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March 17, 2011

The Honorable Mark Leno
Chair, Joint Legislative Budget Committee
1020 N Street, Room 553
Sacramento, California 95814

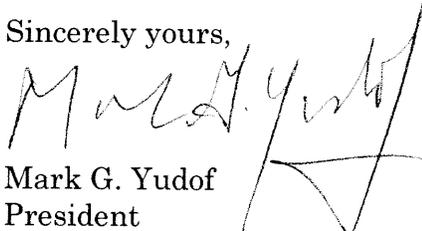
Dear Senate Member Leno:

Pursuant to Section 92830 of the Education Code, enclosed is the University of California's report to the Legislature on *University of California-Mexico Facility Research and Academic Programs (Casa de California), 2009-10*.

If you have any questions regarding this report, Associate Vice President Debora Obley would be pleased to speak with you. She can be reached by telephone at (510) 987-9112, or by e-mail at Debora.Obley@ucop.edu.

With best wishes, I am,

Sincerely yours,



Mark G. Yudof
President

Enclosure

cc: Mr. Gregory Schmidt, Secretary of the Senate
Ms. Jody Martin, Joint Legislative Budget Committee
Ms. Tina McGree, Legislative Analyst's Office
Ms. Amy Leach, Office of the Chief Clerk of the Assembly
Ms. Diane Anderson, Legislative Counsel Bureau
Provost and Executive Vice President Lawrence Pitts
Executive Vice President Nathan Brostrom
Vice President Patrick Lenz
Associate Vice President and Director Steve Juarez
Associate Vice President Debora Obley
Executive Director Jenny Kao

**Report on University of California-Mexico Facility Research and
Academic Programs (*Casa de California*), 2009-10**

March 2010
Legislative Report

**An investment in UC pays
dividends far beyond what
can be measured in dollars.
An educated, high-achieving
citizenry is priceless.**

UNIVERSITY OF CALIFORNIA

Report on the University of California-Mexico Facility Research and Academic Programs (*Casa de California*), 2009-10

Introduction

The following report is forwarded in compliance with Section 92830 of the Education Code, which states:

“On or before March 15 of each year, until 2013, the University of California is requested to report to the Legislature on the facility for University of California-Mexico research and academic programs in Mexico City. The report shall include all of the following:

- (a) The amount of state and nonstate funds spent to support the University of California-Mexico facility and the specific use of these funds.
- (b) The amount of state and nonstate funds spent to support University of California-Mexico research and academic programs.
- (c) A description of the different types of research conducted and the programs operated at the facility.”

This report provides information for the 2009-10 fiscal year for the facility in Mexico City and UC-Mexico research and academic activities, including the following:

- Background information on the UC-Mexico facility, as well as state and non-state funding for the University of California Mexico facility;
- Actual 2009-10 expenditures of state and non-state funds to support the UC-Mexico facility; and
- A description of programs occurring at the UC-Mexico facility during the 2009-10 fiscal year.

Background

The University of California-Mexico facility is called *La Casa de la Universidad de California en México*. Acquired in 2003, the facility was envisioned to be a center for collaborative research for the University of California and Mexican research institutions such as Consejo Nacional de Ciencia y Tecnología (CONACYT), the Mexican Council for Science and Technology. This facility was to provide office and meeting facilities for research faculty and graduate students.

The 2000 Budget Act provided a \$5 million augmentation to the University budget for UC Mexico research for FY 2000-01. However, with the downturn in the State’s economy, funding

was reduced over the next two fiscal years and in FY 2005-06 the University of California received \$4.1 million for UC Mexico research, including \$500,000 that was specifically set aside to establish a “hub” in Mexico City for UC programs, *La Casa de la Universidad de California en México*. This funding came through the UC Institute for Mexico and the United States (UC MEXUS).

The 2000-01 augmentation gave the University the opportunity to begin to realize its goal of developing a new physical arrangement for its programs in Mexico, which had first been proposed to The Regents in November 1998. In July 2001, The Regents of the University of California authorized efforts to develop a center in Mexico City for facilitating the University’s missions of education, research, and public service in Mexico. An annual allocation of \$500,000 from the 2000-01 augmentation of State funds for UC MEXUS was designated for operating expenses for a “hub” in Mexico City.

In the 2007 Budget Act, the Governor vetoed language that allowed UC to use operating funds to pay for debt service for the UC-Mexico facility and eliminated \$500,000 in State support for operations and programs. Because of the importance of a site in Mexico to form an international center to foster educational and research relationships with Mexico, the University has continued to support for *Casa de California* from non-State, University sources. More recently, due to the University’s dire economic situation, *Casa* was tentatively slated to be closed and the property sold. However, because the real estate market in Mexico is not good at the present time, as an interim measure the University began leasing space to non-university organizations to cover the ongoing operating costs.

