

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 2009-10 budget for the Center.

**Executive Summary:** The ILLRRC annual report describes the activities undertaken in 2008-09 to address the Center's Strategic Plan. The proposed budget describes the planned objectives for 2009-10. The 2009-10 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 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 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 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,<sup>1</sup> 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 2008-09, the Center addressed its Strategic Plan's four key priorities through the following activities.

◆ Academic Programs and Community Outreach.

- 📖 Provided credit courses that served 95 university students in Summer 2009. Participation in science courses increased in 2009.
- 📖 Offered a new scholarship for graduate students in aquatic ecology.

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<sup>1</sup> In light of other budgetary adjustments, ISU and SUI reduced their contributions to the Center by \$38,690 and \$20,000 respectively.

- 📖 Hosted classes from four private colleges and universities – Augustana College (IL); Creighton University (NE); Dordt College (IA); and Drake University (IA).
- 📖 Opened a water analysis lab to provide environmental testing services for state and local agencies and the public.
- 📖 Assumed management of the Cooperative Lakes Area Monitoring Project from the Friends of Lakeside Lab.
- 📖 Provided non-credit summer programs that served more than 400 children and adults.
- 📖 Helped organize and host an early-learning conference that served 200 teachers and day-care providers.
- 📖 Provided a science/career day for 80 Talented and Gifted middle school students.
- 📖 Hosted 44 students from Akron-Westfield Community Schools during two science enrichment weekends.
- 📖 Helped organize and host a participatory art experience for 125 people during the Okoboji Winter Games.
- 📖 Planned centennial events for July – October 2009 for alumni and the community.

◇ Research.

- 📖 Hosted the following researchers or research teams:
  - 👥 Seven from Iowa State University, investigating lake currents, ecological benchmarks for lake restoration, assessment of lakes for renovation, pre-settlement conditions in lakes, prairie birds, distribution of prairie plants, and fungi on prairie grasses.
  - 👥 One from the University of Iowa, researching floral structure and function.
  - 👥 One from Indiana University, studying mycorrhizal fungi in prairies.
  - 👥 One each from Wartburg College, University of Texas, University of Arkansas, and University of Belgrade (Serbia), studying diatoms.
  - 👥 One independent researcher associated with the University of California – Davis, investigating pre-settlement forests.

◇ Financial Stability.

- 📖 Negotiated a memorandum of understanding with the Friends of Lakeside Lab to provide long-term support for center staff. The level of support is expected to increase as the Friends endowment grows.
- 📖 Prepared and submitted a grant proposal to purchase research-grade microscopes, which will allow microbiology teaching and research to continue year-round.
- 📖 Obtained local grants and contributions for a 2009 centennial celebration, to draw visitors and develop community support for the Center.
- 📖 Obtained a water analysis lab and developed a business plan for the Lab to produce a net income after the initial investment is paid.

◇ Organizational Effectiveness.

- 📖 Increased marketing to students through print and electronic media.
- 📖 Developed relationships between the Center and the University of Iowa Continuing Education staff to improve the Center's technology infrastructure and facilitate student recruitment and registration.
- 📖 Developed a working relationship with the Friends of Lakeside Lab Board of Directors.
- 📖 Managed successfully the transition between facilities managers following the retirement of a long-time employee.
- 📖 Managed successfully the migration of the Friends' Executive Director to a Center position, which has strengthened the Center's reporting relationships and increased outreach.

◇ Infrastructure Development.

- 📖 Upgraded the telecommunications system to fiber optic cable to improve the speed and capacity of Center communications.
- 📖 Replaced roofs on three historic buildings.
- 📖 Began restoring a native plant garden and the Center's natural areas.
- 📖 Began developing a facilities master plan that will include land use, visitor reception, parking, and circulation.

◇ Partnership Development.

- 📖 Developed a memorandum of understanding with the Friends of Lakeside Lab to support staffing at the Center.
- 📖 Collaborated with the University of Iowa Hygienic Lab to open a water analysis lab to serve the environmental testing needs of northwest Iowa.
- 📖 Partnered with the Nature Connectors, a consortium of 10 area agencies, to hold an early-learning conference.
- 📖 Partnered with ArtsLive to hold the second annual People's Art Project during the Okoboji Winter Games.
- 📖 Participated with other local agencies in Active Okoboji and Environmental Okoboji (umbrella organizations promoting leisure-time activities and environmental education, respectively).
- 📖 Worked with the Dickinson County Conservation Board on Life Under the Ice and other programs.
- 📖 Worked with the Iowa Department of Natural Resources and Town of Wahpeton to implement a deer control program.
- 📖 Partnered with the University of Iowa Recreational Services to provide summer day camps for children.

◇ Financial and Human Resources.

- 📖 Hired an educational coordinator to develop outreach programs.
- 📖 Met the Center's seasonal staffing needs at minimal expense through a contract with the Student Conservation Association.
- 📖 Arranged to provide daily visitor services at minimal expense during the three-month centennial celebration through the use of part-time staff and a volunteer docent program.

To continue to address its Strategic Plan in 2009-10, the Center prepared the budget provided on page 6 and identified the following objectives.

◇ Academic Programs and Community Outreach.

- 📖 Develop the summer course schedule two years in advance to assist faculty and students in scheduling.
- 📖 Work with Iowa State University and the University of Iowa Foundations to access unused endowment funds for scholarships.
- 📖 Improve student awareness of Center courses and scholarships.
- 📖 Host the North American Diatom Symposium in September 2009.
- 📖 Develop a service-learning program for University of Iowa students during spring break.
- 📖 Explore the potential for fall semester courses at the Center.
- 📖 Host the annual meeting of the Iowa Association of Community College Biology Teachers in October 2009.
- 📖 Serve 10,000 visitors during the July – October 2009 centennial celebration, featuring the David Rogers Big Bugs sculpture exhibit.
- 📖 Provide a continuing education weekend for adults in September 2009.
- 📖 Continue current community outreach programs.

