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Misión Querétaro—Juriquilla  
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## 2007 TIES Conference Report

### I. Overview of Conference

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U.S. – Mexico Training, Internships, Exchanges and Scholarships (TIES) partners gathered June 13 – 15, 2007, with their public and private sector partners to examine the accomplishments of TIES higher education partnerships and explore various ways to strengthen and expand these collaborations.

More than 260 academics, government officials from the U.S. and Mexico, institution presidents and rectors, and private and public sector partners participated in the conference titled, ***U.S.-Mexico Strengthening TIES: Expanding the Impacts***, which was held at the Misión Querétaro - Juriquilla in Querétaro, Mexico. The conference was co-sponsored by the U.S. Agency for International Development-Mexico (USAID/Mexico) and Higher Education for Development (HED), and was hosted with two local TIES partner institutions: Universidad Autónoma de Querétaro and the Instituto Tecnológico y de Estudios Superiores de Monterrey - Querétaro.

U.S. Ambassador to Mexico Antonio O. Garza announced the winning institutions of five new TIES partnerships in the opening plenary session. These new partnerships bring the total number of TIES partnerships to 60 higher education partnerships, representing over 100 institutions of higher education in the U.S. and Mexico.

The conference format included plenary sessions, panel presentations, facilitated discussions, and a president-rector roundtable. Three plenary sessions set the framework for the conference. These sessions celebrated the accomplishments of TIES partnerships, explored new levels of engagement to capture opportunities, and provided key details on U.S. government educational opportunities and USAID policy on training and development. (The remarks of Ambassador Ronald D. Godard and HED Executive Director Christine A. Morfit are included in the Appendix to this report.)

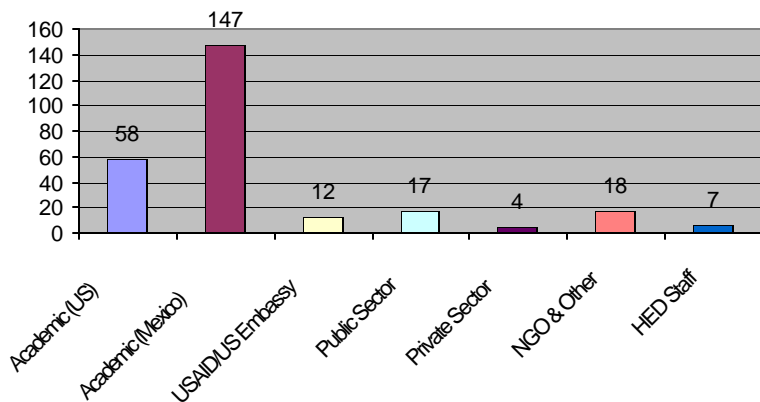
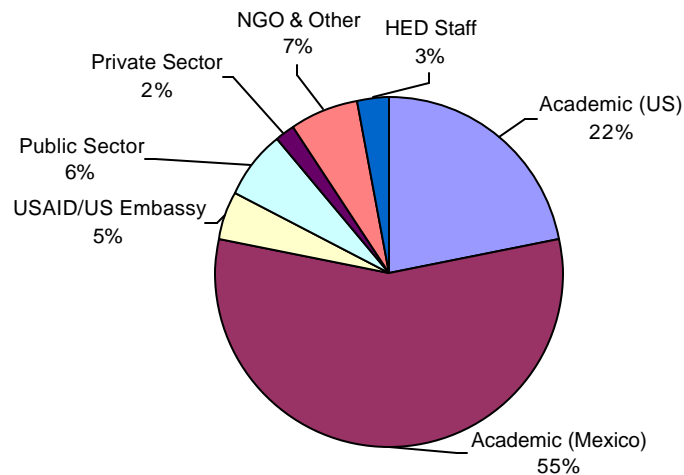
Panel presentations and the subsequent discussions offered opportunities for participants to bring their sector-specific expertise to a variety of topics, including competitiveness, sustainability, legacy development, entrepreneurship, innovation, public-private relationships, outreach, funding, and socio-economic development. TIES partners held in-depth discussions, facilitated by experts in the field, on development cooperation through partnership with higher education.

The Marketplace of Ideas offered time for participants to engage in informal discussions in order to identify new opportunities and models for collaboration and exchange ideas.

The president-rector roundtable on expanding engagement opportunities brought senior U.S. and Mexican institutional leaders together to consider key issues critical to Mexico's development.

## II. Participants

Participants of the 2007 TIES Conference represented U.S. and Mexican Universities, the public and private sector, USAID, U.S. Embassy Officials, Non-Government Organizations (NGOs), HED Staff and other relevant guest attendees. Out of the 263 registered participants, 56% (147) participants were from Mexican higher education institutions and 22% (58) of the participants represented higher education institutions from the United States. Eight percent (21) participants were from the U.S. or Mexican public and private sectors.



Guest participants from the private and public sectors featured in the Marketplace of Ideas included: Hewlett Packard, Peace Corps, Comexus, Representatives from the Secretaria de Desarrollo Social (SEDESOL), National Association of Universities and Higher Education Institutions (ANUIES), Commission for Environmental Cooperation, American Red Cross/Mexico, Education USA-Mexico (Institute for International Education, COMEXUS-Fulbright-Garcia Robles, US Embassy-Public Affairs Section-Culture & Education), Casals & Associates, Georgetown University CASS Program, USAID/Washington, TraiNet Help Desk, Representatives from the Secretaria de Educación Pública (SEP), Project Concern International, Consortium for North American Higher Education Collaboration (CONAHEC), Rainforest Alliance Mexico, Representatives from the Secretaria de Educación Gobierno Estado de Queretaro, Constella Futures, U.S./Mexico Border Health Association, Comision Nacional Forestal Mexico, and SendaSur.

### III. Addressing Conference Goals and Objectives

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The 2007 TIES conference was designed to meet three main conference goals and four conference objectives, as described below.

#### Goal One

- Intensify interactions among current partners, leading to new forms of collaborations.

##### Result

Participants joined panel and Marketplace of Ideas discussions with colleagues with different sector expertise, thereby exposing them to unique perspectives and opportunities for new forms of collaboration. They also participated in facilitated discussions in sector-specific areas with other binational experts in their fields and were able to share experiences and develop strategies to address Mexico's most critical development challenges.

#### Goal Two

- Promote replication and expansion of effective partnership models.

##### Result

Participants shared promising practices and replicable partnership models regarding institutional and human capacity building, resource leveraging, dual and joint degree programs, community outreach projects, student and faculty mobility, and the formation of centers of excellence.

#### Goal Three

- Expand access to resources.

##### Result

Participants had the opportunity to learn about funding opportunities from Education USA/Mexico, the Global Development Alliance, USAID, the Mexican Ministry of Social Development (SEDESOL), SedSur, Mexican National Council for Science and Technology (CONACyT), the private sector and NGOs.

#### Objective One

- Identify new opportunities for sustainable collaborations as a result of cross-sectoral interactions.

#### *Illustrative Examples*

- In **Panel 6: Small, Rural Producers: Opportunities Through Cooperatives and Outreach**, the partnership between Ohio State University and CIDE provided a model for ways in which producers could use microfinance and credit opportunities as a means of sustainability of programs begun as a part of the partnership.
- In **Panel 7: The Legacy of Strengthened Institutional Capacity: Joint, Dual and Trilateral Degree Programs** partnerships in various sectors shared how they were able to establish new sustainable degree program models. The presenters from San Diego State University and the Universidad Autónoma de Baja California, the Illinois Institute of Technology and the ITESM, and the Universidad Autónoma de Querétaro and Western Illinois University gave an overview of the key features and benefits of these replicable degree programs and discussed how challenges were addressed.
- During the **Health Facilitated Discussion**, participants discussed the agricultural 4-H program for young leaders and how it might be applicable to public health. A similar replicable model for health programs could be adapted and supported in Mexico.
- In **Panel 2 Entrepreneurship and Innovation for Sustaining Impact** participants discussed possible future research collaboration on the state of agriculture in Mexico in view of the full and final implementation of NAFTA in 2008.
- In **Panel 3: Tools to Support Beneficiaries**, partners from Southern Oregon University and the Universidad de Guanajuato shared how they offer a sustainable graduate program delivered from the U.S. via distance learning. Twenty-four Mexican faculty members and 37 executives completed the Master's in Management (MiM) Guanajuato program. A private university in central Mexico is interested in a partnership to replicate the MiM.

