PARENTS' FUND COMMITTEE

2015-2016 Volunteer Guide
Dear Parents’ Fund Committee Members,

Each year, about 60 families come together to support Middlebury as members of the Parents’ Fund Committee. Thank you for being among them. We are proud and grateful that so many of you recognize how important the College is to our students and choose to invest your time, energy, and resources in this exceptional place.

Working with the members of the Parents’ Fund Committee is always a joy, but the year ahead will be particularly exciting. We have so much positive momentum coming off an extraordinary year. Together we reached 40-percent parent participation—one of the highest rates in the country—and raised a remarkable $3.3 million. That speaks volumes about the important work of our parent volunteers. And we have a new, dynamic president, Laurie Patton, who is an experienced fundraiser and looks forward to partnering with us.

Parent volunteers form the cornerstone of the Parents’ Fund. We are excited to work with you in reaching out to other Middlebury parents to encourage their support for the students and programs at Middlebury. Thank you again for your generosity and your efforts on Middlebury’s behalf.

Jane and Bob Oberrender  P’13, P’15, P’18
What Does the Parents’ Fund Committee Do?

Each year committee members reach out to other parents to ask them to support Middlebury. Each member makes a personally significant gift and contacts roughly 10 other families to encourage them to make a gift.

COMMITTEE MEMBER RESPONSIBILITIES

- **Lead by example.** Support the Parents’ Fund by making an annual gift or pledge by the end of December and a gift no later than June 1. (Our fiscal year ends on June 30.) Committee members lead the way with gifts that reflect their capacities and raise the bar for others. We hope you will make a gift at one of the giving levels outlined on page 4.

- **Contact** the families assigned to you to request support for Middlebury. Start with a note in early fall to introduce yourself and the Parents’ Fund. Indicate that you will follow up later to ask for a gift.

- **Stay informed** about the College and try to participate in the annual Fall Family Weekend business breakfast meeting and subsequent teleconferences. The more you know about Middlebury, the easier your job will be.

- **Thank people for their gifts.** Your handwritten note or email will be appreciated by the donor and encourages future philanthropy.

- **Keep in touch.** Let us hear from you! Communicate with the co-chairs and the Parents’ Fund staff to let us know what you and other parents are thinking. Your insights and observations are valuable.

- **Use Parents in Action.** PIA is an online system designed for volunteers to access information about your assigned contacts. Familiarize yourself with the program or ask Heidi Webb, associate director of Parent Giving, for updated reports as needed.

- **Confidentiality is key.** The information we share with you is highly confidential, and we thank you for being discreet.

- **Be social.** You can build excitement around what’s happening at Middlebury and support the College’s fundraising efforts by raising Middlebury’s profile through social media. Share, comment, and like the College’s posts. Tag your Middlebury photos. It’s easy and a great way to help the College.

- **Mayday!** If for some reason you cannot fulfill your Parents’ Fund duties, we understand! Just let us know and we will reassign the families on your list.

PARENT GIVING STAFF

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A Tradition of Giving

Since Gamaliel Painter left a bequest of $13,000 and his cane to the College in 1819, philanthropy has played a critical role in Middlebury’s development. Beginning in 1940, gifts to the Annual and Parents’ Funds have been an important source of institutional momentum. These gifts are the primary way for parents, alumni, and friends to sustain the special features that define Middlebury. Middlebury honors these donors through its three giving societies.

GIVING SOCIETIES

Middlebury has several societies that honor donors who are especially generous or consistent in their philanthropy. Sharing recognition levels can raise sights and motivate some parents to make a larger gift than they might otherwise consider. Members of each giving society are acknowledged in Middlebury’s online donor honor roll at go.middlebury.edu/parentsHonorRoll.

LEADING BY EXAMPLE

THE 1800 SOCIETY recognizes donors with the ability and desire to support Middlebury at a leadership level. Giving at the 1800 Society level makes you a philanthropic leader and an example for others to follow.

- Dean’s List—$2,500–$9,999
- College Luminaries—$10,000–$49,999
- Old Chapel Fellows—$50,000–$99,999
- President’s Circle—$100,000 and above

Members of the 1800 Society are dedicated to ensuring that Middlebury students experience the fullest possible range of opportunities.

