The Honorable Denise Moreno Ducheny  
Chair, Joint Legislative Budget Committee  
State Capitol, Room 5035  
Sacramento, California 95814

Dear Senator Ducheny:

Pursuant to Section 92830 of the Education Code, enclosed is the University of California’s report to the Legislature on UC-Mexico Research and Academic Programs (Casa) for 2008-09.

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: The Honorable Gloria Romero, Chair  
    Senate Budget and Fiscal Review Subcommittee #1  
      (Attn: Ms. Seija Virtanen)  
      (Attn: Ms. Cheryl Black)  
    The Honorable Wilmer Amina Carter, Chair  
    Assembly Budget Subcommittee #2  
      (Attn: Sara Bachez)  
      (Attn: Amy Rutschow)  
    Ms. Ana J. Matosantos, Director of Finance  
    Mr. E. Dotson Wilson, Chief Clerk of the Assembly  
    Mr. Gregory Schmidt, Secretary of the Senate  
    Ms. Diane Boyer-Vine, Legislative Counsel  
    Ms. Sara Swan, Department of Finance  
    Joint Legislative Budget Committee (18)  
    Interim Provost and Executive Vice President Lawrence H. 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
UC is not just an institution of higher learning. Here, research aims higher. Service reaches higher.

A higher level of excellence calls for a higher commitment.
UNIVERISTY OF CALIFORNIA

Report on UC-Mexico Research and Academic Programs (Casa)
2008-09

INTRODUCTION

Assembly Bill 1182 was signed by the Governor on October 11, 2009 and became effective on January 1, 2010. AB 1182 adds Section 92830 to the Education Code, which reads in part:

92830. 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 2008-09 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 2008-09 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 2008-09 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 the $500,000 from the UC budget used to support operations and programs at the facility in Mexico City, which further reduced the 2007-08 General Fund support specifically allocated for Mexico research to $3.6 million.

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, 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. If the University is unable to develop a viable plan for the property, then it will be sold when the real estate market in Mexico improves.

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

Table 1 displays the 2008-2009 actual expenditures from non-State funds for the facility in Mexico City. The annual operating budget supports 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 is provided by an Executive Director (50% FTE), who also directs 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.

**2008-09 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 27-30 for the UNAM and 15-17 for the FRP programs. Enrollment figures decreased from 15 to 8 students for the Comparative Perspective program.

**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 evolving. As mentioned previously, due to the fiscal crisis, Casa was slated for closure and the property sold. Currently the University is discussing a plan for programmatic activities that could make Casa financial sustainable over time. That plan, which is still under development, is expected to be submitted for review by the Office of the President no later than May 2010.

2008-09 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 we expect this trend to continue as word spreads about the facility being available for academic, cultural, and social activities. Additionally, scheduling of events will likely double in the academic year 2010-2011, after the facility’s new website is operational (expected April 2010).

While programmatic activities are still evolving, a variety of events and activities took place during the 2008-09 academic year at the facility:

- **July 04, 2008 – Board Meeting.** Institute of Geophysics- UNAM. Organized by Xyoli Pérez, Seismology Department. Number of attendees: 20
- **July 08, 2008 – Strategic Planning Meeting of the Energy Sector.** Meeting organized by Edmundo Granados and Manuel Cossío, Attorneys, Ministry of Civil Service. Number of attendees: 20
- **July 09, 2008 - Welcome students Education Abroad Program.** Organized by Dr. Héctor Calderón Valle, Director Mexico Study Center. Number of attendees: 31
- **August 07, 2008 – AIDS Conference: Binational Collaboration.** Organized by Xochitl Castañeda, Program Director Health Initiative of the Americas, University of California Berkeley, Dr. José Saavedra, Director, National Center for the Prevention and Control of HIV/AIDS in México, and the Dr. Michael Drake, Chancellor of the University of California, Irvine. Number of attendees: 170.
- **September 02, 2008 - UCLA Anderson Information Evening.** Meeting Organized by Jessica Chung, Associate Director, MBA UCLA Anderson School of Management. Number of attendees: 50.
- **September 09, 2008 – National Agreement for Public Safety.** Organized by Dr. Gustavo Javier Fondevila, Director of the Studies for Public Security and Rule of Law, Center for Economic Research and Teaching Program. Number of attendees: 20.
- **September 27, 2008 - The Haas School.** Berkeley MBA Information Session in Mexico. Organized by Lee Forgue, Admissions Specialist, University of California Berkeley, Hass School of Business, Representatives (Peter Johnson and Stephanie Fujii). Number of attendees: 55.
- **November 04, 2008 - Education Abroad Program (EAP), Field Research Program (FRP) Students Presentation.** Organized by Dr. Max Parra, Director Mexico Study Center. Number of attendees: 20.
- **November 05, 2008 - EAP Farewell Reception.** Organized by Dr. Max Parra, Director Mexico Study Center. Number of attendees: 30.