## Objective Two

- Develop sector-specific networks as a result of facilitated discussions and/or presentations.

### *Illustrative Examples*

- In **Facilitated Discussion 2: Public Policy and Competitiveness** participants explored ways to strengthen the Mexican philanthropy community, possibly through the Centro Mexicano para la Filantropía (CEMEFI).
- In **Panel 5: Establishing, Strengthening and Expanding Public-Private Sector Relationships** participants discussed the success of trade missions and how the small business development networks in the U.S. and Mexico can work together to enhance Mexico's competitiveness.
- In **Panel 6: Small, Rural Producers: Opportunities Through Cooperatives and Outreach** the Universidad de Guanajuato and The Pennsylvania State University described the opportunities the partnership is providing for rural producers in Guanajuato through a 4-H agricultural program. A representative from the Secretaría de Desarrollo Social requested that the translated materials for the program be sent to the Ministry, which will allow the materials to be used and shared throughout the region, widening the potential impact of the new 4-H program in Mexico for student leadership.
- In **Panel 8: The University as the Driver of Socio-Economic Development** the partnerships of Colegio de la Frontera Norte-Universidad Autónoma de Baja California-University of California San Diego and San Diego State University & the Instituto Nacional de Salud Pública and University of California Berkeley gave examples of how higher education partnerships can improve the bi-national response to health issues on the border.

## Objective Three

- Gain access to potential resources through new connections to funders in the private and public sectors.

### *Illustrative Examples*

- In various conference sessions, participants learned more about funding opportunities from Education USA, the Global Development Alliance, USAID, the Mexican Ministry of Social Development (SEDESOL), SedSur, Mexican National Council for Science and Technology (CONACyT), the private sector, and NGOs.
- In **Panel 1: Increasing Competitiveness in the Global Market**, Alamo Community College and the Universidad Tecnológica de Coahuila shared their partnership model of training *maquiladora* workers at-cost with considerable savings for participating companies in six cities and how it is recognized as an important contribution to building human capital. The partnership has been encouraged to explore the possibility of expanding the program throughout the network of approximately 60 *universidades tecnológicas* in Mexico.
- During the **Marketplace of Ideas**, key insights on best-practices for leveraging funding were discussed, including:
  1. American Red Cross/Mexico discussed different groups approaching tuberculosis from different angle – including faith-based groups, Rotary International, and TIES.
  2. A representative from Instituto Tecnológico de Saltillo discussed taking new technologies to companies and forming profit sharing arrangements, or getting funding for pilot studies for industrial applications of discoveries made in his lab.
  3. A participant from Duquesne discussed the idea of school farmers integrating with industry and having networks for linking with microfinancing and new business incubators.
  4. COMEXUS discussed raising funding for Fulbright programs and acknowledged that donors drive what scholarships get funded. They also discussed the importance of using their relationship with the U.S. Ambassador to be a “convener” as way to ramp up from “restricted and focused” funding to a broader pool.
  5. Alamo Community College and the Universidad Tecnológica de Coahuila partnership has approached the private sector and government agencies in various Mexican states to develop cooperative agreements to provide funding for continued educational programs targeting the *maquiladora* and manufacturing sector. One example is a recent meeting of manufacturers, chamber representatives, government

officials and educational institutions in the border area near Laredo, Texas, to discuss the formation of a consortium to provide the type of training offered through the TIES program.

6. Partners explored the opportunities of trade missions to Mexico that catalyze business investment through the financial support in the form of small loans to Mexican companies interested in doing business in the U.S.
7. Representatives of Hewlett-Packard presented opportunities for partnerships and organizations to discuss best practices in leveraging additional funding

#### **Objective Four**

- Promote the TIES partnership model in the region.

