

Familia Cardona (pseudonym))

Criterios de la selección del caso de estudio y qué es lo interesante

Significant improvements over time, use of microloans, potential (future) dispute regarding ownership, interesting design.

This family was very welcoming, but the husband is particularly talkative—be ready to move on to the next question to keep him on topic. The house is in fairly good condition, although an extension is currently being built onto the front of the house. The family did receive assistance with the title by CRG around the year 2000. Immediately afterward (2001), the family received a loan from Colonias Unidas of \$2500. Family has made fairly significant improvements to property over time, and son (Guillermo) has plans to continue these (finish extension, finish exterior wall and driveway—showed me the picture he had drawn of the final product).

The design of the house/property is interesting. There is a separate garage, a porch made out of cedar logs, and an extension being built onto the living room. Older son is currently in Wisconsin working as a migrant laborer, but has been living with the family and investing his own money into the improvement of the property. He sold his truck to build the porch. Some (lighthearted) disputes arose during conversation between the father and the son regarding who had invested money in which part of the property and who would inherit the property. Two lots are owned by the parents. At one point, the son mentioned that the father was upset because the son had built the porch over the dividing line of these two lots. Father was concerned that he might not be able to sell the extra lot, but son claimed that he (the son) would never let them sell because he wanted the property for himself.

2. Metadata

a. Alto Bonito. West Alto Bonito (Colonia).. Eulogio and Maria Cristina Cardona

(Nota importante: Esta información será removida antes de enviar a la Universidad de Texas, por cuestiones de confidencialidad. Las únicas personas que deben quedarse con esta información son los responsables del proyecto en cada ciudad. Por lo tanto la seguridad de la información radica en los responsables).

b. Cuadro resumen del número de visitas, fecha, tiempo que se llevó, con quién se hizo la entrevista, quién hizo la entrevista, señalar si se utilizó otra técnica para obtener la información, además de la entrevista semi-estructurada.

c.

Noah Durst made first visit on June to conduct initial questionnaire survey (30 minutes). Guillermo Cardona (son) answered survey. Jenny Harvey and Noah Durst made second visit on July 21st to set up case study interview (30 minutes). Semi-structured interview conducted on July 28th by Lissette Aliaga, Peter Ward, Jenny Harvey, and Noah Durst. Eulogio and Maria Cristina were interviewed (2 hours). Peter conducted interview, Lissette took notes, Noah and Jenny took measurements.

d. Calidad de la entrevista. Qué tan dispuesta estuvo la gente, etc. Anotar, observaciones metodológicas (qué dio resultado para obtener información, qué obstaculizó, recomendaciones para próximos trabajos). Indicar dificultades o problemas con la entrevista o con el levantamiento.

- Very open – Sra was present and was both lucid and coherent and less garrulous (although he was very accommodating). Sat outside while grandson finished cleaning indoors. Then given the grand tour – garden, 2 lots, house etc.
- PMW conducted interview. Lissette drew family tree and trajectory. Noah and Jenny took measurements and created house plan.

3. Reconstrucción de los dueños fundadores y las personas que vivieron en la casa de acuerdo con el árbol genealógico (formato)

- Situación actual detallada:** Currently, there are five people living in the lot. Sr. Eulogio and his wife Maria Cristina, his grandson Eulogio with his fiancée April and Guillermo, who comes home between jobs.
- Situación cuando llegaron al lote**
They bought the lot in 1992 but moved a year later when the structure and roof was built. However, the house had not windows and doors. While the family was complete with 10 children at the time, many often have already left home. At the lot only four children arrived who were single at the time of move-in: José Juan and his son Eulogio, Daniel, Nancy and Guillermo.
- Cambios en la estructura familiar**
As mentioned this family was composed by 10 children who have began their households before move-in. Currently the couple have 34 grandchildren and 14 great children. One of their grandchildren, Eulogio, was raised by them and is considered a son (See Arbol Genealógico). A major crisis in the family took place last year when Daniel who also used the house as its main place to stay between jobs, was kidnapped by zetas while visiting Camargo in México. The family has no news on his whereabouts.