HONORING LOYALTY

THE TRUE BLUE SOCIETY recognizes Middlebury’s most loyal donors, who have made gifts consistently for at least the last three fiscal years. True Blue donors are the foundation of Middlebury’s annual giving program.

HONOR THE PAST/SHAPE THE FUTURE

THE CANE SOCIETY recognizes individuals who have established life-income gifts that benefit Middlebury—such as charitable gift annuities and charitable remainder trusts—or have included Middlebury in their estate plans.
Why Giving Matters

Your gift helps us to teach exceptional young people how to understand the world and contribute to it. It is an investment in today’s students and the world they will shape together. You make it possible for Middlebury to fulfill its mission.

THE PARENTS’ FUND: CREATING THE MIDDLEBURY EXPERIENCE

A Parents’ Fund gift supports every aspect of the Middlebury experience, providing opportunities for learning and discovery and giving the College the flexibility to respond to emerging opportunities and challenges. Because Parents’ Fund gifts are unrestricted and can be spent as they come in, they make a direct and immediate difference in the lives of students and faculty. Parents’ Fund gifts also provide our new president with resources she can use to ensure that Middlebury remains an inclusive and intellectually dynamic community and to plan for its future.

Parents’ Fund gifts are an important complement to the College’s endowment, which is invested for the long term and provides a stable source of income to fund College programs. Here are a few of the things the Parents’ Fund supports:

- Opportunities for students and faculty members to collaborate on independent research
- Internships and other opportunities for students to apply what they are learning to real-world issues
- Student organizations and varsity, club, and intramural sports, where students develop leadership and team-building skills
- Financial aid

Participation Matters Gifts of every size are important to sustaining the Middlebury experience. Gifts of $250 or less from parents and alumni added up to $843,759 last year. Gifts under $100 amounted to $461,759. Year after year, the Parents’ Fund not only sustains Middlebury, but helps it to thrive.

FINANCIAL AID: CHANGING LIVES, CHANGING THE WORLD

There may be no deeper expression of our values as an institution than our commitment to admit the most qualified students without regard to their ability to pay. And no other investment pays greater dividends than supporting talented young men and women with the ability and motivation to make a positive difference wherever they go.

The impact of a gift for financial aid begins with individuals and ripples outward through the entire Middlebury community and the communities our students will help to shape.

Financial aid brings different voices to the classroom, dorm, playing field, and dining hall. It creates a community where students learn to challenge their assumptions and to see the world from new perspectives. It makes Middlebury a place for unexpected questions, deeper discussions, and unanticipated insights. Financial aid helps to ensure that all of our students live and work in a truly diverse environment. When they graduate, they have the power to change their communities by engaging the people and resources around them.

Through the pursuit of knowledge unconstrained by national or disciplinary boundaries, students who come to Middlebury learn to engage the world.

—from Middlebury’s mission statement
Steps to a Successful Solicitation

**FIRST STEP: PREPARE**
- **Attend the annual business breakfast meeting** and pick up your Parents’ Fund Committee packet, or wait to receive your packet in the mail.
- **Make your own gift or pledge first.** Other parents are more likely to join you in giving if you lead by example.
- **Review your parent assignments in Parents in Action.** Have they been consistent givers? Is this their first year as Middlebury parents? Learn as much as you can before you reach out.
- **Stay informed.** The more you know about the Parents’ Fund, various gift opportunities, and the College, the easier your job will be.
- **Ask for help.** You can always refer someone to a Parent Giving staff member if you don’t know the answer to a question.
- **Stress participation.** Let them know their gift, whatever the size, truly matters. Many parents care about Middlebury’s continued excellence. Their gifts demonstrate their confidence in the College and its long-term impact on their student.
- **Ask about matching gifts.** Do their employers have matching gift programs? This can double or even triple the size of the gift.
- **Check contact information.** Confirm all contact information and pass along any updates to the Parent Giving office.
- **Remember, giving makes people feel good.** Enjoy yourself and have fun with your calls.

