

Contact: Diana Gonzalez

LAKESIDE LABORATORY STATUS REPORT

Actions Requested: Consider recommending the following to the Board:

1. Receive the Lakeside Laboratory (Lab) status report.
2. Receive the Lakeside Lab strategic plan.
3. Receive the proposal to restructure Lakeside Lab to become the Lakeside Lab Regents Resource Center.

Executive Summary: For almost 100 years, Lakeside Lab has provided educational opportunities to the state of Iowa. The Regent universities have offered science-based courses that allow students to study nature first-hand. In the recent past, the Regent Enterprise has recognized that its educational offerings can address a number of statewide needs, including lifelong learning especially for place-bound individuals; economic development; and entrepreneurship. Therefore, the Board of Regents directed the Board Office and the Regent universities to develop a resource model that could be replicated to address educational needs across the state. The Board determined that the Lakeside Lab would be used as the underpinning for the model and adopted a resolution (Attachment A) in August 2005 to develop a strategic plan for Lakeside Lab.

During April 2006, an inter-institutional team, which included representatives from the Regent universities, the Board of Regents, and the Board Office¹, undertook the task of responding to the Board's resolution and developed a strategic plan for Lakeside Lab (Attachment B). The strategic plan defines the mission, vision, and values for the Lab, as well as short- and long-term objectives.

While there is a need to continue to provide scientific field research opportunities at Lakeside Lab, it has become apparent that there are other educational needs in the area, especially with respect to lifelong learning and entrepreneurship. The strategic plan provided a springboard to expand the opportunities available through Lakeside Lab (1) to meet the educational needs of northwest Iowa through the following key functions – scientific research, lifelong learning, entrepreneurship, and community involvement; and (2) to develop a model that could be used throughout the state. The proposed name of the expanded entity would be Lakeside Lab Regents Resource Center (Center).

Background:

Iowa Lakeside Lab Background and History

- ◆ The Lakeside Lab campus is a residential facility located on the shores of West Okoboji Lake. The campus includes more than 140 acres, most of which is a nature preserve used as an outdoor classroom.

¹ Tom Bedell (BOR), Jim Bodensteiner & Joel Haack (UNI), Bonnie Bowen (LL), Pat Cain & Chet Rzonca(SUI), Diana Gonzalez & Gary Steinke (BO), and Jack Payne/Bill Tysseling (ISU).

- ◇ Iowa Lakeside Lab was established in 1909 by University of Iowa Professor Thomas H. Macbride as a private summer field station to provide university students and faculty, biology teachers, and the general public the opportunity to study nature first-hand.
- ◇ In 1909, the University of Iowa Alumni Association organized a stock-raising company, the Iowa Lakeside Laboratory Association, to purchase five acres of land on West Okoboji. In 1928, 84 acres of surrounding property were acquired.
- ◇ From 1909 to 1936, the Lab was operated by the Iowa Lakeside Laboratory Association of the Alumni and Friends of the University of Iowa.
- ◇ In 1936, the Association deeded the property to the State of Iowa Executive Council under provision of the Trust Agreement of April 30, 1936. A critical paragraph in the Trust Agreement indicates, "In case of diversion of the property to users other than those set forth in said Trust Agreement, the title shall revert to the grantor herein." The agreement also states that the Lab shall be used for "the accommodation, promotion, support, and maintenance of scientific studies and research in the field of biological sciences."
- ◇ From 1936-47, the Lab was administered by a Board of Managers representing the State Conservation Commission (now DNR), the State Board of Education (now Board of Regents), Iowa Lakeside Association, the U.S. Fish and Wildlife Service, and the University of Iowa.
- ◇ In 1947, the Board of Managers was dissolved and the Board of Regents assumed responsibility for the Lab; since then, it has been run cooperatively by Iowa State University, the University of Iowa, and the University of Northern Iowa through the Board of Regents.
- ◇ Until 1994, the Lab was administered through the University of Iowa. Since 1994, a change was made so that the director of the Lab would be a tenured faculty member at any of the Regent universities. The university where the director is a faculty member is the administrative university for the Lab.
- ◇ In 1993, the Friends of Lakeside Laboratory, consisting of community members, was created to promote Lakeside Lab as a "community resource for environmental education, water quality monitoring, and research." Since its inception, the Friends group has raised \$1.9 million in support of the Lab; a significant amount of those funds was used to build the Waitt Water Quality Lab, Lakeside's first year-round facility. Since 2000, the Friends Group has raised approximately 50% of its projected \$2 million endowment campaign.
- ◇ In December 2004, the Board of Regents approved a Business Plan for the Lab which focused on increasing the availability of educational offerings, including providing year-round activities.
- ◇ In August 2005, the Board of Regents adopted a resolution which directed the Board Office to work with the Regent universities to develop a strategic plan for Lakeside Lab.
- ◇ In September 2005, an executive director was approved by the Board of Regents to serve as the director of academics and research.
- ◇ During April 2006, a Lakeside Lab Strategic Planning Team was appointed by the Council of Provosts and the Board Office to develop a strategic plan for Lakeside Lab.
- ◇ During the past ten years, the credit enrollment at the Lab has ranged from a high of 185 students in 1997 to a low of 83 students in 2005 and 2006.
- ◇ An analysis of the enrollment decline has revealed that the lack of substantial scholarship and grant funds has prevented students and faculty from participating more fully at the Lab.

