

LabLife

2021 Special Report on Philanthropy and Volunteerism

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THE UNIVERSITY OF
CHICAGO
Laboratory
Schools

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Lab's Mission

The Laboratory Schools are home to the youngest members of the University of Chicago's academic community. We ignite and nurture an enduring spirit of scholarship, curiosity, creativity, and confidence. We value learning experientially, exhibiting kindness, and honoring diversity.

Dear Lab community



Lab's Mission Statement

The Laboratory Schools are home to the youngest members of the University of Chicago's academic community. We ignite and nurture an enduring spirit of scholarship, curiosity, creativity, and confidence. We value learning experientially, exhibiting kindness, and honoring diversity.

It is a great pleasure to introduce this Special Report on Philanthropy and Volunteerism. Both of us have taken up our new positions at Lab in a spirit of service to the school community—a spirit exemplified by the many people who supported the Schools with gifts and volunteer hours last year.

We applaud these philanthropists and volunteers for their generosity, and also for their commitment to Lab's mission. Nothing could be more important in 2021 than our collective dedication to fostering scholarship, curiosity, creativity, and confidence among young people. Nothing could be more critical than mining our experiences for valuable lessons, living and learning with kindness, and uplifting the diverse identities and backgrounds in our community.

This year we are celebrating 125 years of education at Lab—of preparing young people for meaningful participation in a healthy democracy. At the same time, this anniversary invites us to look ahead to the next 125 years. Lab's next chapter opens amidst challenges: not only the ongoing global pandemic, but also painful reminders of the persistence

of racial injustice in our society and the fragility of our democracy. As we look ahead, we know that our commitment to kindness, diversity, and democracy means intensifying our efforts to ensure that every member of our community has a sense of belonging at Lab.

Despite these challenges, we feel heartened by the strength of this community, illustrated by its passionate response to the pandemic. Throughout these 18 long months, Lab educators, parents, alumni, and friends have banded together in support of our students and school. We are grateful for your support:

- > Our faculty and staff worked tirelessly to meet the needs of each student. They re-framed curricula and implemented teaching practices to support previously unimaginable modes of education.
- > Through the Director's Impact and Lab Forward funds, our community raised over \$280,000 in support of financial aid, COVID mitigation expenses, and the staffing and infrastructure needed to support remote, hybrid, and in-person learning.

- > Those funds allowed Lab to hire over 40 classroom staff to help run in-person classes in grades N-2 and to support our remote program for grades 3-12.
- > Our community collaborated to successfully limit the spread of the virus on campus. Robust mitigation strategies resulted in an impressive COVID "report card" reflecting zero in-school transmission.
- > In 2020-21, Lab awarded more need-based financial aid (exclusive of University tuition remission) than ever before: an impressive \$3.6 million. And this year, we plan to award up to \$4.25 million in financial aid.
- > In March, our first virtual Dewey Dance Variety Hour—a night of online magic and fun—raised over \$100,000 for financial aid, and helped propel Lab through a difficult time.
- > Our community's talent continued to inspire and bolster us. Several Lab teachers received national awards for excellence in their fields, Lab students won recognition for their work, and renowned astronomer Andrea Ghez, '83, was awarded the 2020 Nobel Prize for her discoveries about the black hole at the center of our galaxy.

- > Our parent community rallied in support of Lab. The Parents' Association welcomed and mentored new families; hosted online sessions on topics including empathy, inclusion, identity, and resilience; produced Lab's second virtual Rites of May; and baked more than 170 lasagnas in 105 kitchens for Lab's faculty and staff.

Finally, our whole community owes special appreciation to David Magill, who emerged from a comfortable retirement and returned to Lab as interim director in May 2020. From there, Dave led Lab for 16 of the most challenging months in our history, with calm and grace. Dave, you heard the call to service and you answered it. From the bottom of our hearts, thank you!

These examples prompt us to ask: With a strong community coming together around a shared mission, what can't we accomplish? We are excited to move into the next 125 years of Lab history with all of you. Congratulations and thanks to the Lab student body, our students' families, our community of faculty and staff, and alumni around the world. We are deeply grateful for your generosity and your service.

With gratitude,

Victoria Jueds, Director

Jason Tyler, '89, MBA'99, University Trustee, Lab Board Chair

Parents' Association

Mission

To promote educational excellence by fostering a spirit of community through the facilitation of communication and cooperation among the Laboratory Schools' parents, administration, faculty, students, and board, and to encourage and facilitate parent participation in programs that support the educational, social, and fundraising initiatives of the Schools.