4. Compra/Ocupación de la vivienda: Donde vivían antes (que tipo de vivienda, si eran dueños). Como supieron de que se vendían solares, por que decidieron comprar, como pagaron, a quien, cuanto, en pagos/por cuanto tiempo.

Rented a house in La Puerta (RGC) from 1992 until 1994 before moving onto lot. Paid \$3,800 for each lot (\$7,600 in total).

5. Levantamiento de la vivienda, su relación con la trayectoria familiar, financiamiento de construcción o modificaciones y problemas constructivos

1. *Plano arquitectónico de 3 etapas de construcción de la vivienda* (o solo dos si se trata de un traspaso reciente -- al llegar y ahora). Presentar los dibujos arquitectónicos de acuerdo con el formato: plantas, fachada, un corte, un esquema tridimensional, volumétrico. Fotografías de los tres, si fuera posible.
 - a. *Situación Actual: incluir el jardín/patio/propiedad y la vivienda;*
 - See photos [here](#)
 - Original house from 1993;

- Multiple renovations and upgrades; home improvement grants.
- Porch alongside west side.
- East side cleared for eventual garageing and new car access;
- Two garages – one wooden frame and open both ends; the other open all round by proper roof and singles (Guillermo's...)
- Extensive gardens; trees planted by Sr. and now mature; lots of space and yard used for animals; chickens; etc.
- Old septic tank closed over; new tanks installed recently
- Extension & chimney (under construction)
- Working on old septic tank – large oblong sub ground structure which cleaned out and walls smoothed off; now covered. Originally intended as new septic tank but inspector rejected it as not being to code etc. So installed two septic tanks) See potos.

b. Situación Inicial: incluir ubicación de fosa séptica o viviendas anteriores

- Very uneven topography so much of the initial work involved clearing the lot and levelling it – tons of dirt and escombros brought in. (Today pretty level).
- Moved onto the lot once they had done some of the levelling and once the house had been built. But just the Shell – they have done all of the interior work. Sra noted that they were still finishing the roof the day they moved in. **Windows still had cardboard on them when they moved in.**

c. Situación intermedia: incluir ubicación de fosa séptica o viviendas anteriores. Ten en cuenta la trayectoria/el proceso de construir en cuanto al año en que recibieron el título de la propiedad (AÑO 2000)

Bought lot in 1992. Roof, cement, structure done in 1993 when family moves in (no windows). Cement septic structure built in 1993, but doesn't pass inspection. Official tanks installed in 1994. Windows and doors repaired/installed by program in 1996. Wall built in 2000. Garage **which of two?)** built in 2004 (materials bought bit by bit by Guillermo). Brick wall built in 2005. New addition started in 2010. New windows and new roof in 2010 (paid for by program, work done by Guillermo). Porch built in 2011.

2. *Vincular la vivienda con la reconstrucción de la trayectoria familiar (al menos en los 3 horizontes).* A lo largo del tiempo, quién ha utilizado cada cuarto. Registrar los cambios y la razón por la que se dieron. Por ejemplo cambio en el número de hogares (casamientos), salida y entradas, es decir, cambios en la estructura familiar. Incluir de forma gráfica en el momento actual, quién usa cada espacio y para qué.

Three bedrooms were already built upon arrival. The bedroom closest to the kitchen was always for Eulogio and María Cristina (Southeast). The single men at the time slept in one bedroom (Northwest) but since they did not stay that long, they never were full in the bedroom. Eulogio stayed in it most of the time and shared the room circumstantially with either his father or his uncles. Since the last three years, he shares this bedroom with his fiancée April. Nancy had her own bedroom but left a year after move-in (Northeast). Guillermo took that bedroom and painted it at his liking (black and white). In the last (three years??), María Cristina installed in that room a washing machine so it has also become sort of the laundry room against Guillermo's will.

The last addition to the house is a unit to serve as a living room, located close to the kitchen but still unfinished.

3. *Fuentes de financiamiento*, para construir o remodelar diferentes partes de la vivienda, para la construcción, el mantenimiento y las mejoras. Estrategias que usa la familia. Who contributes money (and in particular, connection with expectations of inheritance). Prestamos oficiales, hipoteca y riesgo? Importancia del “earned income tax credit” o la seguridad social? Si hay mas de un hogar, cómo se divide el costo de mantener/construir las viviendas?