- ◇ The Lakeside Lab Strategic Plan describes its mission and vision and identifies values, strengths, weaknesses, opportunities, and threats. It also includes one-year and three-year objectives.
- ◇ Concurrent with the development of the strategic plan, the Regent universities developed a variety of summer programs for northwest Iowa in addition to the science programs at Lakeside Lab, including an entrepreneur institute, a summer writing program, Taiko Drummers, and Arts Share on a full-cost recovery basis.

Proposal to Expand Lakeside Lab

- ◇ The name of the expanded entity would be Lakeside Lab Regents Resource Center (Center).
- ◇ Create an executive director position to have oversight of the Center and to report to the Board of Regents through the Education and Student Affairs Committee and the Economic Development Committee. Consolidate the institutional allocations to support the Center under the Board Office. Create an academic manager position to have direct oversight of the Lakeside Lab.
- ◇ The Center would encompass the following functions:
 - ☑ Scientific field research. This research would be conducted at the Lakeside Lab which would continue as a field station that supports the science programs, including education, research, and outreach, of the Regent institutions and the Lakeside Consortium. Primary oversight for the Lab would be through a Lakeside Lab academic manager. As a scientist, the academic manager would work with the Regent universities to develop curricula, recruit faculty, and schedule classes. The Center executive director would provide support to the Lakeside Lab academic manager through facilities management, advertising, and data gathering. Classes offered to area elementary and secondary schools, as well as other postsecondary institutions, would be at full cost.
 - ☑ Lifelong Learning. The purpose of this function would be to provide needed learning opportunities to the citizens of northwest Iowa. The Center executive director would work with the programmatic and distance education administrators at each of the Regent universities to determine need for programs/courses in northwest Iowa. The universities would provide the instruction and faculty. The Center executive director would be responsible for marketing the offerings and helping to identify the need for additional offerings. Other postsecondary institutions seeking to offer distance education courses at the Center would work through the Center executive director to ensure that there is no conflict of interest and that full-cost recovery process is applied. Cultural offerings that support the liberal arts mission of the Regent universities would be provided as appropriate on a full-cost recovery basis. Services that support the Regent universities' programs in social work, health, and similar areas would be provided through the Center on a full-cost recovery basis.
 - ☑ Entrepreneurship. The purpose of this function would be to expand the entrepreneurial educational opportunities for Regent university students. The Center executive director would be responsible for working with the Regent universities to provide entrepreneurial workshops at the Center. The Center executive director would assist the universities to obtain mentors for the participants and to schedule meeting rooms at the Center. All events would be full-cost recovery.

- ☑ Economic Development. The purpose of this function would be to address the Board of Regents' role in economic development with the Iowa Department of Economic Development, the community college system, private colleges, local governments, and regional economic development organizations. This approach would create a model for cooperative rural economic development through educational opportunities and collaborations with other community resources that can be replicated throughout Iowa.
- ☑ Community Involvement. The purpose of this function would be to obtain community support for the Center that would result in endowment funds for the long-term operation of the Center. The Center executive director would be responsible for working with the community and an institutional foundation to elicit donations which would become an endowment for tuition assistance for students, housing assistance for students, faculty research grants, housing assistance for faculty, and acquisition and maintenance of a specialized equipment pool. The immediate goal for the endowment would be \$600,000.
- ◇ The Regent universities' total allocation to the Center would be increased from the current level of \$553,000 to \$600,000 per year and would be capped at that level for a five-year period. These funds would be used to support the operation of the Lakeside Lab, including the Center executive director and the Lakeside Lab academic manager. The Center would be an additional entity of the Regent enterprise.
- ◇ The institutional allocations would be consolidated at the Board Office; administrative oversight would be provided by the university where the academic manager is a faculty member.
- ◇ During the fourth year, an in-depth evaluation would be conducted by the Board of Regents Executive Director or designee and the Regent universities to determine both the continued viability of the Lakeside Lab Regents Resource Center and the ability to replicate the model throughout the state.

AUGUST 2005 BOARD OF REGENTS MEETING RESOLUTION

1. The Board directs the chair of the Iowa Lakeside Laboratory Coordinating Committee, in consultation with the chair of the Education and Student Affairs Committee, to appoint a task force and lead a process for reviewing and updating the Lakeside Lab strategic plan.
2. The strategic plan shall include a process which promotes collaboration among the three Regent universities, the northwest Iowa communities, area community colleges and private colleges, as well as other state and community agencies for the purpose of sharing economic development capabilities with the citizens of northwest Iowa and Lakeside Laboratory.
3. To achieve widespread collaboration in this effort, the Board of Regents directs the three Regent university presidents to create opportunities within their respective university community to support and enhance this outreach endeavor.
4. The Lakeside Laboratory task force shall present its final report, including recommendations, at the June 2006 Education and Student Affairs Committee meeting.

**IOWA LAKESIDE LABORATORY STRATEGIC PLAN
2007 – 2012**

Mission

The Iowa Lakeside Laboratory is a field station that supports the science programs, including education, research and outreach, of the Regent institutions and the Lakeside Consortium. The primary research endeavors will focus on the diverse ecosystems that surround Iowa Lakeside Lab, with special emphasis on studies that relate to water quality and the biodiversity of pristine and restored environments.

Vision

The Iowa Lakeside Lab will be recognized internationally as the premier regional site for the study of the environment in a natural setting, with sufficiently abundant resources to encourage new engagements that support scholarship and continuing education.

Values:

- ◇ Conservation
- ◇ Water quality
- ◇ Integrated Research and Education
- ◇ Unique immersion learning opportunities in a natural setting
- ◇ Collaboration through partnerships
- ◇ Historical preservation
- ◇ Focus on field work
- ◇ Advocates for the implementation of the most advanced science available in the creation of public policy in the areas of biological sciences and natural resources

Strengths:

- ◇ One-hundred year history
- ◇ Strong research reputation
- ◇ Unique field work opportunity
- ◇ Community support
- ◇ Information technology access
- ◇ Strong leadership and staff
- ◇ Board of Regents support
- ◇ Valuable land
- ◇ High biodiversity of ecosystems exist in the surrounding area

Weaknesses:

- ◇ Competition for State of Iowa resources
- ◇ Deferred facility maintenance
- ◇ Some outdated research equipment
- ◇ No marketing, outreach or secretarial staff
- ◇ Distance from the three Regent institutions
- ◇ No Lakeside Lab champion at the Regent universities
- ◇ Negative perception of current University funding ratio (tax)
- ◇ Lack of a detailed database of past, current and future users of the facility
- ◇ Summer classes not full
- ◇ Limited outreach activities
- ◇ Potential research and outreach constraints due to trust provisions
- ◇ No recreation design for use of lake, boardwalk
- ◇ Perception of insufficient value for money spent
- ◇ Consortium has not reached its potential
- ◇ Limited grants/outside funding
- ◇ Lakeside Lab has limited visibility within the Regent institutions, the State of Iowa and the local lakes region
- ◇ Struggle with community over the mission of the Lakeside Lab

Opportunities

- ◇ Increased field work interest
- ◇ Strong feeling regarding water quality
- ◇ Potential to attract national faculty
- ◇ Increased availability of volunteers
- ◇ Engaged local individuals and organizations.
- ◇ Diatom, restoration ecology, wetland ecology and water shed research
- ◇ Links to other departments (e.g. bio-ethics, public health, other science departments as well as arts, creative writing, etc.)
- ◇ Providing access to space on a rental basis
- ◇ The potential for fall and summer courses
- ◇ Potential of increased outreach programs