Highlights

- > The Parents' Association supported families, faculty, administration, and students in a mostly remote or hybrid academic year via a multitude of efforts:
- > Welcomed new families through the mentor program and virtual gatherings to incorporate them into the community and provide opportunities to meet other Lab parents.
- > Supported division administrators to help host first-ever virtual back-to-school orientations with Q&A assistance and by sharing parent feedback to improve family orientation experiences.
- > Provided monthly virtual Parent-to-Parent Chats for each division to provide ongoing insight into school programming, counseling, and current issues through guests such as faculty, administrators, and counselors.

- > Created new parent events—lunch hours and virtual evening socials—to build community across grades, home rooms, and advisories.

- > Supported parents through PA-sponsored meetings and speaker events around important topics of interest, several of which encompassed empathy, inclusion, identity, resilience, and health & wellness concerns.

- > Supported parent-organized affinity groups.
- > Our Parent Wellness Committee hosted three virtual parent education workshops in partnership with the Institute for Social Emotional Learning.

- > Increased funding for faculty grants and extended the eligibility timeline to add flexibility to the overall process in support of teaching and learning innovation.

- > Recognized teachers and staff with in-person appreciation luncheons or gift cards.

- > Created and hosted the second virtual Rites of May festival, marking 52 years of uninterrupted celebrations.

When the Schools shifted to in-person learning across all grades in spring 2021, the PA responded:

- > Created and hosted in-person student activities such as a Middle School grade-level field day and outdoor movie nights, and a High School after-school ice cream social.

- > Partnered with administrators to create first-ever Senior Prom in Kenwood Mall, as well as Middle and High School graduations on Jackman Field including arranging for all decorations, student gifts, and hydration stations.

2020-21 Financials and fundraising

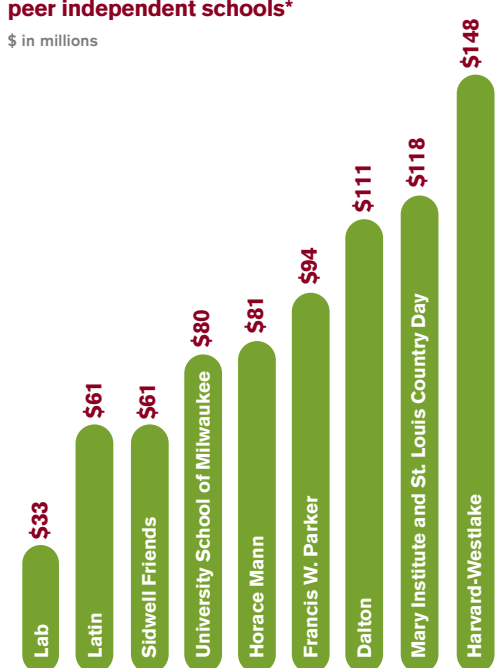
Fundraising Progress (FRP) at Lab: New pledge commitments and outright cash gifts

\$ in millions



Lab endowment in comparison to peer independent schools*

\$ in millions



Alumni and parent support are critical to sustaining and enhancing the Lab experience

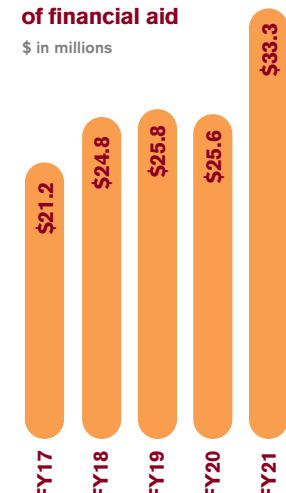
over **45%** of parents gave a gift to Lab

Alumni participation in giving was over

11%

Lab's endowment is an important source of financial aid

\$ in millions



Operating Statement as of June 30, 2021

(\$000s)

REVENUES

Tuition.....	\$72,355
Need-Based Financial Aid.....	\$(3,581)
Net Tuition.....	\$68,774

Private Gifts.....	\$5,222
Endowment Payout.....	\$1,298
All Other Revenue.....	\$2,010

TOTAL REVENUES.....\$77,304

EXPENSES

Teacher Salaries.....	\$32,221
Staff Salaries.....	\$9,637
Benefits.....	\$8,665
Total Compensation.....	\$50,523

All Other Expenses.....	\$5,972
Space Cost and University Allocations.....	\$19,338

TOTAL EXPENSES.....\$75,833

Operating Surplus (Deficit).....	\$1,471
University Target.....	\$4,904

NET SURPLUS (DEFICIT).....\$(3,433)

Fundraising Highlights

- > In 2020-21, the **Director's Impact Fund** raised \$180,978, which supported extraordinary financial aid needs, expenses related to the pandemic, professional development, and curricular work.