First major grant/loan came after CRG intervention.

- Loan/grant for windows and doors.
 - 3 loans between \$2500 and 3500 each from CRG
 - November 2010 grant (weatherization?) and replaced windows with energy double glazing; new doors; insulation in roof etc.,
 - New singles on the roof. Left the lower lines of singles undone on northern edge since Guillermo wants to wrap the porch around that side as well.
 - Grant also for septic tanks – same time?
 - In all cases **they do the work– self help**
4. *Problemas* Los problemas constructivos, de funcionamiento, y de otro tipo (que no les guste algo) que presente la vivienda. Quienes en la casa reportan qué problema. Propuestas de solución. Tomar fotografías que ilustren los problemas.
 - No serious problems observed. Gap under roof on the porch side (see photo) could let birds and insects in (cf the ventilation grids on the eaves). But this minor.
 - Access to the roof space? **Anyone see an attic opening inside? Nope.** NO If not this is a design flaw.
 - Quite good sensitivity to sustainability (see below).
 5. *Elementos simbólicos* o simplemente, cuestiones que no les gustaría cambiar para nada y por qué. (Por ejemplo, el árbol que plantaron en el terreno cuando llegaron, el piso que construyeron con tanta dificultad de material reciclado de demoliciones en la ciudad).
 - Considerable pride in the home and garden having a home of one’s own; garden; chickens; pets --4 dogs; etc. And while few children remain tied to the home (it’s Guillermo’s base when he comes back from Wisconsin, and grandchild and April (girlfriend/partner), they obviously are proud that this is the family base – at least for those who have lived in the house – the “favored five”. The Sra admitted to there always being favorites – “no son parejos, verdad?” In this case because many of the kids were grown up and gone before they moved to the lot in 1993. (See árbol.)
 - They appear to see this as belonging to them (padres) but also as a family patrimony - for those that need it, and it should not be sold – until the last one dies... (see inheritance)

6. Movilidad de los dueños fundadores y sus dependientes

Reconstruir la trayectoria de vida de (el/la) los dueños fundadores, de acuerdo con el formato. Anotando los años clave, con datos de dónde provienen, Cuando se casaron, (si es pareja), a dónde se fueron a vivir, entradas y salidas de la casa, de los dueños fundadores y sus dependientes. Indicar las razones para quedarse, para irse y para regresar. Miembros de la familia extendida, quiénes llegaron (relación de parentesco, cuánto duraron, razones para irse y quedarse, eran parejas con hijos).

7. Subdivisión/traspaso del solar (si hay): proceso y trayectoria. Formal/informal. Dueño oficial (al nombre de quien está el título). Heredado, regalado, o comprado (a qué precio y de qué manera). Process of acquisition.

8. Título de propiedad/ proceso / Cambios en el tiempo. Estado actual del título, problemas con el título. Impacto de subdivisiones. Impacto (si hay) de tener el título de la propiedad (usarlo como aval, seguridad). Property Taxes.

- Everything in order insisted the Sra. Pay \$300 per year for the two lots

9. Cuestiones del testamento, herencia, sucesión. Conflictos, cómo surgieron, cuándo, quienes son los interesados, problemas, arreglos. Expectativas de los miembros de la familia.

Survey had suggested some light hearted tensions about inheritance – Guillermo clearly has expectations that he should get the whole or at least one half. Also a clear sense that this the family patrimony and should never be sold. But when the Sr. also cognizant that the option to sell one half of the lot exists; and or of the opportunity to keep one half clear as gardens if and when they build a garage on the east side (his plan). But Guillermo stakes his claim and frustrates: i) inching the porch across the boundary line; and ii) building his fancy roof garage in the middle of the garden lot...

Both feel that certain adult children have greater claims – because they lived there; have a sentimental attachment to the home; have greater need; and above all, have helped to build and improve it. Five people appear to be accorded the strongest claims: Guillermo; Nancy; Daniel Eulogio (grandson lovechild of son who has lived with them throughout); and Maria de los Angeles. These we label as the “favored five”.