Given the need for collaboration between California and Mexico on academic, scientific, economic, political, and cultural projects, then Interim Provost Lawrence Pitts from the Office of the President asked for a review of *Casa de California* to explore its future viability in concert with campus based programs and research centers. A systemwide group convened in February 2010 and a proposal was submitted. Most recently, the University has engaged in a more thorough review of programs across the UC system to determine which UC activities in Mexico could be significantly enhanced by continued ownership of the property.

Most recently, the University has engaged in a more thorough review of programs across the UC system to determine which UC activities in Mexico could be significantly enhanced by continued ownership of the property. From this review, which also includes a broader investigation into other programmatic possibilities, the University is developing a long-range plan for *Casa*’s sustainability. If the University is unable to develop a viable plan for *Casa de California*, then UC may need to relinquish the property when the real estate market in Mexico improves.

Expenditures of Non-State Funds to Support UC-Mexico Facility

Since the elimination of funding for the UC-Mexico facility in the 2007 Budget Act, no State funds have been provided to support the UC-Mexico facility, operations and programs. Table 1 displays the 2009-2010 actual expenditures from non-State funds for the facility in Mexico City. In 2009-10 the annual operating budget supported the maintenance of the building and grounds, a local facilities manager who ensures that the property is properly maintained, and a part-time

clerical worker (both are employees of *La Casa de la Universidad de California en México, A.C.*, or “Civil Association”, the formal organization under which *Casa* operates).

La Casa de la Universidad de California en México does not have assigned faculty. Leadership for the center was provided by an Executive Director (50% FTE), who also directed the Education Abroad Study Center in Mexico (50% FTE, details follow below). The Executive Director is a UC faculty member whose assignment rotates every two years and who receives a stipend as the director for the center. Campus and alumni activities are coordinated and paid for by the sponsors themselves, although local, campus, or Office of the President staff may provide administrative support for specific activities.

2009-10 Academic Programs and Activities

Education Abroad Study Center. *La Casa* houses the Education Abroad Study Center in Mexico City. The Study Center is responsible for three academic programs: the Universidad Nacional Autónoma de México (UNAM) Program, the Field Research Program (FRP), and the Mexico-U.S. Comparative Perspective Program. Aside from course work taken on site at the *Casa* facility, the Study Center also provides a venue for supporting activities such as orientation, student presentations, and social events for UC students and their Mexican counterparts.

Enrollments in the last three years have remained fairly stable for the UNAM and Field Research programs, at 55-57 total for all programs.

UNAM Program

The UNAM program takes place during the fall and spring for the duration of one semester. In order to prepare EAP students for the transition to the UNAM and to familiarize them with Mexico City, students take a four-week intensive language course as well as a Contemporary Mexico course at *Casa de California*. During this four-week period the Study Center schedules three one-day trips: two to archeological sites and one to the downtown district or “Centro Histórico”, and to the see National Folkloric Ballet. After completing the intensive four-week program students enroll in regular UNAM courses in close consultation with the Study Center Director.

The University of California has a longstanding student exchange agreement with UNAM that has benefited hundreds of students from both universities and has strengthened our relation with Mexico’s most prestigious institution of higher education.

Field Research Program

The Field Research Program (FRP) is a UC-developed program offered twice each year, in the fall and spring. The program is unique in that enables students to engage in field research on any subject throughout Mexico under the guidance of an academic mentor from a university in the region where they will be doing their work. Mentors are brought in from the various sites to *Casa de California* to meet and discuss research opportunities with FRP students shortly after they arrive in Mexico.

Students in the program take three preparatory courses at *Casa* upon arrival in Mexico: intensive language, contemporary Mexican history (both with UNAM program students), and a research methodology course. The latter prepares them to do fieldwork and provides them the academic tools for writing the type of long paper expected at a research institution in Mexico. After they complete the three four-week courses, they leave Mexico City to do their fieldwork research locations. Students can choose from several sites: Jalisco, Zacatecas, Michoacan, Querétaro, Veracruz, Oaxaca, Yucatan, and Chiapas. In the last year, one of our UC students published his paper in an academic student publication.

Mexico-U.S. Comparative Perspective Program

The Mexico-U.S. Comparative Perspective Program, also a UC-developed program, is offered at *Casa* in the fall semester exclusively. The program focuses on issues of migration, economics, gender relations, urbanism, and culture. EAP encourages Mexican university students to enroll in the program in order to strengthen *Casa's* mission, as well as EAP's mission of fostering the academic interaction and exchange of ideas between UC and Mexican students on issues that are of particular interest to both groups. The classroom serves as a meeting ground to discuss bi-national concerns.

