



DUKE LAW

Alumni Club Handbook

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I. Duke Law Clubs Mission Statement

The purpose of the Duke Law Clubs is to help Duke Law School:

1. Engage alumni through networking, volunteer and fellowship opportunities
2. Foster alumni pride in and life-long commitment to the School

II. Club Organization

Club Responsibilities

The club leadership is fully responsible for selecting, planning and executing events and programs. Specific responsibilities include:

- Upon the founding of the club, compose a club charter (see “Club Charter” below for more information)
- Plan and conduct a minimum of three events/programs per fiscal year (July 1 through June 30)
- Meet each year during the summer months (before August 1) to set a tentative calendar of events and assign responsibilities for those events
- Compose a letter from the board to club membership, describing events from the past year, previewing planned activities for the year to come and introducing new board members (to be mailed by Alumni Relations in September – see “Communication” below)
- Complete pre- and post-event reports (see “Individual Event Planning” below)
- Collect fees and make personal phone calls to increase RSVPs, as necessary
- Provide content for the club website to the Alumni Relations staff (see “Communication” below)
- Maintain close contact with the Alumni Relations staff

To help ensure a continually engaged leadership, any club that consistently fails to complete these responsibilities in a timely and professional manner (i.e., fall into a state of inactivity) may lose its “active” status. Loss of such status would require both one year of inactivity and the composition of a new club charter before the club could regain “active” status.

Alumni Relations Staff Responsibilities

The Alumni Relations staff will assist with communication (mail, e-mail and web), data management and finances. Specific responsibilities include:

- Provide the board with a complete membership list each summer to aid in event planning
- Mail/e-mail all event invitations and letters from the board
- Manage RSVPs
- Allot funds as needed (approval made by Dir. Of Alumni Relations and Associate Dean of Alumni and Development)
- Provide payment to vendors and sign contracts for vendors, if necessary
- Maintain the club website
- Advise on event planning
- Assist with securing event location, host, or sponsor

- Maintain close contact with the club boards through monthly e-mails to all club board members
- Arrange for an Alumni and Development staff member to attend club events when possible
- Make the final judgment on pertinent matters. The goal is to empower clubs to be as autonomous as possible; however, the Alumni Relations staff reserves the right to make the final approval on matters including, but not limited to, club financial issues, officer succession, board membership, and the founding and dissolution of the club.

Club Charter

Upon inception, each club shall compose a club charter, which will contain the following information (for a sample charter, see Appendix B):

- *Board Structure.* How will the board be structured? What offices will exist? What are the minimum and maximum numbers of board members? Will there be a requirement for age-balanced representation (i.e., at least one “recent grad” member and at least one “experienced” member)?
- *Description of Volunteer Roles.* For sample job descriptions, see “Volunteer Roles” below.
- *Term Lengths.* How long will board members’ terms be? Will there be a maximum number of terms allowed?
- *Election of New Board Members.* Will the board decide new members or will some other method be employed? Will elections for all positions happen at the same time or will the elections be “stair step” to ensure the presence of at least one experienced leader at a time?
- *Procedure for Removing a Volunteer from the Board.* Will the club have specific criteria under which a board member would be asked to resign? Is such a request at the discretion of the president and Alumni Relations staff or must it be put to a vote involving all board members?
- *Procedure for Amending the Charter.* To be in place should future boards wish to change board structure, term lengths, etc.

Board Structure

With the understanding that different clubs may operate best under varying organizational structures, the establishment of any named officer position(s) is left to the volunteers themselves. For example, the club may operate under the standard president/vice-president/treasurer structure or perhaps the club prefers to operate under a more loosely configured “committee” structure. In any case, the club board must have a central point person (e.g., a “president” or “board chair”) who assumes overall responsibility for the club. For sample job descriptions, see “Volunteer Roles” below. The chosen organizational structure must be clearly described in the club charter.

Volunteer Roles

The following descriptions are guidelines to use in establishing and defining leadership roles within the club board. To provide flexibility to the clubs, the president/board chair is the only required post. If, however, the club chooses a less-structured committee system, it will be the responsibility of the board chair to delegate necessary tasks not specifically assigned to another officer (e.g., accounting duties, paperwork completion).

President/Board Chair (REQUIRED): The president/board chair holds overall responsibility for the club and is the primary contact with the Alumni Relations staff as well as local alumni.

Responsibilities include:

- Represents Duke Law School and his/her alumni club.
- Serves as the primary contact for interested alumni in the area.
- Maintains close contact with the Alumni Relations staff.
- Schedules and conducts the annual summer planning meeting to develop the calendar of club events for the coming year. Schedules and conducts additional meetings or conference calls throughout the year, as needed.
- Delegates responsibilities to include assigning event coordinators and ensuring all reports are completed in a timely fashion.
- Attends a majority of club events throughout the year.
- Plans, in conjunction with the Alumni Relations staff and the rest of the board, for a well-suited successor to assure the continuation of a successful club. Oversees the selection of successors for all board positions.

Vice-President/President-Elect/Chair-Elect: This position aims to provide leadership and continuity to the club in the absence of the president/chair or when the president/chair's term expires. Responsibilities include:

- Represents Duke Law School and his/her alumni club.
- Serves as a contact for interested alumni in the area.
- Conducts the annual planning meeting if the president/chair is unable to attend.
- Succeeds the president/chair at the end of his/her term.
- Attends a majority of club events throughout the year.
- Assists the president/chair in the selection and training of a successor.

Secretary/Communications Chair: This position assists the president/chair with all communication, both with the Alumni Relations staff and with the club membership.

Responsibilities include:

- Represents Duke Law School and his/her alumni club.
- Ensures all paperwork (including the Event Calendar form, pre- and post-event reports) is turned in to the Alumni Relations staff in a timely matter.
- Drafts and/or coordinates the writing of the annual letter to the membership.
- Proofreads all print and e-mail invitations produced by the Alumni Relations staff.
- Relays information for the club website to the Alumni Relations staff. Regularly checks club website for accuracy/timeliness and prompts Alumni Relations staff when changes are needed.
- Assists in all club leadership communication.
- Attends at least one club event during the year.
- Assists in the selection and training of a successor.

Treasurer: This position oversees and ensures adherence to the club's event expenses.

Responsibilities include:

- Represents Duke Law School and his/her alumni club.

- Works with the Alumni Relations team to ensure the efficient spending of event funds.
- Provides an estimate of expenses for each club event
- Tracks club spending and coordinates spending with the Alumni Relations staff.
- Provides regular budget updates to the board.
- Maintains regular contact with the Alumni Relations staff to ensure the club's financial records/goals are in agreement with the staff's records/goals.
- Works with Event Coordinator on budget, pricing, vendors, logistics, etc. for the assigned event.
- Collects event fees (if any) and forward monies to the Alumni Relations staff.
- Attends at least one club event during the year.
- Assists in the selection and training of a successor.

Depending on the size and needs of the board and the club membership, various other positions could be established, including a Young Alumni Officer (encouraging participation among graduates of the last 10 years), a Newcomer Coordinator (welcoming new community members and encouraging participation) or a Publicity Chair (organizing phone calls to alumni to increase attendance at events).

For each event the club conducts, one board member (or a pair/team of board members, depending on the board's size), should be assigned as the Event Coordinator for that event. This spreads out the responsibility so that each board member has one event per year in whose planning the board member is heavily involved. The Event Coordinator for each event should be assigned during the summer annual planning meeting. The Event Coordinator and Treasurer will work together on the planning of club events to ensure the effective coordination of logistical issues as well as cost efficiency.

Event Coordinator(s): This position manages all aspects – including planning, execution and follow up of the assigned event. Responsibilities include:

- Maintains close contact with the Alumni Relations staff throughout the planning process. Does not hesitate to ask the Alumni Relations staff for advice.
- Coordinates site and considers and makes decisions on all event-related issues covered in the “Event Planning Checklist” (see Appendix D).
- Works with Treasurer on budget, pricing, vendors, logistics, etc. for the assigned event.
- Delegates responsibilities both before the event and during the event to other board members, as needed.
- Attends the event. Arrives at the site at least one half hour before the event begins.
- Takes accurate attendance.
- Completes all pre- and post-event paperwork in a timely manner.

Elections

Timing. Board members' terms are based on the fiscal year followed by Duke University (July 1 through June 30). As such, elections to fill any opening positions should be completed during the summer. A recommended timeline for the selection of new officers follows:

- June-July: Solicit nominations. This may be completed in a variety of ways. The Alumni Relations staff and/or members of the club board may have been approached by willing

volunteers or know of potential leaders, club members may recommend other clubs members, or a blast e-mail may be sent out to the club membership requesting self-nominations. In any case, the nominated individuals will need to be contacted to assess their willingness to serve. This will be the joint responsibility of the president/chair and the outgoing board member.

- July: Elections held. It is recommended that elections be completed by a vote of the board members plus the Alumni Relations staff. If, however, a more inclusive method is desired, an online voting system for polling all club members.
- August: Annual planning meeting held with new slate of officers.

Term lengths. A two-year term length is recommended. A term of more than one year will allow for the board member to become experienced in his or her position and implement new ideas based on that experience. A term of more than two years, however, may lead to leader burnout or discourage potential leaders who may be unwilling to make such a long-term commitment.

A term limit of two consecutive terms at a particular position is recommended. Clubs may also want to consider a maximum cumulative term limit. This will help cultivate new leadership.

Ensuring an experienced board. In order to prevent the entire board from “rolling out” at the same time, “stair step” elections are recommended (i.e., one or two positions would be elected one year and a different position/set of positions would be elected the next). In order to achieve this arrangement, when the club is founded, certain officers may need to agree to a one-time one-year or three-year term.

The positions themselves may also be created to help ensure experienced leadership through the establishment of the president-elect or past president position. The president-elect would work closely with the president and then assume the presidency once the current president’s term ends. The use of the past president office would require the president to remain on the board in an advisory position for one year after his or her term is complete.

III. Club Programming

The foundational value of alumni clubs generally lays in services/benefits available and program planning. A club must offer distinctive reasons for area alumni to become active in it. A successful club’s programs and services should be designed to reflect a balance of the following objectives:

- ♦ professional development, education, and intellectual stimulation
- ♦ joint panel discussions or lectures with other Duke graduate and professional schools
- ♦ mentoring and professional peer support
- ♦ networking and development of business contacts
- ♦ social interaction and connection

Annual Summer Planning Meeting

Each club board will meet at least once a year during the summer months to plan a tentative schedule of events for the year. This meeting should be completed by August 1; the Event

Calendar form (Appendix C) should be completed and submitted to the Alumni Relations staff within one week of the meeting. Prior to the meeting, the Alumni Relations staff will provide the board with a list of club members, the tentative dates of any known Law School events in the area and the club's budget for the year.

The program schedule should be well-tailored to the regional audience, which can pose a challenge if a strong leader or planning committee is not established. A mix of new and proven events is a good idea, as there is value in repeating successful efforts; however, once its popularity or effectiveness has faded the event should be phased out. Events should be planned well in advance to allow for adequate publicity to the club membership and other interested parties.

Current clubs have experienced success with some of the following types of programs:

- ◆ Locally relevant industry panel presentations (area of practice or specialty)
- ◆ Career management sessions
- ◆ Prospective student, accepted/current student, and young alumni welcome receptions
- ◆ Faculty or alumni speakers
- ◆ Retirement planning seminars (as long as they are not disguised sales presentations)

Alumni Relations can assist clubs interested in scheduling Duke Law faculty members and alumni to speak. Some faculty members periodically travel to larger metro regions and may be available to participate in a club event while in the area. This also helps to minimize travel expenses which may be incurred by the club invitation.

Key Considerations When Setting an Event Calendar:

- **Variety.** Try to select a mixture of networking, intellectual engagement, social, educational and family-oriented programming that will appeal to different interests.
- **Age of Membership.** Consider the full age range of the club membership. A happy hour might appeal to young alumni, but not to slightly older alumni who may have small children.
- **Event Costs.** Every club event cannot be an upscale cocktail hour with full open bar! A nice event of this scale has to be balanced by something along the lines of a pay-as-you-go happy hour or a potluck picnic at a local park.
- **Location and Time.** Consider where the club membership lives. A downtown event might be successful at lunchtime, but suburbanites may not come back in the evening. Vary the location of your events; don't hold all events in the same neighborhood. Be mindful of traffic and remember that the time of day will affect the age of the crowd you attract.
- **Other Event/Holiday Calendars.** Be aware of religious holidays, major festivals/events in your city, Final Four dates (this is Duke, after all!), etc.
- **Availability of Alumni Relations staff.** Please do not plan ANY events within a week of Leadership Weekend (October 29-30, 2010) or Reunion Weekend (April 8, 2011). The Alumni Relations staff will be UNAVAILABLE to assist you during those times. Also, please bear in mind that invitations for your event go in the mail approximately one

month before the event. Therefore, the invitation for an event scheduled in early May will compete with last-minute Reunion preparations for Alumni Relations staff support.

- **Keep it easy!** Board members are all very busy people. Simple events are more likely to be both successful events and enjoyable experiences for the organizers.

Types of Events: Here is a non-comprehensive list to help begin the process.

- **Speaker Events.** Educational events with speakers are very popular with Law alumni. The Alumni Relations staff will help the club obtain faculty speakers if desired. We can sometimes take advantage of a faculty member's pre-existing trip to your area; however, faculty, in general, tend to have full calendars, so have a first, second and third choice in mind. Alumni may also make engaging speakers or perhaps an interesting member of the community with whom an alum has a connection would be willing to speak. Expenses incurred from out-of-town speakers will not be covered by the office of Alumni and Development.
- **Networking.** Does another Duke professional/graduate school have a club in the area? Does another peer law school have an active club in the area? Co-host a networking event or inter-disciplinary panel discussion.
- **Happy hours/game-watching events.** Probably more appealing to younger alums, these events have the advantage of ease in planning.
- **Community Service.** Volunteer for a group like Habitat for Humanity and revisit the Dedicated to Durham days.
- **Family Events.** Picnics, BBQs, trips to the zoo, etc.
- **Cultural Events.** Obtain a block of group tickets for a show, a museum or a wine-tasting tour. Perhaps a Duke alum works for the organization and would be willing to give a behind-the-scenes tour.
- **Athletic Events.** Men's basketball tickets can be nearly impossible to get, but don't forget about Duke teams in women's basketball, soccer, football, etc.
- **Check with Your Local Convention and Visitors Bureau.** These organizations have a wealth of information about special events in town and even regular events/places that you may not have known existed.

Individual Event Planning

The Event Planning Checklist (see Appendix D) should serve as an adequate guide for the event coordinator. Event planning can be tricky, however. The task can be made much simpler by following a few basic pieces of advice:

- **Over-communicate.** With vendors, speakers, caterers, club boards members, the Alumni Relations staff, etc.
- **Consider and act on the little details.** As the event coordinator, you are responsible for all those little details that nobody notices when they go right, but everyone notices when they go wrong. You'll have to move tables, remember to bring the Sharpie for writing names on nametags, put a bottle of water at the podium for the speaker, etc.
- **Ask for advice.** The Alumni Relations staff put on over 40 vents last year; they know what they're doing. Don't be afraid to ask as many questions as you need. The most valuable service the staff can provide to the club is their event planning expertise.

Look for common pitfalls:

- **Locations.** Does the location have adequate facilities for your event (e.g., sufficient seating, podium and microphone available)? Does it charge for the space or require a minimum food and beverage purchase (account for this in your event budget!)? Does it require a binding contract?
- **Caterers.** Does your location require an in-house caterer? Can you provide your own food? Can your caterer provide vegetarian options (for full meals) and provide for a last-minute overrun of 10 percent? When does the caterer require a final number of attendees? Will the caterer be able to provide all plates, cups, plastic ware, etc.?
- **Hidden Costs.** What service charges (e.g., bartender charges, clean-up charges, A/V rental charges), taxes or gratuities will be added to the final bill?

Finances

Working within a budget. Limited and pre-approved funding support of regional events may be available through the Alumni and Development Office. In order to determine the estimated costs of an event, a pre-event form must be completed and submitted to Alumni Relations where the costs where the costs associated with the event will be reviewed by the Associate Dean and Director of Alumni Relations. Upon approval, the event coordinator will be notified. In some cases, an event host or sponsor may agree to cover some or all expenses relating to the event. Depending upon the type of event, the potential sponsor may receive credit as a BluePrint Benefactor.

Event fees. Any expenses not covered by the approved funding support of the Alumni and Development Office will need to be recouped through charging an event fee to each attendee. It is best to keep these fees in the \$5-25 range. Event fees can be collected online upon registration via a link provided by Duke's Conference Services department. Event fees may also be collected by check. All checks should be made payable to Duke Law School. If cash is collected and a ADO staff members is not onsite, it would be preferred if a board member would deposit the money into his/her personal account and write a check to the Law School to avoid sending cash through the mail. Checks should be mailed to the Alumni and Development Office immediately following the event. The event attendee will need to fill out a payment form (see Appendix G) which will need to be sent to the Law School along with any checks immediately following the event. The alum will have a charge on his/her card from "Duke Law Alumni Association.

Venue. Often times, alumni express an interest in hosting or sponsoring a Duke Law club event or activity either in their firm or in their homes. Depending on the type of event and amount needed to fund, hosting or sponsoring firms may be given credit under the law school's Blueprint Benefactors program. Visit: <http://www.law.duke.edu/alumni/giving/blueprintbenefactors> for a full description and list of benefits of program

Alumni Sponsors. Please do NOT solicit donations from alumni to cover event expenses. Individual alumni may be able to get gift credit for any personal expense related to hosting an event but the specifics as well as the ask for a donation should be coordinated through the Alumni and Development Office. Contact the Alumni Relations staff to work out the specifics for each event

Corporate Sponsors. One benefit of the Duke Law brand is that firms/companies are often eager to establish a relationship with clubs in order to gain direct access and/or exposure to the club's membership. Corporate sponsorships are an excellent way to generate revenue, whether via use of corporate meeting spaces, or sponsored receptions and events. Corporations may have monies in their marketing budget that they will be willing to use to host or sponsor an event that may not be seen as a gift to the school.

Working with corporate sponsors requires the support and input of the Alumni Relations staff. To protect the privacy of our graduates, the Law School does not give out contact information to third parties. Example – a corporation may request that we provide contact information for all attendees so that the sponsor can use the list for future marketing. We would not be able to honor this request but we may be able to allow alumni to voluntarily sign up for information or encourage the corporation to make marketing materials available at the registration desk.

Payment of Vendors. To maintain simplicity, Alumni Relations will pay vendors for all expenses. This will eliminate the need for each club to establish and maintain a checking account. Communicate with the Alumni Relations staff when you have a vendor requiring payment. Alumni Relations will contact the vendor and pay using a University issued visa card. If the vendor requires a check, please keep in mind it will take at least four weeks to get through the Duke bureaucracy. Alumni Relations will need the following information for the check request: an invoice for the total amount, the name of the vendor and address where the check should be sent, and the vendors' tax ID number (usually on the invoice).

Although not preferred, it may sometimes be necessary for a board member to pay an expense using his/her personal credit card and then be reimbursed. In order to process the reimbursement, Alumni Relations will need the board member's social security number and original receipts.

Non-Profit Exemption. The Office of Alumni and Development has a non-profit status which is registered in the State of North Carolina. In planning an event that will require catering services, please be sure to inform the vendor of Duke Law's tax-exemption status. Then, contact a member of the Alumni and Development staff to obtain the official certification form.

Communication

Annual letter. The board will compose a letter to the membership each fall, introducing new board members, reviewing the previous year's events and giving a preview of anticipated events for the coming year. The purpose of the letter is to raise awareness of the club among the membership (especially those who may be new to the area) and to serve as a general "save-the-date" reminder for the coming year's events. Alumni Relations will handle the production and mailing of the letter.

Event invitations. For most club events, Alumni Relations will distribute printed and e-mail invitations to the event. The printed invitations will be in the form of a 4x5 full-color postcard designed by the Alumni Relations staff. The design will remain the same from event to event and will be unique for the Duke Law Clubs. Invitations must be mailed/e-mailed no later than one month prior to the event and the completed event pre-planning form must be submitted to

Alumni Relations before the invitations will be drafted (see Appendix D: Event Planning Checklist). The board will have the opportunity to proof all invitations before they are sent out. A reminder e-mail may be sent out a week prior to the event if the board so chooses

Email. An electronic invitation will be sent via the law school's e-email messaging system. The electronic invitation list will consist of any Duke law alumni in a particular club area. For joint events, we can also pull email addresses for other Duke graduate and professional schools. A reminder will be sent prior to the RSVP deadline.

Hard-copy invitations/Postcards. The Alumni Relations staff will "pull" the invitation list from its database for each invitation to ensure the most up-to-date addresses are used. All club members will be invited to every event. If there are space limitations, the invitation will clearly state that space is limited, the event is only open to the first 35 people to respond, etc.

Website. Each club will have its own webpage on the Alumni and Development site. The page will contain information such as board roster and contact information, event schedule, the annual letter to the membership and pictures from past events. The Alumni Relations staff will maintain the site; however, the club board is responsible for sending information to be posted to Alumni Relations and for checking the website regularly to check its accuracy

Duke Law Logo & Clubs Identity Guide. Detailed information about the appropriate and authorized use of the Duke Law logo is available through the Alumni and Development office. Logo files are available in JPEG or BMP format. Alumni Relations can also provide podium banners for use at club functions.

IV. Retaining Active Members and Increasing Participation

Focus on attracting and retaining members. To maintain an active club, officers should:

- ◆ Reach out to newly graduated alumni in your region, promoting the importance of the alumni networking; Alumni and Development can provide a list of new alumni in each region following graduation each year
- ◆ Offer programs which are of interest to the alumni community in your region, i.e. CLEs, networking, career development, etc
- ◆ Offer occasional "partnerships" events which are of value and interest to the Duke Law community and other Duke graduates schools such as Fuqua

V. Career Support

Many alumni clubs find that career management issues form a major area of interest for members. Whether actively searching for a job, thinking strategically about long-term career development, or pursuing mentoring and support networks, most Duke Law alumni recognize the value of educational and training opportunities as their professional careers evolve. Several suggestions for club services include:

- ◆ Career management seminars – half- or full-day programs

- ◆ Industry-specific networking events
- ◆ Career guides, with regional or industry-oriented resources
- ◆ Job seekers meetings
- ◆ Peer counseling or mentoring groups

Alumni clubs can assist Duke Law by gathering and distributing information about job opportunities for students and alumni in the United States and abroad, raising awareness about the positive impact of a Duke Law degree on companies and organizations, and encouraging club members to update their home and business information as they make professional and geographic moves.

VI. Club Resources

Alumni Relations maintains a variety of resources to serve and support alumni clubs as they in turn serve and support the global alumni network.

- ◆ Alumni Clubs Page
<http://www.law.duke.edu/alumni/connected/clubs/index>
 Alumni programs and events, calendar and event forms
- ◆ Alumni Volunteer Form
<http://www.law.duke.edu/alumni/connected/volunteer/>
 An online form that allows alumni to self select for
- ◆ Duke Alumni Directory
https://www.alumniconnections.com/olc/pub/DUKE/alumni_directory/alumni_directory_1.html
- ◆ Duke Law Blueprint Benefactors
<http://www.law.duke.edu/alumni/giving/blueprintbenefactor>

Appendix A: Alumni & Development Staff Contacts

Toll Free Phone: 1-888-LAW-ALUM

Fax: 919-613-7170

Web: www.law.duke.edu/alumni

E-Mail: alumni_office@law.duke.edu

Mailing Address:

Duke Law School
Alumni & Development Office
Box 90389
Durham, NC 27708

Physical Address:

Alumni & Development Office, Room 1001
Duke Law School
Science Drive & Towerview Road
Durham, NC 27708

Susan McLean, Director of Alumni Relations
919-613-7214, mclean@law.duke.edu

** Law Clubs liaison for DC and Triangle*

Dawn Downing, Assistant Director of Alumni Relations
919-613-8534, downing@law.duke.edu

**Law Clubs liaison for
Atlanta, Charlotte, Chicago,
New England and New York*

David F. Levi, Dean

Janse Haywood, Assistant to the Dean

Jeff Coates, Assoc. Dean for Alumni & Development

**Board of Visitors liaison
Illinois, New York, Mid West*

Kate Buchanan, Asst. Dean for Alumni & Development

**Law Alumni Association liaison
Charlotte, Colorado Georgia, Florida,
Virginia, Washington and Oregon*

Dawn Blalock, Assistant to Associate & Assistant Dean

Kristina Amidon, Regional Director

New England, Pittsburgh, Ohio, Raleigh and D.C.

David Thompson, Regional Director

*New York, New Jersey, Connecticut, Pennsylvania,
Texas, and the North Carolina Triad region*

Jean Brooks, Associate Director of the Annual Fund

**New Lawyers Division liaison*

Sarah Wentz, Associate Director of Annual Giving (Reunions)

Anna Corliss, Annual Fund Coordinator

Mary Pinaula, Director of Advancement Services

Janet Silber, Stewardship & Communications Coordinator

Sondra Haithcock, Development Services Coordinator

Lisa Weir, Development Assistant

Appendix B: Sample Club Charter

Duke Law Club of _____

I. Establishment of the Club and Club Objectives

- A. This charter hereby establishes the Duke Law Club of _____ (the Club), consisting of all alumni of Duke Law School living within the same geographic boundaries as those members of the Duke Club of _____. Current student and parents of current students of Duke Law School will be considering adjunct members and may be invited to certain Club events.
- B. The overall objective of the Club is to advance the Duke Law Clubs Mission Statement. In pursuit of that goal, the Club will adhere to all policies and procedures set forth in the Duke Law Club Handbook and meet all “Club Responsibilities” described in Section II of the Handbook.

II. Officers and Duties

- A. The Club will be led by a board consisting of no more than six but no fewer than four members elected from the Club membership.
- B. Four board members will hold officer positions: the president, president-elect, secretary and treasurer. The remaining two positions are “at-large” positions. The duties for each position are as follows:

President: The president/board chair holds overall responsibility for the club and is the primary contact with the Alumni Relations staff as well as local alumni. Responsibilities include:

- Represents Duke Law School and his/her alumni club.
- Serves as the primary contact for interested alumni in the area.
- Maintains close contact with the Alumni Relations staff.
- Schedules and conducts the annual summer planning meeting to develop the calendar of club events for the coming year. Schedules and conducts additional meetings or conference calls throughout the year, as needed.
- Delegates responsibilities to include assigning event coordinators and ensuring all reports are completed in a timely fashion.
- Attends a majority of Club events throughout the year.
- Plans, in conjunction with the Alumni Relations staff and the rest of the board, for a well-suited successor to assure the continuation of a successful club. Oversees the selection of successors for all board positions.

President-Elect: This position aims to provide leadership and continuity to the Club in the absence of the president/chair or when the president/chair’s term expires. Responsibilities include:

- Represents Duke Law School and his/her alumni club.
- Serves as a contact for interested alumni in the area.
- Conducts the annual planning meeting if the president is unable to attend.
- Succeeds the president at the end of his/her term.
- Attends a majority of Club events throughout the year.
- Assists the president in the selection and training of a successor.

Secretary: This position assists the president with all communication, both with the Alumni Relations staff and with the Club membership. Responsibilities include:

- Represents Duke Law School and his/her alumni club.
- Ensures all paperwork (including the annual meeting report, pre- and post-event reports) is turned in to the Alumni Relations staff in a timely matter.
- Drafts and/or coordinates the writing of the annual letter to the membership.
- Proofreads all print and e-mail invitations produced by the Alumni Relations staff.
- Relays information for the Club website to the Alumni Relations staff. Regularly checks Club website for accuracy/timeliness and prompts Alumni Relations staff when changes are needed.
- Assists in all Club leadership communication.
- Attends at least one Club event during the year.
- Assists in the selection and training of a successor.

Treasurer: This position oversees and ensures adherence to the club's event expenses. Responsibilities include:

- Represents Duke Law School and his/her alumni club.
- Works with the Alumni Relations team to ensure the efficient spending of event funds.
- Provides an estimate of expenses for each club event
- Tracks club spending and coordinates spending with the Alumni Relations staff.
- Provides regular budget updates to the board.
- Maintains regular contact with the Alumni Relations staff to ensure the club's financial records/goals are in agreement with the staff's records/goals.
- Works with Event Coordinator on budget, pricing, vendors, logistics, etc. for the assigned event.
- Collects event fees (if any) and forward monies to the Alumni Relations staff.
- Attends at least one club event during the year.
- Assists in the selection and training of a successor.

At-Large Members (2): These positions are active board members who work to achieve the goals of the board. Responsibilities include:

- Represents Duke Law School and his/her alumni club.
- Completes any task assigned by the president, including serving as the event coordinator for at least one event.
- Attends at least one Club event during the year.
- Assists in the selection and training of a successor.

III. Elections and Term Lengths

- A. Each board member will be elected to a two-year term.
- B. A board member may serve in his/her position for no more than two consecutive terms with no more than five total terms on the board.
- C. Elections will be determined by a majority vote of the board with the Alumni Relations staff receiving a vote. All Club members are eligible for the board.
- D. Elections will be staggered with two board members elected each year. In Year 1 of the election cycle, the Secretary and one at-large member will be elected. In Year 2, the president-elect will be elected (the outgoing president-elect will assume the outgoing president's position). In Year 3, the treasurer and other at-large board member will be elected.
- E. To facilitate the staggered election, the founding secretary and at-large member agree to a one-year term and the founding treasurer and other at-large member agree to a three-year term. After the first election cycle following the Club's founding is complete, all terms will be for two years.

- F. In the event of a vacancy on the board, the president, in conjunction with the Alumni Relations staff, has the power to fill such vacancy for the remainder of the term. If the office of president becomes vacant, the president-elect will assume the role of president and then, in conjunction with the Alumni Relations staff, fill the vacancy in the president-elect position.
- G. The president, in conjunction with the Alumni Relations staff, has the power to request the resignation of any board member who has not met the responsibilities described above.

IV. Amendment

- A. This charter may be amended by a majority vote of the board, pending final approval by the Alumni Relations staff.



DUKE LAW

Duke Law Clubs Events Calendar

*This form is to be completed and returned to the Alumni Relations staff within one week of the Annual Planning Meeting.
This form will help the staff plan; it is understood that details, dates, etc. may change.*

Club:

Board members:

Name	Position Held	Date Term Ends

Tentative Event Schedule:

Event Name	Description	Tentative Date	Estimated Budget	Event Coordinator

Comments/Questions/Requests:



DUKE LAW

Duke Law Clubs Event Planning Checklist

This form does not need to be turned in. Its purpose is to assist the Event Coordinator.

Event:

Complete?	Due Date	Timeframe	Task
		Annual Planning Mtg	Establish event budget: \$ _____
		As soon as possible	Book speaker: _____
		7-8 weeks before event	Set date _____ & time _____
		7-8 weeks before event	Book location: _____
		7-8 weeks before event	Determine cost per attendee: \$ _____
		6 weeks before event	Complete Pre-Event Planning Form & submit to Alumni Relations staff
		5 weeks before event	Proofread/approve invitation drafts provided by Alumni Relations staff
		3-4 weeks before event	Book caterer: _____
		3-4 weeks before event	Arrange for any A/V needs
		2 weeks before event	Assign club board members to make phone calls to increase attendance (if needed)
		2 weeks before event	Request any needed materials from Alumni Relations (nametags, copies of payment form, etc.)
		1 week before event	Give caterer final numbers. Ask when caterer will arrive at site. Get cell number for caterer.
		1 week before event	Reconfirm location.
		4-5 days before event	Follow up with speaker. Provide directions & emergency cell phone number.

Duke Law Clubs Event Planning Checklist (p.2)

Complete?	Due Date	Timeframe	Task
		3 days before event	Brief club board & Alumni Relations staff. <ol style="list-style-type: none"> 1. Provide RSVP list & your cell phone number. 2. Assign board members to event-day tasks. For example: <ul style="list-style-type: none"> _____ Man registration _____ Collect money _____ Meet speaker _____ Set up room/meet caterer _____ Pick up food & bring to location _____ Man door (if security is an issue) _____ Welcome the group/introduce speaker 3. Set event timeline. For example: <ul style="list-style-type: none"> 6:00 Event registration/social period 6:30 Ask everyone to take their seats 6:35 Introductions 6:40 Speaker 7:30 Event adjourns
		Day before event	Collect any materials needed for event <ul style="list-style-type: none"> _____ Nametags & Sharpies _____ Payment forms _____ Sign-in sheet _____ RSVP list _____ Camera _____ Phone numbers for caterer, speaker, location contact & other board members
		30 minutes before event	Arrive at location. Set up room (don't forget water for the speaker!). Manage board members as they complete assigned tasks.
		Within 1 week after event	Complete Post-Event Wrap-Up Form and return to Alumni Relations staff along with any payments and/or receipts collected.



DUKE LAW

Duke Law Clubs Pre-Event Planning Form

*This form is to be completed and returned to the Alumni Relations staff at least six weeks prior to the event.
The form must be received before invitations will be drafted.*

Club:

Event Coordinator(s):

Event Details for Invitations

Event Name:	
Event Date:	
Program Description:	
Start Time:	
Estimated End Time:	
Location with address:	
Directions to Location: (can use hyperlink if available online)	
Parking Information: (include price)	
Cost per Attendee:	
What Cost Covers/Additional Costs to Guests: (e.g., "light appetizers served" or "cash bar")	
Attendance Restrictions: (e.g., limited to 1 st 50 to respond)	
Contact Person for Questions:	
Special Instructions: (e.g., RSVP required for security)	

Duke Law Clubs Pre-Event Planning Form

Estimated Expenses

Room Rental	\$ _____	
Food/Drinks	_____	
Tax/Tip	_____	
Equipment Rental	_____	
Miscellaneous (Ex. Bartender charge, expenses for speaker)	_____ _____	Please list: _____ _____
	+ _____	_____
Total	\$ _____	

Cost breakdown per expected number of guests

_____ # of expected guests X _____ cost per attendee = \$ _____

Alumni and Development Approval Amount

ADO approved amount prior to event \$ _____

Comments/Questions/Concerns:



DUKE LAW

Duke Law Clubs Post-Event Wrap-Up Form

This form is to be completed and returned to the Alumni Relations staff within one week after the event.

Club:

Event Coordinator(s):

Event Name:

Event Date:

Total Number of Attendees:

Event Assessment: (provide overall impressions of the success of the event as well as suggestions for improvement, etc.)

Duke Law Clubs Post-Event Wrap-Up Form

Actual Expenses

Room Rental	\$ _____	
Food/Drinks	_____	
Tax/Tip	_____	
Equipment Rental	_____	
Miscellaneous (Ex. Bartender charge, expenses for speaker)	_____	Please list: _____
	_____	_____
	+ _____	_____
Total	\$ _____	

Event Revenues

_____ # of paying guests X _____ cost per attendee =	\$ _____	
Subsidy from Club's overall budget	+ _____	
Total (must = Total Expenses)	\$ _____	

Club Overall Budget

Balance in Club's budget prior to event	\$ _____	
Subsidy from Club's budget for this event	- _____	
Remaining Balance	\$ _____	

*** Please forward all receipts, checks and credit card payment forms immediately to:**

Dawn Downing, Assistant Director of Alumni Relations
 Alumni & Development Office
 Duke Law School
 Box 90389
 Durham, NC 27708

Duke Law Club Event Payment Form

Event: _____

Date: _____

Cost: \$ _____, payable by check or credit card
(Checks may be made payable to Duke University School of Law)

Attendee's Name: _____

Payment Method: Check _____ Credit Card _____ Cash _____

Credit Card Number: _____

Card Type: VISA _____ MC _____ AMEX _____ Discover _____

Expiration Date _____ Code (on back) _____

of guests: _____ x \$ _____ = Total: _____

Name on Card (please print): _____

Signature: _____

Duke Law Club

Date: _____

****Receipt for
Attendee****

Total: _____

Paid by:

Check

Check #: _____

Credit Card

Type: _____

Cash

Received by:

SAMPLE INVITATION (POSTCARD)

Please join fellow Duke Law School alumni as we welcome summer interns at a reception hosted by

**Rich Baer L'83,
Qwest Communications Int'l. Inc.**
**Greg Kerwin L'84,
Gibson Dunn & Crutcher LLP**

This social gathering is an opportunity for you to meet current students, alumni, and key members of the Denver Duke Law community.

Tuesday, July 27, 2010

5:00 - 6:30 p.m.

Gibson Dunn & Crutcher LLP

1801 California Street, 42nd Floor
Denver, Colorado 80202-2694
Website: www.gibsondunn.com

Please reply by July 23, 2010.

To RSVP or for more information, visit our website at www.law.duke.edu/alumni/events. For questions, contact Susan McLean at 919-613-7214 or mclean@law.duke.edu.



Towerview Road &
Science Drive
Durham, NC 27708

«PREFERRED_MAIL_NAME»
«PREFERRED_ADDRESS_1»
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«PREFERRED_ADDRESS_3»
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Duke University School of Law

Alumni and Students Reception at Gibson Dunn & Crutcher LLP



July 27, 2010