Neither have a Will, but they are worried about conflicts. Many of the children are interested and appear likely to claim (their) share. The Sr.’s view is that it belongs to the last man standing – this ties in with the idea of it being not for sale and the family home – but we pointed out that this would not stand up in law. They are interested in pursuing this, it appears – asked Qs about how much; how make a Will etc. at the end -- and understand that if they want to favor certain children (and the grandson who would not inherit), then it is in their hands to determine. i.e. default in this case will probably be a bigger problem and more conflict than resolving sooner. When we return we should probably ask if they have done anything; check with Erika & Heather to get our facts straight; and point out that grandson would not be one of the 10 as things stand. PMW adds maybe contact them about the Title on death Deed

10. Actividad económica, estrategias en la vivienda para generar ingresos (actividades económicas o renta de alguna parte de la casa), etc. Cambios en el tiempo. Impacto de la crisis de 2008.

11. Estructura de la vivienda y fuentes de financiamiento: para la construcción, el mantenimiento y las mejoras. Prestamos oficiales, hipoteca y riesgo? Importancia del “earned

income tax credit” o la seguridad social? Si hay mas de un hogar, ¿cómo se divide el costo de mantener/construir las viviendas/

Guillermo (son) sold truck to pay for materials for the addition being built on the southern side of house. Income and unemployment check (of Guillermo). Family saved significant amount on labor—Guillermo installed windows, redid roof, built extension, cement walls, garage, insulation. Guillermo estimated \$8,000 spent on home improvements in last 10 years (original survey). Maria Cristina reports having received three loans between \$2500 and 3500 from CRG since 2000.

Amount spent on original shell of house?

11. Condiciones actuales de la vivienda: Problemas que quieren resolver (en cuanto a la salud/discapacidad, la edad, la movilidad. También el diseño de la vivienda y la estructura/necesidades de la familia). Alguna parte sin terminar/que necesita reparación.

12. Sostenibilidad: Si ha escuchado/usado algunas mejoras sostenibles. Oportunidades donde se podría usar una mejora sostenible/cómo?

A number of green applications observed here:

Micro environmental;

- Alignment north south
- Shade trees in north (would be better on west side garden area in this case)
- Raised beds for planting (herbs; lime tree) etc;
- Large magueys and “pups” and close cultivation and care of the same.
- Food scraps etc. go to the chickens; and their straw onto the beds – kind of composting, therefore.

(Not see evidence of rainwater harvesting, and bucket in the bath is for hand bathing, not excess water for spot watering. **This an opportunity, therefore. Maybe talk with him about this?**)

House/dwelling:

- Porch for shade on west side and planned for north side also;
- Insulation in roof
- Extension has walls made of energy rated materials (but other areas probably not)
- East walls painted (apparently) with a paint that reflects heat (Guillermo’s bedroom side)
- New energy efficient windows and some have aluminum reflection on them (see photos – again Guillermo’s bedroom/utility room)
- Low energy light bulbs
- Only saw ceiling fans in kitchen/dining room. But several moveable fans.

13. Percepciones sobre su colonia. Construcción de identidad a través de las 3 generaciones (o las que haya en la/s viviendas (si es el caso, diferenciar entre la identidad de los migrantes y nativos).

- Like the colonia. Keep themselves to themselves though. Are careful about whom they let into their lot (and set the dogs loose at night). Why were we so lucky? Wall all way around. Sra h
- Don’t appear to have close kin living in the colonia. Victor bought a lot next door and lived there before they did, but he sold the lot.

- Drug sales from house in front? Alleged. But not pandillas.

14. Necesidades especiales (trato a los viejos, abuelas cuidando nietos, discapacitados, etc.)

15. Citas, citables para los diferentes temas que no se hayan incluido en los temas tratados en e6ta ficha.

16. Resumen de hallazgos, referentes principalmente a las razones por las cuales se seleccionó el caso.

Two lots open without a division between them (although clear “flags” at both ends). Full walls around the two lots. Acquired from Elias López who encouraged them to buy two at \$3800 apiece (\$7600) and titled by CRG in 2000.