Research. There are no research programs operated at the *Casa* facility. *Casa* does not receive any research funds, state or non-state, and has not received any funding from UC MEXUS (which were allocated not for research, but rather for operational expenses) since FY 2006-07. UCOP provides all of *Casa's* funding, which is used solely for operational and maintenance costs; no money is assigned for academic programming or for research purposes.

Program Development. Programmatic aspects of *La Casa de la Universidad de California en México* in Mexico City are still under consideration. As mentioned previously, due to the fiscal crisis, *Casa* was slated for closure and the property sold. Currently the University is assessing possibilities for use of the *Casa* and developing a long-range business plan(s) for programmatic activities that could make *Casa* financially sustainable over time. Without a sustainable long-range plan the property may be sold when the real estate market improves.

2009-10 Events and Activities

Generally, *Casa* has between 2 and 4 activities each month. The UC Alumni group in Mexico has a monthly conference, as well as a monthly film series. UC researchers, graduate students, research centers, etc. occasionally schedule seminars, meetings, conferences, or book presentations, at *Casa*.

Local university groups also request space at *Casa* to host events. In general, there are approximately 10-15 such events annually. Scheduling of non-UC events has increased in the last two years, and this trend is expected to continue as word spreads about the facility being available for academic, cultural, and social activities.

While programmatic activities are still evolving, a variety of events and activities took place during the 2009-10 academic year at the facility:

- **July 2-3, 2009 – Series Film and Discussion with UC Alumni in Mexico.** Screening of documentary - The Storm that Swept Mexico. Organized by Director Ray Tellez, Keller Media. Number of attendees: 12.
- **July 02, 2009 - The Mexican Higher Education System.** Casa de California Lecture Series. Organized by UC Alumni Association in Mexico. Dr. Armando Alcántara Santuario (PhD, UCLA '99), Universidad Nacional Autónoma de México (UNAM). Number of attendees: 12.
- **July 08, 2009 - The Law of the Federal Police.** Roundtable. Organized by Juan Rojas, Instituto para la Seguridad y la Democracia. Number of attendees: 80.
- **July 09, 2009 - Welcome for students of UC Education Abroad Program.** Organized by Dr. Max Parra, Director, UCEAP Mexico Study Center. Number of attendees: 25.
- **August 06, 2009 - The Rise and Fall of Oil in the World.** Casa de California Lecture Series. Organized by UC Alumni Association in México, Dr. Allen Husker, Assistant Professor, Instituto de Geofísica, Universidad Nacional Autónoma de México (UNAM). Number of attendees: 10.
- **August 19, 2009 – Series Film and a Discussion with UC Alumni in Mexico.** Screening of documentary - Siete instantes. By Filmmaker Diana Cardozo. Organized by Laura Gorham, UC- Alumni Association in Mexico. Number of attendees: 32.
- **September 03, 2009 -The IDIEZ Project: Nahuatl Revitalization at the Universidad Autónoma de Zacatecas.** Casa de California Lecture Series. Organized by UC Alumni Association in Mexico. Dr. John Sullivan (Ph.D, UCSD, '95), Profesor, Universidad Autónoma de Zacatecas; Director, Instituto de Docencia e Investigación Etnológica de Zacatecas, A.C and Macehualli Educational Research. Number of attendees: 18.
- **September 22, 2009 – Dictionary of Latin American Cultural Studies.** Dr. José María Luis Mora. Book Presentation. Event organized by Dr. Mónica Szurmuk and Robert Mckee Irwin, Instituto de Investigaciones. Number of attendees: 80.
- **September 25, 2009 – Series Film and Discussion with UC Alumni in Mexico.** Screening of documentary - Shakespeare and Victor Hugo's Intimacies. By filmmaker Yulene Olaizola. Organized by Laura Gorham, UC Alumni Association in Mexico. Number of attendees: 10.
- **October 01, 2009 – The Institute of National History and Anthropology (INAH) and the Conservation of the Cultural Heritage of Mexico.** Casa de California Lecture Series. Organized by UC Alumni Association in Mexico. Dr. Gloria Martha Sánchez Valenzuela and Yareli Jaidar Benavides, Jefa del Departamento de Conservación Arqueológica de la CNCPC-INAH. Number of attendees: 18.
- **October 10, 2009 - UC Berkeley Haas School of Business MBA Information Session in Mexico.** Organized by Lee Forgue, Admissions Specialist, University of California, Berkeley, Haas School of Business. Number of attendees: 40.
- **October 20, 2009 – Journal of Economics, Economics Report.** Presentation. Organized by Dr. Angel de la Vega and Asociación de Ex alumnos de la Facultad de Economía (UNAM). Number of attendees: 40.
- **October 21, 2009 - Military. A gender analysis from the perspective of female soldiers.** Book Presentation. Organized by Lucía Rayas Velasco and Casa de California. Number of attendees: 80.

- **November 04, 2009 - EAP Farewell Reception.** Organized by Dr. Max Parra, Director UCEAP Mexico Study Center. Number of attendees: 25.
- **November 19, 2009 – Surveys regarding victimization.** Presentation organized by Dr. Marcelo Bergman, Centro de Investigación y Docencia Económicas (CIDE). Number of attendees: 40.
- **November 26, 2009 - Thanksgiving Day Celebration for UCEAP.** Organized by Dr. Max Parra, Director UCEAP Mexico Study Center. Number of attendees: 20.
- **December 02, 2009 – Road Safety Education Workshop.** Organized by Monsignor Salvador Martínez and Colonos de Chimalistac. Number of attendees: 10.
- **December 03, 2009 – Panel discussion: Agriculture, Technology and the Environment.** Casa de California Lecture Series. Organized by UC Alumni Association in Mexico. Number of attendees: 20.
- **December 04, 2009 – End of year celebration, Bisquets Obregón.** Organized by Maria Teresa González and Gabriela Díaz Borbolla. Number of attendees: 60
- **December 11, 2009 – End of year celebration, Viajes Felgueres.** Organized by Gabriela Rodríguez, Rincón Real Coyoacán. Number of attendees: 100.
- **December 16, 2009 – End of year celebration, Construcciones Buenaventura.** Organized by Jenaro Laris (UCSD alumnus), Construcciones Buenaventura. Number of attendees: 100.
- **January 12-14, 2010 - Academic Session.** Organized by Amy Lermer, PhD Candidate, University of California, Santa Barbara Department of Geography. Number of attendees: 15.
- **January 15-16, 2010 - The Students We Share: New Research from Mexico and the United States.** Binational Conference. Organized by Dr. Patricia Gándara, Co-Director, The Civil Rights Project, University of California, Los Angeles. Number of attendees: 150.
- **January 27-29, 2010. Postgraduate Colloquium.** Organized by Dr. Ángel López, Universidad Pedagógica Nacional UPN. Number of attendees: 70.
- **April 7, 2010. Social Memory and Gender: Bands and Reflections.** Casa de California Lecture Series. Organized by UC Alumni Association in Mexico. Lucía Rayas Velasco (UCR '92). Panel Participants: Dr. Hilda Hiparraguirre, ENAH, Dr. Luz Maceira Ochoa, Dr. Rebeca Monroy, ENAH-INAH, Prof. Rodrigo Parrini, UAM-X. Number of attendees: 70.
- **April 29, 2010. Cultural Day: Ships and Sailors. Discussion: From empires to feminism. Photographic exhibition: From Cusco to Himachal, Women in 7 Regions of the World.** By Maria De Lourdes Barrera (UCLA). Number of attendees: 70.
- **May 6, 2010. Objective Evaluation and Rehabilitation of Chronic Lung Diseases.** Casa de California lecture series. Organized by UC Alumni Association in Mexico. Dr. Rodolfo Posadas Valay (UC San Diego). Number of attendees: 10.
- **June 3, 2010. UC Alumni – Lecture Series “Photographing the Mexican Revolution: Promises and Icons.” “Fotografiar la Revolución Mexicana: compromisos e íconos”** By Dr. John Mraz (UCSB '87) Organized by UC Alumni Association in Mexico. Number of attendees: 65.

UNIVERSITY OF CALIFORNIA

University of California - Mexico Facility Research and Academic Programs (Casa de California)

2009-10 Expenditures of Non-State Funds*	Actual 2009-10	Estimated 2010-11
Other Academic (Director stipend, summer salary)	\$ 50,000	\$ -
Staff salaries and benefits		
Employee (of Civil Association)	81,317	52,200
Contract employee	4,137	25,000
Travel		
Program activities	2,730	
Equipment purchase	10,062	
Equipment maintenance	1,525	1,350
Supplies and expenses	3,410	3,000
Routine Building and Maintenance expenses (includes subcontracts for operation and maintenance of center buildings and grounds)	262,315	170,600
Accounting, CPA, Legal, other consultants and related fees	58,042	12,150
Property taxes	24,100	26,000
Other (memberships, training, marketing, library, etc)	2,208	2,470
Interest and Debt Service Expense for Building	79,056	84,246
Total Operating	\$ 578,902	\$ 377,016
TOTAL	\$ 578,902	\$ 377,016
Source of Funds		
General Funds	\$ -	\$ -
UC Non-State	\$ 447,830	\$ 216,016
Income from lease of property*	\$ 108,714	\$ 161,000
Income from event reimbursements (campus-hosted)	\$ 22,358	

* 2009-10 Expenditures are of Non-State funds. State funding to support the UC-Mexico facility was eliminated in 2007.

Source: UCOP Budget Office.

Contact information:

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