

The Duke Alumni Association Strategic Plan, 2005-2010
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Executive Summary

We engage, connect, and celebrate alumni and friends of Duke University.

Forever Duke

To further our mission of engaging, connecting, and celebrating Duke alumni and friends, the Duke Alumni Association (DAA) sets forth a strategic plan to map its direction, guide and build its programs, and define metrics for assessing its performance over the next five years. Led by DAA board members, university staff, and volunteers, the plan also intends to shape current Office of Alumni Affairs operations and budgets so that they serve as effective means to strategic ends.

The plan identifies vision and values, and sets “overarching goals”:

- Develop a genuinely Duke message
- Increase the visibility and impact of the DAA
- Better understand the demographic make-up of Duke alumni
- Develop a mature and thriving volunteer program
- Foster educational opportunities
- Make career services a cornerstone of the DAA
- Promote DAA understanding and engagement through student programming
- Create and maintain alumni connections through innovations and technology
- Develop the resources and funding sources to meet those goals

Steps necessary to realize each goal are defined. To attain the goals, it calls for “universal programmatic emphasis” on opportunities for graduate and professional, international, and minority* alumni, as well as affinity* groups. It sees increased staffing and a new facility within three years as integral ingredients to success.

Strategies and plans through 2010 are specified for all current standing Office of Alumni Affairs programs: Alumni Admissions, Alumni Career Services and Networking, Alumni Education and Travel, Clubs, *Duke Magazine*, Member Benefits and Services, Regional, Reunions and Special Events, Student and Young Alumni, as well as DAA communications.

Each program incorporates those strategies and long-range plans in its annual operating plans, and each identifies metrics to gauge progress and resources necessary to achieve its goals. In each year, progress will be evaluated and reported by the Executive Committee of the DAA Board of Directors.

The plan includes appendices that support its programmatic strategies, and a timetable for its completion by the end of 2005, so that it may be considered for approval by the full DAA Board and Duke’s Board of Trustees in February 2006. A timetable of the plan’s development and implementation is attached.

* The terms “affinity,” “regional,” and “minority,” used throughout the plan, are subject to change. See Appendix A for a more detailed definitions of these and other terms.

The Strategic-Planning Climate

In the past half century, accelerating over the last 25 years, Duke University has changed a great deal: Its student and alumni populations have grown and become more diverse by every measure. The institution itself has evolved from what was essentially an excellent regional, then national, university, to a place of real leadership among the world's great research universities. Every state and dozens of countries are represented in its student body; nearly 60 percent of its alumni have graduated since 1980; the median and average age of alumni is just 45.

On June 30, 2004, following a decade of unparalleled unity and success, many of Duke's leaders stepped down. Richard H. Brodhead succeeded Nannerl O. Keohane when she completed her second term as Duke's eighth president. Chancellor of Health Affairs Ralph Snyderman retired after 15 years of service and was succeeded by Victor Dzau. William Chafe returned to teaching after nine years as dean of the faculty of Arts & Sciences and vice provost for undergraduate education; he was succeeded by George McLendon. Robert Shepard, formerly vice president for development, replaced Senior Vice President for Alumni Affairs and Development John J. Piva, who retired after 21 years at Duke. Mary Champagne, dean of the School of Nursing since 1991, stepped down to return to teaching; Catherine Lynch Gilliss '71 was named dean and vice chancellor for nursing affairs.

In the spring of 2004, Laney Funderburk '60, associate vice president and director of alumni affairs for 22 years, announced his retirement, to be effective at the end of that year. Senior Vice President Piva commissioned a study of the Office of Alumni Affairs, the results of which were presented to Robert Shepard. In August 2004, Shepard reviewed the recommendations of a search committee and named Sterly L. Wilder '83 executive director of alumni affairs, succeeding Funderburk. A few months later, Ellen Medearis was appointed executive director of development to lead the Office of University Development.

A year after the end of the \$2.36-billion Campaign for Duke, another major fund-raising effort for financial aid quietly began. At approximately the same time, a university-wide, strategic-planning process was initiated, which will be informed by the alumni association plan. Wholesale changes to Duke's Central Campus were considered, including the possibility of a new alumni, career, and visitor center that will house personnel and services for alumni.

In this climate of institutional change, as well as in the context of national and global uncertainty, Executive Director Wilder, with assistance from Carol O'Brien Associates, Inc., began a strategic-planning process for the Duke Alumni Association and the Office of Alumni Affairs. Virtually every interest group within the immediate Duke community, as well as representatives of every alumni constituency, were involved in the process. With full participation of an engaged Duke Alumni Association board, led by new president William P. Miller '77, the plan evolved through the spring of 2005. By June, an early draft was circulated and task forces, which included DAA members, university staff, and volunteers, were established to evaluate individual alumni affairs program plans. Evaluations in conferences and meetings continued throughout the summer and resultant recommendations were both incorporated in annual operating plans and informed a new draft of the strategic plan. Operating plans and the new draft were reviewed by the DAA Executive Committee in mid-September and a revised draft of the plan resulted. That draft was reviewed internally throughout the fall and early winter; a final version follows.

Duke Alumni Association Strategic Plan

The Duke Alumni Association (DAA) strategic plan for 2005-2010 aims to bring a new vision to the DAA programs and services. The DAA staff and volunteers are committed to developing the premier alumni association in the country and will be looking to the university leadership to help implement this vision. We believe this plan will serve as a catalyst in achieving this vision and creating a culture of planning, analysis, and accountability.

Staff, volunteers, alumni, and friends who participated in the planning process are listed in Appendix H. (Please note that the Office of Alumni Affairs is the name for the university office and an internal distinction.) Additional definitions and 2005 alumni demographics are listed in Appendix A and B, respectively.

The nine overarching goals of the organization (detailed in Section Two) are:

1. Develop a clear, consistent, and distinctive (genuinely Duke) message and visual identity for the DAA, one that supports the university message and is infused with the values of the DAA.
2. Increase visibility and impact of the DAA within Duke and for Duke alumni, with special attention to leveraging the new Alumni, Career, and Visitor Center and DAA membership.
3. Attain a better understanding of the demographic make-up of Duke's alumni base and assess service, support, and programs to better serve evolving alumni constituencies.
4. Develop a thriving volunteer program that recognizes, stewards, and rewards volunteers.
5. Foster educational opportunities that will strengthen alumni ties to the university.
6. Make Alumni Career Services programs a cornerstone of the DAA, creating new opportunities for alumni and students to further engaged through mentoring and networking programs.
7. Enhance student* programs that promote understanding of the DAA and provide opportunities for further engagement.
8. Create and maintain alumni connections through new uses of technology and find effective ways to advance the mission of the DAA through the use of technology.
9. Develop resources and funding sources to meet new strategic goals.

We understand and are committed to the premise that, in order to achieve the overarching goals of the organization, programmatic goals must be achieved. Over the next five years, we will:

- Increase programming, communication, and interaction in four key areas:
 - Graduate and professional alumni
 - International alumni
 - Minority* alumni
 - Affinity* groups
- Develop regional communities that are coordinated in their messages and programming – building a stronger and more influential Duke presence.
- Partner with university offices and departments.

Much of the success of this plan depends on the opening of the Alumni, Career, and Visitor Center and staff growth that is in accord with our expected programmatic growth. It is also crucial for the success of the new vision that the university increase financial support of programs and activities.

* See Appendix A for a more detailed definition of these and other terms.

Section One – DAA Strategic Plan

Mission and Vision of the Duke Alumni Association

The mission and vision outlined below are to be used by all of the Duke Alumni Association programs. These are the underlying principles that will guide programmatic direction and goals, and should be used as a measure of success.

Mission Statement

We engage, connect, and celebrate alumni and friends of Duke University.

Tag Line

Forever Duke

Vision Statement

We build lifelong ties to the university, and to one another, by cultivating pride in the institution and passion for its success, so that commitment to Duke is a priority to its alumni and friends.

Values of the Duke Alumni Association

We believe in:

- Duke: its past, its present, and its future
- Connecting Duke alumni and friends with one another
- Involving Duke alumni and friends in the life of the university through a variety of activities and programs with broad-based appeal, including educational events, volunteer opportunities, print and electronic communications, meetings and gatherings, support networks, mentoring, and career advice
- Educating students about the benefits and rewards of membership in the Duke Alumni Association
- Offering students and alumni opportunities for service and leadership
- A staff that embodies excellence, integrity, leadership, teamwork, creativity, openness, collaboration, professionalism, and fiscal responsibility
- Encouraging, utilizing, appreciating, and recognizing volunteers
- Promoting a deep appreciation for the range of human differences, cultures, and potential
- Boldness of endeavor; strength of purpose; suppleness of innovation; resilience of youth; wisdom of experience
- A shared passion for Duke that transcends boundaries, real and perceived, engenders a cohesiveness of spirit, and helps form lifelong friendships

Section Two – Overarching Goals

Develop a clear, consistent, and distinctive (genuinely Duke) message and visual identity for the Duke Alumni Association (DAA), one that supports the university message and is infused with the values of the DAA.

Message

- Better articulate the identity and role of the Duke Alumni Association through all DAA events, programs, materials, and departments.
- Position Alumni Affairs communications within the on-campus Duke community.
- Strengthen the DAA’s role as leader for the professional school alumni associations, and work with them to create a unified “Duke Alumni” message and goals.
- Coordinate with the development office, especially the Duke Annual Fund (DAF), to insure that a consistent message is being sent to alumni about the importance of volunteer and philanthropic efforts. Where possible, communicate the messages jointly.

Vehicles for communicating message

- Track the success and impact of communications. Determine metrics for evaluation of results. Use findings to establish best practices for communication with different constituencies.
- Survey alumni to determine preferred method(s) of communication.
- Coordinate email communications, including content, purpose, and visual identity with internal Alumni Affairs programs and university-wide offices.
- Develop protocol for Alumni Affairs and programmatic emails. Communications should be compatible with university guidelines.
- Implement plan to communicate content through appropriate vehicles to segmented audiences.

Visual Identity: marketing and branding of the Duke Alumni Association

- Develop a DAA brand and logo that is recognizable and consistently used by all DAA programs.
- Secure resources for brand overhaul, including logo, marketing materials, dues solicitation, surveys, and website.
- Leverage demographic data to create strategies for reaching specific constituent groups – students, alumni (professional, graduate, and undergraduate; international; and affinity groups), faculty, and staff.

