

# A Community of Giving

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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



Thank you for taking the time to read the Laboratory School's Annual Report on Philanthropy. The excellence of Lab's academic program, the vibrancy of our community, and the pursuit of our strategic priorities are to the credit of the people recognized herein. Their generous contributions of time, talent, and funds have helped see Lab through the first 125 years of our existence and will propel us into our next chapter.

The importance of our donors and volunteers cannot be overstated, especially at this juncture. Here in Hyde Park, and throughout the global network of Lab alumni and friends, we are moving through challenging times. Throughout, the Laboratory Schools have remained remarkably resilient. Our commitment to scholarship, honoring diversity, and exhibiting kindness is unshakable. Lab educators are talented and innovative; Lab students are curious, creative, independent thinkers; and Lab's program is both time-tested and infinitely adaptable.

Lab draws strength from our community, especially from the friends who support the Schools through gifts and volunteer hours. Here are just a few of countless examples:

> For the first time since the 2018–2019 school year, we held a full academic year of successful in-person instruction, extracurricular activities, and other in- and out-of-school programming. As we closed out the year, our entire Lab community was thrilled to resume in-person graduation ceremonies for the Class of 2022 in the beautiful Rockefeller Memorial Chapel.

> The Gunvor Refetoff Memorial Fund, a special fund dedicated to the arts at Lab, enabled teachers across grade levels to engage students in meaningful projects, including the new butterfly mural at Earl Shapiro Hall and an identity mural in Gordon Parks Arts Hall that was created as part of the BRAVE Conference.

> Leveraging philanthropic support and operational funds, Lab is projected to award approximately \$4.9 million in need-based financial aid in 2022–2023, the most in the Schools' history.

> In May, over 600 guests celebrated Lab's 125-year history at the 2022 Connections gala, chaired by Heiji Choy Black and Nicola Halsall Idehen. The evening laid a strong foundation for future fundraising—raising over \$2.5 million for financial aid and in support of the Director's Impact Fund.

> The Parents' Association, as always, partnered with us in a variety of ways to welcome families—new and returning—to Lab's robust, unparalleled curriculum of in-person instruction and programming. The PA also produced and hosted a

fun-filled Rites of May—our first in-person Rites of May since celebrating the 50-year anniversary in 2019.

> Our extraordinary students saw an exciting year of growth and received both regional and national accolades for their scholarship, activism, and professional pursuits. We've listed a mere few of our students' many accomplishments below:

- U-High Midway received the 2022 Columbia Scholastic Press Association's Silver Crown Award in the hybrid category, and also won 19 first place awards in the 2022 Illinois Journalism Education Association Newspaper and Digital News Media Contest.

- Several U-high students made up the team that won first place in this year's Envirothon state championship. In July, this team represented Illinois at the National Envirothon Competition—North America's largest environmental education competition—held at Miami University in Oxford, Ohio.

- *Jazz Dissonance: Examining the Irony of the State Department's Cold War Diplomacy During the Civil Rights Era*, a documentary produced by U-High students placed third in the 2022 National History Competition Senior Group category. Their documentary was also competitively selected to be featured in a virtual showcase at the Smithsonian's National Museum of African American History and Culture.

**The Lab community's contributions of time, talent, and funds have helped see us through the first 125 years of our existence and will propel us into our next chapter.**

With your generosity and support, we feel that the future is indeed bright at Lab. Come what may, we look forward to advancing Lab's cutting-edge academic programs, broadening access to our Schools to students from across socio-economic backgrounds, deepening our ability to provide an experience of equity, inclusion, and belonging for all, ensuring the health and wellbeing of our children and teens, and preparing the next generation of leaders for the betterment of our world.

Thank you for your support and partnership.

With gratitude,

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

Victoria Juedes, Director

## Parents' Association

### Mission

The Parents' Association (PA) provides a vehicle for involving families with the Laboratory Schools in furtherance of common objectives and fosters the widest possible participation of parents in school activities. The operating philosophy of the PA is to engage as many parents as possible in meaningful roles to achieve the goals of diversity, inclusion, and continuity. The mission of the PA is 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 of directors, and to assist in the implementation of school activities.

