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March 19, 2012

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

Dear Senator Leno:

Pursuant to Section 66015.10 of the Education Code, enclosed is the University of California's annual report to the Legislature on the *University of California-Mexico Facility Research and Academic Programs (Casa de California)* for 2010-11.

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 email at [Debora.Obley@ucop.edu](mailto:Debora.Obley@ucop.edu).

With best wishes, I am,

Sincerely yours,

A handwritten signature in black ink, appearing to read "M. G. Yudof", written over a white background.

Mark G. Yudof  
President

Enclosure

cc: 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  
Mr. Jim Lasky, Legislative Counsel Bureau  
Mr. Gregory Schmidt, Secretary of the Senate  
Mr. Dotson Wilson, Chief Clerk of the Assembly  
Ms. Ana J. Matosantos, Director of Finance  
Ms. Sara Swan, Department of Finance  
Provost and Executive Vice President Lawrence Pitts  
Executive Vice President Nathan Brostrom  
Chief Financial Officer Peter Taylor  
Senior Vice President Dan Dooley  
Vice President Patrick Lenz  
Associate Vice President and Director Steve Juarez  
Associate Vice President Debora Obley  
Executive Director Jenny Kao

**University of California-Mexico Facility Research and Academic Programs  
(Casa de California), 2010-11**

March 2012

Legislative Report



UNIVERSITY *of* CALIFORNIA

## UNIVERSITY OF CALIFORNIA

### University of California-Mexico Facility Research and Academic Programs (*Casa de California*), 2010-11

#### 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 2010-11 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 2010-11 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 2010-11 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 2000-01. However, with the downturn in the State's economy, funding was reduced over the next two fiscal years and in 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, a systemwide group convened in February 2010 to review *Casa de California* and explore its future viability in concert with campus based programs and research centers. While a proposal was submitted by the former director based on the meeting discussion, the proposal was not considered to be sufficient to make *Casa* financially sustainable without funding to support academic program development. Moreover, the seismic retrofit necessary to bring the facility up to University standards for safety purposes would require additional funding that also has not been identified. Most recently, the University has engaged in a more thorough review of programs across the UC system to determine if UC activities in Mexico could be significantly enhanced by continued ownership of the property. That review resulted in a decision to offer program and management responsibility of *Casa* to a campus or campus consortium that made a proposal for use of the facility that included a commitment to take on management of the property. After a close evaluation of the *Casa* by several campuses, including a consortium of campuses, no campus or campus consortium felt it was possible to develop a viable and sustaining program for the *Casa*. Thus, no campus or campus consortium came forward with a proposal to take over the property.

### **Expenditures of State and 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 2009-10 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.

### **2010-11 Academic Programs and Activities**

**Education Abroad Study Center.** *La Casa* houses the Education Abroad Program (UCEAP) Study Center in Mexico City. The Study Center is responsible for two academic programs: the Universidad Nacional Autónoma de México (UNAM) Program, and the Field Research Program (FRP). 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 over the entire academic year (no more than about 15 per term), but reduced numbers of applications for the 2012-13 academic year are beginning to show the impact of the ongoing economic problems and concerns about safety in Mexico.

#### 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.

#### EAP 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 at assigned research locations. Due to the Department of State Travel Warnings in Mexico, possible research sites have been reduced from a possible eight to only three: Oaxaca, Yucatan, and Chiapas. In the last year, one of our UC students published his paper in an academic student publication.

**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 at *Casa*) since 2006-07. The only funds *Casa* receives are to support operational and maintenance costs.

**Program Development.** As mentioned previously, in 2009 due to the fiscal crisis, *La Casa de la Universidad de California en Mexico* was slated for closure and it was intended that the property be sold. Over the last year, the University assessed possibilities for developing a business plan(s) for programmatic activities that could make *Casa* financial sustainable over time. Campuses were provided an opportunity to make proposals for use of the facility that included programmatic activities that would make *Casa* financially sustainable, along with a commitment to take on management of the property. Unfortunately it was determined the campuses were not in a position to take on the property. At this time the University is continuing to assess the situation in order to determine the best course of action.

