

LabLife

2018 Special Report on Philanthropy and Volunteerism



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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



Fostering Community, Coherence, Civility—we are a large and highly diverse community but we are one school and we must be intentional as we work to build that shared sensibility.

> Two all-school activities were introduced and embraced as important new Lab traditions. We held our first ever All School Sing which brought together more than 2,000 students, teachers, and staff to see just what we look like (and sound like) as a whole school—maybe a first-ever!

> At the end of the school year, our senior class paraded through the Historic Campus where former teachers and younger students lined the halls. The school “clapped out” the senior class, cheering and congratulating the soon-to-be graduates.

Connecting to the University and City—fully leveraging our role at the University and connecting to our city allows unparalleled opportunities for our school community to both learn and serve.

> Lab educators worked with UChicago experts to think more holistically about how we introduce computational thinking skills across our curriculum in developmentally appropriate ways.

> We brought the Smart Museum to Lab through a creative partnership that helped add student voice to an artistic event. Our Corvus Gallery hosted a satellite exhibit of *Welcome Blanket*, a participatory project created by artist, designer, and Pussyhat Project co-founder Jayna Zweiman.

Supporting All Students—we recognize, and must continually address, the complex interrelations between issues of affordability, access, opportunity to learn, and inclusivity.

> We are deeply proud that Lab has been able to expand its financial aid budget by over 20 percent to ensure that outstanding students are able to join Lab regardless of financial resources. We have more to do, but the participation in Connections this year symbolized that our community values having economic diversity in our school.

> The Schools took a broader approach to diversity, equity, and inclusion by creating eight new extra-service positions focused on these areas. These new DEI Liaisons support school-wide diversity priorities and programs through collaboration with the Diversity Advisory Council, an existing task force drawn from a wide cross-section of community stakeholders, including students.

This coming year promises to be exciting. Together we will continue our focus on these efforts as we plan for the future. Led by our external strategy partners, Lab will create a long-term strategic framework that will benefit our students as they face an increasingly global and changing world. This fall, we will continue the “inquiry phase” through surveys and in-person sessions with Lab faculty, students, parents, alumni, and staff. This phase will culminate in an intensive and innovative multi-day Design Shop (involving about 60 people across stakeholder groups) to sharpen our focus and clarify our thinking and vision.

Lastly, please join us in thanking the Lab Board members who recently completed their service to the Schools for all of their work and commitment: Hanna Goldschmidt, Peggy Lim, Michael Markovitz, and Andy Neal. Please also welcome our newest board members: John Hass, Alexander Lurye, Sundee Mullangi, and Margo Wolf O’Donnell.

We are excited for all the ways our community will contribute to the work at Lab. Your full partnership is why Lab is such an outstanding institution and we offer you our most heartfelt appreciation for all that you do.

Warmest regards,

David H. Kistenbroeker
David Kistenbroeker
Lab Board Chair

Charles H. Abelmann
Charles Abelmann
Director

“Lab offers an incredible educational experience and we can look to our history to help explain that. No other school can lay claim to being the Dewey school,” says Mr. Abelmann. “We have a legacy in John and Alice Dewey’s efforts that can, and should, underpin everything we do. Time and again, our generous community helps shine a spotlight on that legacy and those values. In doing so, they help Lab stay true to what makes a Lab education not just unique but life-changing.”

—DIRECTOR CHARLIE ABELMANN

Leading Lab is a privilege, a deeply rewarding one that allows us to partner with all those who give their time and energy to our school to achieve its mission. This past year we have seen our professionals, students, families, and alumni collaborate on exciting programs and activities. This work has unfolded into four key areas:

Inventing Lab 2.0—holding on to the ideas upon which John and Alice Dewey founded our school: being experiential, interdisciplinary, and democratic.

> We have invested in makerspaces—and the people and training to help us make the best use of those spaces—so that across every grade, students can take hold of ideas and problems, literally.

> We sent Lab and UChicago Charter School students, faculty, and staff on study tours of China where they traveled the path that Dewey followed on his two-year trip that began in 1919. The travelers revisited Dewey’s teachings and connected to a new culture and to one another.