### Highlights from 2021–2022

During the 2021–2022 school year, the PA supported families, faculty, administration, and students through a variety of efforts. This included:

- > Welcoming new families across all divisions—via the volunteer families from the PA's mentor program—to incorporate them into the Lab community and provide opportunities for them to meet other parents; both in-person and virtually.

- > Supporting administrators with back-to-school orientations through Q&A assistance and by sharing parent feedback to help shape well-rounded family orientation experiences.

- > Through a competitive submission process, awarded twenty faculty grants that support novel initiatives in teaching and learning innovation.

- > Hosting monthly virtual Parent-to-Parent Chats for each division. Parent-to-Parent Chats provide ongoing insight into the school and its programming through guest speakers from Lab's faculty, administration, and learning and counseling team.

- > Sponsoring speaker events offered by the Family Action Network (FAN) that support parents on topics of interest and concern, such as empathy, inclusion, identity, resilience, grief and loss, personal growth, and health and wellness.

- > Last year's Bookswap, a long-standing tradition sponsored by the Parents' Association, collected over 10,000 books from Lab families. Bookswap promotes literacy among our earliest readers, recycles books, and lends us the opportunity to share what we have with others. Of the books collected, Lab's N3-5 students selected "new" books to enjoy at home, and nearly 4,000 excess books were donated to two area elementary schools to supplement their classroom collections.

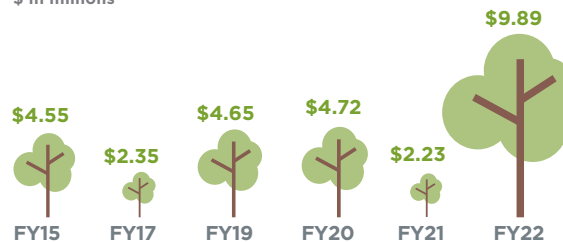
- > The Holiday Book Fair & Bazaar—offered both online and in-person—partnered with Hyde Park's treasured 57th Street Bookstore to operate a pop-up store with books for both adult and young-adult readers. The Bazaar also provided an opportunity for Middle School and U-High Clubs to offer gift wrapping, baked goods, and crafts that raised money for their clubs.

- > The PA's Diversity, Equity, and Inclusion Committee hosted an Affinity Group Summit to build on common goals and met with administrators to collaborate and share data/findings for their year's work. Through this work, the PA supported Lab's growing number of parent-organized affinity groups through the development of in-person and virtual community-building events.

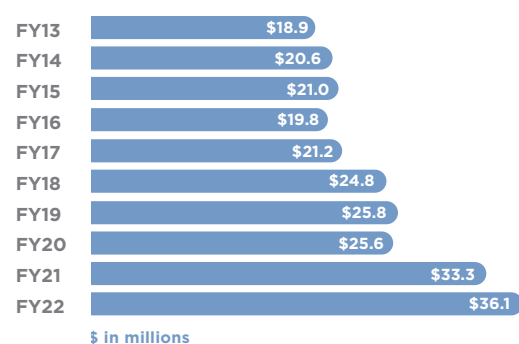
- > Recognizing teachers and staff with in-person appreciation breakfasts or luncheons for each division across both ESH and Historic campuses.

## 2021–2022 Financials and Fundraising

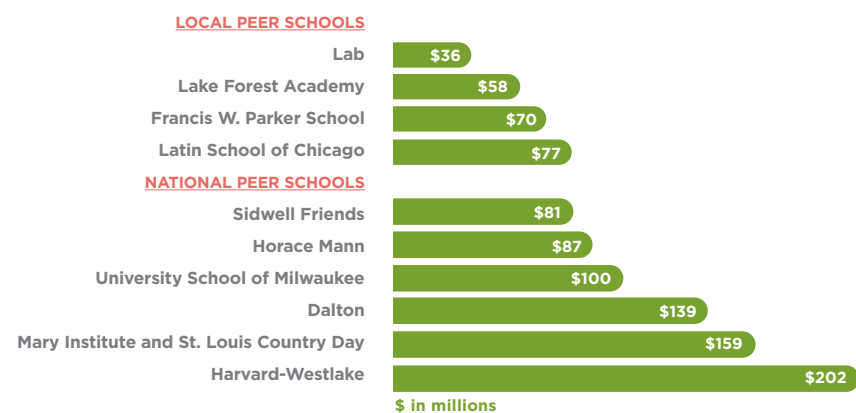
### Fundraising Progress (FRP) at Lab: New pledge commitments and outright cash gifts \$ in millions