Increase visibility and impact of the DAA within Duke and for Duke alumni, with special attention to leveraging the new Alumni, Career, and Visitor Center and DAA membership.

Impact of the DAA on university community

- Strengthen awareness of the role and accomplishments of the DAA through leadership (i.e. membership on the Board of Trustees), partnerships (graduate and professional school alumni and affinity programs), and outreach (students).

Alumni, Career, and Visitor Center

- Leverage design process of an Alumni, Career, and Visitor Center as an opportunity to increase visibility of the DAA, its programs and partnerships, and to engage its volunteers.
- Use the new Alumni, Career, and Visitor Center to enhance existing collaborative efforts on-campus.

Define DAA membership benefits and goals for growth

- Review and evaluate current benefits for general alumni and dues-paying members.
- Determine additional benefits of DAA membership.
- Define “parents” and “friends” of the university and how they fit into the DAA membership programs.
- Determine goals for growth in dues membership on an annual basis and to 2010. Develop strategies and communication plans to meet these goals.
- Identify key constituencies to target for membership. Track results of recruitment efforts and develop profiles of dues-paying members.

Attain a better understanding of the demographic makeup of Duke’s alumni base and assess service, support, and programs to better serve evolving alumni constituencies.

Demographics

- Create survey and evaluation tools to better understand the alumni body in the following ways:
 - Segments: numbers, race, gender, growth rates, classes, legacies, geographic location, professions, sexual orientation
 - Interests and affinity groups
 - Values (generational marketing)
 - Factors creating loyalty (number and types of degrees) and family connections
 - Parents and friends of the university
 - Participation (volunteer and giving)
 - Program specific evaluations

- Evaluate trends and changes in demographics in the alumni body, and provide findings to the university. Use the data to improve programmatic activities in specific regions and on-campus.

Regional activities

- Use the improved data to further develop regional programming that targets the alumni population of specific cities and regions.
- Tailor events to segments of the population, specifically those groups to whom the current DAA programming does not appeal.
- Improve send-off parties to make them key regional events in which AAAC volunteers, club volunteers, and other regional volunteers work together.

Alumni support and services

- Create an alumni support and service system that is characterized by excellence in its proactive, timely, inclusive, and personal nature. (Service and support provided by both volunteers and staff.)
- Develop a culture of accountability and clear responsibilities for providing service to alumni.
- Establish quantitative and qualitative goals for each program to ensure that we are meeting the needs of our alumni and friends (annual and five-year goals).
- Implement measurement tools with which the director and program directors will be measured through performance appraisals.

Develop a mature and thriving volunteer program that recognizes, stewards, and rewards volunteers.

- Articulate volunteer career paths; improve volunteer recruitment and retention; clarify volunteer expectations; and track awards.
- Develop a comprehensive and well-publicized system of recognition and awards.
- Designate a staff member to oversee volunteer programs. (2006)
- Increase international volunteers and better develop volunteer opportunities to attract and engage alumni living abroad.

Foster educational opportunities that will strengthen alumni ties to the university.

- Establish and strengthen current university partnerships to create new opportunities for alumni to engage, on a continuing basis, in educational programs off campus.
 - Regional weekend programs with prominent faculty members
 - Book clubs in conjunction with *Duke Magazine*, Duke Libraries, and other university partners

- Service learning opportunities
- Faculty participation in regional engagements through clubs and travel programs
- Enrich educational programming on campus through already established DAA programs including Reunions Weekend, Homecoming Weekend, Half Century Club, and Founders Weekend (including speaking opportunities for the Distinguished Alumni Award recipient).
- Capitalize on the wide assortment of current on-campus lecture series and consider expanding current DAA alumni lecture series.
- Manage expanding alumni educational opportunities on campus, off campus, and internationally, serving as a gateway for alumni regarding continuing education offerings from all schools, programs, and departments.
- Maintain Alumni Distinguished Undergraduate Teaching Award as DAA-sponsored recognition in the field of educating Duke students.

Make Alumni Career Services programs a cornerstone of the DAA, creating new opportunities for alumni and students to become further engaged with Duke through mentoring and networking programs.

- Further cultivate the relationship between the DAA and the Career Center to become an industry leader in partnerships, programs, and alumni career services.
- Foster relationships between individual graduate and professional school career services and the Career Center.
- In conjunction with the Career Center, develop on-campus networking programs for students and alumni.
- Further develop regional career programs for students and alumni.
- Use the Alumni, Career, and Visitor Center for greater interaction and joint programming.

Enhance student programs that promote understanding of the Duke Alumni Association and provide opportunities for further engagement.

- Create programs that will engage undergraduate, graduate, and professional students.
- Determine ways to evaluate the correlation between student activity and alumni service and giving.
- Develop “nontraditional” ways to engage students with the DAA and local and visiting alumni.
- Institute events and programs that will encourage undergraduate class affinity and strengthen their relationship with the DAA before graduation.

- Engage students who are abroad by connecting them with local alumni and international Duke clubs.

Create and maintain alumni connections through new uses of technology and find effective ways to advance the mission of the DAA through the use of technology.

- Determine technology needs, purpose, and policies for all Alumni Affairs programs.
- Implement a new website that coordinates with key Duke websites, specifically Admissions and the Duke home page. Program websites should be integrated with these and other related sites, i.e. Career Center, Annual Fund, University Development, University Libraries, etc.
- Improve integration of alumni information across the university through the new database. (Implementation dependent on launch of new site.)
- Adopt new technology that will allow the DAA to provide more member-to-member connections for alumni.

Develop resources and funding sources to meet new strategic goals.

- Explore external and university resources and partnerships to meet strategic goals.
- Educate Duke trustees, deans, and administrators as to how the DAA and Alumni Affairs benefit the university and its alumni.
- Work with the graduate and professional schools to maximize the impact of all alumni programs.
- Collaborate with university-wide development staff to continue the success of joint efforts and coordination.
- Quantify annual and five-year cost of strategic plan and estimate, where possible, increased returns in revenues.
- Investigate potential for additional funding sources for the DAA including
 - Lifetime memberships
 - Corporate sponsorships
 - Credit card and similar programs
 - Dues and magazine subscriptions
 - Ad sales
 - Merchandising and marketing of programs

Section 3 – Program Plans

Alumni Education and Travel Program Strategic Plan

Mission Statement

Plan, implement, deliver, and direct high-quality education and travel programs for the benefit and enjoyment of Duke alumni and friends. Involve Duke faculty, senior administrators, and Duke facilities here and around the world, as well as other Duke resources. Strengthen the lifelong bonds and learning relationships between the university, the alumni association, alumni, and friends.

Five-year Strategic Plan

- I. Increase educational programming so that alumni will engage in and recognize our programs as a way to be continually involved in the educational life of the university.**
- Plan and implement all educational programming for Homecoming and Reunions with increased input from the dean of the faculty's office. Arrange for Distinguished Alumni Award recipient to speak at Homecoming. (2006 forward)
 - Develop and create quarterly regional weekends -- an outgrowth of the educational events held during the Campaign for Duke. The idea is to have one theme and offer it at four different cities around the country, working in conjunction with the development office and regional programs. (to be offered 2007-08 and 2009-10)
 - Explore an Alumni Book Club offering, working with the library, *Duke Magazine*, and the English department. Consider having a faculty convener or possibly emphasizing alumni authors and readers. (late 2006 forward)
 - Strengthen the Alumni Lecture Series so that it is known and considered a part of the intellectual life of Duke and the surrounding community by focusing on current topics and featuring the best and the brightest of Duke; consider partnering with the Office of the Provost. (2007 forward)
- II. Develop and expand travel programming, building on our current foundation with increased programming in areas that reflect changing alumni demographics and interests while being continually vigilant of the world situation.**
- Work with old and new travel providers to deliver sound programs that reflect positively on Duke University. (2005 forward)
 - Add alumni to Duke undergraduate courses taking place in an international setting – launch pilot programs in 2006 with the Marine Exploration Programs. If alumni respond positively, this could serve as a template for future offerings with other departments.
 - Increase offerings for service learning travel for alumni. A pilot program will be Brazil Pilgrimage of Pain and Hope in 2006.
 - Plan annual travel reception during Reunion Weekend, thereby providing good will, reuniting visiting alumni with past and future travel faculty members, and promoting future offerings. (2006 forward)
 - Ongoing evaluations of current in-house programming:
 - Oxford Program
 - Marine Lab
 - London Theater
 - New York Cultural Weekend(Examine these relative to each program's lifecycle, current events, and program numbers.)
 - Be open to new in-house programming opportunities (dependent on increased staffing).

- Look for opportunities with other international universities to create a program similar to the Oxford Program, i.e. in China or Europe. (2008)
- Consider travel offerings that will be of interest to the changing younger demographics of Duke alumni, with shorter programs such as the Rome Escape to be offered in 2006.

III. In order to deliver the best possible product to our audience market, promote, track, and measure our programmatic efforts.

- Market young alumni and family programs through the Regional Programs and Young Alumni offerings. (2007 forward)
- Make Education and Travel Web pages more interactive with participants, through surveys, requests for information, faculty information, photo albums, and chat sites. (late 2006 forward)
- Evaluate inserting the brochure in a random sampling of *Duke Magazine* over a three-year period to increase the travel and education presence in our core market. (2007, 2008, 2009)
- Interact regularly with other university entities that have international programs to continually find new ways to co-engage. (2005 forward)
- Create faculty and staff manuals for people who work with Education and Travel. (2006)
- Standardize faculty and staff final reports when they travel for Alumni Affairs. (2006)
- Increase involvement with deans and department chairs regarding opportunities for their faculty to participate in Education and Travel programs, providing them exposure to alumni, service opportunities, and learning experiences. (2005 forward)
- Create informal Education and Travel advisory council (two DAA Board members, two faculty members, two development officers, and two Education and Travel staff). Meet annually for input on quarterly regional events and book-club offerings. (2006-07)
- Evaluate effectiveness of creating separate annual brochures for educational programming and travel programming. (2009)
- Implement online registration system that automatically updates measurements needed. (2006)
- Track and capture information on repeat travelers, donor giving following traveling, and travel patterns of alumni. (2006-07)
- Develop a clear method for recording pertinent information about travelers following trips and educational events via a call report. (2006-07)
- Monitor how registrations are received (i.e. by phone, mail, email, Web, or in person). (2006)
- Develop a system to measure the hits on the Education and Travel website as well as interest on individual trips. (2006)
- Evaluate and consider creating a frequent-travelers program. (2008)

Communications

Mission Statement

All communications representing the Duke Alumni Association (DAA) should send clear, substantive, consistent, appropriate, and distinctive (genuinely Duke) messages. DAA mission, vision, and values should be reflected in all communications for all Alumni Affairs programs.