**SECOND STEP: REACH OUT**
- **Make the contact.** You may choose a phone call or an introductory letter or email, depending on the contact information that is available in Parents in Action. Be upfront. Be sure they know you are a fellow parent working as a volunteer for Middlebury.
- **Find common ground.** What do your assignments appreciate the most about their students’ Middlebury experiences? What are their impressions of Middlebury?
- **Inform them of the Parents’ Fund goal—$3.25 million—and educate them on why all gifts matter.**
- **Be specific.** The College will provide you with a suggested ask amount for each individual based on previous giving history or capacity. You may want to use language such as: “Would you be willing to join me in making a gift of $_____?” Or, “Can I count on your help? Would you consider a gift of $_____?”
- **Listen.** Parents often love having another parent to talk to. You may not receive a gift right away, but you can share your experiences and your conversation may result in a gift down the line.
- **Agree on next steps.** Solicitations sometimes require more than one discussion. The Parent Giving staff is always ready and available to jump in and help if needed.
- **Say thank you.** Whether or not your assignments make a gift, thank them for their time and support. You will receive a notification from Parents in Action once a parent assigned to you makes a gift. An email or handwritten note is always appreciated and encourages future philanthropy.

**THIRD STEP: FOLLOW UP**
Making a Gift to Middlebury

There are many ways to support Middlebury. As a parent volunteer, you can help other parents determine the best way to make a gift.

WAYS TO GIVE

online: go.middlebury.edu/giveparents
phone: 888-367-6433 (toll free)
mail: Gift Administration, Middlebury College, 700 Exchange Street, Middlebury, VT 05753

INCREASING THE IMPACT OF A GIFT

A few ways your assignments can make their gifts go even further are listed below. Please contact Heidi Webb if you have questions or need more information.

Recurring Gifts are a great way to increase the size of your gift by spreading it out over a 12-month period. For more information visit go.middlebury.edu/recurringgift.

Corporate Matching Gifts Many companies will match charitable gifts, and a matching gift is a great way to double the impact. Ask if a parent’s employer has a matching gift program and encourage him or her to check with the human resources office for the appropriate paperwork.

Multiyear Pledge A useful option for someone who would like to make a larger gift is to spread the gift out over a three- to five-year period. If a donor is interested in this option, please contact Heidi Webb at hwebb@middlebury.edu or call 802-443-2888; she will be happy to follow up.

Gifts of Stocks and Mutual Funds Gifts of appreciated stock and mutual funds held for more than one year can be made without incurring capital gains tax. In addition, the gift can be declared as a charitable income tax deduction for the full fair market value of the securities. Interested donors should call 888-FOR-MIDD (367-6433) for more information.

Flexible Giving Options Through a variety of gift plans, parents can help ensure the future of Middlebury College while securing their own finances in ways tailored to their age, income and assets, and vision of giving. A gift can be as simple as including Middlebury in a will or as detailed as creating a trust for heirs and favorite charities. To learn more, contact Middlebury’s planned-giving professionals at 866-496-6433 or giftplanning@middlebury.edu, or visit go.middlebury.edu/giftplanning.
I'm already paying tuition and fees. Why should I support the Parents' Fund? The comprehensive fee is a significant investment in each student and a big commitment. However, the cost to provide a Middlebury education significantly exceeds the comprehensive fee. The difference is made up by endowment earnings and philanthropy, which subsidize and enhance the Middlebury experience. The Parents' Fund supports your student. Every Middlebury program benefits from the annual gifts of parents and alumni. Last year, parents gave $3.3 million, which provided funding for internships; supported academic departments, athletic teams, and interest-based clubs; and created more resources that benefit our students. Parents made an additional $3.1 million in endowment and capital gifts for a variety of purposes. Parent gifts enrich the experience for all students, helping to prepare them for fulfilling and successful lives.

The College is committed to ensuring that a Middlebury education remains relevant and provides experiences that make our students competitive in the job market. We must maintain the quality of the current programs while continuing to enhance them. We ask that all parents give what they can to ensure the future success of their students and their classmates.

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Questions Parents May Ask

If I designate my gift, will it count toward the Parents’ Fund? While our priority is unrestricted gifts, as they provide Middlebury with the most financial flexibility to meet core commitments and create new initiatives, gifts directed to specific purposes also count toward the Parents’ Fund, as long as they are annual gifts. Parents can support a number of different areas through the fund, including financial aid, experiential learning, faculty and academic programs, athletics, and student life.