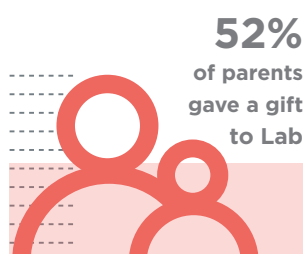
### Lab's endowment is an important source of financial aid



### Lab endowment in comparison to peer independent schools



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



### Alumni participation in giving was 11%



### Operating Statement as of June 30, 2022

(\$000s)

#### REVENUES

Tuition ..... \$79,242  
 Need-Based Financial Aid..... \$(4,035)  
 Net Tuition..... \$75,207

Philanthropy ..... \$4,155  
 Endowment Payout ..... \$1,336  
 All Other Revenue ..... \$4,455

**TOTAL REVENUES ..... \$85,153**

#### EXPENSES

Teacher Salaries ..... \$34,716  
 Staff Salaries ..... \$10,171  
 Benefits ..... \$11,571  
 Total Compensation ..... \$56,458

All Other Expenses ..... \$9,197  
 Space Cost and University Allocations ..... \$17,402

**TOTAL EXPENSES ..... \$83,057**

Operating Surplus (Deficit) ..... \$2,096  
 University Target ..... \$4,904

**NET SURPLUS (DEFICIT)..... \$(2,808)**

### Fundraising Highlights

> At the 2022 Connections Gala, over 600 guests celebrated Lab's 125-year history and laid a strong foundation for the future—raising over \$2.5 million to support financial aid, additional resources for families with need, and for the Director's Impact Fund.

> Alumni and parents created six new endowed funds to support scholarships for students and student activities across all divisions.

> Lab enjoyed a strong Giving Day performance with a 126% increase in donors over the previous year.

> Parents and alums participated in Lab's first Spring Teacher Appreciation Drive, recognizing hundreds of Lab teachers; past and present.

> Leveraging philanthropic support and operational funds, Lab is projected to award approximately \$4.9 million in need-based financial aid in 2022–2023—the highest amount in Lab's history.

> Graduating seniors and their families established the Class of 2022 Scholarship Fund, an endowed fund that will support future Lab students in perpetuity. The class met its goal of raising over \$150,000, cementing its legacy at Lab.

> The Gunvor Refetoff Memorial Fund, a special fund dedicated to the arts at Lab, enabled teachers across grade levels to engage students in meaningful projects, including the new butterfly mural at ESH and an identity mural in Gordon Parks Arts Hall that was created as part of the BRAVE Conference.

> The Class of 1997 reconnected multiple times in the lead up to their 25th Reunion and capped off their celebration by founding the Class of 1997 Scholarship Fund with gifts and commitments totaling over \$100,000.

> The Athletics Office partnered with the Girls' Track Team, '77-80, and other leadership donors, including: Robert Solomon, '78; James Solomon, '72, MBA '78; and John W. Rogers, Jr., '76, to support the new "Touchwall Hall-of-Fame Display Screen" that will showcase athletic news, pictures, schedules, and team highlights.

> The first in-person Alumni Weekend since 2019 brought many former students back to Lab to walk the familiar halls, celebrate the successes of alumni award winners, and contribute to class scholarship funds and financial aid at Lab.

> Alumni from across the decades are stewarding 36 class scholarships, which provide critical support for Lab's financial aid program.



# The Way We Help One Another

Philanthropy and volunteerism in action

## Celebrating Cultural Diversity

Building on a tradition of inclusivity



Parent Richard Zhang has always valued the Laboratory Schools' exemplary emphasis on exhibiting kindness and honoring diversity. Yet, Lab's inclusive and welcoming atmosphere is not always reflected in our larger society. Recognizing the challenges that Asian Americans have recently faced, Richard decided to take action. "The events of the past couple of years have, in particular, highlighted the need for Asians to speak up and for the broader American society to understand and appreciate Asian culture and to defeat anti-Asian hate."