Family Structure especially interesting. Large family 10 children (one of whom recently “disappeared” in Mexico). But the interesting feature is that it is a older family (he is 66 she 62) but having married 48 years ago most of their family building was prior to moving onto the lot. Most children were grown and left before they moved onto the lot in 1993/4. See arbol and timeline. Made for very complicated arbol (which we simplified); but very easy family timeline. Little or no “churn” here. In fact none except for Guillermo who spends many months in Wisconsin and has his bedroom (also the utility room) which he has painted black! (see photos). This is akin to the “vestige” family/households that we saw sometimes in Monterrey.

Extensive self-help input and Investment in combo with \$ investment. Interesting case of self-help once the original structure had been built and taking advantage of self-help programs. Indeed, this is a case where investments have come from income; from would be stakeholder kids (Guillermo especially), and from several grants for home improvement, the last being Aide et al in November. Funds come from income; truck sale; grants and loans. But the work is done through **self-help by them** (Sr. Sra & Guillermo almost exclusively). Generally quite well done and ongoing, and not have the problems of the Garcia family of “botched jobs” through external contractors. A lot of pride in the self-construction. Guillermo (not present today) clearly has a lot of enthusiasm and does his own thing (porch and extension), and the Sr. and Sra. go along for the most part. They also have a lot of pride in the yard and gardens.

Garden and Yard Use. This another interesting aspect of the case – namely the gardens and yard which while not immaculately laid out and organized, are actively used and worked on – trees for shade and sitting under; animals penned along N wall; chickens; raised beds; NW corner for small fire pit and scrub pile; garages; and parking in front of the house. “Dead” spaces (i.e. unused or underutilized) are: porch, which is primarily for shade; the east side (future garage car port which gets a lot of sun); and the old (now covered septic tanks – in essence a large concrete box – the Sr is still working on this apparently, but unclear how it will end up – “bomb shelter”!)

Case demonstrates the very significant amount of improvement achieved by the family over 20 years. But we failed to explore whether they felt that title made any difference for them in so far as they improved the home etc. **How did they feel about title?.** Our assumption is that title per se does not make a difference, but we must ask and explore...

Inheritance issues – clear ideas of what want but confused about how to achieve it.

Survey had suggested some light hearted tensions about inheritance – Guillermo clearly has expectations that he should get the whole or at least one half. Also a clear sense that this the family patrimony and should never be sold. But when the Sr. also cognizant that the option to sell one half of the lot exists; and or of the opportunity to keep one half clear as gardens if and

when they build a garage on the east side (his plan). But Guillermo stakes his claim and frustrates: i) inching the porch across the boundary line; and ii) building his fancy roof garage in the middle of the garden lot...

Whatever, there are clear inheritance and succession issues here. Both feel that certain adult children have greater claims – because they lived there; have a sentimental attachment to the home; have greater need; and above all, have helped to build and improve it. Five people appear to be accorded the strongest claims: Guillermo; Nancy; Daniel, Eulogio (grandson lovechild of son who has lived with them throughout); and Maria de los Angeles These we label as the “favored five”.

But, neither have a Will, and they are worried about conflicts. Many of the children are interested and appear likely to claim (their) share. This troubles the Sra, who appears to realize that there would be ten potential claimants (all the children or 9 if the disappeared son does not return). The Sr.’s view is that it belongs to the last man standing – this ties in with the idea of it being not for sale and the family home – but we pointed out that this would not stand up in law. They are interested in pursuing this, it appears – asked Qs about how much; how make a Will etc. at the end -- and understand that if they want to favor certain children (and the grandson who would not inherit), then it is in their hands to determine. i.e. default in this case will probably be a bigger problem and more conflict than resolving sooner. **When we return we should probably ask if they have done anything; check with Erika & Heather to get our facts straight; and point out that grandson would not be one of the 10 as things stand.**

Good example of sustainability many elements of sustainable housing applications demonstrated in this case – sometimes implicit (common sense); other times deliberate. Have benefited from the AIRA and weatherization grants.