“Our colleges will not be rich enough until they are able to bring the education they offer within the reach of the poorest young man in the land.”

Williams President, P.A. Chadbourne '48, Induction Address in 1872
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The Purpose of the Williams Parents Fund

The Williams Parents Fund exists to enhance the college’s commitment to educate promising, talented young people. Tuition at Williams, although substantial, does not fully cover the actual cost of providing this outstanding education. Since 1821, generous gifts from parents, alumni, and friends of Williams have helped the college to bridge this gap. Each year, parents are invited to honor this tradition by making their own gifts to the Parents Fund.

As a component of the Annual Fund, the Parents Fund not only helps Williams meet its operating expenses, but also makes possible the exceptional educational opportunities that are a traditional part of the Williams experience. Because gifts to the Parents Fund are unrestricted, they are immediately expendable to address the college’s current and highest priorities, and provide Williams with a dependable source of financial operating support.

How the Parents Fund Works

Because Williams subsidizes 100% of its students, including those who pay full tuition, we invite families to acknowledge this support with annual gifts to the Parents Fund. All parents of undergraduates and selected parents of alumni are invited to participate in the Parents Fund.

Parents Fund solicitation begins in October and ends on May 31. All gifts received before June 30 are counted in the fund total. The success of the Parents Fund is dependent on a cooperative effort between parent volunteers and Williams staff. Each year about 75 families donate their time to serve on the Parents Fund Committee (PFC). Each volunteer makes around 10 calls to other Eph families. The PFC is headed by parent Co-chairs, who work closely with the PFC Steering Committee and the Director of the Parents Fund to build relationships with parents. The PFC meets twice yearly, usually during Family Days in October and in April. These meetings are optional.

Many larger gifts to the Parents Fund—those of $50,000 and more—are the result of collaboration with Senior Development Officers at Williams. These officers make personal appeals to those families who have the ability to be especially generous to Williams.

Families may designate their Parents Fund gifts to honor one of these areas:

• **Highest Priorities**
  Allow Williams to meet its core commitments and launch new initiatives through your unrestricted support.

• **Financial Aid**
  Enable Williams to create and foster a diverse community of highly talented students, regardless of their personal financial resources.

• **Academic Excellence**
  Continue the tradition of Mark Hopkins and the Log; support Williams’ educational heart and the special relationship formed between students and professors creating knowledge side-by-side.

• **Student Life**
  Foster the connections that Williams students make with one another through residential life initiatives and more than 100 student organizations, including intramural and club sports and the Outing Club.

• **Equity and Inclusion**
  Nourish initiatives that foster an intellectual environment where all can live, learn, and thrive. Gifts help transforms Williams in important and lasting ways, including providing funding for the Davis Center, RASAN, and special academic programs.

• **Sustainability**
  Help reduce the college’s carbon footprint while teaching today’s Ephs to build a more sustainable future.

• **The Arts**
  Affirm the role that the arts play in the Williams experience by supporting open, creative, and flexible learning opportunities both in and out of the classroom.

• **Athletics**
  Champion the valuable student-athlete experience and show your support for Williams’ legendary intercollegiate athletics program.

By designating their gifts, families can show Williams what they care most about, but budget appropriations for departments and programs are not directly affected by individual gifts.
The Purple Mountain Association

All Williams families are invited to become members of the Purple Mountains Association. Named after the beautiful hills in which the campus nestles, its levels symbolize how gifts from generous families enable Williams students to dream big and to climb far.

Purple Mountaineers provide unrestricted support that makes possible remarkable educational opportunities at Williams. Our hallmark tutorials, the Williams-Exeter Programme, summer research stipends, music, theater, and athletics are among hundreds of programs that combine to make Williams a premier liberal arts college.

In addition to having the personal satisfaction of knowing that their support enriches the education of all Ephs—including their own daughters and sons—Purple Mountaineers experience a deepened bond with the college through increased contact with faculty, administrators, alumni, and other members of the extended Williams family.

Through their leadership, they inspire the efforts of all at Williams to provide an unparalleled liberal arts education.

Courtesies extended to Parent Fund donors to the Purple Mountain Association

• Opportunities to deepen connections with administrators, faculty, and alumni

• A unique piece of Williams memorabilia

• Invitations to an annual Presidential reception (for Mountaineers at the Stone Hill level and above)

• Invitations to an annual Presidential dinner (for Mountaineers at the Mt. Prospect level and above)

ANNUAL GIVING LEVELS

$ 250,000 Mt. Greylock
$ 100,000 Mt. Williams
$ 50,000 The Dome
$ 25,000 Mt. Prospect
$ 10,000 Pine Cobble
$ 5,000 Stone Hill
$ 2,500 Mt. Hope

Parents Fund Guidelines

• All information about Williams’ families is confidential, and is to be used solely for the purpose of helping the college raise funds. Please do not discuss this information with anyone other than Parents Fund personnel. At the end of the fund year, parent profiles should be shredded or returned to the Parents Fund office. Please read Appendix A for a fuller statement.