Five-year Strategic Plan

- I. Develop a strong, recognizable DAA brand and visual identity that is compatible with all Duke University communications. (2005-2010)**
 - DAA messages should be integrated with others at the university, and other departments should understand and support the DAA.
 - Develop a strong visual identity for alumni communications and establish methods to use it to brand alumni messages and materials.
 - Assess recognition of and attitudes about current and past visual identities.
 - Understand future uses of visual identity.
 - Design and test an identity that represents new strategies and vision.
 - Define methods of using it that apply to all areas of Alumni Affairs, and provide it in forms that are easy to use. Monitor its use.
 - Capitalize on energy and excitement of new brand.

- II. Lead effort to coordinate university-wide alumni messages and materials to create a package that leverages Duke's programs and further strengthens alumni ties to the university through a diversity of opportunities.**
 - Make sure that University Development plans and programs are compatible with DAA messages, and that those messages support development goals.
 - Represent and promote DAA's mission, purpose, and interests throughout Duke, specifically in the Office of News & Communications Web, press, and related outreach.
 - Foster relationships that will allow new avenues for engagement and intellectual alumni opportunities, capitalizing on success of programs university-wide.
 - Audit all current communication efforts for purpose, audience, method, reach, frequency, and cost.
 - Use information as a catalyst to drive university-wide collaboration.
 - Understand what is being created and disseminated in Alumni Affairs: to whom and how it is being sent, who is doing it, and why. Review its cost. See it in relation to other communications across the university to see if duplication can be avoided and/or economies realized.

- III. Create a consistent DAA message and visual identity that allows each program to have its own identity while still being clearly recognized as part of the DAA. (2005-2007)**
 - Conduct and share assessments of existing materials and methods of producing and distributing them. Explore options for both.
 - Provide clear guidelines for consistency and ways to achieve it.
 - Work collaboratively with all DAA programs to ensure all are meeting both the DAA and programmatic branding needs.

IV. Creatively look for new ways to engage alumni through communication; provide clear steps to maintain and build new communications methods and vehicles. (2005-2007)

- Help to create, review, and make necessary changes to communications efforts.
- Conduct, or help to conduct, assessments of effectiveness with audience.
- Estimate costs of communication vehicles and provide ways to control those costs.
- Provide the means to effective communications ends.

Duke Magazine

Mission Statement

Duke Magazine engages alumni by providing a sense of the intellectual dynamism that characterizes the Duke community. By offering profiles of Duke newsmakers, observations on academic and student life, reports from the research frontiers, and Duke perspectives on weighty issues of the day, the magazine does more than inform its readers. It deepens the bonds they share with the university and with each other.

Five-year Strategic Plan

- I. Showcase Duke’s standing as a world-class research university to expand its impact and visibility, demonstrate the depth and breadth of its resources, and celebrate its excellence.**
 - In every publishing year, assuming constancy in university priorities, produce
 - at least four feature stories reflecting the university’s research agenda.
 - at least four feature stories on social trends that point to expertise in multiple departments and schools of the university. (2008)
 - at least four feature stories on campus-life issues. (2007)
 - at least two feature-length profiles of alumni or prominent mentions of alumni in trend stories, along with each issue’s set of three mini-profiles.
 - In every publishing year, showcase minority members of the Duke community through feature stories, news accounts, and mini-profiles.
 - In every issue, include news or feature content that accents Duke’s global reach. (2008)
 - Revamp “Gazette,” the campus-news section, in order to highlight research on campus in ways distinct from eDuke news. (2009)
 - In partnership with the Career Center, Duke libraries, University Archives, and the Nasher Museum of Art, continue to highlight the resources and collections represented by those areas of the university, including significant moments from Duke’s past. (2006)
 - Publish at least two pages of reader responses, through the “Forum” section, every issue. (2006)

- II. Build a firmer financial foundation for the magazine in order to offset increasing production and mailing costs and to help maintain the standard of excellence for which *Duke Magazine* has become emblematic.**
 - Solicit voluntary subscriptions through a separate letter or some other targeted means. (2007)
 - Place special emphasis on increasing activity in the Classifieds section. (2007)
 - Explore the idea of having some Web content available only to magazine subscribers. (2008)
 - Aim to increase advertising revenue through a more assertive and targeted effort to solicit advertising. (2009)
 - Explore the idea of building a magazine endowment, particularly for areas of special interest to journalism-oriented alumni, like the Felker Fellow staff position. (2009)
 - Explore the idea of offering lifetime subscriptions, akin to lifetime alumni dues. (2009)
 - Explore the costs/benefits of establishing an advertising consortium of campus magazines to increase attractiveness to potential advertisers. (2009)

- III. Cultivate relationships on and off campus to support the DAA’s focus on mentoring and networking.**

- Formalize the arrangement with *New York* magazine whereby the two publications sponsor a summer intern based in New York. (2007)
- Look to an audience of at least 100 for an annual *Duke Magazine* campus forum series, featuring a public dialogue with a Duke notable and co-sponsored with a university department, program, or professional school; also look to the forum as a candidate for magazine reprints. (2007)
- Mentor three editorial interns every year, some of them working toward the Certificate in Policy Journalism and Media Studies. (2007)
- Participate in Career Week activities, and continue the editor's involvement in teaching a two-semester sequence in Magazine Journalism. (2006)
- Nurture student mentoring arrangements with members of the Editorial Advisory Board. (2007)

IV. Enhance the involvement of the Editorial Advisory Board to capitalize on the high level of professional expertise its members provide.

- Specify that every board member will be responsible for evaluating every issue of the magazine. (2006)
- Engage the board in reviewing peer university magazines as well as *Duke Magazine*. (2007)
- Target board members for occasional writing assignments, so that board members are represented in at least three issues a year as feature writers or book reviewers. (2007)
- Engage board members in meetings and/or workshops with journalism students when they are on campus for fall meetings. (2007)
- Invite a select group of journalism students to sit in on fall meetings. (2007)

VI. Be aware of and respond to shifting reader demographics.

- Conduct comprehensive readership surveys. (2007, 2009)
- Conduct online surveys for quick feedback on specific content in the print or online versions. (2008)

VII. Strengthen the magazine's Web presence to build stronger ties between alumni, especially young alumni; to nurture a greater connection with Duke; and to broaden the magazine's reach and readership. The expectation is that, over time, the Web features will see a greater number of unique visitors, longer session lengths among users visiting those areas, and more return visits.

- Promote online class notes as a way to build relationships among alumni and to share personal news in a timely and friendly manner, with the expectation that most class-notes activity will migrate to the Web. (2008)
- For at least every other issue, produce Web-specific features and supplemental information, images, and audio tied to print features. Many of these features will move beyond replicating the print version on the Web to make a greater and more creative use of Web technology—for example, slide-shows, video clips, and audio clips. (2010)
- For at least every other issue, develop an online post-and-response forum around a theme treated in the magazine's news and/or features pages. (2008)
- Preview a feature in every issue through Duke Blue Connections, the magazine website, or a separate email announcement. (2009)
- Promote the RSS-feeds feature. (2007)
- For every issue, feature Web links that encourage readers to seek out additional information on selected stories. (2006)

Member Benefits and Services

Mission

Provide opportunities and programs that highlight and reward the importance of membership in the Duke Alumni Association and create new ways to connect with Duke through campus and corporate partnerships.

Five-year Strategic Plan

- I. Increase percentage of alumni who are dues-paying members of the DAA to create a consistent revenue stream.**
 - Look at current revenue streams for annual and lifetime dues memberships to determine potential for five-year growth. Evaluate potential increase in lifetime and annual dues charges. (2006)
 - Determine which benefits are “worth paying for” without creating a full, two-tiered dues structure. (Example: *Duke Magazine* and concierge/hospital assistance service.)
 - Evaluate the necessity and value of local clubs membership dues programs and their effect on DAA dues payment.
 - Determine next steps for voluntary magazine subscriptions. Evaluate past revenues and develop projections through FY 2010.

- II. Improve benefits, programs, and services offered by outside vendors to increase the visibility and value of the DAA to alumni.**
 - Create a strong benefits program that has a well-articulated policy for the quality and benefits of all services offered to Duke alumni.
 - Determine policy for outside vendors who are interested in providing benefits or services to alumni.
 - Partner with university programs, such as Duke Health System, Primate Center, Nasher Museum, and Library Services, to provide special benefits, reduced membership costs, and other services to DAA members.

- III. Market benefits of DAA membership to alumni and students.**
 - Develop communication plan that articulates the benefits of membership and creates a case for dues payment.
 - Evaluate current communications through mail and Web. Track success of mailings.
 - Look for ways to market to the increasing number of graduate and professional alumni and growing diversity of the overall alumni population. Encourage university-wide recognition and membership in DAA.
 - Establish plan to educate current students about the importance of membership in DAA.
 - Determine a stewardship plan for dues members that recognizes consistent and lifetime giving.

Duke Regional Programs

Mission Statement

Duke Regional Programs will connect, engage, and celebrate the family of Duke alumni, parents, and friends in any and all geographic regions away from Duke's campus, thus creating a united and coordinated "Duke presence" in these areas. Creating a regional Duke presence will increase the satisfaction and engagement of Duke alumni by involving the entire university to expand volunteer opportunities, build strategically planned regional events, and centralize communication.

Five-year Strategic Plan

I. Coordinate short-term and long-term goals for all DAA programs under the regional umbrella.

- Ensure that Duke Clubs, Alumni Admissions, Alumni Careers, and Students and Young Alumni collaborate on planning and implementation of all initiatives, starting in 2005-06. By 2006-07 and beyond, establish calendar and timetable of all annual activity to assist in timing, coordination, and use of resources.
- Organize regional communication to share and brand the DAA message. In 2005-06, document all communication that goes out to both volunteers and alumni. In 2006-07, develop plan to maximize use of communication.

II. Engage University Development, Duke's professional and graduate schools, Admissions Office, academic areas, plus other entities that plan regional activity to plan strategically for our major regions, and to identify volunteers for and donors to university-wide programs.