- > The Lab community responded to the need for support to bring students back to the classroom, donating \$105,412 to the **Lab Forward Fund**

which supported the technology, staffing, and infrastructure needed for the return to in-person learning in spring 2021.

- > In March 2021, Lab hosted the first **virtual Dewey Dance Variety Hour**, a night of online magic and fun that raised over \$100,000 for financial aid.

- > Leveraging philanthropic support and operational funds, Lab will award approximately \$4.25 million in need-based financial aid in 2021-22, the most in its history.

- > **Funding from Connections 2020** enabled Lab faculty to participate in workshops led by the Institute for Social and Emotional Learning, talks with Dave Mochel on applied attention, and a talk by Dena Simmons on how to foster communities that are diverse, equitable, and inclusive.

- > Alumni from the classes of 1951, 1960, 1961, 1966, 1970, 1971, and 1990 hosted virtual gatherings for classmates to reconnect during the pandemic.

- > The Class of 2021 and their families (including grandparents!) established the **Class of 2021 Scholarship Fund** with more than \$160,470, creating an endowed fund that will support future Lab students in perpetuity.

- > The Class of 1970 reconnected multiple times during the pandemic and founded the **Class of 1970 Scholarship Fund** with gifts and commitments totaling \$76,541.

- > Alumni from across the decades are stewarding **32 class scholarships**, which provide critical support for Lab's financial aid program.

- > In June 2021, the first **virtual Lab Alumni Week** offered alumni and the broader Lab community opportunities to reconnect, including a virtual tour, panel discussion, sparkling wine tasting, alumni awards program, and more.

The way we help one another

Philanthropy and volunteerism in action

12 U-High girls

Making a commitment to Lab after 60 years of connection



Bonnie Thornton Dill, '61, and Carol Aldrich Barkin, '61, recently came together with fellow classmates to make a difference for future alumni. Thornton Dill is a professor in the Harriet Tubman Department of Women, Gender, and Sexuality Studies and dean of the College of Arts and Humanities at the University of Maryland. Barkin, the author of more than 40 books for adults and children, lives in New York and is a Harvard graduate.

In 2021, calling themselves "12 U-High girls from the Class of '61," the women made a gift for their 60th reunion, in honor of five classmates who had died.

Some of the "12 girls" had grown up in Hyde Park and some, like Thornton Dill, lived outside the neighborhood but spent many years hanging out near campus. At their 50th Lab reunion, someone suggested a brunch after the event and the women, as Thornton Dill puts

it, "started catching up on the last 50 years of our lives." They began to reconnect, talking, says Barkin, "about life, love, art, the world."

Over the last decade, Thornton Dill says, they have all "discovered that there were a lot of things we had in common from our Lab experience. The values we learned at Lab, including the importance of education, and of higher education, were values we had all carried with us." Barkin describes how Lab influenced her career: "From English teachers at Lab, I learned a love of clear and elegant writing, and an understanding of the power good writing can have in our lives and the unending pleasure it can offer us." Indeed, after U-High, many of the women became PhDs, teachers, or writers.

As the group approached their milestone reunion in 2021, Thornton Dill suggested they make a collective gift to Lab. She recounts, "Everyone gave generously, in a way that was meaningful to them, in an outpouring of gratitude for Lab, for our experience of school, and for our friendships with each other." The women decided to direct their gift toward financial aid. Barkin explains, "We all felt that we had benefited from Lab and wanted at this stage of our lives to give something back. We wanted our gift to support scholarships because it was important to all of us that students' access to Lab not be limited by their families' means."

"Part of what's been so good about arranging this gift has been realizing how strong the friendships that I made at Lab are and continue to be."

—Carol Aldrich Barkin, '61

On the process of making the group's gift, Barkin reflects, "Part of what's been so good about arranging this gift has been realizing how strong the friendships that I made at Lab are and continue to be. Do you know that feeling when you don't see a friend for a long time and then you see them again and realize that you still have the same strong connection? This is something about my Lab experience that I've treasured over so many years."

For anyone who has watched friendships blossom at Lab, this story of connection resonates, inspiring hope for the future of the institution and for its thousands-strong body of alumni.

