



Mission San Juan Capistrano

ANNUAL  
REPORT  
2016-2017

A Place of Renewal

Flip for Historic Supporters Registry >



*“What a privilege it is to share the story of Mission San Juan Capistrano with visitors of all ages. The stories of the Acjachemen people, the Spanish Padres and soldiers and their impact on California connects visitors with the past to better understand present day Orange County. The beautiful Mission grounds cared for so lovingly are always imbued with a sense of peaceful tranquility even on the most crowded days. I always come away enriched by my time walking the path of the past peoples of Mission San Juan Capistrano.”*

*- MaryAnn S., San Juan Capistrano, Mission Volunteer Docent -*





*“My sister and I always look forward to a trip to the Mission, especially when we take family and friends who have never been, or haven’t been in years. Whether it’s for a special event or simply to witness the blooming of the magnificent plants surrounding the Mission, it’s always a memorable experience. I have been visiting the Mission since a grade school field trip back in the early 50s.”*

*- Joseph L., San Bernardino -*



# To You, Our Friends of the Mission

2017 was a landmark year for the Mission. It was a year in which stewardship, safety, service, and guest experience prevailed as organizational values. Because of delivering excellence in these areas, the Mission continued to be a place of inspiration, education and preservation for nearly 300,000 visitors.

It is at this time we celebrate a few of the defining achievements of 2016-2017 fiscal year and 2017 calendar year:



*We love the beauty and tranquility of the gardens. My kids love visiting the colorful fish in the koi pond and enjoying the butterflies while sitting in the grass."*

- Teffah A.,

Huntington Beach -



ANNUAL REPORT 2016-2017

## A Landmark Year for Mission San Juan Capistrano



### Outstanding Financial Status

The Mission's annual audit process came back with outstanding reports of the organization's commitment to transparency and fiscal stewardship. The Mission ended its fiscal year on a positive, raising much-needed funds for the site's care, conservation, student scholarships and more.

### The Swallows Are Back!

Soon following the 2017 St. Joseph's Day and Return of the Swallows festivities a new nest and hatchlings were discovered under the eaves of the Serra Chapel. Nationwide headlines celebrated the return of the Mission's famed swallows. As a result, an appreciative public flocked to visit to see the new nests under construction.

### Celebrating the Acjachemen People

The Mission Preservation Foundation and staff are committed to protecting and celebrating the landmark's rich Catholic and early California history. As part of the annual Day of Remembrance, the Mission celebrated a rare public mass in the Ruins of the Great Stone Church. Joining with members of the local Native American community, attendees gathered to remember their ancestors and Mission builders who perished in the earthquake of 1812.

### New Museum Book Coming in 2018

Throughout the year, the Mission's Museum Registrar and Executive Director worked hand in hand with Beacon Books to develop a first ever book on the Mission's Museum collection. The forthcoming book entitled "Mission Treasures: Historical Collection Revealed" will be available for purchase in early 2018.

## Focus on the Site's Security

In 2017 the Mission organization worked to identify new means and methods for efficiently assuring greater security for the site, its guests, and visitors. In light of recent events at historic sites, the Mission is committed to protecting both its physical assets as well as ensuring the well-being of its supporters from all over the world.

## Stewardship for the Serra Chapel

During 2017 the Chapel was the subject of continued care as conservators repaired paint finishes and preservation staff oversaw the installment of new clearstory windows to replace the long time worn and cracked windows.

## Private Events at the Mission

Numerous private events were held at the Mission serving a variety of audiences and constituencies, from professional organizations hosting destination industry-specific events, to local business meetings, rehearsal dinners, retirement parties and a few local high school proms. The Mission was busy ensuring that each event was both safe and memorable for all who attended.

## New Audio Tour Coming in 2018

After a decade of use, the Mission's award winning "Voices of the Mission" audio tour will be retired in favor of a new audio tour experience. Working in partnership with Tour Mate Ltd., over this past year the new audio tour will be available in English, Spanish, German and French. The new audio tour utilizes an even easier more efficient audio player wand, which reflects the organization's commitment to using technology in a way that affordably improves access and understanding of the Mission's rich past.

## Taking Care of Our Art

Preserving the Mission's historic art collection is a prevailing goal of the Mission's staff and its volunteer Art Guild. As part of this effort, two paintings were conserved this year by way of a grant from the California Missions Foundation and private funds and donations:

*Portrait of an Unknown Saint, Artist Unknown, c. 18th century*

*Station of the Cross XIII, Artist Unknown, c. 19th century*

## Thirteenth Annual Battle of the Mariachis

The Mission's Mariachi event celebrated 13 years as one of the most renowned and recognized mariachi festivals on the West Coast. Mariachi groups traveled from across Southern California and beyond to compete before a panel of distinguished mariachi experts. Guests enjoyed a full day of riveting performances, excellent food and the tradition of mariachi music. This special event is only made possible because of the generosity of Erma Jean "EJ" Tracy and the Thomas J. and Erma Jean Tracy Family Foundation. We celebrated Mariachi Nuevo on their ground breaking "win."