- Enhance automated internal university-wide communication by annually updating the online Alumni and Development Calendar. In 2005-06, introduce new and updated internal calendar for staff to help see what is occurring in every city. In 2006-07, and every year thereafter, evaluate system and implement necessary upgrades.
- Schedule regular face-to-face meetings to reach out to university areas. In 2005-06, determine which units should be met with, and have schedule first set of meetings. Determine what other methods of communication (phone, email, etc.), should be used to supplement meetings. In 2006-07, increase communication, determined by results of 2005-06.
- For all events that take place regionally, make sure that a regional volunteer is invited to attend, thereby creating an environment in which information can be shared about all regional Duke activity. Begin in 2005-06 and evaluate effectiveness to determine how to improve in 2006-07, and thereafter.

III. Develop standardized volunteer opportunities and growth, with specific roles and stewardship, under the regional umbrella.*

- In 2005-06, determine identity of program volunteers, by number, class, school, affiliated groups, etc. to determine baseline numbers. Create job descriptions and specific roles for DAA volunteers. Upon evaluation, determine goals for increases in the number of volunteers and for volunteer roles in 2006-08.
- In 2005-06, create updated online training tools for all volunteers, and update each year thereafter. In 2006-07, create consolidated resource and manual for all DAA volunteers.
- In 2005-06, institute policy for Alumni Affairs staff to visit the entire range of DAA volunteers when traveling. In the past, staff regularly visited only Duke Club volunteers.

* Appendix D articulates the cooperative effort between the all DAA programs to better manage, track, recognize, and steward DAA volunteers.

The changes will ensure that, in addition to club volunteers, Alumni Admissions volunteers, Young Alumni volunteers, and career volunteers will be visited. The visits will identify, train, and thank volunteers. In 2006-07 and thereafter, pilot and evaluate regional training sessions for volunteers. In 2007-08, implement regional training in major regions.

- Introduce trip reports for traveling staff to share information about volunteers. In 2005-06, determine format for reports and to whom reports should be sent, outside of the Alumni Affairs office. In 2006-07 and thereafter, improve upon reporting and sharing of trip report information.
- Develop one point of entry for all DAA volunteers by 2007-08.

IV. Create a dynamic Web presence for all regional activity.

- Develop website that will include all regional events, contacts, university resources, volunteer opportunities, online registration and payments, etc. In early 2006-07, introduce new resource to all DAA volunteers. In late 2006-07, extend opportunity to use new website to all Duke schools, programs, departments, etc.

V. Establish over-arching, high-profile regional committees that combine all facets of Duke in a region.

- From 2005-07, work with Development and other departments to determine structure of committees and where they should exist. In 2007-08, determine potential committee members and pilot committees in a limited number of regions. Evaluate success, and increase number of committees in 2008-10.

VII. Determine return on investment for regional activity.

- In 2005-06, baseline figures will be determined in the following areas: number of volunteers, volunteers per program, event attendees, number of and type of regional communication, and resulting participation.
- All of this data will be broken down demographically by age, class, school, giving history, affiliated group, volunteer participation in other areas, event attendee participation in other areas, etc.
- In 2006-07, goals will be set for years 2-5 of the strategic plan for an increase in volunteers (by region, class, school, etc.) and strategically planned events.

Alumni Admissions Program– Regional Program

Mission Statement

The Alumni Admissions Program serves as the liaison between Alumni Affairs and Undergraduate Admissions. Its mission is to serve as an advocate and resource for alumni parents and grandparents who are interested in the admissions process. The program also provides a network of volunteers to conduct alumni interviews for undergraduate applicants.

Five-year Strategic Plan

I. Enhance efficiency and satisfaction of Alumni Admissions Advisory Committee (AAAC) experience for volunteers and prospective students.

- Fully automate the administrative tasks and distribution process of interviews for volunteers. Move from the current interview distribution system to a fully automated online program.
 - Implementation begins, September 2005
 - Fully automated system, September 2007
- Establish 100% of volunteers accessing AAAC information and training materials by email/website. (Currently, 70% of the AAAC chairpersons receive interviews and communication via email. By September 2007, all chairpersons and interviewers will use the Web for interviews and information.) (2007)
- Increase interview completion to 75%. (In 2004-05, our overall completion rate – the number of returned interviews/number of interviews issued – was roughly 60%.) (2006)
- Respond to 100% of interview requests. (Response rate in 2004-05, the first year it was tracked, was approximately 85%)
- Increase AAAC committees in top 10 international markets. (2004-05 marked the first year that the Alumni Admissions Program became fully responsible for the international AAACs. With the guidance from the Admissions office, determine the top 10 markets for applications and have committees in place to interview 60% of the applicants from those markets.) (2008)
- Increase Volunteer Leadership Conference participation. (In 2005, 8% of the 250 AAAC chairpersons attended the conference. The goal is to double that participation rate, focusing on committees that would benefit from the conference.)
- Establish volunteer recognition system for thanking/rewarding volunteers. (This process will help identify active volunteers so that they can be thanked and rewarded appropriately. This will increase our retention of volunteers.) (2008)
- Update website to include job descriptions, volunteer expectations, and pertinent training information. (2007)
- Recruit volunteers that demographically reflect Duke's alumni base. (2010)

II. Better integrate AAAC Program with clubs/regional programming and Admissions Office.

- Coordinate face-to-face meetings with AAAC chairpersons/members and clubs staff and admissions officers when they travel. This will facilitate training and reinforce the importance of the AAAC. (At present, there is little coordination between departments. Beginning in September 2005, efforts will be made to schedule face-to-face meetings.)
- Develop website interface with Admissions Office for interview request. (2006)
 - Currently, all requests are made to a phone number monitored by a work-study student or team member.
 - A website interface will allow for quicker response time.
- Involve 100% of AAAC in send-off party development. (Facilitate and encourage local club leadership and AAAC chairperson to schedule send-off parties.) (2010)
- Encourage AAAC chairpersons to serve on local club boards. (2007)

- Work with Young Alumni Program to integrate young alumni volunteers as Duke ambassadors and enhance the communication process for prospective students. (2008)

III. Establish and manage expectations for alumni parents of students applying to Duke.

- Communicate services and events more fully. (Through correspondence and website, establish realistic expectations for alumni and their children as they experience the admissions process.) (2010)
- Establish a tracking system for calls from alums about admissions process and respond to 100% of calls. (2006)
- Set up “alum conversations” for 100% of requests. (2010)
- Track number of alum-affiliated children through admissions process. (2010)
- Sponsor events such as the Alumni Admissions Forum, Blue Devil Days breakfasts, and Welcome Picnic to enhance admissions process. (2010)

IV. Enhance the Alumni Endowed Undergraduate Scholarship (AEUS) Program.

- Continue to foster the new full tuition AEUS program to elevate its prestige so that it will become a recruiting tool. (2010)
- Promote awareness of the AEUS through online and print communication. (2010)

Alumni Career Services and Networking – Regional Program

Mission Statement

Develop a career community through which alumni can connect to Duke, meet their own career needs, and assist students in finding career direction and opportunity.

Five-year Strategic Plan

I. Increase involvement, both on campus and virtually, of alumni in career services.

- Engage alumni who serve on visiting boards for various Duke departments and professional schools. Invite them to campus and to alumni regional events as guest speakers. Engage members of at least six boards by 2010.
- Increase alumni participation in Duke Career Week (from 200 to 300) over the next five years.
- Leverage the use of the alumni career website, e-newsletters, and other means of communication to solicit career/industry advice from alumni to share with students and alumni.
- Engage minority groups in all areas of alumni career services including Career Week, *DukeConnect*, and other on- and off-campus programming.

II. Establish regional ongoing career networking events in Duke's major cities as part of Duke's developing regional presence.

- Plan, implement, and evaluate pilot events in four cities: Charlotte, Washington, New York, Los Angeles. (2006)
- Engage high-profile alumni who are in senior positions and industry leaders in their profession to serve as panelists and local networking resources. Work with University Development, schools, departments, and academic areas to determine appropriate alumni to engage those who are already involved and those looking for a way to get involved.
- Collaborate with the professional schools' alumni clubs and other departments on campus to provide services to all alumni.
- Establish alumni career liaisons through the Duke Clubs to assist in planning career-related events regionally.

III. Create a vibrant and broad-based online career mentoring community for alumni and students. Implement new technology that will give the Career Center the ability to identify interest groups and business affiliations (e.g. ethnicity, career changers, business opportunities).

- Increase the number of alumni in *DukeConnect* by 5,000 each year to a total of 25,000 by 2010. Provide alumni volunteers with the opportunity to limit the number of contacts they get on a monthly basis. Allow volunteers to self identify in various groups (e.g. recent graduate, young alumni, experienced professional, career changers) to demonstrate that *DukeConnect* has a place for everyone. Build the database to allow alumni to opt into various career center programs, such as allowing students or alumni to shadow them at work, career panels, recruitment for jobs and internships, and housing.
- Propose and implement marketing materials by fall 2005 to recruit new volunteers annually. Utilize grassroots efforts to have alumni club members and *DukeConnect* volunteers encourage their classmates and Duke friends to volunteer for *DukeConnect*.
- Provide quarterly newsletters and communication to volunteers, starting in fall 2005.
- Engage volunteers in all aspects of career services and demonstrate consistent appreciation.

IV. Double the number of alumni who utilize career services and career related-programs, such as counseling, job fairs, and networking events from 300 in 2005 to 600 by 2010.

- Increase overall services provided by establishing new initiatives, such as alumni internship program for recent graduates and career changers. Increase opportunities for non-pre-professional students and alumni to gain experience and career direction.
- Increase staff to assist with the additional career counseling and programs. Add an additional counselor and a full-time support staff member. (2006-07)
- Integrate alumni career services throughout Duke to include alumni from professional schools and accommodate their alumni who use the services.
- Develop protocol for the Career Center and other career offices on campus to extend services to alumni who might not ordinarily fit into their respective categories.

V. Make the Duke Alumni Career Services team a national leader in the alumni career field.

- Increase involvement in professional associations by presenting at conferences, chairing committees, and writing articles starting in 2005.
- Become a resource for media outlets.

Duke Clubs Program – Regional Program

Mission Statement

The Duke Clubs Program will be the frame onto which the Regional Program, established in 2005, will be built to serve as the main point of contact between Duke University and its alumni throughout the world by providing local access to resources and programming. The Clubs Program will broaden its goals to assist in promoting all aspects of the Regional Program.

Five-year Strategic Plan

- I. Strengthen the network among alumni and between alumni and the university by increasing the participation rate of alumni in Duke Clubs Program, through demographic targeted programming and volunteer engagement.**
 - Employ new technology of an upgraded Duke alumni website to allow better events communication and registration and tracking of participation data. (2006)
 - Engage unified regional network of all component programs to encourage participation at the local level. (2006)
 - Establish a calendar of events including all club, AAAC, Career Services, and Young Alumni events for each club area in collaboration with staff and volunteers from all programs. This will serve to unite the local volunteer network, focus alumni attendance at events, and make more efficient use of resources. (2007)
 - Use communications and registration tracking data to extract statistics on class year, Duke school, age, race, sex, and geographic location of participants, as well as the frequency of their participation. (2007-10)
 - Capitalize on increased staff resources, more sophisticated technology, and strengthened volunteer network of regional program. (2006-10)
 - Relate attendance statistics to determine popularity of events that should be planned and invested in. (2010)
 - Involve university-wide faculty and staff to plan, promote, and execute regional programming to broaden the reach and ensure that programming is in step with broad university trends and initiatives. (2010)

- II. Increase efficiency of communication contact as more information is made available to alumni from multiple sources around Duke. It is particularly important that a more integrated Regional Program results in integrated communication strategies.**
 - Schedule Duke Club communications to coordinate with, include, or be included in communications of other aspects of Regional Program. (2006)
 - Assure that all regional volunteers and staff and staff of other university programs receive Duke Clubs communications. (2006)
 - Create a system to track all communication per individual. (2007)
 - Package messages from various programs into single print mailings or e-mail broadcasts, so that alumni get fewer pieces of mail or email messages, but more information. More efficient use of communication will enhance its effectiveness. (2008)
 - Provide opportunities for alumni to provide feedback to staff and local volunteers on progress of regional and club programming through surveys and website listservs. (2008)

- III. Establish succession planning strategy for Duke Club leadership to ensure a regular Duke presence in all regional areas. Assuming that club leaders are those volunteers who have a**

well-established relationship with Duke staff and fellow alumni in their area, this goal formalizes the promotion of volunteers to leadership positions.

- Collaborate with current club leaders to confirm succession plan. (2007)
- Coordinate with university-wide staff to identify new volunteers and assess current volunteers for promotion. (2007)
- Create a tracking system for Regional Program and other university staff to evaluate the level of engagement and training of volunteers. (2008)
- Work with other DAA programs to create a consistent recognition program so that all volunteers can be recognized and rewarded for work in an equal and regular fashion. (2008)
- Establish methods for volunteers to be provided feedback and to give feedback. (2007)
- Utilize club volunteers to help other club leaders through semi-annual conference calls. (2006)
- Strengthen on-campus training opportunities for volunteers by continuing the annual Volunteer Leadership Conference, as well as creating a local, regional component for volunteer training. (2005-10)
- Create a larger pool of potential club leaders by increasing volunteer opportunities in response to new programming initiatives in Career Services and Young Alumni, and in establishing more sophisticated regional alumni boards. (2010)

IV. Re-structure local Duke Club dues policies and procedures to maximize return. Assure that alumni understand the purpose and importance of local dues versus other contributions to Duke, especially DAA dues.

- Survey all Duke clubs to establish which clubs charge dues, the amount they charge, how much dues revenue is collected annually, what dues are used for, and what benefits are offered for dues payers. (2006)
- Provide a clear and concise statement about the importance and use of local dues and the difference between local dues and DAA dues for use in club dues communications. (2006)
- Provide an online tool through local club websites to collect and track local dues payments. (2006)
- Work with alumni affairs communications and marketing personnel to assure that local club dues policies and communications are coordinated with DAA dues policies and communications. (2007)
- Establish policies governing which clubs should charge dues, which benefits should be offered, and establishing dues amount. (2007)
- Standardize local club dues solicitations so that all clubs convey a similar message about the use and benefits of dues and employ best practices for communications and collection of dues. (2007)

Students and Young Alumni Program – Regional Program

Mission Statement

Expand and create new Students and Young Alumni Program to promote understanding of the Duke Alumni Association, increase visibility of DAA on campus, and provide opportunities for engagement and leadership for a lifetime.

Five-year Strategic Plan

- I. Create opportunities for meaningful interactions with the DAA and increased presence of Duke alumni on campus, focusing on Homecoming and other programs that will be enhanced by the presence of the Alumni, Career, and Visitor Center.**
- Increased Homecoming programming and participation for both students and young alumni (YA). By 2010, 1500+ YA returning to campus for Homecoming weekend.
 - 2005 Homecoming Dance:
 - YA: 355
 - Students: 1348
 - G&PS: 104
 - 2005 YA party:
 - YA: 355
 - Seniors: 626
 - Develop new programs for alumni to interact with students on-campus, create one new “tradition” for alumni involvement on campus. (2010)
 - Create opportunities (working with Career Services) for current students to interact with the Duke club in city where they are living for the summer.
 - One student program in each of the “Big 10” YA cities (Boston, New York, Philadelphia, Washington, Charlotte, Raleigh/Durham, Atlanta, Chicago, Los Angeles, San Francisco). (2008)
- II. Educate and engage current students with the DAA and expand student programming to be part of a four-year engagement plan that will prepare them for a lifetime of participation with Duke.**
- Create four well-known, DAA-branded events on-campus each year. Each event will be focused on a particular constituency: freshman, sophomore, junior, and senior. Event should be “big” and an event to be anticipated; consider event partnership with President’s Office and Student Affairs. (2007, dependent on funding)
 - Events should promote class identification and DAA mission
 - Create one graduate and professional student event that is well known as a DAA event, partner with Graduate and Professional Student Council (GPSC) and professional schools to pool resources and students.
 - Partner with GPSC and professional schools to integrate the DAA into orientation, providing graduate students an opportunity to connect with Duke, not just their school or program.
 - Provide leadership opportunities through the alumni association in which involved student leaders are able to interact with DAA board members. (2007)
 - Work with Student Affairs to define a role for the Duke Alumni Association in the class government structure. Areas of collaboration include class website, event sponsorship, leadership opportunities, and increased visibility with alumni. (2008)
 - Continue to form partnerships with deans, Student Affairs, Student Government, and GPSC; look for new areas of collaboration, including orientation and career services.

- Coordinate with programs already in place, such as Senior Week, to create programs collaboratively that will prepare students for a lifetime of participation.
- www.dukealumni.com will serve as the host for all class websites and will be seen as the one point of entry for class information; class banners with website will be created and posted at all class events. (2008)
- Leverage the new Alumni, Career, and Visitor Center to increase visibility of DAA and DAA-sponsored programs on campus.
- Increase visibility of Alumni Distinguished Undergraduate Teaching Award as DAA-sponsored recognition in the field of educating Duke students. (2006)

III. Provide regional and virtual opportunities for YA to connect with their fellow alumni and Duke.

- Define the role of the YA representative on club boards, recruit new regional YA leaders, and create a support mechanism for these YA representatives.
 - Host focus groups in at least six of the big YA cities. (2006)
 - Create clear volunteer path for alumni and other university staff.
 - Determine which clubs have YA representatives and their role in the club structure. (2006)
 - Define the YA presence in non-“Big 10” YA cities. (2006)
 - Have YA representatives on all club boards and define their roles.
 - “Big 10” YA cities (2007)
 - Additional “tier 2” YA cities (2008)
 - YA training in place during Volunteer Leadership Conference. (2008)
 - Recognize YA leaders with YA Charles A. Dukes Award. (2008)
 - Better address new graduates and transient YA through YA welcoming committee, managed by the local YA representative.
- Solidify a YA Web presence on www.dukealumni.com. (2006)
- Develop a regional online resource for prospective students with YA listed who serve as a resource for YA involvement in the AAAC process. (2006)
 - Four YA listed for 10 “Big 10” YA cities
 - Two YA listed for “tier 2” YA cities

IV. Develop leadership opportunities for students and YA that will produce future leaders and volunteers in ways that deepen their commitment to Duke and prepare them for active roles in the DAA, Duke Annual Fund, and university-wide leadership.

- Define volunteer path for YA, from student leadership positions to YA leaders board to DAA Board of Directors.
- Develop Young Alumni Leaders Board to promote the interests of YA by voicing and advocating their needs to the DAA Board of Directors, the DAA, university officials and administrators, and current students.
 - Twenty-member committee (2008), 40-member committee (2010)
 - Two YA sitting on DAA Board (2008)
- Create a process to identify class leaders as students and provide class leadership opportunities through the DAA before graduation and as YA leading up to the 5th Reunion. Solidify class identity as students and provide a vehicle for the community post graduation (Web). (2008)
 - Self-managed class websites (1-10 years postgraduation)
 - Yearly class notes posting by 75% of class (1-10 years postgraduation)
- Work closely with Annual Fund, University Development, Admissions, Student Affairs, and Greek Life to engage YA in Duke and serve as a resource for university-wide opportunities for further engagement.

Reunions and Special Events

Mission Statement

To promote, nurture, and maintain alumni connections with one another and with the university through reunion and special-event programming and related communications, as well as through robust online communities centered on class year and affinity group affiliations. This program helps alumni rekindle memories of, and renew relationships from, their Duke experience; forge new relationships with other Duke alumni; and acquire knowledge of current university programs and goals. The result is increased fiscal support, volunteer activity, and pride in the institution.*

Five-year Strategic Plan

- I. Continue to enhance Reunion Weekend, Homecoming, large regional alumni events, and other on-campus Duke alumni events to bring all aspects of the university community together in ever greater numbers.**
 - Measure pre-reunion activity (networking, online registration, class-notes posting, evaluation) and reunion attendance, and create individual class goal projections. (2006)
 - On Homecoming Weekend, Half Century Club (HCC) would focus on induction of the previous spring's 50th reunion class into the ranks of the HCC, as well as on the 55th and 60th reunions. Measure Half Century Club attendance and pre-reunion activity to create projections for future years. (2006 forward)
 - Each of the active groups would have at least one event per year (preferably on campus, during Homecoming). (2007)
 - Identify all university offices that participate in Reunions and/or Homecoming; based on these numbers, project growth. (2006)
 - Identify student groups that participate in Reunions and/or Homecoming; based on these numbers, project growth. (2006)
 - Define criteria for event management through the Reunions and Special Events office and evaluate staff growth needed to manage increased number of events.

- II. Develop communication plan that would support/enhance the overall DAA communication plan by keeping classes and groups apprised of news specific to their class/group within the framework of the overall DAA brand.**
 - All alumni would receive appropriate communication vehicles from Reunions and Special Events program each year.
 - All groups would receive news that highlights their activities, current student news, and outreach initiatives.

- III. Develop robust affinity group communities that connect alumni with common interests/experiences to one another before, during, and between reunion years, resulting in greater participation in the life of the Duke community.**
 - Identify alumni leaders from student groups that were active during their era, and recruit them to establish—and grow—their group. (2005-07)
 - Identify common interests in alumni base around which a group could be formed, then recruit alumni to establish a group around their special interest. Examples include Duke gardeners, Duke readers (book club), alumni who coach Little League softball, Duke entrepreneurs, etc. (2006-08)

* Appendix D articulates the cooperative effort between the all DAA programs to better manage, track, recognize, and steward DAA volunteers.

- Host an active, user-friendly website for each group, featuring photos, message board, and news.
- Establish and enhance class websites, linking them with *Duke Magazine* and online directory; all reunion-year class websites would feature class notes, reunion message boards/websites, and a “how to volunteer” feature.
- Determine a policy for working with an affinity group and define the benefits, review process, and staff support as a Duke alumni affinity group. Website management should be automated as much as possible but will require staff support. (2006)
- Outline process on how to establish and nurture a group via “getting started” webpage. (2005-06)
- Affinity group sites would serve as a gateway to graduate and professional schools’ groups that have an online presence. (2006-07)

Appendix A

Glossary of Terms

Affinity: “Affinity” is defined as a self selected group of Duke alumni who choose to identify as a community and are recognized as such in the Duke alumni database. Affinity groups include, but are not restricted to, fraternities, sororities, dorms/houses, athletic teams, ethnic groups, clubs and organizations, undergraduate programs (example: Hart Leadership Program), graduate school programs, and minority groups. Affinity does not refer to undergraduate classes.

Alumni: “Alumni” are defined as all persons who have completed at least two semesters of work towards a degree from Duke University or its predecessor, Trinity College.

International alumni: “International alumni” refers to Duke University alumni of any citizenship who are not living in the United States.

Minority: "Minority" may not properly describe those to whom we refer, but we do not have a word that does. In this plan, minority is intended to refer to Duke alumni and friends who may not have been adequately served and supported by the association in the past.

Recent Graduates: “Recent graduates” refers to alumni of the graduate and professional schools who have not yet celebrated their fifth reunion.

Regional: “Regional” refers to the Duke Alumni Association’s effort to coordinate, integrate, and synchronize all Duke programs, events, and activities that take place in regions, cities, and locations away from the Duke campus. Regional means coordinated university-wide efforts of Duke programs, rather than merging of Duke clubs in an area of the country or world.

Student: When unspecified, “student” refers to all current undergraduate, graduate, and professional students.

Young alumni (YA): “Young alumni” refers to undergraduate alumni of Trinity College or Pratt School of Engineering who have not yet celebrated their tenth Reunion. The distinction is not intended to separate the younger alumni, but to focus on programming that will engage them at a point in their life.

Appendix C

Strategic Planning Time Table 2004 - 2006

October 2004	Carol O'Brien Associates, Inc. hired to manage the strategic planning process for the Duke Alumni Association (DAA)
October 2004	Draft of timeline and concept of the strategic plan to DAA Board – Executive Committee
<u>2005</u>	
January 14	DAA staff strategic planning session - Strengths, Weaknesses, Opportunities and Challenges (SWOC) analysis
February 22	Student SWOC analysis session
March 2	University-wide faculty and staff SWOC analysis session
March 4,5	DAA Board of Directors Meeting – SWOC analysis and begin process to establish DAA mission, vision, and values
April 4	Conference call to discuss DAA mission, vision, values, and DAA tagline
April 12	Conference call to finalize draft of mission, vision, values, and DAA tagline
May 20, 21	DAA Board of Directors Meeting: review draft of strategic issues; approval of mission, vision, and values statement and tag line; presentation by Charlie Cardillo, Harvard Alumni Association, on alumni and volunteer metrics
June 16	First draft of DAA strategic plan completed
July/August	Task Forces created to review individual program documents – task force members include DAA board members, university-wide staff, volunteers, and students
August 8	First draft of program specific strategic plans completed
August 15	Meeting with Senior Staff and Carol O'Brien to review program strategic planning documents
August 22	Second draft of program specific strategic plans completed
August 22- September 8	Task forces met by phone to review individual program strategic plan documents
September 16	Volunteer Leadership Conference – Morning session, strategic planning discussion
September 16-18	DAA Executive Committee reviewed draft of strategic plan

September 28	Graduate and Professional Student Affairs staff member, lunch with Sterly Wilder to discuss the strategic plan
October 14-15	DAA Board Meeting – strategic plan review and discussion, board approved strategic plan draft
November 4	Final strategic plan draft completed
November 14	Share draft with Professional School Alumni Affairs Directors
November 16	Share draft with Cabinet
November 16, 17	Strategic plan presented to university-wide staff (March 2 nd group invited)
November 17	Strategic plan presented to public affairs and government relations management group
November 18	Strategic plan presented to students
December 2	Present strategic plan to Committee on Institutional Advancement, Duke Board of Trustees
<u>2006</u>	
January 23	Present strategic plan to Deans cabinet
January 31	Present strategic plan to Senior Officers
February 10, 11	Submit to DAA Board for approval; review and approve metrics, return on investment, and rollout plan
February 24, 25	Final strategic plan and rollout shared with Trustees for their endorsement
March 1	Plan posted on DAA website
March - December	Rollout and surveying (Dates TBA)

Appendix D

Program-wide Volunteer Management and Recognition

Based on the strategic goal to “attain a better understanding of the demographic make-up of Duke’s alumni base and assess service, support, and programs to better serve evolving alumni constituencies” the DAA programs will track the following information about volunteers as well as continuing to track general alumni demographic information that will serve as indicators for success and growth across all programs.

Alumni and Volunteer Information

1. Participation in DAA Events
2. Participation in General Duke Events
3. Reunions/Homecoming Attendance
4. Duke Donor
5. Lifetime Giving to Duke (Pledged/Paid)
6. Lifetime Duke Annual Fund Giving (Pledged/Paid)
7. Years of Consecutive Giving
8. Dues Payment (Lifetime/Annual)
9. DAA Volunteer Leadership Position
10. Duke Volunteer Leadership Position
11. Family Affiliations/Relationships
12. Current Students/Potential Students
13. City
14. Class Year
15. Duke Graduate Degree
16. Active Email Address

Based on the strategic goal to “develop a mature and thriving volunteer program that recognizes, stewards, and rewards volunteers” all programs will work together to develop standardized volunteer opportunities with specific roles. Additionally, a new DAA Board of Directors committee was created to evaluate the DAA’s practices of volunteer recognition and stewardship, specifically reviewing the Charles A. Dukes Award and the Distinguished Alumni Award. Once the committee has come to a consensus, all programs will work together to nominate and select the winners for these award.

Appendix E

SWOC Analysis:

At the start of the strategic planning process, six sessions were held with on-campus groups and alumni to discuss the DAA's Strengths, Weaknesses, Opportunities, and Challenges (SWOC). Results of these sessions helped direct the strategic plan, especially in regard to the way that the DAA interacts with the university and different on-campus constituents. Results from these sessions are on pages 36 - 43. The groups who participated are as follows:

DAA Staff (1/14/05)

DAA Executive Committee and Program Directors (1/15/05)

Duke Development Cabinet (2/22/05)

Duke Student Leadership (2/23/05)

DAA University-wide Constituency (3/2/05)

DAA Board of Directors (3/4/05)*

* See Appendix H for a full list of those participating in each of these sessions.

SWOC Analysis – Strengths

	DAA Staff (1/14/05)	DAA Executive Committee & Program Directors (1/15/05)	Duke Cabinet (2/22/05)	Duke Student Leadership (2/23/05)	Campus/ Staff Constituents (3/2/05)	DAA Board of Directors (3/4/05)	TOTALS
Excited about Duke	1						1
Staff longevity	1						1
Supportive colleagues	1						1
Financial resources	1		1				2
University-wide support and top leadership support	1				1		2
Expectation from the university	1						1
Talent and quality of staff	1	1	1		1	1	5
University culture of excellence	1		1				2
Technical infrastructure	1						1
Teamwork	1						1
Campus wide name recognition	1						1
Good programs	1		1				2
Excited volunteers	1						1
Increased diversity of students and alumni		1					1
Dedication		1					1
Loyalty		1				1	2
Passion		1				1	2
Intelligence		1					1
Optimism		1					1
Benefits and Product(s)		1		1			1
New leadership of Sterly Wilder			1	1	1	1	4
"DUKE" name/brand			1			1	2
Alumni identity-community			1	1			2
Pride			1				1
Entrepreneurial			1				1
Self-identify			1				1
Worldwide alumni network			1				1
Leadership identification			1				1
Volunteer opportunities			1				1
Reunion programming			1		1		2
Alumni get value from today's experience			1				1
Admissions interviewing and managing expectations			1	1	1		3
Parallel programs: university and schools			1				1
Duke basketball - identity and engagement			1	1	1	1	4
Communication strategies			1				1
Outreach to graduate and professional schools				1			1
Undergraduates - captive audience				1			1
Career Initiative - networking with alumni, Duke connect, career week				1	1	1	3

<i>Duke Magazine</i>				1			1
Good PR re: alumni				1			1
Alumni rather than association				1			1
Clubs are distributed nationally and internationally			1	1			2
Revivable Traditions				1			1
To-be revitalized Homecoming				1			1
Strategic planning process is inclusive						1	1
Mobilize alumni						1	1
Growing # of international students						1	1
well-informed alumni						1	1
UG clubs and organizations build strong feelings, future ties						1	1
"Welcome home" DAA plus other duke areas welcome returning alumni						1	1
Alumni giving to campaign						1	1
Alumna dean -nursing- brings special knowledge reconnecting						1	1
Many staff are alumni						1	1
Many opportunities to be engaged						1	1
Value of Duke education and degree						1	1
Enhanced communication to parents (Chronicle)						1	1
Enthusiastic affection of alumni for Duke							1
Complexity of Duke--something for everyone--cornucopia							1
Duke is a place that has fostered input; open line of communication							1
Tradition of involvement with athletics --10% of students participate (larger # of women)							1
Highly successful alumni							1
Grad and prof. programs are international							1
Young, adaptable							1
Multiple generations							1

SWOC Analysis – Weaknesses

	DAA Staff (1/14/05)	DAA Executive Committee & Program Directors (1/15/05)	Duke Cabinet (2/22/05)	Duke Student Leadership (2/23/05)	Campus/ Staff Constituents (3/2/05)	DAA Board of Directors (3/4/05)	TOTALS
Staff longevity	1						1
Financial resources	1		1		1		3
More university "support"	1						1
Visibility - inside and outside	1						1
Communication and lack of brand with Alumni, Students & abroad	1	1	1	1	1	1	6
Personal and programmatic evaluation	1		1				2
Technical Infrastructure (website & support)	1	1				1	3
Technical Infrastructure (alumni database)					1		
Better defined teamwork and communication	1						1
Lack of understanding of role (young alumni)	1						1
Lack of diversity of staff and board		1		1	1	1	4
Alumni engagement -disrupted, sporadic		1	1			1	3
Volunteer leadership - identification and support			1				
Unfulfilled potential		1					1
Visibility/Credibility/Respect		1					1
Power (priority/perception of stature w/in Univ.)		1					1
Poor self-image "inflated"		1					1
Benchmarking		1					1
Manpower		1	1				2
Facilities/space		1		1	1		3
Execution of ideas		1					1
Staff development		1					1
Worldwide alumni network			1				1
Lack of serious intent to engage (magazine)			1				1
Alumni Mobility			1				1
Lack of alumni network			1				1
Not enough networking/volunteer for alumni and students			1	1			2
Cost of Reunion weekend			1				1
Admissions interviewing and managing expectations of Alumni parents			1				1
Hospital benefits - patient			1				1
Clubs vary and can be strengthened			1	1	1		3
Parallel programs: schools and university			1				1

Communication strategies			1				1
Homecoming - not yet able to use as rallying point			1		1		2
Fundraising focus/perception				1			1
Disconnect with benefits of DAA				1			1
Grad students so spread out and have individual AA's				1	1	1	3
Poor football team				1	1		2
Student organization advising				1			1
Affinity groups around the arts				1			1
Tracking of student activities				1			1
Not enough ways for alumni to "give" back				1			1
Untapped resources of alumni networks (Union)					1		1
Working with student fundraising - forget about until seniors					1		1
Regional program did not attract women - too mainstream					1		1
Well-informed alumni					1		1
Connection to diversity-alumni of color, others					1		1
"Let Duke be Duke" (largest base is NC)					1	1	2
Leadership transition might lead to "wait & see"					1		1
How to talk about Duke now: not apologetic, change is constant, sense of tradition					1		1
Connection to Duke is too defuse						1	1
Complexity of Duke can be confusing						1	1
National brand is magnified with mistakes						1	1
Reliance on Duke Basketball Ball -where would we start without it?						1	1
Lack of clarity of role of DAA Board of Directors						1	1
Differences in generations (students are more competitive now)						1	1
Lack of regionalization opportunities						1	1
Lack of affinity to Duke vs. the northeast and ivies						1	1
Too-focused on pre-professional careers						1	1

SWOC Analysis – Opportunities

	DAA Staff (1/14/05)	DAA Executive Committee & Program Directors (1/15/05)	Duke Cabinet (2/22/05)	Duke Student Leadership (2/23/05)	Campus/ Staff Constituents (3/2/05)	DAA Board of Directors (3/4/05)	TOTALS
Successful capital campaign - talented engaged alumni	1	1					2
Communication technology	1						1
Position of DAA (identity, who we are, branding)	1						1
Leveraging relationships (alumni with alumni and alumni with us)	1	1	1				3
New Building - Central Campus	1	1	1	1	1	1	6
New president and new administration (Momentum)	1	1					2
Special opportunities with new president	1						1
Youth allows us to be innovative	1						1
Working with Students at Duke and while home		1	1	1			3
Integration of graduate and professional school alumni	1	1					2
Enhanced volunteer management	1	1					2
Powerful partner to University Development	1						1
Parents of current Duke students and young alumni	1	1		1			3
Career Center partnership - incorporate more alumni, increase mentoring and internship	1	1		1	1	1	5
More to do with our changing demographics and affinity groups	1						1
International Affinity groups		1	1				2
Diverse alumni base		1					1
Technology/ World Wide Web (DAA, Clubs, Regional)	1		1	1			3
Courage (tough issues)		1					1
Synergy with University Strategic Plan		1					1
Duke brand		1	1				2
Engage Young Alumni	1			1	1		3
Lifetime relationship: education, ideas, contact			1				1
5 generations of Duke students and alumni			1				1
Build database - track alumni interests, improve data, searchable by alumni				1			1
Duke "locations" in cities/ new Regional cooperative DAA effort				1		1	2
Professional alumni allegiance				1		1	2
eDuke and Duke Blue Connections: make opt in				1			1

Umbrella groups, DSG, GPSC				1			1
Alumni networking: many options - Duke, school, affinity				1	1		2
Parents-events, newsletters, solicited, magazine				1			1
Partnering with Duke student groups (example: Duke Union, LGBT Center)				1	1		2
Online Calendar - all departments and offices)				1			1
Extend consistent messages from Web pages, etc. to other vehicles, sources (tour guide scripts)						1	1
DAA staff can be helped/developed more broadly						1	1
Desire for more alumni/student interaction (i.e. career week, mentors, etc.)				1	1	1	3
Graduate and Professional population is very interested being more engaged with Duke & DAA						1	2
Homecoming can improve (affinity groups)						1	1
Make alumni programs seamless for schools						1	1
Become a models for volunteer involvement; Emphasize service opportunities						1	2
Lifelong learning opportunities (on campus and off)						1	1
Summer sports camps						1	1
TIP program						1	1
Executive health program and other new executive education programs						1	1
Council on civic engagement needs AA representation						1	1
Diversity of alumni body							1
Alumni defined by relationships to affinity groups; opportunity to leverage those relationship							1
Foster relationships on campus						1	2
Duke alumni meet alumni from many generations + students							1
Find ways to recognize small donors-leverage larger gifts (basic info to get out)							1
Better integration of alumni and development							1
Reunions are great opportunity to bring people back							1

SWOC Analysis – Challenges

	DAA Staff (1/14/05)	DAA Executive Committee & Program Directors (1/15/05)	Duke Cabinet (2/22/05)	Duke Student Leadership (2/23/05)	Campus/ Staff Constituents (3/2/05)	DAA Board of Directors (3/4/05)	TOTALS
Communications technology	1						1
Positioning of Alumni Affairs - articulate, brand, consistency	1	1			1	1	4
Young Duke vs. peer institutions	1						1
Missed opportunities	1						1
Perception of changing student experience	1						1
World Wide Web / Technology	1		1	1			3
Website - Clubs was sites are not updated or user friendly				1			
Students education and communicating the value of participating: Undergrad, Graduate & Professional	1	1	1	1	1	1	6
Volunteers- have more than DAA staff can service or keep engaged	1				1		2
Partnering with Development in the next capital campaign	1						1
Cultivating parent engagement	1				1		2
Changing demographics - International students and alumni; affinity groups	1						1
Diverse population of alumni		1	1				2
Terrorism		1					1
Reconciliation of old/new alumni		1					1
Retaining "disengaged" alumni		1					1
Integration of Grad/Prof. schools		1		1			2
Future income		1					1
Resources		1					1
Decentralized management		1					1
Managing alumni expectations			1				1
Invest in young alumni (track them more effectively)			1				1
Student satisfaction (Greek system, social life, etc.)			1				1
Educate alumni re: value/cost of lifelong relationship			1				1
General website is confusing				1			1
Affinity groups - sharing ideas and best practices				1			1
Connect online resources (career center)			1	1			2
Inviting undergraduates and graduate students from local area in summer and holiday break				1			1
Duke alumni (general) vs. Duke alumni (affinity)				1			1
Disconnected internship program				1			1

Confusion between Annual Fund and DAA				1		1	2
DAA dues				1			1
Alumni house? What is it?				1			1
Peer educators				1			1
Duke homepage more content with alumni, less faculty articles				1			1
Big "D"?-new Big "D"--introverts				1			1
Reach non-leaders				1			1
New geographic demographic				1			1
Old Duke tradition					1		1
Maintain freshman expectations of DAA (need to set expectations)					1	1	2
Maintain parents expectations					1		1
Focus programs and efforts - can't be everything to everyone					1		1
Not everyone is totally invested in Duke--faculty, staff, students					1		1
Professional alumni allegiance					1		1
Need plan for lifelong learning					1		1
Space for alumni events, parking/signs/directions/inaccessibility					1		1
Developing staff programs to advise, mentor alumni					1		1
Admissions - legacies and clarifying DAA's role					1	1	2
Staffing					1		1
Costs					1	1	2
Diversity of staff and BOD						1	1
How to connect people with Duke relationships						1	1
Lots of resources-alumni think we don't need anymore "Duke doesn't need my help"						1	1
Charitable orientation away from Duke						1	1
Creating meaningful ways alumni can participate without giving \$\$						1	1
Make experience on BOD more relevant so others want to serve						1	1

Appendix F

University-wide Review

In the fall of 2005 a draft of the strategic plan was brought before a university audience for feedback. Those groups involved in the review included:

Volunteer Leadership Conference Attendees (9/16/05)
Professional School Alumni Affairs Directors (11/14/05)
DAA University-wide Constituency (11/16/05 and 11/17/05)
Duke Development Cabinet (11/16/05)
Public Affairs and Government Relations Management Group (11/17/05)
Duke Student Leadership (11/18/05)*

Notes from these meetings are included on pages 45 – 51.

Entering the final stage of review, the plan was presented to the Committee on Institutional Advancement of the Duke Board of Trustees on 9/30/05 and 12/2/05. Notes from these meeting are included on pages 52 – 53.

The DAA Strategic Plan will be presented to the Deans Cabinet (1/23/06), Senior Officers (1/31/06), DAA Board of Directors (2/10/06), and Board of Trustees (2/24/06). Notes will be included.

* See Appendix H for a full list of those participating in each of these sessions.

Volunteer Leadership Conference

September 16, 2005

During the 2005 Volunteer Leadership Conference a 2 hour session was held to provide an opportunity for university volunteers to give feedback and offer suggestions to the main goals of the strategic plan. Volunteers were randomly broken up into eight groups and assigned on the strategic goals (it was after this meeting that the ninth goal to “Foster educational opportunities that will strengthen alumni ties to the university” was added. Below are notes from each of the break out groups. (VLC attendees are listed on pages 61 - 65.)