Fundraising Highlights

> Lab’s financial aid budget increased by +20%

> Connections 2018 helped raise more than \$3.4 million to support the revitalization of Jackman Field and to help build upon Lab’s commitment to financial aid

> Alumni are stewarding 27 class scholarships

> On a terrace overlooking NYC, Lab kicked off a new regional event series: Lab on the Road

> 66% of parents made a contribution to Lab

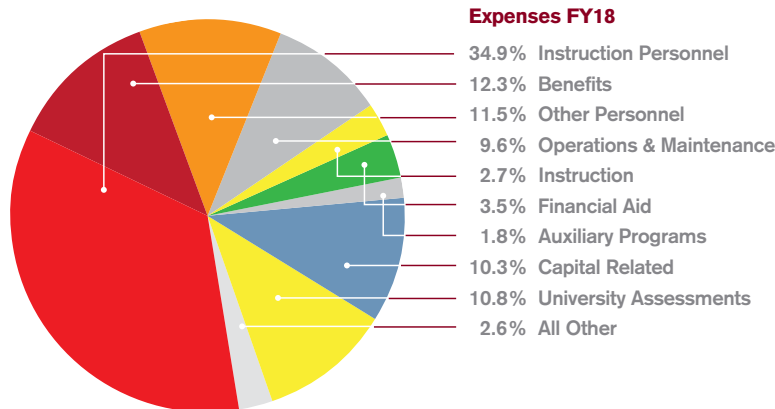
> Approximately 800 people—parents, faculty, staff, alumni—attended Connections 2018

> Senior parents founded the Class of 2018 Scholarship Fund with more than \$215,000

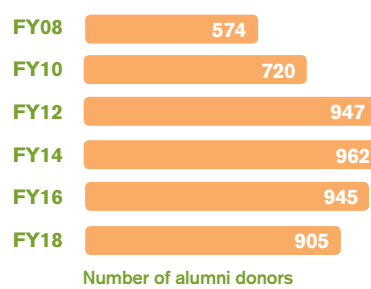
> Nearly 400 alumni returned to campus for Alumni Weekend 2017

> Alumni participation in giving continued an upward trend hitting 13%

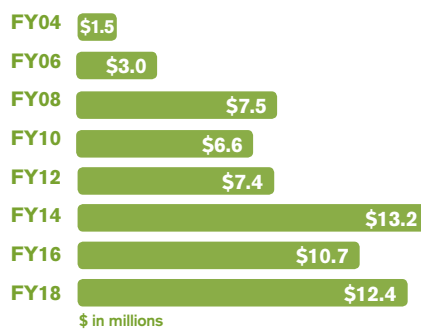
2017–18 Financials and Fundraising



Consistent support from alumni is critical to sustaining and enhancing the Lab experience



Philanthropic investment in Lab remains strong



Overall Parent Participation

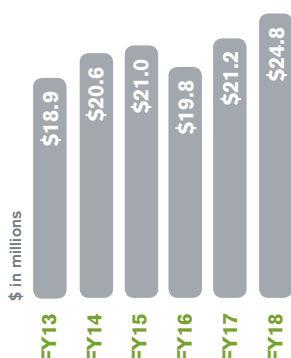
Families are increasingly supporting the Parent Fund and Lab

FY18 66%
FY17 64%
FY16 60%

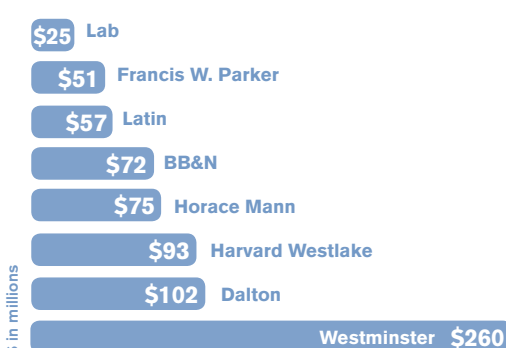
Parent Fund Participation

FY18 45%
FY17 42%
FY16 21%

Lab’s endowment, an important source of financial aid, continues to grow



Lab endowment in comparison to peer independent schools*



*Source: Lab FY18; Benchmark schools NAIS DASL FY17

Operating Statement as of June 30, 2018

REVENUES	
Tuition & Fees	\$65,251,241
Auxiliary Programs	\$ 4,554,247
Gifts	
Restricted Gifts/Current Use	\$9,059,644
Unrestricted Gifts	\$967,575
Total Gifts	\$10,027,219
Endowment Payout	\$1,124,596
Other Income	\$557,818
TOTAL REVENUES	\$81,515,121

EXPENSES	
Instruction Personnel	\$27,175,933
Other Personnel	\$9,001,395
Benefits	\$9,553,581
Total Personnel	\$45,730,909
Instruction	\$2,090,163
Operations & Maintenance	\$7,488,057
Financial Aid	\$2,692,861
Auxiliary Program	\$1,396,279
Capital Related	\$7,999,387
University Assessments	\$8,393,124
All Other Expenses	\$2,070,829
Total Non-Personnel	\$32,130,700

TOTAL EXPENSES	\$77,861,609
Addition to Capital Reserves	\$3,653,512
NET SURPLUS (DEFICIT)	\$0

Development Report as of June 30, 2018

Unrestricted Gifts	\$972,093
Financial Aid and Scholarships	\$3,493,516
Capital and Naming Gifts	\$6,051,625
Programmatic Support	\$1,780,579
Annuities and Planned Gifts	\$113,502
Other Restricted	\$17,386
TOTAL PHILANTHROPIC SUPPORT	\$12,428,701

Philanthropy and volunteerism at work

Donors help shape Lab 2.0



As Lab looks to prepare students for an increasingly complex world, honoring Dewey's core beliefs guides the way: Education should be interdisciplinary, hands-on, and help students develop into adults who can participate meaningfully in a global democratic society. Newly built and beautifully outfitted makerspaces allow students to touch, build, tinker, shape,

and play through projects that naturally integrate math, science, art, physics—and delight.

Farther afield, a special contribution made possible study tours to China for a dozen Lab faculty and staff and students from both Lab and the UChicago Charter school. The students, who followed the same path taken by Lab founder John Dewey in 1919,

are working on a documentary film of their experience. It will be shown at a May 2019 colloquium honoring the 100th anniversary of Dewey's two-year trip to China. The Centennial Colloquium, Dewey: Then and Now, is funded in part by the same gift.

Philanthropy fosters community, coherence, civility



Lab is a big school and it is one school. That mindset inspired new all school traditions and brought our community together. Connections, Lab's annual gala fundraiser brought hundreds of people together in support of financial aid and to help make possible the newly revitalized Jackman Field.

Professional development, supported by Lab's Parent and Alumni Funds, fosters collaboration among our educators and enhances the student experience. For

example, a group of N-5 teachers attended the Harvard Graduate School of Education Project Zero Institute to consider the requirements of a powerful learning experience in the 21st century. In a Project Zero classroom, teachers are also learners who model intellectual curiosity and rigor, interdisciplinary and collaborative inquiry, and sensitivity to the ethical and aesthetic dimensions of learning.

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 of directors, and to assist in the implementation of school activities.

Highlights of the Parents' Association activities include:

> Welcoming new families through the mentor program, summer parties, and parent orientation events

> Supporting parents through PA-sponsored meetings and gatherings, Restaurant Week and other outings, and the Volunteer Fair, which encourages all to get involved

> Bringing together more than 1,400 students, families, faculty, and staff at the annual Rites of May festival

> Awarding \$16,000+ in faculty and student grants which made possible: opera singer Keira Duff visiting U-High; visual artist Turtel Onli joining the fourth grade; the EU Mock Council and various club and classroom activities for students across the grades and interest areas

> Partnering with the Schools on student events, athletic spirit and booster activities, graduation celebrations, and more

> Honoring teachers with faculty appreciation luncheons

Hosting prominent thinkers through the PA Speaker Series

> Devorah Heitner, author of *Screenwise: Helping Kids Thrive (and Survive) in Their Digital World*.

> Lisa Miller, renowned scientist and author of *The Spiritual Child: The New Science on Parenting for Health and Lifelong Thriving*.

> Rob Lieber, *New York Times* columnist and author of *The Opposite of Spoiled: Raising Kids Who Are Grounded, Generous, and Smart About Money*.

Deepening Lab's connections to the university and city



Lab's connection to the University of Chicago offers unparalleled opportunities for our students—from special access to the Smart Museum and Oriental Institute to classroom visits by parents who are UChicago experts. Over recent years, a partnership between Lab and the UChicago Charter Schools has deepened. The vision and generosity of Peggy and Yung Bong Lim brought greater intentionality to how

the schools work together. This year, students from both high schools participated in a seminar on the rights of minors taught by Law Professor Emily Buss and UChicago Law students. Throughout the year, Charter School families are invited to lectures, concerts, and other special events at Lab, and an ongoing collaboration has developed between our third grades.

