

Contact: Diana Gonzalez

IOWA LAKESIDE LABORATORY REGENTS RESOURCE CENTER
2011-2012 ANNUAL REPORT AND BUDGET REQUEST FOR 2012-2013

Actions Requested: (1) Receive the 2011-2012 annual report of the Iowa Lakeside Laboratory Regents Resource Center (ILLRRC) and (2) recommend approval of the 2012-2013 budget for the Center.

Executive Summary: The ILLRRC annual report describes the activities undertaken in 2011-2012 to address the Center's Strategic Plan. The proposed budget (Attachment A) describes the planned objectives for 2012-2013. The proposed 2012-2013 budget for the Iowa Lakeside Laboratory Regents Resource Center has been reviewed by the Board Office and the Council of Provosts and is recommended for approval.

Background: For more than 100 years, Lakeside Laboratory has provided educational opportunities to the state of Iowa - the Regent universities offer science-based courses that allow students to study nature first-hand. The Regent Enterprise recognizes that its educational offerings can address a variety of statewide needs, including lifelong learning, especially for place-bound individuals; economic development; and entrepreneurship.

In September 2006, the Board of Regents approved (a) a name change from the Lakeside Laboratory to the Iowa Lakeside Laboratory Regents Resource Center (ILLRRC) to reflect its expanded functions, (b) a Strategic Plan which defined the mission, vision, and values, as well as short- and long-term objectives for the Center, (c) an increase in annual Regent university allocations from \$553,000 to \$600,000 for a five-year period,¹ and (d) assigning administrative responsibility for the Center to the University of Iowa through the Associate Provost and Dean of Continuing Education.

The ILLRRC Strategic Plan provided a springboard to expand the opportunities available through the Center (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 can be used throughout the state to address unmet needs.

The Board also directed the Board of Regents Executive Director or designee and the Regent universities to conduct an in-depth evaluation during the fourth year (2010-2011) to determine both the continued viability of the Iowa Lakeside Laboratory Regents Resource Center and the ability to replicate the model throughout the state.

The ILLRRC continues to make progress by providing unique educational programs to university students, the public, public school students, and by collaborating with local associations and the Iowa Department of Natural Resources. During 2011-2012, the Center addressed its Strategic Plan's four key priorities through the activities identified on the following pages.

¹ The universities' total allocation dropped below \$600,000 during the last three years and in the proposed budget.

◇ Academic Programs.

- 📖 Seven university science classes and one credit writing class were offered in Summer 2011 to 73 students; the science courses met for four weeks and the writing class met for one week. The ILLRRC continues to provide a site for the Okoboji Entrepreneurial Institute, which enrolled 32 students during the Summer 2012 institute. The entrepreneurial institute met for one week but it required student work prior to and after the on-site workshop experience. (A1)
- 📖 The first ever Winter Ecology Workshop was provided in January 2012. It resulted in one semester hour of academic credit for students. (A3)
- 📖 In addition to summer and winter classes, a number of Iowa universities brought students to the Center for field trips ranging from two days to a week. (A3)
- 📖 The Center hosted a Writer in Residence from the University of Iowa who provided a public reading of works, taught a writing workshop, and assisted with programming in the public schools. (A3)
- 📖 During the Okoboji Winter Games, the Center partnered with ArtsLive to host the "People Project," an animal outlined on the ice and photographed from the air. (A3)
- 📖 The Center continues to offer day camps to school-aged children, providing instruction in water analysis, aquatic animals, and local flora and fauna. (A3)
- 📖 The Center regularly hosts day visits from public school children in the Sibley-Ocheyedan, Spencer, Spirit Lake, and Okoboji community school districts. Akron-Westfield students participated in a weekend overnight visit to the Center. (A3)
- 📖 Center staff partnered with other local organizations to provide a training seminar whose focus was on engaging young children with nature; 160 day care providers and preschool teachers participated. (A3)
- 📖 Internships were provided to high school students from Spirit Lake and Spencer community school districts. (A3)

◇ Community Outreach.