## 2017 - A Summer of "Sold Out" Concerts

The 2017 Music Under the Stars concert series was sold out earlier than ever before. A new milestone was reached with 100% of all concert tables sold to Mission Preservation Society members. Please be sure to visit the Mission's five-year calendar of events to see the upcoming lineup and to save the dates for 2018.



## Heather Headley Headlines the 2017 Romance of the Mission Gala

Grammy and Tony award winning artist, Heather Headley joined along with long standing community partner, The Ritz-Carlton, Laguna Niguel, to raise critical funds for the preservation of the Mission. The spectacular evening was highly successful in bringing an engaged community together for the purpose of raising funds and awareness for preservation. It was at this year's event that Sheila and Jim Peterson were recognized for their long-standing support and contributions to the Mission's successful preservation. Joining in on the success were Lugano Diamonds and Tadashi Shoji with their underwriting of significant and special support for the cause.

## Member Appreciation at the Mission

In August, the Mission hosted a week-long celebration of its nearly 10,000 members of the Mission Preservation Society with 15% off in the Mission Store. Christmas at the Mission also provided a wonderful member appreciation event with free snow play. Look for more member appreciation benefits and events in 2018.

## Front Courtyard Rehabilitated

The Mission successfully updated and repaired the uneven, failing front courtyard walkways to an appreciative mobility challenged community. The overall project included removing failing and dangerous tiles and stabilizing the walkways by installing new DG material to ensure a safer path of travel in the front courtyard.

## West Gate Beautification Project

Completed in the summer of 2017, the West Gate Beautification Project included tree stump removal and installation of a new masonry retaining wall. Additionally, during this project the West Wing Corral underwent refurbishment by replacing all wooden fence posts and patching the paver area.

## Seismic Monitoring of the Great Stone Church Ruins

In August, the Mission completed the installation of new electronic monitoring devices in the Great Stone Church Ruins. The new monitoring program now includes selective electronic crack monitoring at locations around the vault of the Sacristy, and a continuation of the existing monitoring program to ensure the ruins remain safe, stable, and accessible to the public.

## Heritage Tourism Association Program

For a third year, over \$35,000 was raised by the Mission to support marketing the historic downtown's identity as a tourism destination serving local and regional visitors alike. The marketing co-op successfully reached hundreds of thousands to remind them of all the unique shopping, dining, and museum and tour experiences offered in San Juan's historic downtown. Overall, marketing for the Mission generated over 14 million impressions. Information about the downtown district was also specifically distributed to over 300 locations and to the three airports of Orange County, San Diego and Ontario. For more information about the downtown Heritage Tourism Association Members, see page 8 of the Historic Supporters Registry.

## A Place of Volunteerism

From July 1, 2016 through June 30, 2017 there were over 300 volunteers who donated 8,883 hours to support the access, operations and mission of the Mission as a place of inspiration, education and preservation.



## Educating California's Students

Nearly 55,000 students experienced a field trip to the Mission this school year. The overall count was 67,936 including teachers and chaperones who came to experience inspired learning about the early California mission system right here at Mission San Juan Capistrano. Of the students visiting, 7,977 received scholarship funding via the Adopt-A-Class Scholarship Program (AAC) funded from generous donors and grants from the Nicholas Endowment and the Wells Fargo Foundation. Total dollars received for the Adopt-A-Class Scholarship Program were \$103,354.56 in the 2016-2017. Our education partners included The Discovery Science Foundation, Journeys to the Past, Ocean Institute and the OC Philharmonic Society.



## A Closing Message

*This year's annual report and historic registry features testimonials of Mission friends and supporters. In reading their words, one is reminded of the great meaning and impact of the place we call Mission San Juan Capistrano. For our volunteers, donors, members, students and visitors we are grateful.*

*We thank you for your care and interest in ensuring that Mission San Juan Capistrano, the birthplace of Orange County, continues to be a vibrant place well into the future and one that can mean so much to so many.*

*Sincerely,  
On behalf of the Mission Preservation Foundation*

**Mechelle Lawrence Adams**  
*Executive Director, Mission San Juan Capistrano*

**George O'Connell**  
*President, Mission Preservation Foundation*

**Reverend Monsignor J. Michael McKiernan**  
*Pastor/Rector, Mission Basilica, San Juan Capistrano*

*"It's a special privilege to serve as Executive Director of Mission San Juan Capistrano. It is a rewarding and unique lifestyle to work daily with this outstanding team of Board Members, dedicated and professional staff, and caring volunteers on protecting this incredible landmark. All of the best things in my life have a direct connection to my experiences at the Mission."  
- Mechelle Lawrence Adams, San Juan Capistrano -*