In celebrating a life, alumni help support all students



Zeke Upshaw, '09

Issues of affordability, inclusivity, access, and opportunity to learn are at the heart of Lab. To honor the life of Zeke Upshaw, his family and friends created the Zeke Upshaw, '09 Memorial Fund to provide financial support to talented and highly-motivated students whose financial situation might otherwise prevent them from attending Lab. Zeke, who graduated from the Ariel Community Academy before coming to U-High as a John W. Rogers and Victoria Marie Rogers Scholar, collapsed as he played basketball for the G League's Grand Rapids Drive. He died

two days later. He was only 26 years old.

To help endow the scholarship, former Lab Board Chair John W. Rogers, Jr., '76, a trustee of the University of Chicago, pledged to match all donations to the newly established fund, up to \$100,000. With donations from more than 100 alumni, parents and friends of Zeke, the fund stands at \$187,000. In addition, Vistria Group (of which Lab parent Marty Nesbitt is co-CEO) committed \$40,000, in each of the next four years, to allow the Fund to begin supporting students as soon as 2018.

The gift of time



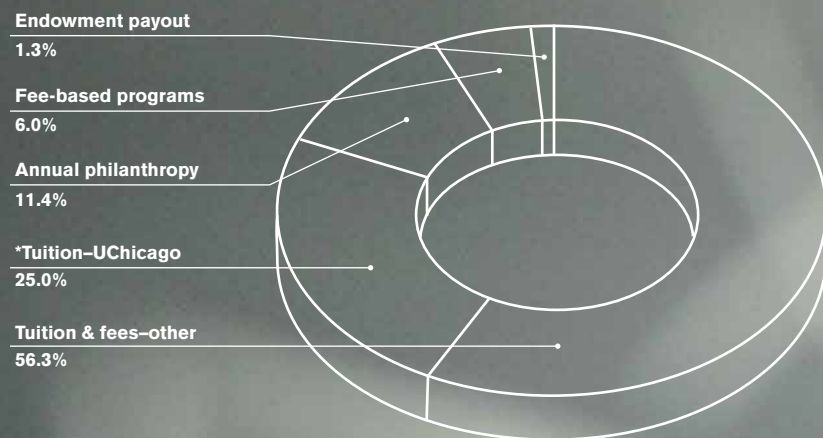
Hundreds of parents and alumni volunteer in ways large and small—you make Lab better. Volunteers share expertise in our classrooms, sponsor

summer interns, and make possible important community traditions—from Rites of May and Bookswap to class potlucks and LabArts. Thank you!

Finances and fundraising at Lab: frequently asked questions

How is Lab funded?

Lab's annual budget is funded by the following sources:



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

Why does Lab have a fundraising program?

Fundraising at Lab closes a budget gap in annual operations, and funds around 50% of Lab's financial aid budget. In addition, it allows Lab to meet aspirational goals that would otherwise be impossible to reach.

Generous support from parents, alumni, faculty, and staff allows Lab to offer a first rank educational program without having to rely solely on tuition increases. Furthermore, by connecting passionate philanthropists to programs and projects, fundraising also allows

Lab to realize programs that further our vision and mission, and often go above and beyond in creative and meaningful ways.

Without this additional income, 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 2017–18 school year 925 (66%) families and 905 (13%) alumni made a gift to the Schools. Lab's participation goals for 2018–19 are:

- Parent participation: 70%
- Alumni participation: 14%

> Our philanthropy program is comprised of several key elements:

- Major gifts
- Annual Fund

- Bequests and planned giving
- Connections and Dewey Dance fundraiser events
- Class gifts

> In 2014, Lab completed the \$82 million Lab+ Campaign which enhanced every aspect of Lab including a \$192 million campus expansion and renovation that included the building of Earl Shapiro Hall and Gordon Parks Arts Hall. Going forward Lab will be integrated into the major UChicago fundraising campaign cycles. The current UChicago campaign, Impact & Inquiry, ends in 2019.

How does Lab's financial aid program work?

All of Lab's awards are based on demonstrated financial need. Lab does not give merit-based aid. Approximately 10% of families receive aid—separate from any tuition benefit a family might receive as a full-time employee of the University. On average, Lab meets 100 percent of students' demonstrated need. Aid monies are distributed through two paths:

How is Lab's budget determined and who decides?

