

Contact: Diana Gonzalez

**IOWA LAKESIDE LABORATORY REGENTS RESOURCE CENTER
2010-2011 ANNUAL REPORT AND BUDGET REQUEST FOR 2011-2012**

Actions Requested: (1) Receive the 2010-2011 annual report of the Iowa Lakeside Laboratory Regents Resource Center (ILLRRC) and (2) consider approval of the 2011-2012 budget for the Center.

Executive Summary: The ILLRRC annual report describes the activities undertaken in 2010-2011 to address the Center's Strategic Plan. The proposed budget describes the planned objectives for 2011-2012. The 2011-2012 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. 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 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.

During 2010-2011, the Center addressed its Strategic Plan's four key priorities through the activities identified below and on pages 2-3.

◆ **Academic Programs.**

- 📖 The Center continued to offer a unique summer experience to university students through its hands-on, full-immersion courses. The total enrollment for summer credit courses in 2011 was 104, which represented an increase of 20% from the prior year. The offerings included courses in science, writing, and entrepreneurial studies. (A1)

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

- 📖 Scholarship support from the Friends of Lakeside Lab increased from \$12,240 in 2010 to \$15,895 in 2011 (+29.9%). (A2)
- 📖 The Center provided new financial aid to undergraduate students, using an ILLRRC scholarship fund at the University of Iowa Foundation that was previously restricted to graduate students. (A2)
- 📖 Private colleges, including Dordt College, Creighton University, and Augustana College, continued to use the Center's facilities for weekend field trips. (A3, A5)
- ◇ Community Outreach.
 - 📖 Community outreach continues to be a strong growth area for the Center. The Center's summer day camps for young children were filled to capacity in 2011. The curriculum now incorporates project-based learning and student-led inquiry. (A5)
 - 📖 As a result of new partnerships (identified below), there was an increase of visits by K-12 groups during the academic year. (A5)
 - 📖 Grants from Humanities Iowa and the Friends of Lakeside Lab allowed the Center to expand its summer lecture series to include two special presentations, which included a showing of the documentary film *Lost Nation: The loway* by its producers that drew a standing room only audience of more than 100 guests. (B5)
 - 📖 A participatory event during the Okoboji Winter Games continues to be popular with approximately 200 participants in 2011. (A5)
- ◇ Research.
 - 📖 Attracting researchers to the Center is challenging because of its distance from the Regent universities. However, a number of graduate students and retired faculty continue to use the facilities during the summer. (B4)
 - 📖 In November 2010, Center personnel met with staff from the Iowa Department of Natural Resources and the Iowa Institute for Hydraulic Research (Hydroscience and Engineering) from the University of Iowa to explore possible research projects. As a result of that meeting, a proposal was developed to conduct a hydrodynamic study of West Lake Okoboji although it has not yet been funded. (B4)
 - 📖 The Center is also working with Professor Lee Burras at Iowa State University to increase the use of the Center by ISU researchers. (B2)
- ◇ Financial Stability.
 - 📖 The Friends of Lakeside Lab completed their \$2 million endowment campaign. Therefore, additional revenue is now available to support Center programs. (C2, F1)
 - 📖 The Friends increased their scholarship awards in 2011 (as described above); the Friends support Center staffing with an annual \$30,000 contribution, and are a major customer of the Center's water testing laboratory through their sponsorship of the Cooperative Lakes Area Monitoring Project. (C2, F1)
 - 📖 Demand for services continues to increase at the water testing lab since its renovation and re-opening in 2008. (C1, F2)

◇ Organizational Effectiveness.

- 📖 A part-time clerk was hired in April 2011 to handle clerical duties that were being shared by the Executive Director and the Facilities Manager which has given them more time for academic and management responsibilities. (D4)
- 📖 Center staff continued to work with the Continuing Education staff at the University of Iowa to implement the recommendations of a December 2009 Lean planning process. As part of that process, a new on-line registration program was developed for the summer day camps. (D6)

◇ Infrastructure Development.