- 📖 Under the direction of the education coordinator, the Center offered weekly programs to the public during the summer. The following activities are typical of the weekly programs. (A5)
 - ⇒ Trees, Camouflage and Beach Bacteria: This Week at Lakeside Lab!
 - ⇒ "The Trees of Northwest Iowa," Lakeside Faculty Lecture Series presented by Peter van der Linden, author of *The Forest and Shade Trees of Iowa*.
 - ⇒ "Nature's View of Aesop's Fables: The Wolf in Sheep's Clothing: Mimicry and Camouflage".
 - ⇒ "What's Happening with Emerson Bay? In the past, the public beach at Emerson Bay has had high beach bacteria readings. Research is being done to find the cause.
 - ⇒ In 2012, the topic of the annual nature weekend was "Lakeside Lab to Present: 12,000 Years of Living Around the Lakes."

📖 Day camps were expanded from four to seven for school age children; cooperative programs with local public schools were continued. (A1, A5)

📖 The first diatom class for high school students was offered in Summer 2012. (A1, A5)

◇ Research.

📖 There was a cooperative research program between the Iowa Department of Natural Resources (IDNR), a faculty member from Indiana University School of Medicine, and a student. (B4, F2)

📖 An amphibian occupancy survey of 134 restored wetlands in Dickinson County was conducted during Summer 2012. The IDNR's ArcGIS polygons were incorporated into the study data (i.e., wetland restoration dates and surface area). Data analysis will be completed during Fall 2012. (B4)

◇ Financial Stability.

📖 The Regent universities continued their fiscal commitment to the ILLRRC. (G1)

📖 The Friends of Lakeside Lab continued to provide student scholarships. In addition, the Friends supported special projects, such as the Cooperative Lakes Area Monitoring Project (CLAMP). (C2, F1)

📖 The ILLRRC rented classrooms and sleeping rooms to outside groups. (C3)

📖 Resources are adequate for the current scope of activity. Many repairs have been completed in recent years to restore campus buildings on the National Historic Register. (C1, F2)

📖 Fiscal responsibility for the water analysis facility was transferred to the State Hygienic Laboratory. (E3)

◇ Organizational Effectiveness.

📖 The Center maintains limited on-site staff (Executive Director, Educational Coordinator, Facility Manager, and Part-Time Secretary). Additional staff members are employed to teach during the summer and winter sessions. Cooking and cleaning staff are employed for the summer session and when facilities are used. (D3, D4, D6)

📖 The Center receives additional support from the University of Iowa Division of Continuing Education for web design, business functions, registration, and MIS; the Center also receives support from the Offices of the Registrars at the three Regent universities. (D6)

📖 These combined efforts allow the Center to be maintained by a small, critical on-site staff while availing itself of the services at the three Regent universities. (D3)

📖 Web scheduling was increased to allow direct participant registration for day camps. (C3)

◇ Infrastructure Development.

- 📖 The Center's wireless network has been strengthened and is now available in all sleeping rooms, classrooms, and laboratories. The Center now has a 360° camera with microphones for virtual meetings. (E2)
- 📖 All recommended fire safety improvements have been completed. (E2)
- 📖 Sections of an aging sewer line were replaced; approximately 12 motel units have new plumbing, fixtures, and carpeting. (E2)
- 📖 The Center website is under revision. The revisions will allow easier navigation, more vivid presentation of current events, participation in social media, closer identification with the Friends of Lakeside Lab, the water analysis collaborative project between the Center and the University of Iowa Hygienic Lab, and combining the Lakeside Lab and the Iowa Lakeside Lab Regents Resource Center. (F1 , F2)
- 📖 The Center's walking trails continue to be expanded for access by the general public and researchers. (E2)

◇ Partnership Development.

- 📖 Many Center programs have been developed collaboratively with other entities:
 - 🌿 The Center's water testing lab partnered with the State Hygienic Lab. (F2, F3)
 - 🌿 In cooperation with the Okoboji Protective Association (OPA) and the Iowa Department of Natural Resources, interns housed at the Center checked for zebra mussels to prevent this invasive species from entering Iowa's great lakes. IDNR provided training and logistics for interns, OPA provided a financial contribution to the sponsors of the interns, and the Center provided residential services to the interns. (F2, F3)

◇ Financial and Human Resources.

