

Contact: Diana Gonzalez

**IOWA LAKESIDE LABORATORY REGENTS RESOURCE CENTER**  
**2009-10 ANNUAL REPORT AND BUDGET REQUEST FOR 2010-11**

**Actions Requested:** Receive the annual report of the Iowa Lakeside Laboratory Regents Resource Center (ILLRRC) and consider approval of the 2010-11 budget for the Center.

**Executive Summary:** The ILLRRC annual report describes the activities undertaken in 2009-10 to address the Center's Strategic Plan. The proposed budget describes the planned objectives for 2010-11. The 2010-11 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,<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 2009-10, the Center addressed its Strategic Plan's four key priorities through the activities identified on the following page.

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<sup>1</sup> In light of other budgetary adjustments, ISU reduced its contribution to the Center by \$19,900. The 'mortgage' for the motel units purchased and owned by ISU at Lakeside Lab will be paid off in November 2010. The budget cut is opportunistic savings that could be reduced when the twice yearly loan payments are not required during FY12.

◇ Academic Programs and Community Outreach.

- 📖 Lakeside Lab continued to offer a unique summer experience to university students through its hands-on, full-immersion courses. In Summer 2009, 87 students were enrolled in credit courses in science, writing, and entrepreneurial studies. Eligibility rules for a scholarship fund at the University of Iowa Foundation were expanded to include undergraduate students and provided more financial aid.
- 📖 In September 2009, more than 100 scientists from the United States, Canada, and other countries participated in the 20<sup>th</sup> North American Diatom Symposium at Lakeside Lab.
- 📖 In October, Lakeside Lab hosted the annual meeting of the Iowa Association of Community College Biology Teachers.
- 📖 Community outreach is a strong growth area for the Lab which hosted a three-month sculpture exhibition and centennial celebration that attracted approximately 20,000 visitors.
- 📖 School-year programs served approximately 1,000 children, including Talented and Gifted and Alternative School students.
- 📖 A participatory art event during the Okoboji Winter Games drew more than 200 people.
- 📖 The Lab provided a number of adult programs, including Natural History Weekend.
- 📖 The Lab provided summer programs which served more than 500 people.

◇ Research.

- 📖 Most research at Lakeside Lab is conducted by graduate students. The following are examples of research conducted during 2009-10.
  - 🌿 Three students from Iowa State University led a project called “Transport by intrusions generated by boundary mixing.” The students resided on the Lakeside Lab campus for most of the summer.
  - 🌿 One student from Indiana University led a project called “Role of mycorrhizal fungi in native and reconstructed tallgrass prairies.”
  - 🌿 One student from the University of Texas conducted research in diatom culture.
  - 🌿 Two retired faculty members (Wartburg College and University of Iowa) also conducted research at the Lab.

◇ Financial Stability.

- 📖 With increased demand for K-12 programs, the Lab initiated a fee schedule to recover the cost of the services.
- 📖 Grants from the Carver Trust and Messengers of Healing Winds, supplemented with reserve funds and alumni gifts, enabled the Lab to purchase 12 research-grade microscopes which will improve microbiology teaching and allow research and instruction to occur beyond the summer months.

- 📖 The Friends of Lakeside Lab completed their \$2 million endowment campaign. This will increase income for scholarships and programming at the Lab.
- 📖 More than \$74,000 was raised from the local community to support the Centennial celebration in 2009.
- 📖 Increased business at the newly-renovated water analysis lab brought Lakeside Lab closer to the goal of making that operation self-supporting.
  
- ◇ Organizational Effectiveness.
  - 📖 Through participation in a Lean exercise with University of Iowa staff, Lakeside Lab streamlined its basic processes and ensured the continuity of its operations after a key staff person retired.
  - 📖 Student billing was consolidated at the University of Iowa to eliminate duplication of services and make payment more convenient for students.
  - 📖 A database of alumni names and addresses was compiled and communication with alumni was improved by re-establishing a biannual newsletter.
  
- ◇ Infrastructure Development.
  - 📖 A Master Plan draft was prepared to guide the future development and stewardship of Lakeside Lab.
  - 📖 Telecommunications were assessed which resulted in an upgrade plan that will both decrease monthly charges and increase bandwidth for internet access.
  - 📖 Following the recommendations of the University of Iowa fire safety officer, improvements were made to several laboratory and residential buildings. Other improvements are planned.
  - 📖 Roofs were replaced on two historic buildings; the renovation of a native plant garden continued; and significant progress was made in eliminating invasive plants from the Lab's natural areas.
  