New family engages at Lab

Helping others "be a part of this amazing experience"



The 2021–2022 school year is a big moment in the academic careers of first-grade twins Mika and Alex Kleinmuntz: For the first time, they will not be in the same classroom. However, their parents, Catherine Kleinmuntz, AB'79, AM'81, PhD'84, MBA'89, and Don Kleinmuntz, AB'78, MBA'80, PhD'82, are feeling enthusiastic about the transition.

"At first, the twins were concerned about being separated," Catherine says. "But their kindergarten teachers, Christina Hayward, Janice Cincotta, and Kimberly Redman, handled the situation beautifully. That support helped

Mika and Alex move forward with resilience."

This is just one example of the care their children have experienced at Lab.

"Lab provides our children an experience that excites their curiosity and drives their desire to explore and create," says Catherine who has served Lab in several volunteer roles related to the Parents Fund and Dewey Dance.

"What I really love is that Lab has strong academics as well as a great culture. The student body is diverse in every way—so that when Lab teaches diversity, equality, and inclusion, the children live it. Sending our kids to Lab is an incredible gift that will benefit them in so many ways."

"Making sure that students come from different walks of life is vital to making Lab a special place. We are so happy to be able to help sustain that mission at Lab."

To that end, Catherine and Don made a three-year commitment to support financial aid at Lab.

"Most of my career I've been involved with either public or private universities," Don says. "I'm aware of the life-changing potential of a top-notch education, and I want to help make it as widely available as possible to all students."

Catherine credits two "warm and welcoming" classroom parents, Neda Laiteerapong and Sonia Bobra, with sparking her interest in volunteering at Lab, which led her to join the Parents Fund Committee and the Parent Development Committee. "Connecting with Lab parents is part of the fun. And it helped me to expand the group of Lab parents that I could interact with."

"We love the people at Lab, and we feel so lucky to be a part of this amazing experience."

"I'm aware of the life-changing potential of a top-notch education, and I want to help make it as widely available as possible to all students."

—Don Kleinmuntz, AB'78, MBA'80, PhD'82

Professional development opportunities

Creating new paths of pedagogy and connection through philanthropy



They danced near Sue the T. rex and strolled the *Nature Walk* habitats in party clothes at what turned out to be one of Lab's last large gatherings before Illinois's March 2020 'stay at home' order. It was Leap Day, February 29, and 900+ Lab community members gathered at the Field Museum for Connections 2020, a gala that raised \$1.6 million for professional development and financial aid—monies that would prove of specific importance the following school year in the midst of the COVID-19 pandemic.

While in the past teachers might have traveled for hands-on learning, circumstances radically changed Lab's professional development environment. The gala funded a number of virtual trainings to help focus Lab educators on the ways to support students and peers as they faced the loss, stresses, and dislocations of life under COVID.

Lab had already adopted the Collaborative for Academic, Social, and Emotional Learning (CASEL) framework which

Nicole Neal, director of student services, says maps beautifully to Lab's mission and strategic framework. She notes that Lab teachers and counselors think deeply about social emotional growth for all students and aim to support them in becoming self-aware, building healthy relationships, and making sound decisions.

With Connections funding, the Institute for Social Emotional Learning, helped Lab operationalize the CASEL framework through workshops on integrating social emotional learning (SEL) into the core curriculum and on the intersection of SEL and diversity, equity, and inclusion. The Institute also offered summer training on using outdoor spaces to foster SEL and provided support throughout a year. "Teach Meets" gave teachers facilitated time to reflect with peers on how things were going and to share strategies for self-care. Programming for parents included a workshop series that explored practical strategies for helping children manage

emotions and maintaining positive family communication. This collaborative approach helped create strategies that bridged home and school.

Connections support also made it possible for Lab to bring to its entire faculty and staff two speakers: Dena Simmons and Dave Mochel. Simmons, recently at Yale's Center for Emotional Intelligence, is an advocate for pairing social emotional learning with a larger socio-economic focus to strengthen work against racial injustice, hate, and inequity—especially in K–12 environments. Mochel, an educator and life coach, espouses the concept of applied attention, which he identifies as a human-centered and research-based approach to stress, anxiety, distraction, and setbacks. He shared tools to help educators continue bringing their talents and energy into their now-virtual classrooms.

John Dewey would have been proud of the innovation and ingenuity with which Lab teachers approached the last year. During the pandemic, Connections support for professional development offered teachers strategies to advance their own learning so that they could catalyze student learning, even when traditional paths of pedagogy and connection were closed.