Presented By



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*Executive Director  
Mission San Juan Capistrano*

2016-2017  
**Financials**  
 Mission San Juan Capistrano



**SUMMARY OF GIVING, FISCAL YEAR 2016-2017**

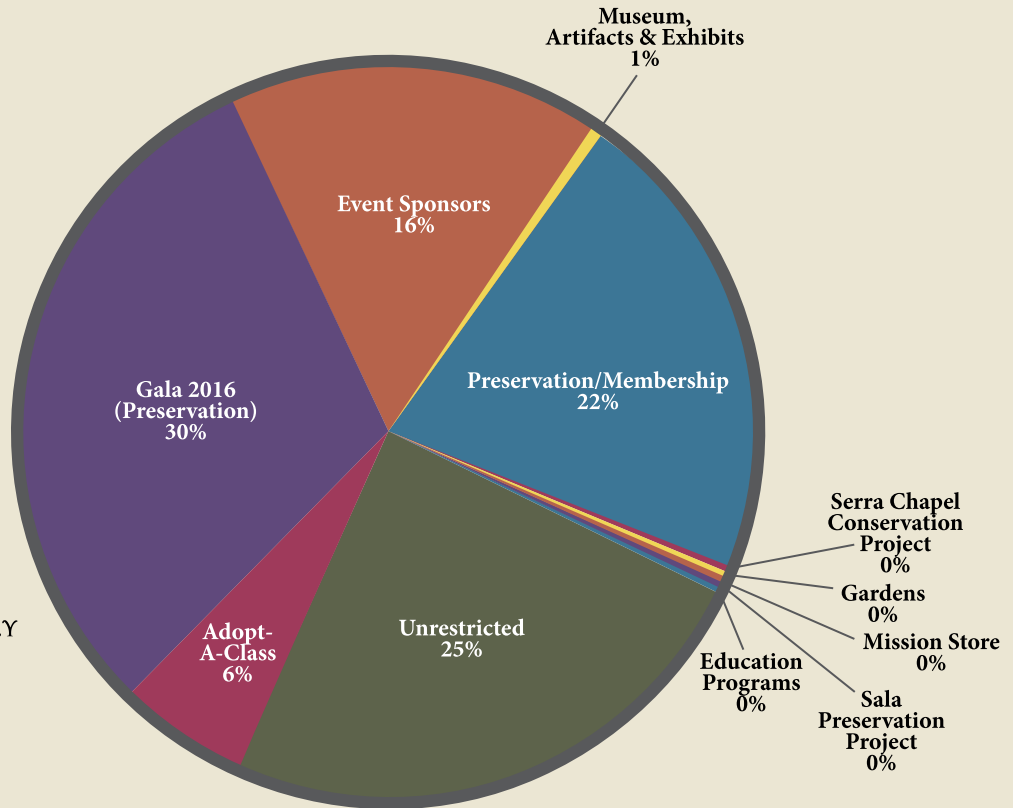
Cash	\$1,577,198.44
Gifts-in-Kind Special	\$258,373.99
<b>GRAND TOTAL</b>	<b>\$1,835,572.43</b>

**PROGRAM/CATEGORY**

**GIFT TOTAL**

Adopt-A-Class	\$103,354.56
Gala 2016 (Preservation)	\$560,773.50
Gardens	\$680.00
Education Programs	\$50.00
Event Sponsors	\$296,342.82
Mission Store	\$267.50
Museum, Artifacts & Exhibits	\$10,217.30
Preservation/Membership	\$401,682.04
Sala Preservation Project	\$6,000.00
Serra Chapel Conservation Project	\$4,573.17
Unrestricted	\$451,631.54
<b>GRAND TOTAL</b>	<b>\$1,835,572.43</b>

PERCENTAGE OF MONEY  
 RECEIVED PER GIVING CATEGORY  
 FOR FISCAL YEAR 2016-2017



## COMBINED STATEMENT OF ACTIVITIES FOR FISCAL YEAR ENDING JUNE 30, 2017

### REVENUES

<i>Revenue and other support</i>	
Admissions	\$1,499,057
Tours and photo income	\$801,858
Mission signature events	\$607,425
Private events	\$329,032
Auxilliary activities	\$31,950
Memberships	\$321,675
Contributions and gifts-in-kind*	\$1,364,091
Grants	\$59,000
Educational program fees	\$100,539
Merchandise sales, net of cost of goods sold**	\$937,216
Interest	\$6,940
Other	\$5,816
<b>Total revenue and other support</b>	<b>\$6,064,599</b>

\*Contributions are distributed between Revenue accounts  
(Mission signature events, development events, contributions and gifts-in-kind).  
\*\*The revenue for the Mission Store is included in the merchandise sales.