#### 2010-11 Events and Activities.

Generally, *Casa* has between two and four scheduled activities each month. Typically, the UC Alumni group in Mexico has a monthly lecture, 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 it is expected this trend will continue as word spreads about the facility being available for academic, cultural, and social activities.

*Casa de California* hosted a variety of events and activities during the 2010-11 academic year at the facility:

- **July 8, 2010 – Welcome for students of UC Education Abroad Program.** Organized by Veronica Tellez Esquivel, Program Coordinator, UCEAP Mexico Study Center.

- **July 13, 2010 – Series Film and Discussion with UC Alumni in Mexico.** Las buenas hierbas. Organized by Laura Gorman, UC Alumni Association in Mexico and Mujeres en el Cine y la Television.
- **August 21, 2010 – 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.
- **September 9, 2010 – Casa de California Lecture Series.** The Legislative Development Project for the Promotion of Renewable Energy and Climate Change. What impact can we foresee for Mexican Society? Organized by UC Alumni Association in Mexico. Felix Ruiz, UC Berkeley.
- **September 27, 2010 – Book Presentation.** Los Cuarenta y Uno. Organized by Dr. Robert McKee Irwin, UC Davis.
- **October 2 and October 21, 2010 – Exhibition and Conference.** New Sea Creatures, by Marie Louise Grish. Organized by UC Alumni Association in Mexico.
- **October 7, 2010 – Casa de California Lecture Series.** Perspectives of Scientists Participation on Science Education in Mexico: An Area of Opportunity. Organized by UC Alumni Association in Mexico. Dr. Cristina Reynaga-Peña (UC Riverside alumni) –
- **October 28, 2010 – Series Film and Discussion with UC Alumni in Mexico.** Anonymous Tijuana: A Tear, a Smile. Organized by Laura Gorman, Mujeres en el Cine y la Television A.C and Centro de Atencion Integral CAI.
- **November 1, 2010 -- Series Film and Discussion with UC Alumni in Mexico.** Abel. Organized by Laura Gorman, Mujeres en el Cine y la Television A.C and Centro de Atencion Integral CAI.
- **November 8, 2010 -- Series Film and Discussion with UC Alumni in Mexico.** Abel. Organized by Laura Gorman, Mujeres en el Cine y la Television A.C and Centro de Atencion Integral CAI.
- **November 15, 2010 – Series Film and Discussion with UC Alumni in Mexico.** La Ultima Mirada. Organized by Laura Gorman, Mujeres en el Cine y la Television A.C and Centro de Atencion Integral CAI.
- **November 22, 2010 – Series Film and Discussion with UC Alumni in Mexico.** Familia Tortuga. Organized by Laura Gorman, Mujeres en el Cine y la Television AC and Centro de Atencion Integral CAI.
- **November 22, 2010 – Book presentation and panel discussion.** Guadalupe Lopez Bonilla, Discursos e Identidades en Contextos de Cambio Educativo. Dr. Judith Kalman, CINVESTAV, Dr. Colin Lankshear, McGill University, Dr. Michele Knobel, Montclair University. Organized by Mtra. Guadalupe Lopez Bonilla, Universidad Autonoma de Baja California and Dr. Carmen Perez Fragaso.
- **November 26, 2010 – Thanksgiving Day Celebration for UCEAP.** Organized by Dr. Max Parra, UCEAP Mexico Study Center.
- **November 29, 2010 – Series Film and Discussion with UC Alumni in Mexico. Los Olvidados.** Jose Antonio Valdes Peña, Investigator, Cineteca Nacional. Organized by Laura Gorman, Mujeres en el Cine y la Television AC and Centro de Atencion Integral CAI.

