berkeley, 1911), p. 165. Such indications of advance scouting throughout the trek are given *passim* in the diaries.

¹⁹The diaries reveal *passim* the reciprocal bestowal of gifts on the part of Spaniards and Indians.

²⁰Actually opposition occurred only in one area of Baja California, May 25-28, as given in the Portolá diary. Portolá "tired of mere arguments that were to no purpose . . . ordered the sergeant and two soldiers to fire two shots in the air without injuring them, which was sufficient to make them disperse." Smith and Teggart (eds.), *Portola Diary*, p. 13, and Tibesar (ed.), *Writings of Serra*, I, 75, where Serra cites the same incident.

²¹Describing the Carmel River, but not certain of being near the Bay of Monterey, Crespí wrote: "An arroyo of water which came down from the mountains, well forested with trees, and an estuary into which the arroyo empties, near some small lagoons of little consequence." Bolton (ed.), *Crespi*, p. 204. Concerning the Salinas, Crespí wrote: "The river which we have been following for so many days empties into this great bay, which forms an estuary that penetrates the land about two leagues and causes the river to rise and fall. Near the beach it is now very full and of great depth, so that it cannot be forded." *Ibid.*, p. 203.

²²The *San José* was to have gone to Monterey but was lost at sea. *Ibid.*, p. 206.

²³This was done. The original document of taking possession was written in the hand of Portolá and signed by him, by Miguel de Pino, Juan Pérez, and Pedro Fages. It is in the Archivo General de la Nación, Mexico City. There is a photograph copy in the Santa Barbara Mission Archives. Document 57a of the Junípero Serra Collection.

²⁴Portolá kept his diary as ordered by Gálvez. The one by Costansó is longer and more detailed, that kept by Crespí still longer and much more detailed. A soldier, Velásquez, and two sailors carried the news of the occupation of Monterey from that port as far south as Todos Santos where they found Governor Armona who sent the news on to the viceroy, Carlos De Croix, August 3, 1770. Portolá himself, on reaching San Blas by sea, sent a notice also to the viceroy which reached him before the message sent overland out of Monterey.

²⁵It was Costansó who selected the site and prepared the plans for the Monterey presidio. The presidio was built under the direction of Pedro Fages. Geiger, *Junípero Serra*, I, 249.

²⁶See note 20, *ante*.

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²⁷For many years missionaries in California were not allowed to leave a mission even for a short distance without a military guard. This was to insure their protection, and applied whether their errand was a sick call to a nearby rancharía or a visit to a neighboring mission. This regulation put into force by Fages alone precludes the possibility of any friar walking from mission to mission in California, a legend that has a hard time dying. Soldiers did not walk from mission to mission. They rode; so did the missionaries who accompanied them.

²⁸Palóu, who saw Mission Santa María in 1773 on his way to San Diego, stated: "The spot is very sad and gloomy. It has a small level piece of ground, but it is alkaline, and will permit the sowing of only about a bushel and a half of wheat; and in time of drought there is a scarcity of water to irrigate the land. It lacks pasture. Some trees have been planted but have died." Bolton (ed.), *Historical Memoirs*, I, 209. Serra, however, in May, 1769, painted a brighter picture than either Gálvez or Palóu. He and Portolá explored the area and both thought it should continue as a mission. Rivera reported negatively. Serra wrote to Gálvez and to Palóu urging its retention as a mission. It was retained. Geiger, *Junípero Serra*, I, 217.

²⁹The mission was founded May 14, 1769, by Serra.

³⁰Rivera did not accompany the second Portolá expedition of 1770, hence was not present at the founding of Monterey. After his return from the first Portolá expedition, January 24, 1770, he was sent to Baja California to bring supplies to San Diego.

³¹Portolá remained at Monterey until July 9, 1770, and returned from there to Mexico by ship, the *San Antonio*, in company with Costansó. Geiger, *Junípero Serra*, I, 252.