### EXPENSES

<i>Program services</i>	
Conservation	\$679,766
Education	\$384,800
Accessibility and sustainability	\$2,073,774
<b>Total program expenses</b>	<b>\$3,138,340</b>
<i>Support services</i>	
Management and administration	\$1,162,110
Development and fundraising	\$1,114,915
<b>Total support services</b>	<b>\$2,277,025</b>
<b>Total expenses</b>	<b>\$5,415,365</b>
<b>Increase in net assets</b>	<b>\$649,234</b>
<i>Net assets</i>	
Net assets, beginning of year	\$8,466,531
Net assets, end of year	\$9,115,765
<b>Increase in net assets</b>	<b>\$649,234</b>

## COMBINED STATEMENT OF FUNCTIONAL EXPENSES FOR FISCAL YEAR ENDING JUNE 30, 2017

EXPENSES	PRESERVATION PROGRAMS			SUPPORT SERVICES		TOTAL
	Conservation	Education	Accessibility & Sustainability	Management & Administrative	Development & Fundraising	
<i>Compensation and related expenses</i>						
Salaries	\$245,600	\$211,084	\$1,011,487	\$397,708	\$161,928	\$2,027,807
Payroll taxes	\$17,506	\$15,299	\$102,100	\$28,932	\$12,403	\$176,240
Group insurance/benefits	\$39,477	\$38,481	\$334,607	\$103,915	\$22,882	\$539,362
<b>Total compensation and related expenses</b>	<b>\$302,583</b>	<b>\$264,864</b>	<b>\$1,448,194</b>	<b>\$530,555</b>	<b>\$197,213</b>	<b>\$2,743,409</b>
Auto expenses	\$20	\$13	\$296	\$61	\$100	\$490
Bank charges	\$708	-	\$44,050	\$58,001	-	\$102,759
Cemetery expense	-	-	\$30,000	-	-	\$30,000
Computer supplies	-	-	\$513	\$28,037	-	\$28,550
Conferences and seminars	\$380	-	\$6,988	\$8,052	\$380	\$15,800
Depreciation	\$96,470	-	\$212,799	-	-	\$309,269
Donations paid	-	-	\$15,651	-	-	\$15,651
Dues and subscriptions	\$190	-	\$254	\$7,996	\$488	\$8,928
Furniture and equipment	\$7,930	-	\$8,739	\$11,784	-	\$28,453
Insurance	-	-	\$1,130	\$95,146	-	\$96,276
Leases	\$1,212	\$943	\$4,791	\$22,602	\$1,906	\$31,454
License, permits and taxes	-	-	-	\$1,225	-	\$1,225
Marketing and development	\$35,480	\$19,700	\$123,002	\$90,113	-	\$268,295
Office supplies	\$359	\$298	\$7,282	\$9,465	\$393	\$17,797
Outside printing	\$8,297	\$227	\$28,328	\$3,292	\$102	\$40,246
Outside services	\$99,359	-	\$715	\$15,281	\$28,121	\$143,476
Postage	\$7,032	\$48	\$971	\$1,747	\$1,182	\$10,980
Private events	-	-	-	-	\$111,110	\$111,110
Professional services	\$40,676	-	\$18,145	\$47,446	-	\$106,267
Public relations	\$10,093	\$39	\$19,972	\$6,180	\$29,703	\$65,987
Repairs and maintenance	\$10,614	-	\$24,279	\$102,357	-	\$137,250
Scholarship funding	-	\$91,862	-	-	-	\$91,862
Security	-	-	\$7,957	-	-	\$7,957
Special events	-	-	-	-	\$742,314	\$742,314
Supplies	\$56,929	\$5,099	\$57,213	\$24,004	\$679	\$143,924
Utilities and telephone	\$1,434	\$1,707	\$12,505	\$98,766	\$1,224	\$115,636
<b>TOTAL EXPENSES</b>	<b>\$679,766</b>	<b>\$384,800</b>	<b>\$2,073,774</b>	<b>\$1,162,110</b>	<b>\$1,114,915</b>	<b>\$5,415,365</b>

*The Independent Auditor's Report was prepared by Redwitz Inc. and reflects an unqualified opinion.*

*The Independent Auditor's Report was made public on October 16, 2017 and is available for public review at the Mission San Juan Capistrano Administrative Office by request. (949) 234-1312*