- **December 2, 2010 – Lecture.** Strategic actions in cámpines to maintain competitiveness in the uncertainty of a changing climate. Dr. Antonio Lloret Carrillo (UCSB alumni), Professor, Instituto Tecnológico Autonomo de Mexico (ITAM).
- **December 6, 2010 – Series Film and Discussion with UC Alumni in Mexico.** Nosotros los pobres. Discussion with Alicia Molina, Cine Club DISCAPACINE. Organized by Laura Gorman, Mujeres en el Cine y la Television A.C and Centro de Atencion Integral CAI.
- **December 10, 2010 – Series Film and Discussion with UC Alumni in Mexico.** Visa al Paraiso. Discussion with Cine Club DISCAPACINE. Organized by Laura Gorman, Mujeres en el Cine y la Television A.C and Centro de Atencion Integral CAI.
- **December 13, 2010 – Series Film and Discussion with UC Alumni in Mexico.** Santa. Discussion with Cine Club DISCAPACINE. Organized by Laura Gorman, Mujeres en el Cine y la Television A.C and Centro de Atencion Integral CAI.
- **December 16, 2010 – End of Year Celebration,** Encontrak. Organized by Reyna Guevara and Rebeca Quintanilla.
- **January 20-21, 2011 – Conference.** 2nd Postgraduate Colloquium. Identity and Perspectives II. Organized by Dr. Silvia Ortega Salazar, Chancellor – UPN and Dr. Angel Lopez y Mota, UPN.
- **March 23-24, 2011 – Conference.** Taller de Soclizacion de nuevas opciones de titulación. Organized by Dr. Joaquin Hernandez Gonzalez, Coordinator, Universidad Pedagogica Nacional (UPN)
- **March 30, 2011 – Series Film and Discussion with UC Alumni in Mexico.** Volar como pajaros: Las fiestas del tambor y el elote entre los huicholes. Discussion with Octavio Hernandez and Marina Anguiano. Organized by Laura Gorman, Mujeres en el Cine y la Television A.C.
- **April 7-8, 2011 – Interviews by Dr. Federaico Besserer (UC Alumni), United World Colleges.** Organized by Dr. Federico Besserer, Universidad Autonoma Metropolitana (UAM).
- **May 20, 2011 – Conference.** Reunion de construcción del Proyecto Internacional sobre practicas profesionales en UPN – Ajusco, para licenciaturas escolarizadas. Organized by Marcelino Guerra Mendoza, Universidad Pedagogica Nacional (UPN)

**Contact information:**

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UNIVERSITY OF CALIFORNIA

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

2010-11 Expenditures of Non-State Funds*	Actual 2010-11	Estimated 2011-12
Other Academic (Director stipend, summer salary)	\$ -	\$ -
Staff salaries and benefits		
Employee (of Civil Association)	75,320	77,000
Contract employee	4,511	4,333
Travel		
Program activities	772	-
Equipment purchase	772	-
Equipment maintenance	940	1,000
Supplies and expenses	1,805	2,917
Routine Building and Maintenance expenses (includes subcontracts for operation and maintenance of center buildings and grounds)	183,360	194,428
Accounting, CPA, Legal, other consultants and related fees	20,559	32,310
Property taxes	27,346	27,563
Other (memberships, training, marketing, library, etc)	793	2,500
Interest and Debt Service Expense for Building	95,832	102,553
<b>Total Operating</b>	<b>\$ 412,010</b>	<b>\$ 444,604</b>
<b>TOTAL</b>	<b>\$ 412,010</b>	<b>\$ 444,604</b>
<b>Source of Funds</b>		
General Funds	\$ -	\$ -
UC Non-State	\$ 139,434	\$ 238,604
Income from lease of property*	\$ 205,840	\$ 206,000
Income from event reimbursements (campus-hosted)	\$ 66,736	

\* 2010-11 Expenditures are of Non-State funds. State funding to support the UC-Mexico facility was eliminated in 2007.

Source: UCOP VP Budget Office.

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