Richard decided to provide the leadership gift for the Asian Culture Fund, a new endowed fund that will support student- and teacher-led initiatives that elevate Asian culture and combat anti-Asian hate. Creating this fund builds on the work that Lab faculty and staff have done for years, while ensuring sustained funding and adding momentum and excitement to the work.

Richard and his family see the Asian Culture Fund as a perfect complement to Lab's extensive diversity, equity, and inclusion work. "I remain both faithful and optimistic about the notion of a collectively supportive and mutually appreciative community as a truly distinctive and proud feature of America." Lab provides a terrific starting point for young learners and future leaders to gain exposure to a variety of cultures and to understand the power of an inclusive and caring community.

In furthering the Fund's emphasis on community, Richard offered a matching gift opportunity to inspire others to contribute to the Asian Culture Fund. "I want to encourage more Asian voices and broader

participation so that the fund enjoys stronger sustainability and deeper impact."

From holiday celebrations to classroom presentations, all students will have opportunities to learn and grow thanks to the Asian Culture Fund. Richard and his family are proud to help support values of curiosity, kindness, and understanding.

**"THE EVENTS OF THE PAST COUPLE OF YEARS HAVE, IN PARTICULAR, HIGHLIGHTED THE NEED FOR ASIANS TO SPEAK UP AND FOR THE BROADER AMERICAN SOCIETY TO UNDERSTAND AND APPRECIATE ASIAN CULTURE AND TO DEFEAT ANTI-ASIAN HATE."**

—RICHARD ZHANG

## A Lab Family Affair

Where parenthood, friendship, and community meet



Twins Chase and Grant Chavin, '97, spent their formative years at Lab. As Lab "lifers", the twin brothers took advantage of all that the Schools had to offer. According to Chase, "I can say, unequivocally, that the school had a meaningful impact on my life. My closest friends, to this day, are Lab alums." Now, as a proud Lab parent, Chase is delighted to share his love for Lab with his kids and his wife, Stefanie. "I have been hearing about Lab and felt part of the Lab community almost since the day I met Chase," said Stefanie.

The Chavins' dedication to and appreciation for Lab has never wavered. As active alums and, now, parents, they have stayed committed and connected. "I always identified with the Lab community. Staying

involved allowed me to keep relationships with friends and mentors beyond my time at school. I also felt indebted to the Laboratory Schools, both for my education and for the incredible aid I received when I was there," shared Grant.

As the brothers looked forward to celebrating their 25-year class reunion with the community of friends that they love, they decided it was time to pay it forward for future generations of Labbies by providing the leadership and foundational gift for the Class of 1997 Scholarship Fund. This endowed fund, supported by members of the Class of 1997, will provide scholarship support to Lab students in perpetuity. Class funds are a valuable way for alums to engage with Lab.

There are currently 36 classes with endowed scholarship funds, and that number continues to grow every year. These funds, donated through annual and reunion gifts, provide critical support to ensure that Lab remains inclusive and accessible to students from all backgrounds.

Grant's wife, Kendra, loves that Lab is a family affair for the Chavins. "I think the kids and I feel a greater sense of community because of Grant and Chase's lifelong dedication and contributions to Lab. I can only hope that my two boys create just as many friendships and memories throughout their Lab journeys."

**"I ALWAYS IDENTIFIED WITH THE LAB COMMUNITY. STAYING INVOLVED ALLOWED ME TO KEEP RELATIONSHIPS WITH FRIENDS AND MENTORS BEYOND MY TIME AT SCHOOL."**

—GRANT CHAVIN

## Gratitude and a Giving Attitude

Paying it forward to future generations



Stu Schuster, '63, transferred to Lab as an eleventh grader and he categorically believes it was one of the best decisions of his life. "The warmth of the people and the teachers; their knowledge and expectations; and the discipline that I learned at Lab prepared me for life."

After graduating from Lab, Stu went on to study computer science at a time of incredible growth in the field. He never left Lab behind, however. He stayed connected to friends and classmates, rarely missing his milestone reunions. "Our reunions are almost better than a family reunion. It's a party but also an opportunity to reconnect and find out what people are doing." From acting and writing to teaching and researching, Stu has always been impressed with his classmates' achievements and professional pursuits.