• The Parents Fund ends on May 31; gifts must be received by June 30 to be credited to the annual total.

• Gifts of cash, checks, credit cards, and securities are all accepted.

• Matching gifts are welcomed. They credit parent fund totals and are counted towards membership in the Purple Mountain Association.

• Parents may make gifts to the Parents Fund in honor of their Williams children. Those who have had gifts made in their honor receive notification of this recognition.

• The college encourages parents to give first to the Parents Fund, and then, if so inclined, to consider additional gifts for restricted or endowed purposes. A family giving Williams an endowed or restricted gift, but no additional gift to the Parents Fund, is not counted as a donor to the Parents Fund.

• Once a family has made a gift, they are not solicited again until the next fundraising year (an incentive to give early)!
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eph</td>
<td>Derived from the name of founder Ephraim Williams, the nickname for a Williams student or alum. It rhymes with 'chief.'</td>
</tr>
<tr>
<td>P’20</td>
<td>Parents of students of the class of 2020; “P” for parent followed by the abbreviated form of the class year.</td>
</tr>
<tr>
<td>P’08,’04</td>
<td>A parent of two Ephs, one class of ’08 and the other class of ’04.</td>
</tr>
<tr>
<td>Parents</td>
<td>In the PF world, this refers only to parents who are NOT also Williams alumni.</td>
</tr>
<tr>
<td>Alumni Parents</td>
<td>Parents who went to Williams themselves; they are NOT solicited by the PF.</td>
</tr>
<tr>
<td>PAL</td>
<td>Parents of ALumni.</td>
</tr>
<tr>
<td>PF</td>
<td>Parents Fund.</td>
</tr>
<tr>
<td>PFC</td>
<td>The Parents Fund Committee.</td>
</tr>
<tr>
<td>PMA</td>
<td>Purple Mountain Association; Purple Mountaineers are donors who have given $2,500 or more to the current PF.</td>
</tr>
<tr>
<td>Assignment</td>
<td>A family that a member of the PFC has been assigned to contact and ask to support.</td>
</tr>
<tr>
<td>Current</td>
<td>Referring to gifts, this means for use in this fiscal year; immediately expendable.</td>
</tr>
<tr>
<td>DONOR</td>
<td>A family who made a gift to the PF this year.</td>
</tr>
<tr>
<td>LYBUNT</td>
<td>Last Year But, Unfortunately, Not This; a family that made a gift to the previous PF, but has not yet given to the current PF.</td>
</tr>
<tr>
<td>SYBUNT</td>
<td>Some Year(s) But, Unfortunately, Not This; a donor who did not give last year but has given in some earlier year(s).</td>
</tr>
<tr>
<td>OCR</td>
<td>Office of College Relations, administrative home of the Parents Fund.</td>
</tr>
<tr>
<td>Major Prospect</td>
<td>A family the college has identified as having the capacity to join the PMA and make a significant restricted gift. AKA: rated prospect.</td>
</tr>
<tr>
<td>SDO</td>
<td>Senior Development Officer, a member of the OCR team who works exclusively with major prospects.</td>
</tr>
<tr>
<td>Staff 1</td>
<td>This is the title of the SDO assigned to a rated prospect.</td>
</tr>
<tr>
<td>Unrestricted</td>
<td>Refers to funds that are not designated for a specific purpose or use.</td>
</tr>
</tbody>
</table>
Getting Your Williams Education

One of the benefits of volunteering for the Parents Fund is learning more about Williams College, the superb education it offers, and how it works. Here are some things you should know. You will find additional information in the appendices.

**Tuition, room, board, and student fees cover roughly two-third of the College's actual expenditures per student.**

This is news to most parents, who often assume that if they are paying full tuition they are covering the entire cost of their children's education. A combination of Parents Fund dollars, Alumni Fund dollars, and income from the endowment makes up most of the difference between what the college charges and the true cost of a Williams education. Since 2000, the Board of Trustees has kept tuition increases among the lowest of any of our peer institutions. They have been able to do so because of the ongoing generosity of Williams parents and alumni.

To see how gifts are used go to http://provost.williams.edu/priorities-and-resources/ and http://teachitforward.williams.edu/priorities/alumni-fund-parents-fund/

Generous giving has made Williams the college it is. Public college and university budgets are tied to the financial health of state and federal governments. When times are tough, budgets are cut and programs may suffer. Even in good times, public institutions of higher learning may be subject to legislative pressures that do not always create the best educational policy. Private colleges such as Williams enjoy freedom from political control, but that freedom comes at a price: these colleges have to raise their own money. Generations of Williams families, all of whom benefited from the generosity of people who came before them, do their share by giving gifts to keep the college strong and support the education of the next generation of students.

Since every student benefits from the Parents Fund, we ask every family to give—at whatever level is appropriate for them. Families may use gifts to indicate an aspect of the Williams experience that they especially value:

- Highest Priorities
- Financial Aid
- Academic Experience
- Student Life
- Equity and Inclusion
- Sustainability
- The Arts
- Athletics
- Athletics

This option allows families to show their support for what they feel is an important part of the Williams experience. However, these gifts do not increase the budget for the chosen area. If the donor does not choose to honor one of the above, the gift will go to WilliamsHighest Priorities.

Percent of current undergraduates who receive financial support from the Parents Fund while attending Williams: 100
Your Role on the Parents Fund: Job Descriptions
FOR EVERYONE

• Make a gift to Williams. Support the Parents Fund by making an annual gift that is appropriate for your family.

• Ask fellow parents to give to Williams. Contact fellow families assigned to you to request gifts for Williams. Start with a note in early fall to introduce yourself and the Parents Fund. Indicate that you support the PF and that you will be contacting them later to ask for a gift.

• Lead by example. Make your own gift or pledge by the end of October. As a donor, you will be able to talk about your own commitment and will be more confident in asking other parents to join you in supporting Williams.

• Attend Parents Fund Committee Meetings. They are held at Family Days in October and in late April. These meetings are an opportunity to meet PFC members and PF staff, become better acquainted with Williams and, most importantly, get charged up about the Parents Fund. Discover the excitement of interacting with fellow volunteers and hearing the scoop on campus events from faculty, students, and senior staff.

• Stay informed about the College. Knowledge is power. The more you know about Williams and higher education, the easier your job will be. Read this manual, EphNotes, the Williams Magazine, and watch for regular updates from the Parents Fund staff. Don't forget the college's website—where a wealth of information awaits. Subscriptions to The Williams Record are available online at http://williamsrecord.com/subscriptions/. You can also read the Record online at http://williamsrecord.com/.

• Thank people for their gifts. Your fellow parents could have directed their contributions to 1,001 other worthy causes, but they chose to give to Williams and you should lead the way in thanking them. Every gift deserves a personal thank you. Your thanks solidifies the relationship between that donor and Williams.

• Keep in touch. Let us hear from you! What are you hearing from parents? Communicate with the Co-Chairs, Steering Committee representatives, and the Parents Fund staff to let us know what you and other parents are thinking. We welcome feedback concerning the College's fund-raising efforts and all other aspects of school activity.

• Build the team. Help the PF staff identify, recruit, and solicit new Parents Fund Committee members.

• Reports. In October, with the launch of the PF, you will receive profiles of the parents whom you are assigned to solicit. These profiles show biographical information and the giving histories for each family. Using a password provided by the PF office, you may view these profiles online in order to track giving and changes in contact information for your assignments.

• Confidently speaking! The information in parent profile reports is confidential. The sole purpose of this information is to help you with your work for Williams. Please hold this information in confidence. Do not leave it where someone else can see it, do not discuss it with others, and do not use it except for Parents Fund purposes. Shred these documents or return them to the Parents Fund office when you finish your work. Please be sure to read Appendix A before you begin your Parents Fund work.

• Have fun! Take time to enjoy talking to fellow parents about their children and their Williams experience. They are interesting people who have a lot in common with you – your children go to the same superb institution! People may not always say so, but in their heart of hearts they appreciate the work you are doing to help keep Williams strong.

Mayday! Mayday! If for some reason you cannot fulfill your Parents Fund duties, we understand! Sometimes careers and personal lives take unexpected turns. If this happens to you, let us know as soon as you realize that you have to re-juggle your priorities. The families assigned to you can be given to someone else.
FOR STEERING COMMITTEE MEMBERS:

The Steering Committee provides leadership and advice to the PFC. It is comprised of twelve or more families, including at least two from each class and representatives of parents of alumni and international families.

- **Help guide the PF.** Participate in monthly Steering Committee conferences calls and attend biannual planning sessions. Provide feedback and ideas concerning the fundraising efforts by the College.

- **Lead by Example.** Make a leadership gift of $2,500 or more to the Parents Fund, if possible.

- **Support fellow PFC members.** Be responsible for a team of Parents Fund Committee volunteers. In coordination with the Parents Fund, contact your team throughout the year to answer questions they may have and provide encouragement and support. Call your PFC team in the fall to introduce yourself and contact them again in the spring to thank them for their work for Williams.

- **Ask for Leadership Gifts.** Either alone or working with PF staff, solicit up to five families for leadership gifts to the Parents Fund.

FOR CHAIRPERSONS OF THE PARENTS FUND:

- **Communicate with the Steering Committee on a regular basis.** This includes soliciting members of the Steering Committee for their gifts and organizing steering committee meetings or conference calls as necessary.

- **Identify and invite parents to join the PFC and PFC Steering Committee.**

- **Determine participation goals for the Fund.**

- **Communicate with the full committee as needed.**

- **Chair Parents Fund Committee meetings and attend Family Weekend receptions.** Assist with agenda planning and priorities to help each meeting run smoothly.

- **Approve and sign gift appeal letters and thank you letters.**

- **Assist the Director of the Parents Fund with related matters as appropriate.**
Tools

PARENTS FUND PROFILE REPORTS
These provide information on the families you will call. Each profile lists parent names, current Williams student(s), class year, past gifts, pledges, and contact information.

Here are some tips to make the most of this information:

• Look at the date of this family’s gift last year—if they made one. That can give you a good clue as to when to call this year and what size gift to ask for.

• Make sure that you do not call anyone labeled “Do Not Solicit.” If this appears on a profile, please inform the Parents Fund office.

• Look for matching gift companies. If this appears on the profile, make sure to ask for the matching gift.

SUPPLIES

PFC volunteers will be supplied with Williams note cards and paper, return envelopes, and, of course, a purple pen. Please let us know when you need more supplies. If you prefer, you may also use your own stationery.

ONLINE RESOURCES

Online reports—these enable you to log in and see Fund totals and also which parents have made gifts. You will receive a user ID and password. Instructions to access reports begin on page 12. If you would like assistance setting up our account, please call Grant Sun at 413-597-4357.

Online PFC Manual—accessed from the Williams website: http://giving.williams.edu/parents-fund/

WHO TO CONTACT IF YOU NEED HELP

Grant Sun, Assistant to the Director
413-597-4357
Grant.E.Sun@williams.edu

Jane Nicholls, Director of the Parents Fund
413-597-4744
Jane.Nicholls@williams.edu

Mailing Address:
75 Park Street
Williamstown, MA 01267

Street Address:
Vogt House
63 Park Street
Williamstown, MA 01267

Fax: 413-597-4036
Email: parents.giving@williams.edu
On-line Giving: http://give2.williams.edu
http://give2sports.williams.edu
Working the Magic: How to Inspire Parents to Make a Gift

The fun part of working for the Parents Fund is crafting your approach, making your calls, seeing what works—and what doesn’t—and modifying your approach.

PREPARATION

Studies have demonstrated that individuals are four to eight times more likely to make a gift in response to a visit or phone call than to a mail solicitation. The experience of the Williams Parents Fund reflects this, so the more personal solicitations we can make as a Committee, the more successful our efforts will be. Phone calls, email messages, personal notes, and visits are the most important components of the Parents Fund program. Start early, and schedule calls in your calendar. Some parents will make larger gifts if you give them enough time to consider how they might do it.

Start your efforts with a short, personal note of self-introduction to each of the families you will be calling. That way they will know to expect your call and will be more likely to greet you warmly.

As you prepare yourself to make calls or set appointments for visits on behalf of the Parents Fund, remember you only have control over the request, not the answer. So, no matter what answer you receive, you need to feel you have asked well and presented a strong case for support. Every gift is important. Sadly, some people seem embarrassed or concerned if their gift is “small.” Our goals are participation and dollars. When it comes to participation, all gifts are equal.

MAKING THE CALL

• Unblock your phone. Some families, to avoid telemarketers, have their phone set to reject calls from people whose numbers come up on their caller I.D. as “anonymous.”

• SMILE when you are on the phone.

• Introduce yourself and let your fellow parent know that you are calling on behalf of Williams.

• Ask if it is a good time to talk. If it is not, ask when it would be convenient time for you to speak for five or ten minutes. Make an appointment to call back.

• Thank them if they have given to the Fund in the past.

The Purple Cow

Williams’ unofficial mascot, formally established in 1907 by a vote of the student body, is the lovable, enigmatic purple cow. The story behind the cow’s origin varies:

Whether due to the purple glow of the surrounding Berkshire Mountains, a nonsense poem* by Gelett Burgess, or a rumored prank involving a can of purple paint and a local farmer’s unfortunate livestock, the humble cow is a reflection of the College’s persistent refusal to take itself too seriously.

* I never saw a purple cow,
  I never hope to see one;
  But I can tell you anyhow;
  I’d rather see than be one.
• Make it a conversation about Williams. Use the name(s) of your child(ren) and the name(s) of the prospect’s child(ren). Don’t forget that one of our goals is to strengthen parent-to-parent ties, and another is to strengthen the relationship between parents and the college. There are many things to speak about: dorm life, activities, courses, family weekends, and Williams Regional Associations, which include both alumni and parents. Listen to their thoughts and experiences.

• Share your own reasons for supporting the college and serving on the PFC.

• Ask for a gift, this is the reason you have contacted the family, be sure you ask them to consider joining you in support of Williams!
  • Suggest a specific amount. This gives the potential donor something substantial to say “yes” or “no” to, and the promise of a specific amount is more likely to turn into an actual gift.
  • How much? The call list will show each individual’s giving history for the past few years: use it to guide you. Almost half of all PF gifts are around $100, a third are less than $100. For those who have never given, or who have made small gifts, try using the class year to sent an amount. For example, ask a P’20 family to give $120.
  • For those who have made larger gifts, encourage them to double their gifts.
  • Let families know about the Purple Mountain Association.
    o Members receive a unique piece of Williams memorabilia.
    o Mountaineers at the Stone Hill level and above, receive an invitation to a Presidential Reception in April.
    o Mountaineers at the Mt. Prospect level and above, receive an invitation to a Presidential dinner in May.
  • Remember, we welcome all gifts, all benefit our Ephs, and all count equally towards our participation goal.

• Once you have asked for a specific gift, be patient and allow the parent to respond to your request before jumping in. If someone says he or she has already given, thank them!

THE ANSWER—YES!

If the answer is yes, ask the individual how he or she would like to make the Parents Fund gift. If by check, remind your donor that he or she has a business reply envelope and/or give them this address: 75 Park Street, Williamstown, MA 01267.

Encourage credit card giving. Williams accepts AMEX, Master Card, or Visa. To complete this transaction, use one of the PF business reply envelopes. Credit card gifts can also be made on line at: or at give2.williams.edu.

For gifts of stocks, securities or cash wire: please direct them to http://giving.williams.edu/outright-gifts-of-securities/ or have them call 413.597.4118.

If you can't get a check, get a commitment. Sometimes families cannot make a gift now, but anticipate being able to give later. When you write to thank them, reference their commitment and when they expect to make the gift. As the date approaches, send a follow-up reminder. Be sure to let the Parents Fund office know so that we can record their commitment.

Thank them! Right then and later with a note. Enclose another gift envelope if they’re uncertain whether or not they still have one.
THE ANSWER—MAYBE

“Maybe” is the most common of all responses. “I have to check with my wife/husband” is the number one response. Try to determine if the parent is serious about making a gift or if this is his/her polite way of saying no. Usually you can find out just how serious the prospective donor is by responding:

*Thank you for considering my request. I will call you the day after tomorrow once you have had a chance to talk to your spouse. Would you like me to call you at home or at work?*

A fellow parent may express surprise at the size of the request. Your response might be:

*I understand that this gift request is larger than anything you may have previously considered. I had a similar reaction, but I reconsidered after thinking about the important role Williams plays in my child’s life.*

Whatever their concerns:

- Be patient and listen. Give the individual the opportunity to talk about what is on his or her mind.

- Remember that it is better to get the parent to make a gift at any level than not make a gift at all. Any gift will increase the participation rate for their child’s class.

THE ANSWER—NO

If appropriate, keep the conversation going. It’s important that they know our call is not just about dollars. Send them a personal note letting them know that you hope they will still consider giving. Tell them why it’s important to you. Do not hassle them with additional calls and please inform the Parents Fund office.

In the event you reach disgruntled parents, do not argue or pretend to agree with complaints they may have, but show them respect by treating their concerns seriously. Let them know that you will either get answers for them or will have someone else respond. Then contact our office; we will follow up with them.

**No matter what the outcome, write a thank you note! Or call!**
Appendix

A. Confidentiality Guidelines

Thank you for serving as a Williams volunteer. Your leadership strengthens Williams as well as the bonds between your fellow parents and the college, and we greatly appreciate your support.

Because we routinely provide you with private information appropriate to your volunteer assignments, this document outlines Williams guidelines designed to protect you and all members of the Williams family against unauthorized use or disclosure of personal data, including email and postal addresses, telephone numbers, and giving histories.

1. Please handle all confidential information responsibly and discreetly and respect your fellow parents’ right to privacy.

2. This information is for Williams-related purposes only, and may not be used for commercial, political, or advocacy solicitations of any kind.

3. Please don’t share or permit access to this confidential information with any person or organization unless authorized to do so by Williams.

4. Please don’t alter, copy, duplicate, reproduce, store in a retrieval system, or transmit this data in any form or by any means unless authorized to do so by Williams.

5. Please promptly dispose of (or return to Williams) any data no longer needed for your volunteer work. Disposal must be secure and unrecoverable (shredded or erased if stored in an electronic format).

Many thanks for abiding by these conditions. We appreciate everything you can do to make sure the privacy of your fellow Ephs is honored and protected.

And thanks again for all you do for Williams!
B. Dashboard Report Instructions

1. Go to www.williams.edu

2. Click on ALUMNI & FAMILIES TAB

3. Click on Parents Website
4a. Scroll past RESOURCES ...

4b. ...until you reach PARENTS FUND (click here)
6. If this is your first time signing-in, enter your assigned User ID, hit “Login & Acceptance”. When prompted, hit the “Forgot your Williams user ID or password?”, enter your EMAIL ADDRESS and you will be able to change the assigned password received in your personal email box.

* Your assigned User ID is listed in the Parents Fund and Committee Roster that was recently mailed in your PFC supply packet.
5. Click on MY REPORTS

8. The first page of your report is an overview

9. Click on any of the choices for more detailed information
10. Sample of the first page of Committee Assignment

11. Click on name to open detailed information about donor

12. Details include information about Eph (note: gender of Eph is on previous screen)

12a. ... and giving history
C. Williams Talking Points

While our principal purpose is fundraising, we also strive to strengthen ties between parents and other parents, and between parents and the college. Here is a list of topics that you might enjoy talking to fellow parents about. Of course, there are many others: College Council, theatre productions, musical groups, Cap and Bells, the Berkshire Symphony, *The Williams Record*, and sports—intramural, club, or varsity. You will find other ideas for topics on the Williams website www.williams.edu which has college press releases and updates. It is a great way to keep up with campus events.

**FIRST-YEAR PARENTS**

Did they attend Fall Family Days? Did they see or did their children take part in the Frosh Review?

Do they know about Mountain Day, a special Williams tradition? There is a description on the next page.

What entry are they in? Entries are a vital part of the First-Year experience. Junior Advisors lead and coordinate activities for frosh entries.

**SOPHOMORE PARENTS**

Has their Eph chosen a major yet?

Is their child considering spending Junior Year abroad or in the Mystic Program, or serving as a JA (an honor at Williams)?

Has their child taken a tutorial yet?

**JUNIOR PARENTS**

Where is their child? In Williamstown or away from campus?

Is their child planning a summer internship through the Career Center?

Have they made their hotel and restaurant reservations for Graduation weekend?

**SENIOR PARENTS**

Is their child doing an Honors project?

Has their child taken advantage of the Career Center?

**Commencement Preview:**

- Although the dates vary, Commencement weekend events take place on Saturday and Sunday and follow the same format each year. The schedule is available on line at http://commencement.williams.edu/.

- Have they made hotel reservations? How about restaurant reservations for Saturday night? If they haven’t made them, encourage them to do so right away! Have them go to DestinationWilliamstown http://www.destinationwilliamstown.org/ for more options.

- Do they know that tickets to Baccalaureate on Saturday are limited in number. Tickets for Baccalaureate and Commencement are given to students when they pick up their robes.
D. Williams Mountain Day –
A Floating Holiday in October

Each year, the President spontaneously declares a beautiful Friday in October to be Mountain Day. Following college tradition, at 7 am the Thompson Chapel bells ring out “The Mountains” to announce the event (in recent years this has been augmented with an email from the President). Classes are cancelled and throughout the day there are outdoor activities with the festivities culminating on Stony Ledge for song and refreshments. This holiday celebrates the natural beauty of the surrounding mountains.

Mountain Day is one of Williams oldest traditions, dating back nearly to the founding of the College. It grew out of a holiday known as Chip Day, begun in 1796. This was a day each spring when students were given a holiday from classes in order to clear the debris from cutting firewood the previous winter. Williams students, preferring to use the day for recreation, created a fund used to hire others to clear the chips, giving the students a day off, which soon became used for hiking in the nearby mountains.

In 1857, the College added an additional holiday to celebrate the fall foliage. In 1927, the *Mountains of Eph*, the Williams Outing Clubs trail guide, described it as a “day set apart by the Faculty to give the students the opportunity of becoming better acquainted with the mountains in the glory of the autumn foliage.” Until the mid-19th century, students celebrated both Chip Day and Mountain Day.

For many years Mountain Day was spontaneous, determined by the weather and announced by the playing of the College’s song, “The Mountains,” on the chapel bells. After 1933, there was no longer much interest in climbing the mountains on Mountain Day and the tradition was abandoned.

In the 1960s, students began to ask for the return of Mountain Day. The Williams Outing Club responded by holding “Mount Greylock Day” one weekend each year in October. Finally, in the early 1980s, the College reinstated Mountain Day. Stony Ledge was chosen as the main location for the holiday, because Mt. Greylock had become too crowded with tourists. Mountain Day quickly became a huge success, drawing 250-300 students. Now, in addition to day hikes, overnight hikes, and bike rides up to Stony Ledge, there are buses to bring people up who just want to enjoy in the festivities on the mountain. These include musical performances, cider, and donuts.
E. Understanding the Williams Endowment

“Why should I make a gift?” asks the voice on the phone. “Williams has an endowment of more than $2 billion.”

Good question. Here’s what you need to know to give a good answer.

Williams has a substantial endowment because for two centuries donors have made their gifts with the understanding that the college will provide support in perpetuity. Perhaps the greatest financial challenge facing the college is the proper allocation between expenditure from the endowment for current needs and saving for future support. The college and the Board of Trustees have to estimate the rate of return expected by the endowment over the coming years. This estimate, together with judgments about inflation, helps to determine a spending rate that will ensure that the endowment will be able to provide that perpetual support.

Over time, the college projects a total annual return on its assets of 4 percent. We budget so that in the long run we protect the purchasing power of the college’s assets. This means Williams can spend, on average, 4 percent of the value of the assets each year. To ensure that the base grows to provide for future spending, every year we need to return 4 percent or more to the principal.

But that is in the long run. In some years returns are higher and in other years returns are lower. When returns are higher, endowment income spending falls below 4 percent, but when returns are lower, spending exceeds 4 percent.

The goal is to provide a stable program that maintains current excellence—a program that is not subject to swings in funding (up or down) because of market fluctuations. So we save for rainy days when the market shines, and we spend during stormy markets—on a steady basis.

The cumulative impact of endowment and annual giving on the college over the years has made Williams what it is today, and allows it to envision an even brighter future.
F. How Are Gifts Used

The charts below, along with other financial data are available online from the Provost’s website: http://provost.williams.edu

**Sources of Revenue 2016–17 Plan ($000s)**

<table>
<thead>
<tr>
<th>Source</th>
<th>Revenue (in $000s)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Gifts</td>
<td>23747.27745</td>
<td>11%</td>
</tr>
<tr>
<td>Asset Use</td>
<td>109822.3527</td>
<td>45%</td>
</tr>
<tr>
<td>Student Charges</td>
<td>81316.78</td>
<td>36%</td>
</tr>
<tr>
<td>Other</td>
<td>10046.77358</td>
<td>4%</td>
</tr>
</tbody>
</table>

Total of 225M $/1,000 above

Endowment earnings and gifts now account for 69% of revenues

**Allocation of Williams Expenditures**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Support &amp; Instruction</td>
<td>71%</td>
</tr>
<tr>
<td>Administration</td>
<td>11%</td>
</tr>
<tr>
<td>Plant &amp; Renewal</td>
<td>18%</td>
</tr>
</tbody>
</table>
The difference between spending per student ($104,900) and tuition fees ($63,300) reflects the substantial annual subsidy ($41,600) enjoyed by every full pay student, thanks to the resources provided by endowment earnings and gifts. Average revenue per student ($38,800) falls well short of full tuition and fees, reflecting the financial aid discount that makes it possible for talented students from all backgrounds to attend Williams.

* Compound annual growth rate (CAGR) is a business and investing specific term for the geometric progression ratio that provides a constant rate of return over the time period.
H. How Fundraisers Saved Williams

Adapted from the Alumni Fund Class Agent Handbook 2006–07.

In one of the earlier acts of planned giving, Colonel Ephraim Williams, while on his way to thrash the French at Lake George, took time to make out a will. In a document dated July 22, 1755, he made provisions to found a “free school” in West Township, which at that time was the farthest outpost in Massachusetts. He put in a clause saying that, to gain access to his funds, the town must be renamed “Williamstown.”

Forty-eight days later, Colonel Williams was killed at the Battle of Lake George. Not wanting to rush into things, the school founders took their time getting the educational enterprise off the ground—36 years, to be precise. Once they got going, however, their ambitions soared, and they proposed that the school become a college. There was only one other institution of higher education in Massachusetts (a puritanical place in Cambridge) and only six other colleges in all of New England. The Commonwealth of Massachusetts granted a charter to Williams College in 1793. Clearly, this was a time of growth opportunity for colleges.

It may have been the time, but many people thought Williamstown was not the place. There was no Theatre Festival, no place to get a decent cup of coffee, and no Thai restaurant. The trustees petitioned the legislature in 1819 to move the college to Northampton, but the lawmakers in their wisdom refused. Two years later, the president of Williams, Zephaniah Swift Moore, in one of the more dastardly deeds in education, absconded with half the student body—and, as legend has it, a good portion of the library—over the hills to the east, where those infidels founded a college in the town of Amherst.

This left the remaining Williams loyalists in a fix. Emory Washburn, Class of 1817, saved the day by rallying parents, alumni, and friends to save the college. Using techniques that still work today, Washburn and his fellow volunteer fundraisers made appointments, visited prospects, and talked up the college to anyone who would listen.

Those early Williams supporters heard the call—even though they did not have telephones—and responded. The money flowed in, and by 1828 the new college president, Rev. Edward Dorr Griffin, stood in the middle of Main Street supervising construction of a handsome new building that would have classrooms, a library, a chapel, and, eventually, his name. And with it stands the wonderful tradition of cheerful volunteer support of Williams College. When reached by letter, phone call or e-mail, graduates and parents are both friendly and generous, and because of this the college flourishes.

And what about Amherst? Alas, due to the pedagogical perfidy connected to its founding, Amherst fundraisers suffer from the Curse of Zephaniah, which causes their letters to drop straight into the trash and directs all their phone calls to answering machines.
## 2017 PARENTS FUND TIMELINE  All times are Eph time

<table>
<thead>
<tr>
<th>SUMMER</th>
<th>June–July</th>
<th>Regional Send-off Parties • PF16 Final Report • Plan: Move-In Day events and Family Days mailings &amp; events • Update manual, timeline, web page • Form new PFC • Send: PMA and PFC’16 TY gifts • PFC Co-Chairs Conference Call: plan solicitation strategy, set goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUGUST</td>
<td>August 25</td>
<td>PMA Reception announcement to P’20</td>
</tr>
<tr>
<td></td>
<td>August 29</td>
<td>PF Hospitality Tent: 8:30 am – 4:00 pm (Move-In Day) PF Mixer 5:00 – 6:00 pm (Move-In Day) Solicitation of parents of athletes in fall sports</td>
</tr>
<tr>
<td>SEPTEMBER</td>
<td>September 13</td>
<td>PFC Co-Chairs Conference Call 4:00 pm – 5:00 pm: assess Move-In Day events, review goals &amp; timeline, plan Family Days, assign authors for Direct Mail #1</td>
</tr>
<tr>
<td>OCTOBER</td>
<td>October 4</td>
<td>Steering Committee Conference Call 4:00 pm – 5:00 pm: finalize plans for FD</td>
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<tr>
<td></td>
<td>Mid–October</td>
<td>Direct Mail #1A: P’17 P’18 P’19 PAL only</td>
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<tr>
<td></td>
<td>October 28</td>
<td>Fall meeting of the PFC 1:30 – 3:30 pm, Griffin Hall 3 (Family Days) Parents Meet Parents Tea 4:30 – 5:30 pm, Faculty House (Family Days)</td>
</tr>
<tr>
<td></td>
<td>October 29</td>
<td>PF Tel-A-Thon 9:00 am – Noon, Mears Lewis (Family Days) Presidential Reception: P’20 families interested in the PMA: 5:00 – 6:30 pm, Sloan House</td>
</tr>
<tr>
<td></td>
<td>Late October</td>
<td>PFC Members make gifts and pledges • PFC members receive assignments and supplies • send notes or emails of self-introduction to assignments</td>
</tr>
<tr>
<td>NOVEMBER</td>
<td>November 1</td>
<td>Direct Mail #1B: P’20 only</td>
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<tr>
<td></td>
<td>November 8</td>
<td>Steering Committee Conference Call 4:00 – 5:00 pm: Family Days debrief; draft email appeals</td>
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<tr>
<td></td>
<td>November 13</td>
<td>Solicitation for parents of athletes in fall and winter sports</td>
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<tr>
<td></td>
<td>Mid November</td>
<td>PFC calls begin</td>
</tr>
<tr>
<td>DECEMBER</td>
<td>December 5</td>
<td>Year-end Post Card Reminder to PAL and PAUG without email addresses</td>
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<tr>
<td></td>
<td>December 13</td>
<td>Steering Committee Conference Call 4:00 – 5:00 pm</td>
</tr>
<tr>
<td></td>
<td>December 30</td>
<td>Email appeal to PAL and PAUG with email addresses (between Xmas / New Year's Day)</td>
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<tr>
<td></td>
<td>Ongoing</td>
<td>PFC calls: focus on those who gave to last Fund before 12/31; first-year parents</td>
</tr>
<tr>
<td>JANUARY</td>
<td>January 3</td>
<td>Steering Committee Conference Call 4:00 – 5:00 pm: Direct Mail #2</td>
</tr>
<tr>
<td></td>
<td>January 18</td>
<td>Review drafts of Direct Mail #2</td>
</tr>
<tr>
<td>FEBRUARY</td>
<td>February 7</td>
<td>Solicitation for parents of athletes in spring sports</td>
</tr>
<tr>
<td></td>
<td>Mid February</td>
<td>Direct Mail #2 to PAL and PAUG; remind SR families of Record Honor Roll</td>
</tr>
<tr>
<td>MARCH</td>
<td>March 7</td>
<td>Steering Committee Conference Call 4:00 – 5:00 pm: Recognition Event</td>
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<tr>
<td></td>
<td>Mid March</td>
<td>PMA and PFC Conference Call with Senior Administrator Solicitation for spouses of alumni</td>
</tr>
<tr>
<td>APRIL</td>
<td>April 4</td>
<td>Steering Committee Conference Call 4:00 – 5:00 pm</td>
</tr>
<tr>
<td></td>
<td>April 28</td>
<td>Spring Meeting of the PFC 1:30 – 3:30pm, Mears Lewis PMA Reception for Leadership Donors and PFC Volunteers 4:30 – 7:00pm</td>
</tr>
<tr>
<td></td>
<td>April 29</td>
<td>PF Tel-A-Thon 9:00 am – Noon, Mears Lewis</td>
</tr>
<tr>
<td>MAY</td>
<td>May 9</td>
<td>Steering Committee Conference Call 4:00 – 5:00 pm</td>
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<tr>
<td></td>
<td>May 18–23</td>
<td>Blast Email #2: Final Exams Mini Campaign • Wrap-up calls, thank you notes</td>
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<td></td>
<td>May 31</td>
<td>Parents Fund solicitations officially end</td>
</tr>
<tr>
<td>JUNE</td>
<td>June 13</td>
<td>Steering Committee Conference Call 4:00 – 5:00 pm</td>
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</tbody>
</table>
THANK YOU AGAIN
for volunteering to help the Parents Fund this year.
It is through your gifts of time and talent that we will be able to sustain the present and enhance the future of Williams.

We look forward to working with you!