

Contact: Diana Gonzalez

IOWA LAKESIDE LABORATORY REGENTS RESOURCE CENTER
ANNUAL REPORT AND BUDGET REQUEST

Actions Requested: Receive the annual report of the Iowa Lakeside Laboratory Regents Resource Center (ILLRRC) and consider approval of the 2008-09 budget for the Center.

Executive Summary: The ILLRRC annual report describes the activities undertaken in 2007-08 to address the Center's Strategic Plan. The proposed budget describes the planned objectives for 2008-09. The 2008-09 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 almost 100 years, Lakeside Laboratory has provided educational opportunities to the state of Iowa. At the Lakeside Laboratory, 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 Iowa Lakeside Laboratory Regents Resource Center to reflect its expanded functions, (b) a Strategic Plan which defines 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, 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 (2010-11) to determine both the continued viability of the Iowa Lakeside Laboratory Regents Resource Center and the ability to replicate the model throughout the state.

During 2007-08, the Center addressed its Strategic Plan's four key priorities through the following activities.

◆ **Academic Programs and Community Outreach.**

- 📖 Offered 17 credit courses in science, entrepreneurship, writing, and teacher education which served 206 students.
- 📖 Developed two new courses; an endowed scholarship was established by an alumnus.
- 📖 Provided scholarships in the amount of \$13,560 to 26 students by the Friends of Lakeside Lab.

- 📖 ILLRRC hosted classes from four private colleges involving 60 students.
 - 📖 Provided outdoor education programs for 108 children from three local school districts; hosted a school district which provided its own science programming for 79 students.
 - 📖 Hosted a one-day conference for 160 day-care providers and preschool teachers to instruct them in how to engage young children with nature.
 - 📖 Hosted renowned primatologist and author Jane Goodall who met with 100 high school students.
 - 📖 Provided summer day camps for 69 children, in conjunction with the University of Iowa Recreational Services.
 - 📖 Provided Master Conservationist training for nine adults.
 - 📖 Provided 14 family programs on environmental subjects, serving 490 visitors.
 - 📖 Provided six faculty/staff lectures attended by 180 students and visitors.
 - 📖 Hosted three Writers in Residence who provided in-school programs for 110 children; taught two writing workshops; and provided public readings of their work.
 - 📖 Hosted the People Project during the Okoboji Winter Games; 140 adults and children formed a giant turtle on the ice in front of ILLRRC and were photographed from the air.
 - 📖 Provided programs for local Rotary, Kiwanis, and Audubon groups.
- ◇ Research.
- 📖 Hosted 11 visiting graduate student researchers.
- ◇ Financial Stability.
- 📖 Developed a budget for 2008-09 that continues academic programs and community outreach, provides necessary repairs to buildings, accelerates restoration of natural areas on campus, improves ties with alumni, and provides for celebration of the ILLRRC centennial.
 - 📖 Re-opened the Center's water chemistry lab with assistance from the University of Iowa Hygienic Lab and Iowa Department of Natural Resources to analyze environmental samples from northwest Iowa. The business plan for this new endeavor indicates that invested funds will be recovered and the lab will be self-sustaining after 4-5 years. The Dickinson County Board of Supervisors committed a one-time contribution of \$100,000 to help with start-up costs; it is expected to be received in 2008-09.
- ◇ Organizational Effectiveness.
- 📖 Hired a new facilities manager.
 - 📖 Assumed responsibility for all community outreach programs previously provided by the Friends of Lakeside Lab. The former executive director of the Friends was hired by ILLRRC to focus on education and outreach. This will result in expanded programming at ILLRRC, improved organizational efficiency, and reduced administrative costs. The Friends will provide \$30,000 for the new position beginning in 2008-09.

- ◇ Infrastructure Development.
 - 📖 Made progress in restoring natural areas and a neglected native-plant garden on campus.
 - 📖 Developed relationships with a local historical preservation expert and the facilities manager at Iowa Lakes Community College who helped the ILLRRC staff identify priorities for building repairs and improvements.
 - 📖 Granted an easement to the Town of Wahpeton for an extension of the Lakes-area recreational trail, constructed in Fall 2007. This has increased the visibility of the Center in the community and attracted more visitors.

- ◇ Partnership Development. ILLRRC hosted meetings for several community and environmental groups, including the Okoboji Protective Association, Northwest Iowa Soil and Water Conservation Society, Ducks Unlimited, Iowa Department of Natural Resources (DNR), Iowa Environmental Council, Iowa Lakes Community College, University of Iowa Hygienic Lab, and ISU Extension. ILLRRC also forged partnerships with the following organizations:
 - 📖 Ten local agencies to organize and host a conference for early learning professionals. ILLRRC subsequently received an award from Upper Des Moines Opportunity, one of the project partners.
 - 📖 Iowa Lakes Coordinator Development Corporation, Iowa Lakes Community College, and the ISU Extension Service on economic development, including a possible new business and entrepreneurial center in Northwest Iowa.
 - 📖 University of Iowa Hygienic Lab and DNR to re-open the ILLRRC water analysis lab.
 - 📖 University of Iowa Recreational Services to provide summer camps and the SUI Writers Workshop on the Writers in Residence Program.
 - 📖 ArtsLive to offer the People Project.
 - 📖 DNR to develop a fire management plan for the ILLRRC prairie restorations and a deer management plan. DNR and ILLRRC staff conducted a successful prescribed burn of the prairies.
 - 📖 ISU Extension and the Dickinson County Nature Center to discuss the Master Conservationist Program.
 - 📖 YMCA and other organizations in the new Active Okoboji recreational coalition.
 - 📖 Iowa Lakes Community College to discuss ILLRRC facilities management.