When Stu and his wife, Bette, started to make financial plans, they learned about the possibility of a charitable remainder trust and named Lab as a beneficiary. A charitable remainder trust is a charitable giving vehicle that can provide the donor with an income stream for their lifetime and will make a valuable gift to the named charitable beneficiaries in the future. Stu and Bette have generously stipulated that their donation should support scholarships and financial aid for Lab students.

Stu is happy to give current and future students a chance to experience the incredible Lab education that he enjoyed. "I have always felt that education is the great equalizer. There is nothing you can do for youth that is more important than giving them an educational opportunity in order to help them succeed."

Stu has fond memories of the Lab teachers who challenged him, supported him, and had a tangible impact on his life and career. So supporting the Schools has been a lifelong priority. "I can't think of any other donation that would be as important as allowing people to experience what I experienced at Lab."

**"I HAVE ALWAYS FELT THAT EDUCATION IS THE GREAT EQUALIZER. THERE IS NOTHING YOU CAN DO FOR YOUTH THAT IS MORE IMPORTANT THAN GIVING THEM AN EDUCATIONAL OPPORTUNITY IN ORDER TO HELP THEM SUCCEED."**

—STU SCHUSTER

## Lending a Hand with Lots of Heart

Creating connections through volunteering



Margo Wolf O'Donnell has volunteered at Lab since her oldest child, Amanda, '22, started in nursery school. "As a working parent and someone not originally from Chicago, volunteering enabled me to have a connection to my children and to make lasting friendships with other parents." What started with holiday celebrations in the classroom led to fundraising with the Parent Development Committee and eventually a seat on Lab's Board of Directors. Despite a busy career, Margo always made time to be present for Lab activities. "These were activities I would never have gotten to do in my day job as a lawyer!"

Margo, her husband, Ger, and two children, Amanda and Ben, a currently-enrolled student, have many fond memories at Lab—big and small. After having volunteered to fundraise for the buildout of Earl Shapiro Hall, Margo and her family were excited to attend the groundbreaking ceremony for the building, and even dig a little dirt! The U-High graduation ceremony in Rockefeller Memorial Chapel will always hold a

special place in Ger's heart. "It is amazing to see how all of the little children who you first met in nursery school have grown up to become such accomplished young people."

During her senior year at Lab, Amanda was one of many graduating students who contributed to the Class of 2022 Scholarship Fund. Supporting the class fund in the years ahead is just one way that Amanda and her classmates will stay in touch. "I will stay connected to Lab through friendships and relationships with teachers. It was a wonderful place to grow up and learn."

Whether making latkes for a classroom celebration, raising financial support for a school initiative, contributing to high-level strategy discussions during the pandemic, or supporting the athletics program, Margo and her family have found joy, friendship, and community by engaging as volunteers.

"Our advice is to get involved early at Lab and get to know other parents. We have met some of our closest friends through our volunteer work at Lab," Ger shared. Margo agrees. "Giving back to the community you live in is an important lesson that we hope our kids will carry with them. Being a part of the Lab experience as a volunteer has been an honor."

**"IT IS AMAZING TO SEE HOW ALL OF THE LITTLE CHILDREN WHO YOU FIRST MET IN NURSERY SCHOOL HAVE GROWN UP TO BECOME SUCH ACCOMPLISHED YOUNG PEOPLE."**

—GER O'DONNELL



# Fundraising and Finances at Lab:

## Frequently asked questions

### Why does Lab have a fundraising program?

Generous and thoughtful support from parents, alumni, faculty, staff, and friends helps Lab close budget gaps in annual operations and allows the Schools to meet aspirational goals that enhance the educational experience for all students.

Connecting passionate philanthropists to programs and projects, fundraising allows Lab to realize activities that further our vision and mission and to open doors to students in need of financial assistance.

Without these additional resources from dedicated supporters, Lab would be forced to make difficult choices between tuition levels, financial aid budgets, and programmatic activities. The Schools count on the participation of every member of the community to ensure that students have access to exceptional faculty, opportunities, and resources.