• **November 09, 2008 Reception in honor of UCLA CHANCELLOR GENE BLOCK.** Organized by the Alumni Associations of the University of California. Number of attendees: 65.

• **December 02, 2008 – Civic Association of Chimalistac.** Meeting organized by Mr. Agustin Barrinagamentería – Colonos de Chimalistac. Number of attendees: 50.

• **January 03, 2009 - EAP UC ALUMNI Reception 2009.** Organized by The University of California Alumni Association In Mexico. Number of attendees: 75.

• **February 04, 2009 – Civic Association of Chimalistac.** Meeting organized by Mr. Agustin Barrinagamentería – Colonos de Chimalistac. Number of attendees: 60.

• **February 18, 2009 – Series Film and a Talk with UC Alumni in Mexico.** Two Short Documentaries. “Angel y Testimonios”. By Filmmaker Lilly Wolfensberger. Organized by Laura Gorham, UC- Alumni Association in Mexico. Number of attendees: 20.

• **February 18, 2009 – Civic Association of Chimalistac.** Meeting organized by Mr. Agustin Barrinagamentería – Colonos de Chimalistac. Number of attendees: 20.


• **March 05, 2009 - Civic Association of Chimalistac.** Meeting organized by Mr. Agustin Barrinagamentería – Colonos de Chimalistac. Number of attendees: 25.

• **April 15, 2009 – Democratic Accountability and the Future of Political Science in Mexico.** Roundtable. Organized by Center for U.S.-Mexican Studies at the School of International Relations and Pacific Studies, University of California, San Diego. Number of attendees: 100.

• **April 22, 2009 – Series Film and a Talk with UC Alumni in Mexico.** Screening of documentary - La frontera infinita (The Infinite Border). By Filmmaker Juan Manuel Sepúlveda. Organized by Laura Gorham, UC- Alumni Association in Mexico. Number of attendees: 20.

• **June 04, 2009 - Mexico City Environmental Challenges.** Casa de California Lecture Series. Organized by UC- Alumni Association in Mexico and by Dr. Michael Hanowsky, Fulbright-García Robles Scholar, Instituto Tecnológico Autónomo de México. Dr. Megan L. Relamed National Science Foundation International Research Fellowship Program Post Doctorate Fellow, Center for Atmospheric Sciences. Universidad Nacional Autónoma de México (UNAM). Number of attendees: 20.

Contact information:
University of California
Budget and Capital Resources
1111 Franklin Street, 6th Flr.
Oakland, CA 94607-5200
Office website: [http://budget.ucop.edu](http://budget.ucop.edu)
Report website: [http://budget.ucop.edu/legreports/200910/200910legreq.html](http://budget.ucop.edu/legreports/200910/200910legreq.html)
**UNIVERSITY OF CALIFORNIA**

**Casa de California**

**2008-09 Expenditures**

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<tr>
<th>Expenditures</th>
<th>Actual 2008-09</th>
<th>Estimated 2009-10</th>
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<tr>
<td><strong>Expenditures</strong></td>
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<tr>
<td>Other Academic (Director stipend, summer salary)</td>
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<td>Staff salaries and benefits</td>
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<td>Supplies and expenses</td>
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<td>Routine Building and Maintenance expenses (includes subcontracts for operation and maintenance of center buildings and grounds)</td>
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<td>Accounting, CPA, Legal, other consultants and related fees</td>
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<td>Property taxes</td>
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<td>Other (memberships, training, marketing, library, etc)</td>
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<td>Interest and Debt Service Expense for Building</td>
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<td><strong>One-time Items</strong></td>
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<td>Renovation of Building C</td>
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<td><strong>TOTAL</strong></td>
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<td>General Funds</td>
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<td>UC Non-State</td>
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<tr>
<td>Income from lease of property*</td>
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*$1,311,000 Mexican pesos (MXN); conversion rate of $12.70 MXN/USD on 3/4/10

Source: UCOP Budget Office.