- 📖 A strategic visioning committee has been considering ways to strengthen academic and research opportunities at the Center. The committee includes representation from the three Regent universities, Center staff, Friends of Iowa Lakeside Lab, Board Office staff, Indiana University School of Medicine, and SUI Division of Continuing Education staff. Preliminary discussion includes expanding the day camps for school age children, appointment of an academic/research director, and development of faculty research opportunities, environmental data archive, and enhanced laboratory facilities. (C3)
- 📖 The Center hired a part-time staff member during the peak summer session to help with promoting and monitoring the summer day camps. (D3)

To continue to address its Strategic Plan in 2012-2013, the Center prepared the budget provided on page 7 and identified the following objectives.

◇ Academic Programs and Community Outreach.

- 📖 Develop marketing and recruitment efforts to increase student enrollment by 15% each year for the next five years. (D1)

- 📖 Develop at least one new/expanded course offering each year for the next five years. (A5)
- ◇ Community Outreach.
 - 📖 Maintain the current level of community outreach activities and determine the appropriate level and mix of staffing. (D3)
- ◇ Research.
 - 📖 Fund one exploratory research project which will be cooperatively co-sponsored by the three Regent universities. (B5)
- ◇ Financial Stability.
 - 📖 Increase tuition and room and board revenue in relation to the enrollment goals. (C3)
 - 📖 Investigate and adjust charges for day camps. (C3)
 - 📖 Plan for a stable number of day camps based on student/parent interest and staffing needs. (A1)
- ◇ Organizational Effectiveness.
 - 📖 Expand MIS and web capability to allow direct participant access to registration for sleeping accommodations and classrooms. (D3)
 - 📖 Complete the website revisions. (E2)
- ◇ Infrastructure Development.
 - 📖 Equip Mann Hall for virtual classroom use. (E1, E3)
 - 📖 Ensure usability of virtual conferencing in Waitt Hall. (E3)
 - 📖 Renovate sewer lines. (E1)
 - 📖 Continue trail restoration. (E1)
- ◇ Partnership Development.
 - 📖 Continue partnership with the Okoboji Protective Association. (A5)
 - 📖 Continue partnership with the State Hygienic Laboratory. (A5)
 - 📖 Investigate partnerships for enrollment and course sharing with Iowa independent colleges and universities. (A5)
- ◇ Financial and Human Resources.
 - 📖 Complete the strategic plan. (G2)
 - 📖 Investigate the feasibility of hiring an academic/research director. (D3, G4)
 - 📖 Plan for the effective use of seasonal and part-time staff. (D3)

**CONSIDERATIONS RESULTING FROM THE FIVE-YEAR EVALUATION OF THE LAKESIDE
LABORATORY REGENTS RESOURCE CENTER CONDUCTED IN 2011-2012**

1. The Center continues to benefit from relationships with the Friends of Lakeside Lab. Center staff members attend Friends board meetings.
2. Center faculty and staff will plan and implement new and expanded courses for the academic summer session which are unique to the Lab or draw on historical strengths, such as aquatic ecology, diatoms or combinations of experiences at the Center and one of the University campuses.
3. Investigate the addition of an academic/research director to strengthen the linkage between the Center, Regent universities, and other higher education institutions.
4. Review the appropriateness of the Center for offering other academic coursework.
5. Consider the usefulness of the Center to help promote distance education programs offered by the Regent universities.

PROPOSED BUDGET²

IOWA LAKESIDE LAB REGENTS RESOURCE CENTER	FY 09 Actual	FY 10 Actual	FY 11 Actual	FY 12 Actual	FY 13 Proposed Budget
REVENUE					
Carry forward	\$449,080	\$407,074	\$217,794	\$153,439	\$71,557
Regent university allocation	\$598,967	\$565,793	\$557,231	\$548,338	\$562,046 ³
Room and Board	\$72,844	\$64,869	\$66,300	\$67,177	\$82,195
Center revenue	\$71,590	\$95,916	\$99,271	\$73,265	\$85,500
Friends Support Non-Credit Ed. Prog.	\$22,500		\$30,000	\$33,000	\$33,000
Course Fees		\$3,186	\$7,119	\$3,640	\$5,700
TOTAL REVENUE	\$1,214,981	\$1,136,838	\$977,715⁴	\$878,859	\$839,998
EXPENDITURES					
Salaries and benefits	\$440,422	\$408,620 ¹	\$388,851	\$403,483	\$413,570 ³
Travel and hospitality	\$42,037	\$39,901	\$33,455	\$41,078	\$42,900
Supplies and Other	\$55,904	\$70,305	\$60,879	\$45,025	\$46,500
Utilities	\$46,478	\$46,334	\$42,622	\$35,416	\$50,000
Maintenance and repairs	\$89,910	\$257,094 ⁵	\$132,810	\$166,667	\$132,000
Equipment	\$106,051	\$36,701	\$35,267	\$18,329	\$25,000
Marketing		\$3,656	\$389	\$1,963	\$5,000
Tuition Allocation to ISU/UNI/SUI		\$29,097 ⁶	\$121,496 ⁷	\$58,472	\$70,000
Debt Service	\$17,014	\$17,014	\$8,507		
Scholarship Expense				\$36,869	\$30,895
Operational planning	\$10,092	\$10,322			
TOTAL EXPENDITURES	\$807,907	\$919,044	\$824,276	\$807,302	\$815,865
NET BALANCE	\$407,074	\$217,794	\$153,439	\$71,557	\$24,133

² Majority decrease due to unfilled ISU coordinator and office manager retirement.

³ Includes 2.5% increase of approved salary increases.

⁴ FY 2011 – Received a gift from Lavonne Foote Estate in the amount of \$100,000 to improve the campus. This gift was non-operating and was not included in the report.

⁵ Includes improvements to main cottage, facilities manager's house and bathhouse, new roofs for stone labs, life-safety improvement, IT upgrades.

⁶ Tuition transfers to ISU and UNI for Summer 2008 and Summer 2009.

⁷ Includes tuition transfers for ISU and UNI for Summer 2010 and SUI tuition transfers covering Summer 2008 through 2010.

Iowa Lakeside Laboratory Background

- ◇ The Lakeside Laboratory campus, established in 1909, is a residential facility located on the shores of West Okoboji Lake. The campus, most of which is a nature preserve used as an outdoor classroom, includes more than 140 acres.
- ◇ From 1909 to 1936, the Laboratory 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. The agreement states that the Laboratory 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 Laboratory 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 Regents assumed responsibility for the Laboratory. 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.
- ◇ In December 2004, the Board of Regents approved a Business Plan for the Laboratory which focused on increasing the availability of educational offerings, including providing year-round activities.
- ◇ Between 1997 and 2006, the credit enrollment at the Laboratory ranged from a high of 185 students in 1997 to a low of 83 students in 2005 and 2006. The lack of substantial scholarship and grant funds has prevented students and faculty from participating more fully at the Laboratory.

Expanded Lakeside Laboratory Functions

The Lakeside Laboratory Regents Resource Center encompasses the following functions:

- ◇ *Scientific Field Research.* The purpose of this function is to continue the Lakeside Laboratory as a field station that supports the science programs, including education, research, and outreach, of the Regent institutions and the Lakeside Consortium. Classes offered to area elementary and secondary schools, as well as other postsecondary institutions, will be on a full-cost recovery basis.
- ◇ *Lifelong Learning.* The purpose of this function is to provide needed learning opportunities to the citizens of northwest Iowa. The Center executive director will work with the programmatic and distance education administrators at each of the Regent universities to determine the need for programs/courses in northwest Iowa. The universities will provide the instruction and faculty. Other postsecondary institutions seeking to offer distance education courses at the Center will work through the Center executive director to ensure that there is no conflict of interest and that a full-cost recovery process is applied. Cultural offerings that support the liberal arts mission of the Regent universities will be provided as appropriate on a full-cost recovery basis. Services that support the Regent universities' programs in social work, health, and similar areas will be provided through the Center on a full-cost recovery basis.