#### *Illustrative Examples*

- In the **President-Rector roundtable**, senior leaders from U.S. and Mexican TIES partnership institutions discussed the vital role of higher education has in contributing to local, regional and national development. They also shared their institution's highest priorities and models for deepening and expanding their TIES university partnerships to contribute to economic and social development.
- In the **Plenary, Exploring New Levels of Engagement: Capturing Opportunities** Ambassador Godard stated that TIES partnerships have much to share with other countries. The methodology developed can be extremely helpful for forging strategic alliances to seek solutions to development problems in other parts of this Hemisphere. U.S. and Mexican universities, working together or separately, could pool their know-how not only expand current bilateral university partnerships but also to provide the essential technical advice for forging new partnerships among the other thirty-three American republics.
- Conference participants had the opportunity to **visit two local TIES partnerships** to learn more about how the partners are promoting their partnership models in the region. The Universidad Autónoma de Querétaro-Consejo de Ciencia y Tecnología del Estado de Querétaro and West Virginia University partnership hosted visitors in the Amazcala Complex and shared information about their efforts to support rural producers in establishing and sustaining small-scale competitive greenhouses. The Tecnológico de Monterrey/Campus Queretaro-University of Wisconsin Madison partnership welcomed visitors to the Tecnológico de Monterrey dairy farm so that guests could learn about their efforts to train industry technicians by sharing best practices in the area.
- In **Panel 1 Increasing Competitiveness in the Global Market**, Alamo Community College and the Universidad Tecnológica de Coahuila shared that their project could be expanded throughout Mexico and beyond the U.S - Mexico border region and replicated throughout Central America and the Caribbean. With modest effort, developed materials could be translated into French and francophone instructors can be recruited to teach courses in non-English and non-Spanish speaking countries.
- In **Panel 4 Leaving a Legacy: Sustainable Impacts and Results** partnerships including Colorado State University-El Colegio de Frontera Sur, the University of Connecticut-Universidad Autónoma de Baja California and the University of New Mexico-Universidad de Quintana Roo showed how they are creating leaving a legacy with sustainable impact and results. Their partnerships have developed a center of excellence, leveraged funds from the Fund for the Improvement of Postsecondary Education (FIPSE) and Hewlett-Packard to continue its work, and expanded partnership efforts to foster strategic local, state and national ties demonstrates the success of the TIES model.
- In **Panel 9 Networks of Support for Sustainability**, the University of Illinois-Universidad Autónoma Querétaro-CINVESTAV, the University of Texas at El Paso, the Universidad Autónoma de Ciudad Juárez partnerships demonstrated how they have increased Mexican stakeholder participation at the local, state and national levels; led community outreach programs and strengthened institutional relationships through collaborative research. Their partnerships illustrate how modest seed awards such as those provided by TIES can catalyze the development of sustainable networks.

## **IV. Facilitated Discussions: Best Practices and Lessons Learned**

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Conference participants had the opportunity to delve into sector-specific topics that were facilitated by experts in their fields. A brief summary of each facilitated discussion follows.

### **Discussion 1: Health**

*Facilitator: Rebeca L. Ramos, US-Mexico Border Health Association*

This discussion focused on the aspects of design and planning that contributed to successful outcomes in public health and how might they be replicable in other settings. Participants discussed how TIES partnerships strengthen and expand networks to affect local and national policy and how Mexican partner institutions can continue their efforts in public health and mobilize new resources.

In response to the conference theme, the discussion highlighted a need for training of TIES participants on the principles and practices of replication (adaptation, scalability, technology transfer, etc.) such as how to achieve the replication of knowledge at the community level, explore limitations of distance education, and community based participatory research methodologies.

Participants also noted the need for engagement with the public sector in the area of policy change, like how to transform social attitudes and public policy to address health disparities among vulnerable populations like the disabled. They saw the need to seek the support of professional organizations like the National Board for Certified Counselors (NBCC) and to pursue community extension programs with strong advocacy components, new low cost technology development and experiential and problem based learning.

### **Discussion 2: Natural Resource and Water Management**

*Facilitator: Raúl Pineda López, Universidad Autónoma de Querétaro*

Participants in this discussion explored the following aspects of project design and planning that foster sustainable natural resource management: expanding “south-south” collaborations, identification of key people with solid ties to funding sources, substantively involving local community stakeholders, and establishing links with extension centers. Another important topic of this discussion included the prospects for partner universities in Mexico seeking to continue their contributions to sustainable natural resource and water management. In addition, the following strategies were offered to foster broader networks among TIES partnerships in this sector: coordinating the exchange of information among all parties, ensuring that activities and communications respond directly to local, regional, and national natural resource management priorities; disseminating information broadly; and carefully analyzing the roles and responsibilities of each partner/stakeholder as the network is expanded.