Taking parental involvement to a new level



It's normal for children to feel apprehensive on their first day of nursery school. But lucky for Lena Jessen, MBA'04, and Andy Jessen, MBA'04, years ago their daughter, Livvy (now an 11th grader at U-High), dove right into Lab's Nursery School and never looked back.

"She just looked like she was at home," remembers Lena, who is currently a full-time parent after working as a business consultant. "The classrooms are set up so perfectly to spark the kids' curiosity. Livvy dove right in. She couldn't wait to get to the marker table to write her name, then to the sand table to dig up dinosaurs. We knew it was where she belonged."

When kids two and three, Eliza (now grade 8) and Graham (now grade 5), came along, the Jessens wanted the Lab experience for their younger children as well.

"The teachers, even for the younger grades, give the kids a lot of agency," Lena says. "Lab is not a place where the teachers will prescribe every detail. That's important to us as parents, because life isn't curated."

This strong belief in the Schools' design and mission is what inspired the family's substantial parental involvement as volunteers. What began as a tenure as a room parent in 2008 has snowballed into an incredible commitment of time and resources. Andy and Lena became co-chairs of Connections—Lab's gala fundraising event—in 2016, after first volunteering for the committee in 2008. Lena has been an active member of Lab's Board since 2008, chairing both the Board's Alumni and Family Relations and Development committees. She has also chaired the Parent

Development Committee, is a member of the Parents' Association Board, and is still a room parent!

"We felt in the beginning that joining these committees would be a great way to meet people in the community," Lena says. "We weren't affiliated with the University, so getting involved in the Schools helped us cultivate relationships with other parents and with teachers."

"Now, Lab is such a huge part of our family's lives. We spend so much time there. Our kids' friends are there, our friends are there. We've benefitted so greatly from Lab, and we feel it's important to give back."

"Lab is a school that is developing confident, independent, and critical thinkers," Andy adds. "We want to do anything we can to support such a special place."

"Lab is a school that is developing confident, independent, and critical thinkers. We want to do anything we can to support such a special place."

—Andy Jessen, MBA'94

Fundraising and finances at Lab:

Frequently asked questions

Why does Lab have a fundraising program?

Securing generous support from parents, alumni, faculty, staff, and friends of Lab helps the institution close budget gaps in annual operations and allows Lab to meet aspirational goals that would otherwise be impossible to reach.

By connecting passionate philanthropists to programs and projects, fundraising also allows Lab to realize activities that further our vision and mission, and often go above and beyond in creative and meaningful ways.

Without these additional resources from dedicated supporters, Lab would be forced to make difficult choices between tuition levels, financial aid budgets, and programmatic activities.

What is the scope of Lab's fundraising program?

Lab's Alumni Relations and Development office works with 100+ alumni and parent volunteers to facilitate all major fundraising efforts for the school. During the 2020–21 school year, 615 (45%) families and 835 (11%) alumni made a gift to Lab.

Our philanthropy program consists of several key elements, including the Fund for Lab, our annual giving program; special events such as Connections and Dewey Dance; classroom gifts for Earl Shapiro Hall and Lower School classrooms; the

annual senior class gift; major gifts in support of specific programs; and bequests and planned giving.

In recent years, institutional campaigns have catalyzed tremendous improvements at Lab. As Lab looks toward its future, strategic campaigns remain the most powerful fundraising mechanism for transformational growth.

How does annual giving, known as the Fund for Lab, support the school?

Lab's annual giving program makes it possible for Lab to invest in the people and programs that are the heart of the Lab experience. Annual giving supports all of Lab's core programs, making an immediate and real difference in the lives of

students, families, and teachers. In the summer of 2021, Lab renamed its annual giving funds, previously known as the Parents Fund and the Alumni Fund, as the Fund for Lab. We are one community. One Lab. One Fund.

What are the goals of Lab's financial aid program?

Lab's financial aid program seeks to remove financial barriers for students who contribute to and benefit from a Lab education. Lab's financial aid program serves to bolster the Schools' mission to honor diversity in all its forms. Increasing financial aid resources for current and entering students allows us to change the lives of future Lab alumni and strengthen our commitment to cultivating and nurturing a diverse and inclusive community.

How does Lab's financial aid program work?