Middlebury has a significant endowment. What more does it need? Middlebury’s hallmark features—a personalized education with a global perspective, a focus on the environment and the liberal arts, an international network, and a wide range of opportunities for students to apply what they are learning—are expensive. The endowment covers just 19 percent of Middlebury’s total budget, which is significantly lower than our peer schools with larger endowments. The remainder is made up by tuition and fees and annual gifts from parents and alumni. It would take $100,000 in endowment to provide the same income and create the same impact as a $5,000 Parents’ Fund gift.

I can only afford a small gift. Does it really matter to Middlebury? A resounding yes! Last year, gifts of $250 or less added up to $843,759. Gifts under $100 amounted to $441,837. We are proud that between 30 and 40 percent of parents make a gift to Middlebury each year, and we hope to maintain that strong parent participation.

Why is parent participation important? Participation is widely viewed as a measure of approval for any institution. Outside organizations, foundations, the media, and major donors view participation as a key measure of the overall strength of the College. When parents make a gift to the College, they demonstrate their belief in the power of a Middlebury education and recognize its significance in their students’ lives. Last year, 40 percent of parents made a gift to the College, a resounding vote of confidence in Middlebury.
What is Middlebury doing to keep the comprehensive fee down? Middlebury’s Board of Trustees and senior leadership recognize that the cost of higher education has risen at a higher rate than inflation for many years and presents a challenge for many families. The administration carefully monitors expenses, and the cost of a Middlebury education has actually fallen in comparison to peer colleges since 2010. In addition, Middlebury’s other programs—Language Schools, Schools Abroad, and the Middlebury Institute of International Studies—contribute to the institution’s overall bottom line.

Why should I give to Middlebury, when there are many other deserving causes? We recognize that people have many philanthropic priorities, but we do hope that every parent will include Middlebury in his or her list of charitable priorities. A gift to Middlebury is an important investment in your student and in the future. That gift to Middlebury also has leveraging power, as the College’s programs, students, faculty, and alumni have a significant impact on the world.

I’m upset about a professor/decision/policy. Why should I give? Parent support is essential to the long-term strength of Middlebury. Your investment today helps to ensure Middlebury’s reputation as one of the finest liberal arts colleges in the country and enhances the value and prestige of your child’s degree. Middlebury is bigger than any one issue or any one person, and, by definition, a college is a place that encourages many diverse points of view. Students—not the current administration or trustees—are hurt by the withholding of gifts.

My child/other relative wasn’t admitted to Middlebury. Why should I give? Chances are that child or grandchild is having success at the college he or she is attending. Try to turn the conversation to that success; many people recover from their initial disappointment once they see their children happy at other colleges. Remind the parent about his or her positive experiences at Middlebury. Be a good listener and sympathetic friend. Sometimes that’s all it takes for the person to reconsider.

Can I make a gift in honor of my student or a coach or faculty mentor? Yes, and many parents choose to do that. When you make a gift in someone’s honor, that person will receive a certificate to notify him or her of this recognition. It’s a great way to acknowledge your student’s accomplishments or the impact someone at Middlebury has had on your child’s life. It is particularly meaningful for seniors when their parents contribute to the senior class gift in their honor.
Parents in Action

Parents in Action (PIA) is an online reporting tool that makes it easy for volunteer fundraisers to keep track of their assignments and outreach. Because Parents in Action is tied to the College’s main database, information is updated nightly. In addition to your Parent Giving staff partner, who is always willing to answer questions and help you to get whatever you need to do your work, this database is your primary source of information.

**WHAT CAN PARENTS IN ACTION DO FOR YOU?**

- It provides up-to-date contact and giving information for each of your assignments.
- It provides an email notification when one of your assignments makes a gift.
- It provides a dashboard with goals and progress to date.
- It provides templates for outreach and follow-up.
- It links to the Middlebury parent online giving site.
- It allows you to keep track of your work and send updates to Heidi Webb.

**HOW DO YOU LOG INTO PARENTS IN ACTION?**

**FOR RETURNING USERS:**

- Type go.middlebury.edu/pia into your web browser. You may also get there from the Middlebury home page. Click on “Quick Links” in the bottom right-hand corner and then on “BannerWeb.”
- Enter your user ID and PIN. Your user ID is your Middlebury ID number (available on the front cover of this guide or by calling 802-443-2200). Your PIN is the 6-digit password you chose during your initial login.
- Click on Web for Advancement tab at the top of the screen.
- Select Agents/Parents-In-Action.

**FOR NEW USERS:**

- Enter your user ID and PIN. Your user ID is your Middlebury ID number (available on the front cover of this guide or by calling 802-443-2888). Your PIN is the last 6 digits of your ID.
- The first time you log in successfully, the system will tell you that your PIN has expired and will prompt you to choose a new secure PIN.
- At the next prompt, please set a security question.
- If you have trouble logging in, please contact the Middlebury Help Desk at 802-443-2200 or helpdesk@middlebury.edu.

**ONCE IN THE SYSTEM:**

- Click on Get My Parent Assignments to check the progress of your assignments and find contact information.
- Resources for Volunteers: Find links to useful information on the Middlebury website, as well as templates that you can customize to aid in your outreach.
Middlebury Today

MIDDLEBURY’S FINANCES

Middlebury’s FY16 budget was $316,790,000 and includes the undergraduate college, Language Schools, Schools Abroad, Bread Loaf School of English and Writers’ Conferences, and Middlebury Institute of International Studies at Monterey.

**FY16 REVENUE**

- Student Fees: 65%
- Endowment: 19%
- Other Sources and Short-term Investments: 2%
- Auxiliary: 2%
- Reserves and Initiatives: 3%
- Sponsored Activities: 3%
- Current Use Gifts: 6%

**FY16 EXPENSES**

- Salaries, Wages, and Benefits: 50%
- Financial Aid: 18%
- Library Books: 1%
- Contingency: 1%
- Repairs and Maintenance: 1%
- Tax and Insurance: 1%
- Utilities: 3%
- Capital: 4%
- Debt Service: 5%
- Travel, Food, Supplies: 5%
- Contract Services: 5%
- Other Expenses: 6%

Helpful Resources

WHERE TO GET INFORMATION

PARENTS’ FUND COMMITTEE RESOURCES
www.middlebury.edu/giving/priorities/

MIDDLEBURY MAGAZINE
www.middmag.com

MIDDLEBURY NEWS ROOM
www.middlebury.edu/newsroom

THE CAMPUS (student newspaper)
www.middleburycampus.com

STUDENT BLOG
www.middbeat.org

SOCIAL MEDIA

Get to know other parents and Middlebury. Join the conversation in the Middlebury parents’ Facebook group. Share, comment, retweet, and like Middlebury’s posts. Follow Middlebury on Instagram and enjoy photos of campus.

MIDDLEBURY ON FACEBOOK
www.facebook.com/middleburycollege

INSTAGRAM
https://instagram.com/middleburycollege/

MIDDLEBURY ON TWITTER
www.twitter.com/middlebury
www.twitter.com/MiddAthletics
www.twitter.com/Middcampus
Timeline of Events and Action Items

**OCTOBER 2-4**
- Fall Family Weekend

**OCTOBER 3**
- Parents’ Fund Committee annual business breakfast meeting
- Parents’ Reception at Hadley Barn
- Online PIA volunteer assignments become available
- Committee members begin introductory and welcome calls
- Parents’ Fund Committee appeal letters are mailed to parents

**NOVEMBER**
- Parents’ Fund Committee conference call
- Middlebury calendar and magazine are mailed to parents

**DECEMBER**
- Calendar year-end postcard appeal is mailed to parents
- Solicit parent assignments before the end of the calendar year
- Monthly Parents’ Fund Committee email updates begin
- Season’s greeting email message to all parents

**DECember 31**
- End of tax year

**JANUARY**
- Parents’ Fund Committee co-chair welcome email to Feb parents

**FEBRUARY 6**
- February Celebration

**FEBRUARY 10**
- February Orientation

**FEBRUARY**
- Parents’ Fund Committee appeal letters are mailed to parents

**MARCH**
- Second solicitation and/or follow up calls

**APRIL 15**
- Student Research Symposium

**MAY**
- Committee members complete fiscal year-end reminders
- Fiscal year-end reminder postcard is mailed to parents

**MAY 29**
- Commencement
- Committee members receive preferred seating

**JUNE 30**
- End of Middlebury’s fiscal year

**JULY**
- Final Parents’ Fund Committee report is mailed to all volunteers

**AUGUST**
- Welcome receptions held around the country. Committee members are invited help welcome new students and families.