### **Discussion 3: Trade and Business Development**

*Facilitator: Robert McKinley, Institute for Economic Development*

Participants in this facilitated discussion examined how the trade and business development partnerships developed under TIES can work together to expand their impact and sustain their momentum. Participants agreed that a knowledge base is needed to examine the idea of TIES partnerships as “laboratories” and grow existing and past relationships. Partners must catalyze the success and impact of their partnerships in the public sector and private sector, in addition to the academic community, in order to influence policy. Letting the world know of these successes is key to expansion and achieving greater impact by bringing in more stakeholders. Outcomes and successes can be framed to dovetail with governmental and non-governmental economic development efforts.

### **Discussion 4: Public Policy and Competitiveness**

*Facilitator: Martha Juy, USAID Government and Competitiveness Project, CASALS*

Participants in this facilitated discussion explored ways to strengthen the civil society structure and reach throughout Mexico. Participants stressed the importance of building mechanisms in Mexico for civil society leaders to communicate and transfer knowledge. It is important that information and research regarding common goals are shared and communicated to stakeholders to inform public policy. Interventions must be relevant at the municipality level in order to be effective. Higher education institutions are uniquely positioned to advance and strengthen civil society participation by training leaders who will develop appropriate public policies that fight poverty and promote economic development.

## **Discussion 5: Agriculture and Rural Development**

*Facilitator: Fernando Fernandez, USAID's Micro and Rural Finance Project, AFIRMA*

Participants examined aspects of project design and management that contribute to successful outcomes in rural, indigenous communities; the challenges of “scaling up” to have greater impact; and how resources can be identified and leveraged to address these challenges. The dominant theme of this discussion was the role that universities in Mexico must play as catalyzers for improved opportunities with respect to achieving greater impact. In addition, the collateral knowledge shared between universities must be harnessed for the full potential to be reached.

Private and public sector investment were both posited as important mechanisms for achieving higher impact. The example of private sector investment in the U.S. agricultural sector was discussed as potential model for success in Mexico. With regard to government support, universities need to analyze and validate appropriate technologies that could encourage support from the ministry of agriculture in Mexico. Introducing agriculture to younger generations as a healthy alternative lifestyle, not solely as an occupation should be considered.

## **V. Conference Evaluation Summary**

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### **Conference Assessment Overview**

At the end of the Conference, 58 participants completed an assessment form responding to questions about the conference objectives, plenary sessions, presentations, and moderated discussions. The following tables summarize selected questions.

A large majority (96%) reported that the conference provided cross-sector interaction opportunities, and 83 percent responded that the conference provided sector specific interaction opportunities.

Positive written comments for cross-sector and sector-specific interaction opportunities included:

- Meeting colleagues from universities that participants hadn't met previously
- Examples in presentations of working with NGO's and government
- The diverse format encouraged communication among participants
- Meals offered networking opportunities
- Ample opportunity for networking during un-moderated discussions

Not all participants, however, agreed there were adequate opportunities for cross-sector and sector-specific interaction; their comments included:

- Aside from the Marketplace and meals, there were few opportunities for interaction
- Speakers had a tendency to speak too long, precluding networking during sessions

In terms of suggestions for future conference topics and how to improve panels/marketplace/facilitated sessions, respondents suggested:

- Add Time for a Project Directors-only meeting to discuss project challenges.
- Include beneficiaries as part of the panels
- Distribute abstracts of partnerships
- Increase time for marketplace presentations
- Make Conference location more accessible for travelers

Overall, attendees noted that the conference was successful, well planned and that sessions were informative. The panel presentations by Ambassador Godard and Rodger Garner, Mission Director, USAID/Mexico, were well received by a large majority of the participants. Conference attendees described the friendly welcome and support from Conference and USAID staff, and a few said that they were particularly pleased that so many of the sessions were in Spanish. Participants suggested that more information be available about similar partnerships, and that there be more opportunities for dialogue among and across panels.

Additional information about participant responses to selected evaluation questions are described in the following Tables:

Table 1 describes the participants' responses to selected assessment questions. In general, participants gave high marks for opportunities for cross-sector and specific sector networking and interaction.

*Table 1: Selected Participant Responses to Conference Evaluation*

| <b>Overview of Conference (Selected Questions)</b>  | <b>Rarely/ Sometimes</b> | <b>Frequently/ Almost Always</b> |
|---|--------------------------|----------------------------------|
| Overall, the Conference Provided sufficient opportunities for cross-sector interaction                                    | 4% (2)                   | 96% (52)                         |
| Overall, the Conference provided sufficient opportunities for sector-specific networking                                  | 17% (9)                  | 83% (45)                         |
| Overall, the Conference sessions provided information about potential sources of resources related to my partnership work | 26% (14)                 | 74% (40)                         |
| The Conference Activities promoted ways to replicate the TIES Partnership Model in the region                             | 21% (12)                 | 78% (43)                         |

The Marketplace was a new program element for this TIES conference and generally it was well received by participants. As seen in Table 2, 89 percent of participants' responses stated that the marketplace was successful in generating new ideas. Written comments about the marketplace, however, were mixed:

- A desire from marketplace presenters to be able to visit tables
- Additional time needed per table
- People were knowledgeable and available
- Marketplace was a very positive addition
- Good format
- Disorganized

*Table 2. Selected Participant Responses to Overview of Marketplace*

| <b>Overview of Market Place</b>   | <b>Not Useful/ Somewhat Useful</b> | <b>Useful</b> |
|---|------------------------------------|---------------|
| Information from the Marketplace provided knowledge that was:   | 22% (9)                            | 78% (32)      |
| The Marketplace provided suggestions for new contacts to benefit my current partnership:                      | 15% (6)                            | 88% (35)      |
| The Marketplace gave me ideas for new collaborations and/or opportunities                                     | 12% (5)                            | 88% (36)      |
| The Marketplace provided me with ideas for further funding and/or resources to sustain my current partnership | 29% (12)                           | 71% (29)      |
| The Marketplace demonstrated ways to promote the TIES Model in the Latin America/Caribbean Region             | 43% (17)                           | 58% (23)      |

In summary, the overall conference components were viewed as excellent. The lowest marks (70%) were given to conference location and ease of travel. A number of individuals commented that the location was difficult and a long journey. Many were unaware of the bus from Mexico City and flew directly into Queretaro airport. The highest scores (98%) went to meals.

Table 3. Selected Questions from Conference Components

| Conference Components  | Poor<br>2/1 | Okay<br>3 | Excellent<br>5/4 |
|--|-------------|-----------|------------------|
| Pre-conference Registration Procedures including notifications, on-registration, request for materials were: | 4% (2)      | 8% (4)    | 89%(45)          |
| Conference location and ease of travel:  | 6% (3)      | 26% (13)  | 70% (40)         |
| Hotel rooms were:  | 2% (1)      | 18% (9)   | 80% (40)         |
| Meetings rooms were:   | 4% (2)      | 11% (6)   | 85% (45)         |
| Meals were:  | 0%          | 2% (1)    | 98% (52)         |
| Receptions were:   | 2% (1)      | 6% (3)    | 92% (48)         |
| Optional tours-evening, weekend events were:   | 4% (1)      | 13% (3)   | 83% (20)         |
| Translations, interpretations were:  | 4% (1)      | 0%        | 96% (29)         |

## VI. Conclusion

The ***U.S.-Mexico Strengthening TIES: Expanding the Impacts*** conference was an opportunity for TIES partners to gather with their public and private sector partners to reflect on the accomplishments of 55 higher education partnerships and look to the future. Three plenary sessions set the framework for the conference. Through panel presentations, facilitated and Marketplace of Ideas discussions, and roundtables, academics and leaders in the public and private sectors were able to not only share the highlights of the partnership's impact on Mexico's development, but to also see their partnerships and collaborations in a greater context.

The conference organizers set very ambitious goals and objectives for the conference participants. The conference was more than simply a chance to share impressive results — it was an opportunity to explore ways to leverage these results to increase scope, scale and/or replicate these models in Mexico and throughout the region. Participants had the opportunity to learn about what is working in their own and divergent fields and sectors and consider how to apply new strategies to deepen collaborations. Participants are encouraged to continue this fruitful dialogue begun at the conference to achieve greater impact.