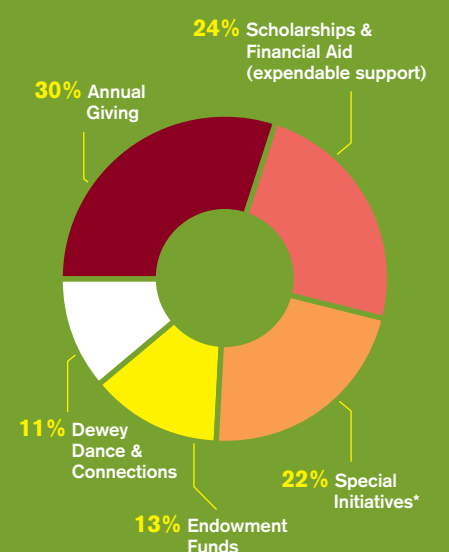
Securing financial aid support has long been a focus of Lab's development efforts. All of Lab's awards are based on demonstrated financial need and Lab does not give merit-based aid. In 2020–21, 9% of families received aid—separate from any tuition benefit a family might receive through a parent's full-time employment with the University.

Aid monies are distributed through two paths:

1. Financial aid awards subsidize family tuition obligations and are awarded for tuition at any grade level.
2. A scholarship is a formally designated award, usually funded by an endowment fund or private gifts, and assigned to a particular student for his or her entire High School career.

What areas does the Lab community support?

Lab is grateful for the support of its community of parents, alumni, faculty, staff, and friends in a number of critical areas. In 2020–21, donors made gifts to the following areas:



*In 2020–21, special initiatives included restricted support for classroom gifts, athletics, professional development, the Chris Freeman Memorial Fund for Math Education, the makerspaces, robotics, the Library Fund, the Director's Impact Fund, and the Lab Forward Fund.

How much financial aid does Lab provide annually?

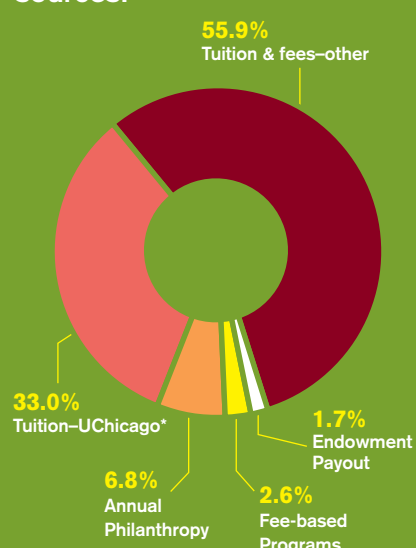
In 2020–21, Lab awarded more need-based financial aid (not including University tuition remission) than ever before—\$3.6 million. In 2021–22, Lab plans to award up to \$4.25 million in financial aid, the highest amount in Lab's history. Continued increases in Lab's financial aid budget, mainly achieved through philanthropy, are critical to Lab's commitment to strengthening socioeconomic diversity and ensuring full access for all students to the transformative educational experiences at Lab.

What would a substantially larger endowment do for Lab?

Endowment income has historically been a stabilizing force in the operation of education institutions, is less variable relative to other revenue streams, and is available in perpetuity. At Lab, revenue from the endowment provides critical support for our financial aid program. In addition, individual endowment funds also support professional development; Model United Nations; the Summer Link Program; the Zena Sutherland Awards for Children's Literature Program; faculty, staff, and student award programs; and more. Growing the endowment remains a long-term priority for philanthropy at Lab.

How is Lab funded?

In FY21, Lab's annual budget was funded by the following sources:



*Revenues from tuition transfers from the University on behalf of University employees whose children attend Lab.

Please explain the tuition benefit for University of Chicago employees

The University's Lab Tuition Assistance Program is available to full-time employees of the University and certain affiliated units. At minimum, this benefit pays 50% of Lab tuition for children of these employees. Qualifying employees whose adjusted gross income falls below \$250,000 are eligible for additional support based on a formula that caps their expected tuition contribution per child to a set percentage of their AGI. In addition, employee families with

multiple children attending Lab at the same time are eligible for an additional \$2,000 discount for each child beyond the oldest.

Importantly, non-University families do not subsidize this benefit and Lab does not lose any tuition income by offering this benefit. The University makes a direct transfer of funds into Lab's accounts to cover this benefit. That transfer constitutes around 33% of Lab's total budgeted revenue.

How does Lab support students who need financial assistance beyond tuition?

Lab strives to ensure that all students are able to fully access everything the Lab experience offers. To this end, Lab provides additional support to families who receive financial aid, as needed, for services and materials such as Extended Day, books and supplies, and other expenses. This support is funded through the endowed Karen Putman Memorial Student Assistance Fund, to which any family can contribute, and by other gifts. Families may access this support by contacting the Office of Admissions and Financial Aid.