Threats

- ◇ Visitors disturbing the virgin wilderness
- ◇ Competition for activities, e.g. conferences
- ◇ Ability to provide continued state support
- ◇ Struggle with the community regarding the mission and administration of the Lakeside Lab
- ◇ Transportation issues during the summer
- ◇ Student ability to pay for lodging, fees, etc.
- ◇ Scientists don't perceive the study of Iowa is attractive
- ◇ Perceived administrative structure – slowness of decision-making

Objectives

Three-year objectives of Iowa Lakeside Lab 2007 to 2010:

- A) Academic programs
 - 1. To diversify the course offerings at the Lab
 - 2. To seek scholarships for students to attend summer programs
 - 3. To increase the number of year-round classes that can be scheduled at the Lab.
 - 4. To create on-line programs at the educational institutions that feature attendance at the Lab in the fall and spring months.
 - 5. To establish outreach programs aimed at K-12 students and adults interested in the environment.

- B) Research Activities
 - 1. To distribute to the faculties of the Regents institutions and the consortium the list of research conducted and research opportunities in the region.
 - 2. To develop at each institution a "Lakeside research champion committee" to discuss and create new research activities.
 - 3. To create a research advisory board, composed of current research representatives of the "research champion" committees, to advise the executive director and staff regarding research activities.
 - 4. To provide each Lakeside researcher a supportive environment for scholarship.
 - 5. To develop a grant writing program for the underwriting of research activities at the Lab

- C) Financial Stability
 - 1. To create a realistic yearly budget with the goal of breaking even by year three (assuming a specific level of fixed support from the institutions).
 - 2. To seek grants that will enhance the ability of students and faculty to conduct their research at Lakeside Lab.
 - 3. To create a program of outreach that will support the overall activities of the Lab.
 - 4. To negotiate with the institutions the indirect costs charged on research grants and contracts.

- D) Organizational Effectiveness
 - 1. To market the Lakeside academic and research strengths to the appropriate faculty at the Regent and consortium institutions.
 - 2. To increase the membership in the Lakeside consortium by at least ten educational institutions within three years.
 - 3. To develop a staffing plan that will meet the Academic, Research, and Financial stability goals articulated above.
 - 4. To prioritize the hiring of new staff and the replacement of those who will be retiring within the next three years.
 - 5. To establish a program aimed at motivating and increasing the morale of Lakesides employees.

6. To create an organizational structure that simplifies Lakeside director's reporting relationships with the BOR institutions and permits more rapid decision-making.
 7. To develop and maintain a database of organizations, students and individuals who have used Lakeside Lab over the past five years.
- E) Infrastructure Development
1. To prioritize the maintenance needs of the site.
 2. To assess the facilities and equipment needs of educators and researchers and to develop a plan to meet those needs.
 3. To develop a grounds management plan, including assessing the current land use and prioritizing actions to achieve desired use.
- F) Partnership Development
1. To work with Friends of Lakeside Lab to define their role in supporting the Lakeside programs.
 2. To strengthen partnerships with environmental research and monitoring groups in the region (Department of Natural Resources, U.S. Geological Survey, U.S. Fish & Wildlife Service, etc).
 3. To strengthen partnerships with non-profit environmental and educational groups in the region (Iowa Natural Heritage Association, Nature Conservancy, Lakes Associations, water quality groups).
- G) Financial, Human, and Physical Resources
1. To increase and cap the institutional allocations at \$600,000 per year for the next five years.
 2. To prepare a business plan for the five -year period.
 3. To employ an Executive Director for the Lakeside Labs and the Okoboji Economic Development Institute. A portion of this person salary would be paid by the Iowa Economic Development Department. This person's role would include fund raising, outreach activities and marketing.
 4. To employ an academic manager to be in charge of the Lakeside Lab academic and research activities.
 5. To outsource most of the physical plant maintenance.

One -Year Goals

- A. One-year specific goals will be written for each year and for each activity under the seven long-term objectives listed above.
- B. The yearly review of the Lakeside Lab activities against these goals will be the basis for the five- year evaluation of the Lakeside Lab's success.
- C. The yearly goals will be written in terms of the outcomes that are to be achieved at the Lakeside Lab.