◇ Research.

- 📖 Raise awareness of research opportunities at the Center through marketing to Regent university and private college faculty.
- 📖 Provide exemplary service to scholars using the Center.

◇ Financial Stability.

- 📖 Initiate discussion with the Friends of Lakeside Lab on developing a planned giving program.
- 📖 Obtain the match for a \$70,000 challenge grant from the Roy J. Carver Charitable Trust for the purchase of microscopes.

◇ Organizational Effectiveness.

- 📖 Hire a new office manager when the current manager retires and provide a smooth transition between the two.
- 📖 Develop a data base of alumni and lab users and begin regular communication with them.

◇ Infrastructure Development.

- 📖 Complete the facilities master plan.
- 📖 Replace roofs on two historic laboratory buildings.
- 📖 Complete restoration of the native plant garden and plan interpretation for the garden.
- 📖 Continue restoration of natural areas on campus.

◇ Partnership Development.

- 📖 Develop a science curriculum with Spencer Community Schools for K-12 education at the Center.
- 📖 Partner with the University of Iowa Museum of Natural History to provide adult continuing education weekend opportunities.
- 📖 Continue partnerships with ArtsLive, Nature Connectors, Active Okoboji, and other community groups.

◇ Financial and Human Resources.

- 📖 Adjust the budget to meet reduced allocations from the Regent universities during the current economic downturn.

Proposed Budget<sup>1</sup>

IOWA LAKESIDE LABS REGENTS RESOURCE CENTER	FY05 Actual	FY06 Actual	FY07 Actual	FY08 Actual	FY 09 Budget	FY09 Actual	FY 10 Budget
<b>REVENUE</b> (Does not include tuition)							
Carry forward	\$105,233	\$98,651	\$142,074	\$345,631	\$449,080	\$449,080	\$407,074
Regent university allocation	\$420,406	\$557,138	\$599,637	\$600,000	\$600,000	\$598,967	\$541,310 <sup>7</sup>
Room and Board	\$81,869	\$87,269	\$77,049	\$83,048	\$70,000	\$72,844	\$70,000
Center revenue	\$29,777	\$18,020	\$42,328	\$33,269	\$71,796 <sup>2</sup>	\$94,090 <sup>3</sup>	\$94,000
<b>TOTAL REVENUE</b>	<b>\$637,285</b>	<b>\$761,078</b>	<b>\$861,088</b>	<b>\$1,061,948</b>	<b>\$1,190,876</b>	<b>\$1,214,981</b>	<b>\$1,112,384</b>
<b>EXPENDITURES</b>							
Salaries and benefits	\$278,650	\$339,536	\$301,920	\$345,502	\$506,582	\$440,422 <sup>4</sup>	\$478,218
Travel and hospitality	\$42,684	\$55,269	\$23,452	\$38,657	\$43,000	\$42,037	\$41,000
Supplies and Other	\$128,701	\$61,295	\$22,353	\$41,764	\$35,986	\$55,904 <sup>5</sup>	\$53,985
Utilities		\$48,235	\$62,394	\$55,720	\$55,000	\$46,478	\$50,000
Maintenance and repairs		\$59,638	\$88,324	\$93,907	\$68,000	\$89,910	\$134,500 <sup>8</sup>
Equipment	\$29,194	\$32,855	\$0	\$15,304	\$55,000	\$106,051 <sup>6</sup>	\$55,000
Marketing	\$0	\$5,162	\$0	\$5,000	\$20,000	\$0	\$15,000
Debt Service	\$17,014	\$17,014	\$17,014	\$17,014	\$17,014	\$17,014	\$17,014
Operational planning	\$42,391	\$0	\$0	\$0	\$0	\$10,092	\$10,000
<b>TOTAL EXPENDITURES</b>	<b>\$538,634</b>	<b>\$619,004</b>	<b>\$515,457</b>	<b>\$612,868</b>	<b>\$800,582</b>	<b>\$807,907</b>	<b>\$854,717</b>
<b>NET BALANCE<sup>1</sup></b>	<b>\$98,651</b>	<b>\$142,074</b>	<b>\$345,631</b>	<b>\$449,080</b>	<b>\$390,294</b>	<b>\$407,074</b>	<b>\$257,667</b>

<sup>1</sup> Includes both general and restricted funds.

<sup>2</sup> The increase is due to the salary contribution for the Friends of Lakeside Lab and increased revenue from facility rental.

<sup>3</sup> Includes Grant for Ed Coordinator for \$22,500.

<sup>4</sup> ISU Course Coordinator \$25,000 that was not filled. Faculty Instructors estimated budget was \$93,000 but actual costs totaled \$63,000.

<sup>5</sup> Data charges have increased since telecommunications were upgraded.

<sup>6</sup> Majority of the increase due to the purchase of a new tractor for \$28,000 and for conduit work related to internet and phone connection across the campus \$35,500.

<sup>7</sup> ISU reduced contribution by \$38,690, SUI reduced contribution by \$20,000.

<sup>8</sup> Includes improvements to Main Cottage, new roofs for stone labs, life-safety improvements, improvements to Facilities Manager's house and historic outhouse.

### 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 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**

- 📖 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 faculty 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" committee, 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 underwriting 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 an outreach program 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 Center employees.
- 📖 Create an organizational structure that simplifies the Center executive director's reporting relationships with Regent 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.