### 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 aims to provide families who receive financial aid, and exhibit a high need, with additional support for services and materials not covered by tuition such as Extended Day, books and supplies, field trips, extracurriculars, and other expenses. This support is funded annually, in part, through the endowed Karen Putman Memorial Student Assistance Fund, to which any family can contribute. Connections 2022 also highlighted this need and raised funds to support current and future Lab families with expenses beyond tuition. Families may access this support by contacting the Office of Admissions and Financial Aid.

### How does the Fund for Lab support the school?

Lab's annual giving program, the Fund for Lab, 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.

### What is the scope of Lab's fundraising program?

> Lab's Alumni Relations and Development Office works with hundreds of alumni and parent volunteers to facilitate all major fundraising efforts for the school.

> During the 2021-2022 school year, 758 (52%) families and 773 (11%) alumni made a gift to Lab.

> Our philanthropy program consists of several giving opportunities, including the Fund for Lab and the Spring Teacher Appreciation Drive; special events, such as Connections and Dewey

Dance; the senior class gift; major gifts in support of specific programs, activities, and interests; and bequests and planned giving.

> As Lab looks toward its future, strategic campaigns remain the most powerful fundraising mechanism for transformational growth of our facilities, student life, and the financial aid program. Lab's vision for the future will be developed with principles of diversity, equity, and inclusion and student wellness in mind.

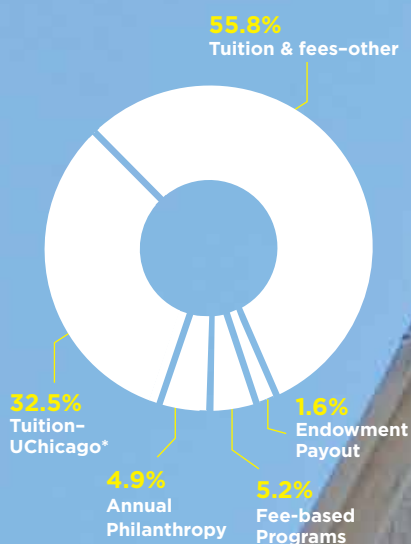
### What would a substantially larger endowment do for Lab?

A robust endowment provides Lab with the foundation needed to grow existing programs, develop new ones, open doors to students, and support our excellent faculty and staff. Revenue from our endowment currently provides critical support for our financial aid program. These funds are also used to support a variety of programs and initiatives including: professional development for our teachers and staff; Model United Nations; the Summer Link Program; the Zena Sutherland Awards for Children's Literature

Program; and faculty, staff, and student award programs. Starting in the 2022-2023 school year, the newly-founded Asian Culture Fund will begin distributing awards to support curriculum, extracurricular activities, and social events that elevate any and all aspects of Asian or Asian American culture and heritage and/or that seek to combat anti-Asian hate. Growing Lab's endowment remains a primary focus of our fundraising program and a long-term philanthropy priority for Lab.

### How is Lab funded?

In FY22, Lab's annual budget was funded by the following sources:



\*Revenue from tuition transfers from the University on behalf of the University of Chicago's Lab Tuition Assistance Program

Annual giving provides flexibility that allows for up-to-the-minute innovations and access to the latest opportunities for students and faculty. A gift to the Fund for Lab is a gift that has the potential to transform the lives of many Lab students.

### 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 need. Lab does not give merit-based aid. In 2021-2022, 9.5% 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 at any grade level.
2. A scholarship is a formally designated award—usually funded by an endowment fund or private gift—that is assigned to a particular student.

### How much financial aid does Lab provide annually?

In 2021-2022, Lab awarded more need-based financial aid (not including University tuition remission) than ever before—\$4 million. In 2022-2023, Lab has budgeted to award up to \$4.92 million in financial aid. 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 to the transformative educational experiences at 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 of Chicago (and certain affiliated units). At minimum, this benefit pays 50% of Lab tuition for children of these employees. Qualifying employees whose adjusted gross income (AGI) 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. Employee families with multiple children attending Lab at the

### What do the Lab community's donations support?

Lab is grateful for the support of its community of parents, alumni, faculty, staff, and friends who have donated to a number of critical areas. In 2021-2022, donors made gifts to the following areas:

