

Contact: Diana Gonzalez

LAKESIDE LABORATORY REGENTS RESOURCE CENTER BUDGET

Action Requested: Consider approval of the 2007-08 budget for the Lakeside Laboratory Regents Resource Center.

Executive Summary: For almost 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 number of statewide needs, including lifelong learning, especially for place-bound individuals; economic development; and entrepreneurship.

In September 2007, the Board of Regents approved (a) a name change from the Lakeside Laboratory to the Lakeside Laboratory Regents Resource Center to reflect its expanded functions, (b) a Strategic Plan for the Center which defines the mission, vision, and values, as well as short- and long-term objectives, (c) an increase in Regent university allocations from \$553,000 to \$600,000 for a five-year period, and (d) assigning administrative responsibility for the Center to the University of Iowa through the Associate Provost and Dean of Continuing Education.

The 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.

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 to determine both the continued viability of the Iowa Lakeside Laboratory Regents Resource Center and the ability to replicate the model throughout the state.

Proposed Budget¹

LAKESIDE LAB REGENTS RESOURCE CENTER	FY 05 Actual	FY 06 Actual	FY 07 Budget	FY 07 Actual	FY 08 Budget
REVENUE (Does not include tuition)					
Carry forward ²	\$105,233	\$ 98,651	\$142,074	\$141,974	\$ 345,532 ³
Regent university allocation	\$420,406	\$557,138	\$600,000	\$599,637	\$ 600,000
Room and board	\$ 81,869	\$ 87,269	\$ 80,000	\$ 77,049	\$ 80,000
Center revenue	\$ 29,777	\$ 18,020 ⁴	\$ 20,000	\$ 42,328	\$ 30,000
TOTAL REVENUE	\$637,285	\$761,078	\$842,074	\$860,988	\$1,055,532
EXPENDITURES					
Salaries and benefits	\$278,650	\$339,536	\$445,472 ⁵	\$301,920 ⁶	\$ 470,440
Travel and hospitality	\$ 42,684	\$ 55,269	\$ 50,000	\$ 23,452	\$ 43,000
Supplies, utilities, maintenance, & repairs	\$128,701	\$169,168	\$ 184,000	\$ 173,070	\$ 193,750
Equipment	\$ 29,194	\$ 32,855	\$ 40,000	\$ 0	\$ 55,000
Marketing	\$ 0	\$ 5,162	\$ 15,000	\$ 0	\$ 10,000
Debt service	\$ 17,014	\$ 17,014	\$ 17,014	\$ 17,014	\$ 17,014
Operational planning	\$ 42,391	\$ 0	\$ 0	\$ 0	
TOTAL EXPENDITURES	\$538,634	\$619,004	\$ 751,486	\$ 515,456	\$ 789,204
NET BALANCE¹	\$ 98,651	\$142,074	\$ 90,588	\$345,532⁷	\$266,328

¹ Includes both general and restricted funds.

² These are restricted funds.

³ While the carry forward has grown, salaries will diminish this amount as staff positions are filled. Furthermore, the physical site, some of which is on the National Historic Register, needs repair and renovation. The Center will celebrate its 100th year anniversary in 2009; some of the carry forward funds will be used for special activities to celebrate the anniversary.

⁴ Center revenue was lower than projected because the outreach director was not hired and programs were not implemented.

⁵ Includes budget for full-time executive director, ½ time academic director, and \$15,000 for information technologist during the summer term.

⁶ The academic director position was open after September 30, 2007; the executive director and summer information technologist positions were not filled in FY 2007.

⁷ Balance is due to prior carry forward and unfilled positions in FY 2007.

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 includes more than 140 acres, most of which is a nature preserve used as an outdoor classroom.
- ◇ 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.
- ◇ During the past ten years, the credit enrollment at the Laboratory has 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 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
 - ☑ Diversify the course offerings at the Center.
 - ☑ Seek scholarships for students to attend summer programs.
 - ☑ Increase the number of year-round classes that can be scheduled at the Center.
 - ☑ Create on-line programs at the educational institutions that feature attendance at the Center in the fall and spring months.
 - ☑ Establish outreach programs aimed at K-12 students and adults interested in the environment.
- B. Research activities
 - ☑ Distribute to the faculties of the Regent institutions and the consortium the list of research conducted and research opportunities in the region.
 - ☑ Develop at each institution a "Center research champion committee" to discuss and create new research activities.
 - ☑ 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.
 - ☑ Provide each Center researcher a supportive environment for scholarship.
 - ☑ Develop a grant writing program for the underwriting of research activities at the Center.
- C. Financial stability
 - ☑ Create a realistic yearly budget with the goal of breaking even by year three (assuming a specific level of fixed support from the institutions).
 - ☑ Seek grants that will enhance the ability of students and faculty to conduct their research at the Center.
 - ☑ Create a program of outreach that will support the overall activities of the Center.
 - ☑ Negotiate with the institutions the indirect costs charged on research grants and contracts.

- D. Organizational effectiveness
- Market the Center's academic and research strengths to the appropriate faculty at the Regent and consortium institutions.
 - Increase the membership in the Center consortium by at least ten educational institutions within three years.
 - Develop a staffing plan that will meet the academic, research, and financial stability goals articulated above.
 - Prioritize the hiring of new staff and the replacement of those who will be retiring within the next three years.
 - Establish a program aimed at motivating and increasing the morale of the Center employees.
 - Create an organizational structure that simplifies the Center director's reporting relationships with the BOR institutions and permits more rapid decision-making.
 - Develop and maintain a database of organizations, students and individuals who have used Lakeside Laboratory over the past five years.
- E. Infrastructure development
- Prioritize the maintenance needs of the site.
 - Assess the facilities and equipment needs of educators and researchers and to develop a plan to meet those needs.
 - Develop a grounds management plan, including assessing the current land use and prioritizing actions to achieve desired use.
- F. Partnership development
- Work with Friends of Lakeside Lab to define their role in supporting the Center's programs.
 - 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).
 - 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
- Increase and cap the institutional allocations at \$600,000 per year for the next five years.
 - Prepare a business plan for the five-year period.
 - Employ an executive director for the Lakeside Laboratory Regents Resource Center and the Okoboji Economic Development Institute. A portion of the salary would be paid by the Iowa Economic Development Department. The role of the executive director would include fund raising, outreach activities and marketing.
 - Employ an academic manager to be in charge of the Lakeside Laboratory Regents Resource Center academic and research activities.
 - 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 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 Lakeside Laboratory Regents Resource Center.