- 📖 Telecommunications were upgraded in 2011 which resulted in providing more bandwidth at a lower cost. (E2)
- 📖 Significant progress was made in completing fire safety improvements required by the University of Iowa fire safety officer. (E2)
- 📖 Roofs and siding were replaced on several student cabins; the steps on a much used trail were replaced; and progress was made in fighting invasive species in the natural areas. (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)
 - 🌿 Three pre-school day camps, a "Go Fish" 4-H Camp, were developed in partnership with Dickinson County Extension. (F3)
 - 🌿 A spring field day for Talented and Gifted students was developed in partnership with the Lakeland TAG teachers group. (F3)
 - 🌿 The winter People Project with ArtsLIVE and Life Under the Ice was developed in partnership with the Dickinson County Nature Center. (F3)
- 📖 The Center also continued to develop a new relationship with the Spencer public school which is bringing K-12 student groups to the Center for science and project-based learning. (F3)
- 📖 The Center started a similar program with the Spirit Lake public schools. The entire 7th grade came to the Center in Spring 2011. (F3)

◇ Financial and Human Resources.

- 📖 Through closer cooperation with the University of Iowa Division of Continuing Education, the Center was able to operate with a part-time clerk instead of a full-time office manager. (D4)
- 📖 The Center received a \$100,000 bequest, which will be used to improve the accessibility and usefulness of the Center for public programs. (C2)

To continue to address its Strategic Plan in 2011-2012, the Center prepared the budget provided on page 5 and identified the following objectives.

- ◇ Academic Programs and Community Outreach.
 - 📖 Improve student awareness of the Center and its scholarships. (D1)
 - 📖 Develop academic and public programs for the 50th anniversary observance of the Center's internationally known course, *Ecology and Systematics of Diatoms*. (A5)
 - 📖 Increase the number of summer day camps for children. (A5)
- ◇ Research.
 - 📖 Develop a research grant program to increase use of the Center's facilities. (B5)
- ◇ Financial Stability.
 - 📖 Continue to increase the volume of business in the water testing laboratory. (F2, F3)
- ◇ Organizational Effectiveness.
 - 📖 Develop a seasonally adjusted schedule for the Center's new clerk to accommodate changes in workload during the course of the year. (D3)
- ◇ Infrastructure Development.
 - 📖 Rebuild or relocate the lower of two main trails to improve safety and accessibility. (E1, E3)
 - 📖 Develop an outdoor classroom. (E3)
- ◇ Partnership Development.
 - 📖 Continue to develop on-campus learning with the Spencer and Spirit Lake public schools. (A5)
- ◇ Financial and Human Resources.
 - 📖 Hire a part-time assistant for the Education Coordinator to meet the increasing demand for summer public programs. (D3, D4)

Proposed Budget¹

IOWA LAKESIDE LABS REGENTS RESOURCE CENTER	FY09 Actual	FY10 Actual	FY11 Actual	FY 12 Budget
REVENUE				
Carry Forward	\$449,080	\$407,074	\$217,794	\$153,439
Regent University Allocation	\$598,967	\$565,793	\$557,231	\$548,338
Room and Board	\$72,844	\$64,869	\$66,300	\$81,300
Center revenue	\$71,590	\$95,916	\$99,271	\$93,200
Friends Support Non-Credit Educational Prg	\$22,500	-	\$30,000	\$30,000
Course Fees	-	\$3,186 ¹	\$7,119	\$5,700
TOTAL REVENUE	\$1,214,981	\$1,136,838	\$977,715 ³	\$911,977
EXPENDITURES				
Salaries and Benefits	\$440,422	\$408,620	\$388,851	\$487,000
Travel and Hospitality	\$42,037	\$39,901	\$33,455	\$36,700
Supplies and Other	\$55,904	\$70,305	\$60,879	\$41,000
Utilities	\$46,478	\$46,334	\$42,622	\$50,000
Maintenance and Repairs	\$89,910	\$257,094	\$132,810	\$132,000
Equipment	\$106,051	\$36,701	\$35,267	\$35,000
Marketing	-	\$3,656	\$389	\$500
Tuition Allocation to ISU/UNI/SUI	-	\$29,097 ²	\$121,496 ⁴	\$70,000
Debt Service	\$17,014	\$17,014	\$8,507	-
Scholarship Expenses	-	-	-	\$15,000
Operational Planning	\$10,092	\$10,322	-	-
TOTAL EXPENDITURES	\$807,907	\$919,044	\$824,276	\$867,200
NET BALANCE	\$407,074	\$217,794	\$153,439	\$44,777

¹ FY2009 - Course fees are included in Center Revenue.

² Includes tuition transfers to ISU and UNI for Summer 2008 and Summer 2009.

³ FY2011 - 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 above operating report.

⁴ Includes SUI tuition transfers covering Summer 2008 through 2010 and ISU/UNI tuition transfers for Summer 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.