As a unit of the University of Chicago, Lab participates in both annual and multi-year University budgeting processes. With the guidance of Lab's Board, and under the director's leadership, Lab's finance team works with the principals, department chairs, and other administrators to determine staffing and capital needs and operating budgets. These programmatic costs, along with enrollment forecasts, the growth of net tuition, fundraising, and other revenues are incorporated into a multi-year budgeting model that guides Lab's annual budget choices.

Please explain the tuition benefit for University of Chicago employees

The University's Lab Tuition Remission Program is for full-time employees of the University (and associated units.) At minimum this program pays 50 percent of Lab tuition. That amount increases up to 85 percent based on a sliding household income scale. Importantly, non-university families in no way subsidize this benefit and the Schools do not lose any tuition income. The University makes a direct transfer of funds into Lab's accounts to cover this benefit. That transfer translates to about 25 percent of Lab's budget.

What is the largest portion of Lab's budget?

Teacher and assistant teacher compensation accounts for 50% of Lab's expense budget. Salaries, and what have generally been >4% annual increases, are set and remain in place as part of the teachers' union negotiations held every several years. The current collective bargaining agreement expires June 30, 2019.

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

Our financial aid program serves to bolster Lab's commitment to diversity in its all forms by diversifying the varied socioeconomic backgrounds that make up our community. In short, our financial aid program seeks to remove financial barriers for students who contribute to and benefit from a Lab education.

How much financial aid does Lab provide annually?

Lab will award approximately \$3.4 million in need-based financial aid in 2018–19 (not including University remission.) For 2018–19, the average aid grant is \$15,162, and the median aid grant is \$12,404. The total reflects a 20 percent increase in aid over last year. Still, continued increases in Lab's aid budget, mainly achieved through philanthropy, are critical to Lab's aspirations around economic diversity and full access to all 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. Endowment income is less variable relative to other revenue streams and is available in perpetuity. By increasing the endowment, Lab could more reliably address ongoing programs, increase its ability to provide financial aid, and further reduce its dependence on tuition increases.

1. A scholarship is a formally designated award, usually funded by endowment payout or private gifts, and assigned to a particular student for his or her entire High School career.

2. Financial aid awards subsidize family tuition obligations and are awarded for tuition at any grade level

Securing financial aid support is a fundraising priority for Lab and a core part of all our development efforts.

Board

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Senior Director, Commercial
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Senior Scientist at Argonne
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Director
University of Chicago Laboratory
Schools



School Leadership

As of October 1, 2018

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Director

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Sandra Bixby
Principal, Middle School

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Strategic Advisor and Director,
Communications and
Marketing

Damon Cates
Executive Director, Alumni
Relations & Development

Colleen Coyle
Director, Family Life Programs

Carla Ellis
Assistant Director of Schools

Kiel Gray
Executive Assistant to the
Director

Brian Hewlett
Director, Innovation &
Technology

Christopher Jones
Associate Director of Schools,
Finance and Operations

Nicole Neal
Director, Student Services

Betsy Noel
Coordinator, Wellness
EOD/Deputy Title IX
Coordinator

Irene Reed, '92
Executive Director, Admissions
and Financial Aid

Priyanka Rupani, '06
Director, Diversity, Equity, &
Inclusion

Stephanie Weber
Principal, High School

Carla Young
Principal, Nursery-Grade 2

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Dean of Students, Nursery-
Grade 2

Asra Ahmed
Assistant Principal, High School

Ryan Allen
Dean of Students, Middle
School

Ana Campos
Dean of Students, High School

John Damer
Director, Development
Operations

Kellyn Gawel
Director, Human Resources

Rickey Harris
Dean of Faculty, Nursery-Grade 2

Allison Jones
Assistant Principal, Middle
School

Brian Lipinski
Director, Finance

Uzma Panjwani
Assistant Principal, Lower School

Sonia Perez
Dean of Students, Lower School

Noah Rachlin
Dean of Teaching & Learning,
High School

David Ribbens
Director, Athletics

Liesje Spaepen
Dean of Teaching & Learning,
Nursery-Grade 2

Joseph Wachowski
Director, Operations

Michael Zarobe
Director, Alumni Relations



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As of October 1, 2018

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Lauren Polite

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As of October 1, 2018

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Investment Banking
Associate
Macquarie Capital

**David Solow, '97,
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Vice President
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Staff Anesthesiologist
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Chase Chavin, '97
Principal
Morgan Management

Cheryl Cortez, '92, MBA'03
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The Banc Funds Co.

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Professional Soccer Player
Charleston Battery

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