- ◇ *Entrepreneurship.* The purpose of this function is to expand the entrepreneurial educational opportunities for Regent university students. The Center executive director is responsible for working with the Regent universities to provide entrepreneurial workshops at the Center. All events will be on a full-cost recovery basis.
- ◇ *Economic Development.* The purpose of this function is to address the Board of Regents' role in economic development in partnership with the Iowa Department of Economic Development, the community college system, private colleges, local governments, and regional economic development organizations. This approach will 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 is to obtain community support for the Center that will result in endowment funds for the long-term operation of the Center, including 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 is \$600,000.

Strategic Plan Three-Year Objectives (2007 to 2010)

A. Academic programs

1. Diversify the course offerings at the Center.
2. Seek scholarships for students to attend summer programs.
3. Increase the number of year-round classes that can be scheduled at the Center.
4. Create on-line programs at the educational institutions that feature attendance at the Center in the fall and spring months.
5. Establish outreach programs aimed at K-12 students and adults interested in the environment.

B. Research activities

1. Distribute to the faculty of the Regent institutions and the consortium the list of research conducted and research opportunities in the region.
2. Develop at each institution a Center "research champion" committee to discuss and create new research activities.
3. Create a research advisory board, composed of current research representatives of the "research champion" committee, to advise the executive director and staff regarding research activities.
4. Provide each Center researcher a supportive environment for scholarship.
5. Develop a grant writing program for underwriting research activities at the Center.

C. Financial stability

1. Create a realistic yearly budget with the goal of breaking even by year three (2009-10) (assuming a specific level of fixed support from the institutions).
2. Seek grants that will enhance the ability of students and faculty to conduct their research at the Center.
3. Create an outreach program that will support the overall activities of the Center.
4. Negotiate with the institutions the indirect costs charged on research grants and contracts.

D. Organizational effectiveness

1. Market the Center's academic and research strengths to the appropriate faculty at the Regent and consortium institutions.
2. Increase the membership in the Center consortium by at least 10 educational institutions within three years (2009-10).
3. Develop a staffing plan that will meet the academic, research, and financial stability goals articulated above.
4. Prioritize the hiring of new staff and the replacement of those who will be retiring within the next three years.
5. Establish a program aimed at motivating and increasing the morale of Center employees.
6. Create an organizational structure that simplifies the Center executive director's reporting relationships with Regent institutions and permits more rapid decision-making.
7. Develop and maintain a database of organizations, students, and individuals who have used Lakeside Laboratory over the past five years.

E. Infrastructure development

1. Prioritize the maintenance needs of the site.
2. Assess the facilities and equipment needs of educators and researchers and develop a plan to meet those needs.
3. Develop a grounds management plan, including assessing the current land use and prioritizing actions to achieve desired use.

F. Partnership development

1. Work with Friends of Lakeside Lab to define their role in supporting the Center's programs.
2. Strengthen partnerships with environmental research and monitoring groups in the region (Department of Natural Resources, U.S. Geological Survey, U.S. Fish and Wildlife Service, etc).
3. Strengthen partnerships with non-profit environmental and educational groups in the region (Iowa Natural Heritage Association, water quality groups, etc.).

- G. Financial, human, and physical resources
1. Increase and cap the institutional allocations at \$600,000 per year for the next five years.
 2. Prepare a business plan for the five-year period.
 3. Employ an executive director for the Iowa Lakeside Laboratory Regents Resource Center and the Okoboji Economic Development Institute. A portion of the salary will be paid by the Iowa Economic Development Department. The role of the executive director will include fund raising, outreach activities, and marketing.
 4. Employ an academic manager to be in charge of the Iowa Lakeside Laboratory Regents Resource Center academic and research activities.
 5. Outsource most of the physical plant maintenance.

Strategic Plan One-Year Goals

- A. 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 Iowa Lakeside Laboratory Regents Resource Center activities against these goals will be the basis for the five-year evaluation of the Center's success.
- C. The yearly goals will be written in terms of the outcomes that are to be achieved at the Iowa Lakeside Laboratory Regents Resource Center.