- ◇ Financial and Human Resources. In 2007, ILLRRC hired the first full-time executive director, a new facilities manager, and an educational coordinator. ILLRRC also established relationships with the Regent universities foundations for future collaborative fund-raising.

To continue to address its Strategic Plan in 2008-09, the Center prepared the budget provided on page 6 and identified the following objectives.

◇ Academic Programs and Community Outreach.

- 📖 Increase enrollment in credit courses by developing a more flexible academic schedule, seeking more scholarships, and marketing courses on-line and on-campus more creatively.
- 📖 Continue K-12, family, and adult programs and the Writers in Residence Program.
- 📖 Continue and expand the conference for early childhood teachers and providers.
- 📖 Host a science/career day for talented and gifted students from local schools.
- 📖 Host the nationally known David Rogers' "Big Bugs" sculpture exhibit from July-September 2009 as part of the centennial celebration of Lakeside Laboratory.

◇ Research.

- 📖 Visit each Regent university to share what is available at ILLRRC and to explore research opportunities with faculty.

◇ Financial Stability.

- 📖 Analyze charges for ILLRRC services and adjust as needed to ensure that services are self-supporting.
- 📖 Explore opportunities for research grants with Regent university faculty.
- 📖 Reduce net balance by investing in building repairs and upgrades.

◇ Organizational Effectiveness. The Center intends to hire additional employees to advance programmatic goals, reduce travel costs, and allow the Executive Director to focus on fund-raising and key initiatives. The following new employees account for the proposed increase in salaries and benefits in the 2008-09 budget:

- 📖 Part-time campus coordinator at Iowa State University to assist with marketing and student recruitment.
- 📖 Part-time, temporary employee to develop centennial activities and events.

◇ Infrastructure Development. Maintenance and repairs are expected to be funded by carryover funds from the prior year.

- 📖 Develop a campus utilization master plan in consultation with faculty, the local community, and university provosts. This will identify needs and set priorities for buildings, pedestrian and vehicle circulation, parking, grounds, and natural areas.
- 📖 Repair Main Cottage, the oldest building on campus.
- 📖 Replace roofs on two of the historic stone laboratories.
- 📖 Install fiber-optic cable to increase bandwidth and improve internet service.
- 📖 Make safety improvements as recommended by the State Fire Marshall.
- 📖 Continue to restore natural areas and the native plant garden.

◇ Partnership Development.

- 📖 Continue with current partners and expand partnerships as opportunities arise.
- 📖 Work with the Friends of Lakeside Lab to define the relationship between the Friends and ILLRRC.

◇ Financial and Human Resources.

- 📖 Work with the Regent universities foundations and registrars to develop a database of ILLRRC alumni.
- 📖 Host the centennial celebration, including public events and an alumni reunion.

Proposed Budget¹

IOWA LAKESIDE LAB REGENTS RESOURCE CENTER	FY 05 Actual	FY 06 Actual	FY 07 Actual	FY 08 Budget	FY 08 Actual (Unaudited)	FY 09 Budget
REVENUE (Does not include tuition)						
Carry forward ²	\$105,233	\$ 98,651	\$142,074	\$ 345,631 ³	\$ 345,631	\$ 449,080
Regent university allocation	\$420,406	\$557,138	\$599,637	\$ 600,000	\$ 600,000	\$ 600,000
Room and board	\$ 81,869	\$ 87,269	\$ 77,049	\$ 80,000	\$ 83,048	\$ 70,000
Center revenue	\$ 29,777	\$ 18,020 ⁴	\$ 42,328	\$ 30,000	\$ 33,269	\$ 71,796 ⁵
TOTAL REVENUE	\$637,285	\$761,078	\$861,088	\$1,055,631	\$ 1,061,948	\$1,190,876
EXPENDITURES						
Salaries and benefits	\$278,650	\$339,536	\$301,920 ⁶	\$ 470,440	\$ 345,502	\$ 506,582 ⁷
Travel and hospitality	\$ 42,684	\$ 55,269	\$ 23,452	\$ 43,000	\$ 38,657	\$ 43,000
Supplies	\$128,701 ⁸	\$ 61,295	\$ 22,353	\$ 55,750	\$ 41,764	\$ 35,986
Utilities		\$ 48,235	\$ 62,394	\$ 55,000	\$ 55,720	\$ 55,000
Maintenance and repairs		\$ 59,638	\$ 88,324	\$ 83,000	\$ 93,907	\$ 68,000
Equipment	\$ 29,194	\$ 32,855	\$ 0	\$ 55,000	\$ 15,304	\$ 55,000
Marketing	\$ 0	\$ 5,162	\$ 0	\$ 10,000	\$ 5,000	\$ 20,000
Debt service	\$ 17,014	\$ 17,014	\$ 17,014	\$ 17,014	\$ 17,014	\$ 17,014
Operational planning	\$ 42,391	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
TOTAL EXPENDITURES	\$538,634	\$619,004	\$ 515,457	\$ 789,204	\$ 612,868	\$ 800,582
NET BALANCE¹	\$ 98,651	\$142,074	\$345,631⁹	\$ 266,427	\$ 449,080	\$ 390,294

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. For its 100th year anniversary in 2009; some of the carry forward funds will be used for special activities.

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

⁵ The increase is due to the salary contribution from the Friends of Lakeside Lab and increased revenue from facility rental.

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 Increase in salaries due to full year of director plus new position with benefits.

⁸ This amount includes supplies, utilities, and maintenance and repairs.

⁹ 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, 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.
- ◇ 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 (2009-10) (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 (2009-10).
 - 📖 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 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 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.
- 📖 Employ an academic manager to be in charge of the Iowa 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 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.