- ◇ Partnership Development.
  - 📖 A number of Lakeside Lab's public programs were developed in collaboration with community groups, including two winter programs – "Life Under the Ice" with the Dickinson County Nature Center and "The People's Art Project" with ArtsLive.
  - 📖 Lakeside Lab is a major partner in the annual "Outdoors, Let's Explore" conference, a training program for early learning providers. This program has outgrown the facilities at the Lab and is now held off-campus.
  - 📖 A new collaboration in 2009-10 with the Spencer public schools developed hands-on science programs for K-12 students at the Lab. The first program was held in Spring 2010.

◇ Financial and Human Resources.

- ▣ As of March 1, 2010, the Lab began operating with one less full-time employee. Services have been maintained through closer cooperation with the University of Iowa Division of Continuing Education and increased organizational effectiveness as described in Organizational Effectiveness.

To continue to address its Strategic Plan in 2010-11, the Center prepared the budget provided on page 5 and identified the following objectives.

◇ Academic Programs and Community Outreach.

- ▣ Improve student awareness of available scholarships.
- ▣ Expand the use of the microbiology lab beyond the summer season.
- ▣ Continue all existing public programs.

◇ Research.

- ▣ Explore funding possibilities for a research grant program to increase use of the Lakeside Lab facilities.

◇ Financial Stability.

- ▣ Work toward cost recovery in the water analysis lab by increasing the volume of tests conducted in the lab.

◇ Organizational Effectiveness.

- ▣ Increase participation of Lakeside Lab staff and faculty in the University of Iowa Workflow automated processes.

◇ Infrastructure Development.

- ▣ Finalize the facilities master plan.
- ▣ Upgrade internet service and reduce costs by connecting to the Iowa Communications Network (ICN).
- ▣ Complete fire safety improvements.
- ▣ Replace the roof on the last of five historic laboratory buildings.
- ▣ Continue stewardship programs on the grounds.

◇ Partnership Development.

- ▣ Pursue program development with the Spencer public schools.
- ▣ Continue other existing partnerships.

◇ Financial and Human Resources.

- ▣ Maintain present staff to enable existing programs to continue.

Proposed Budget <sup>1</sup>		as of 6/30/2010				
IOWA LAKESIDE LABS REGENTS RESOURCE CENTER	FY07 Actual	FY08 Actual	FY09 Actual	FY 10 Budget	FY10 Actual/w encumbrances	FY 11 Budget
<b>REVENUE</b>						
Carry forward	\$142,074	\$345,631	\$449,080	\$407,074	\$407,074	\$217,794
Regent university allocation	\$599,637	\$600,000	\$598,967	\$541,310	\$565,793	\$557,231
Room and Board	\$77,049	\$83,048	\$72,844	\$70,000	\$64,869	\$64,900
Center revenue	\$42,328	\$33,269	\$94,090	\$94,000	\$95,916	\$115,100
Course Fees					\$3,186	\$3,200
<b>TOTAL REVENUE</b>	<b>\$861,088</b>	<b>\$1,061,948</b>	<b>\$1,214,981</b>	<b>\$1,112,384</b>	<b>\$1,136,838</b>	<b>\$958,225</b>
<b>EXPENDITURES</b>						
Salaries and benefits	\$301,920	\$345,502	\$440,422	\$478,218	\$408,620	\$447,135
Travel and hospitality	\$23,452	\$38,657	\$42,037	\$41,000	\$39,901	\$41,300
Supplies and Other	\$22,353	\$41,764	\$55,904	\$53,985	\$70,305	\$76,800
Utilities	\$62,394	\$55,720	\$46,478	\$50,000	\$46,334	\$50,000
Maintenance and repairs	\$88,324	\$93,907	\$89,910	\$134,500	\$257,094	\$150,000
Equipment	\$0	\$15,304	\$106,051	\$55,000	\$36,701	\$50,000
Marketing	\$0	\$5,000	\$0	\$15,000	\$3,656	\$15,000
Tuition Allocation to ISU/UNI					\$29,097	\$17,000
Debt Service	\$17,014	\$17,014	\$17,014	\$17,014	\$17,014	\$8,507
Operational planning	\$0	\$0	\$10,092	\$10,000	\$10,322	\$5,000
<b>TOTAL EXPENDITURES</b>	<b>\$515,457</b>	<b>\$612,868</b>	<b>\$807,907</b>	<b>\$854,717</b>	<b>\$919,044</b>	<b>\$860,742</b>
<b>NET BALANCE</b>	<b>\$345,631</b>	<b>\$449,080</b>	<b>\$407,074</b>	<b>\$257,667</b>	<b>\$217,794</b>	<b>\$97,483</b>

<sup>1</sup> Majority decrease due to unfilled ISU coordinator and office manager retirement.

<sup>2</sup> Includes improvements to main cottage, facilities manager's house and bathhouse, new roofs for stone labs, life-safety improvements, IT upgrades

<sup>3</sup> Tuition transfers to ISU and UNI for Summer 2008 and Summer 2009

### **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**

- 📖 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 10 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.