1. **Develop a clear, consistent and distinctive (genuinely Duke) message and visual identity for the DAA, one that supports the University message and is infused with the values of the DAA.**

- "Visual" Duke
- Existing Logo – Chapel – Blue Devil
- Duke Blue
- Forest/gardens
- Cameron Craziess

Descriptors

- Blue
- Smart
- Quality education
- Medical Center

Duke

- Academic Excellence
- Spirit/Community Spirit
- People/Camaraderie/Celebration
- Agent for Change – Youth
- Authority/Experts

Duke Alumni Association

- Loyalty
- Given
- It is Duke
- Communication Line
- Web as a source of All activities
- Not aware of career services
- Less expensive travel opportunities

Communication

- Email
- *Duke Magazine*
- Reunions

- Branding not clear
- Duke giving confusion/coordination
- Affinity Group Information (Database)
- Website
- DAA coming to region linking Clubs together expanding definition of "region"

2. Increase visibility and impact of the DAA within Duke and for Duke alumni, with special attention on leveraging the new Alumni Center and DAA membership.

- Question 1 Services for Alumni Center
 - Presence: Parking; shuttle info resource
 - Computers; lifelong learning training; relocation
 - Showcase alumni; Duke history; oral histories; even space (pay?, alumni and Duke affiliates only?)
- Ability for residence together for "learning" experiences
- Close to outsiders for first few years
- Maintain calendar see how it goes
- Gathering space – hang out, wireless, business center (phones, fax, internet) "concierge"
- Hours 24 x 7
- Tour Center

3. Attain a better understanding of the demographic make-up of Duke's alumni base and refine service and support to better serve evolving alumni constituencies.

- Networking
 - i. Profession
 - ii. Career Path
 - iii. Cultural Background
- Other organizations of involvement
- Continuing Education interests
- Networking
- "Living Library"
- Alumni Roll Call
- Easier Access to Online Directory
- Target Travel to Demographic Groups
 - i. (Family – Cost – Destination – Length)
 - ii. Interests
 - iii. Volunteerism
- Regional as opposed to local events

4. Develop a mature and thriving volunteer program that recognizes, stewards and awards volunteers.

- Structure engagement
- Relationships – new & old
- Offer variety – serve multiple interest and constituencies
- Reconnecting

- Reliving common experience
- Innovative
- Chance to mark milestone – Recognition of personal milestones (25th reunion)
- Recognize years of service – tell the stories of volunteers
- Clarify mission so can see results

Advertise better the variety of opportunities for volunteering – a) short term – break up b) define opportunities c) support from staff

- Reach out to multiple demographics inclusive
- More electronic communication
- Meaningful relationships

5. Make Alumni Career Services programs a cornerstone of the DAA, creating new opportunities for alumni and students to become further engaged with Duke through mentoring and networking programs.

- Good technology for networking and publicity of how to use it!
- Interaction within the Duke community! A much better Duke connection
- Identify career life stages e.g. career transitions, retirees business opportunities
- Have people categorize how people identify themselves e.g. Major, BME
- Work with students to ingrain the giving back mentality
- Emotional intelligence and networking 101
- Getting people together in smaller groups
- Duke Clubs
- Virtually

6. Enhance student programs that promote understanding of the Duke Alumni Association and provide opportunities for further engagement.

- Recruiting
- Know students from town – more than send-off party
- Mentoring program – other careers and visibility of opportunities
- Multigenerational groups with common interests – housing/tenting etc.
- Move to new city – new students (recent grads) moving to area
- Welcome cocktail party and interns
- Most important information to convey before students leave
- What the DAA has to offer? Alumni coming in and talking about career and engaging with Duke and teaching

7. Create and maintain alumni connections through new uses of technology and find innovative ways to advance the mission of the DAA through the use of technology.

- Email
- Portal website for each class
 - class notes
 - exchange class information
 - personalized
 - include links to local clubs sites
 - comprehensive, robust
- Better links from DAA site to other university

news/Chronicle

- Offer listserves about campus issues
- DAA host/sponsor all sub-sites
- Blackberry/tree-friendly
- Use CD/DVD/podcast to present campus speakers/lecturers (downloadable)
- Streaming video of "Coach K" tv-cast
- Make two-way communications to alumni and from alumni
- Message boards/classifieds/job postings
- Message boards divided by interests, locale, school
- (E,T,F, ...)
- Large robust career connections
- Increased individual contact (human)
- Cell phone, wallpaper, ring tones
- Screensavers

8. Develop resources and funding sources to meet new strategic goals.

- Stock buying club
- Market benefits of paying dues
- Collaborate with other ACC schools
- Think of benefits of corporate sponsorship
- Expand travel program
- Corporate sponsorship – trips
- Seminars, sessions, etc. highlighting Duke faculty
- Raffle/lottery for special Duke packages
- Increasing dues

University-wide Comments 11/14/05 – 11/18/05

Combined notes from the Professional School Alumni Affairs Directors Meeting on 11/14/05, Duke Alumni Association university-wide strategic planning discussions on 11/16/05 and 11/17/05, Duke Development Cabinet meeting on 11/16/05, John Burness' Management Group on 11/17/05, and the student discussion group on 11/18/05.

What will be Different by 2010?

- Create a vision of a place that you can “go home to” and an organization that provides value to your life and instills pride in your association
- Increased visibility of DAA and Office of Alumni Affairs on campus
 - Sponsor education events (Festival of Book)
 - Increased emphasis on student programs and establish strong DAA presence among students – graduate and undergraduate
 - Alumni/Career and Visitor Center
- Signature Events and Programs – University-wide
 - Reunions
 - Homecoming
 - Career Week
- Solidify Duke presence in Regions
 - Coordinate DAA programs – Alumni Admissions, Career and Clubs
 - Coordinate efforts University-wide
- Ensure that programming reflects the changing demographic nature of the alumni body
 - Pay special attention on increased and targeted programming for graduate and professional alumni, minority alumni, international alumni and affinity groups
 - Think out of “traditional” box of club events
 - Develop special programming for young alumni for early engagement
 - Career networking and mentoring opportunities – on and off campus
- Begin to track participation data and trends for all programs.
 - Establish volunteer and participant profiles to make sure that programming is effective.
 - Look at donor information for alumni participants
 - Demonstrate impact of alumni programs
- Volunteer recognition and tracking
 - DAA and CA Dukes
- Improved communications – clear message and distinct message
- Improved website and Web presence
 - Online class notes

Comments and suggestions:

Affinity Groups

- What is the appropriate name for this grouping, “Special interest groups” was suggested
- Does “affinity” incorporate all types of groups? Where would Jewish alumni fall...affinity or minority?
- For affinity group formation, it would be helpful to have a “how to” guide based off the DUBAC and DUMB experiences. To include:
 - Rules about fundraising
 - Contact people across the university
- When creating the affinity group guide and rules, the DAA must use language and policies that don't stifle creativity through the affinity format

Minority and Women

- The plan needs to better reflect the DAA strategy to reach the minority groups (not just mention it)
- In the appendices there is a need to define “minority” alumni
- Note the DAA and university’s ongoing commitment to the women’s initiative
- Is there an ethnic mix of AAAC volunteers? How does that reflect on the university if it is not? – New online system is helping to weed out some of the older volunteers and allow room for younger more diverse group of volunteers.

DAA & university message

- Reflect the “forever duke” language in everything from the admit letter to consistent message across university-wide websites
- University initiative to make knowledge useful – faculty, students, and alumni
- Alumni services offered may be too fractional – how much will get to be too much?
- Be more deliberate about stage of life communication
- Necessity for someone to take on the lead with coordinating communication across the university offices
- What is the new Duke brand?
 - Socially responsible and involved with civic engagement.
 - How is the new Duke brand articulated in the university plan
 - Through programming is the DAA sending the message of the newer Duke brand?

University Strategic Plan

- More clearly define how the DAA strategic plan is coordinated into the university strategic plan
- Articulate when and how the university plan, university department plans, and the DAA plan come together

Surveying

- How do alumni want to be involved with the university?
- Is the DAA value added or do we have to “sell them” on being involved as alumni.
- Survey everyone not just baby boomers and young alumni
- Survey people who attended large events – create a profile of events different alumni demographics would attend
- Ask alumni where they get their information about Duke (Chronicle, DAA site, *Duke Magazine*...etc.)
- Elicit information from graduating seniors about what they want and how the DAA could serve them post graduation

Students

- What does current student communication look like?
 - Interviewed by duke alumni > send off party > pic book picnic > homecoming > career week > Senior programming > last day of classes...
- What is the DAA doing to increase communication with graduate students?
 - DAA integrating into graduate and professional school orientation
 - Increasing communication post graduation – what is their first communication after completing their degree? (Dues solicitation)

Career Week

- It is important to include success stories and alumni helping students and other alumni
- Promote career week as being sponsored by the Duke Alumni Association

Educational Programming

- Duke Faculty in educational programming
 - Knowledge at service of society
 - Reward faculty for being involved – give them academic stimulation, get them excited about what we are doing. (example: Wayne Pond – UNC – Humanities and Human values gets professors very excited)
 - In addition to inviting faculty, involve their top scholars as well
 - Reading assignments in advance of programs gets alumni more engaged and participatory
- Online portal – include alumni and faculty
- Alumni have a thirst for education
- Re-create committee of faculty to ask for ideas on programming.
- Book club online – linked with freshman reading
- History lecture series – make bigger take global health for example...
- Stanford has “think again” program, bringing a 2 day academic and university workshop to 10 cities each year
- When looking for faculty lecturers, consider those in the graduate and professional school as well as undergraduate.

Young Alumni/Recent Graduates

- Recent graduates are the alumni who have recently graduated from Duke’s graduate and professional schools
- Young Alumni are alumni who are 0-10 years out of Duke undergrad

Committee on Institutional Advancement Abridged Minutes

Friday, 9:00 a.m.
September 30, 2005

The Committee on Institutional Advancement met at 9:00 a.m. in the Terrace View Classroom of the Westbrook Building on Friday, September 30, 2005. Chair Kimberly Jenkins presided.

Committee members attending, in addition to Dr. Jenkins, included: Nancy Allen, Jaime Baim, Thomas Clark, Bill LeFew, Logan Leinster, Becca Parrish, Alan Schwartz, Charles Smith (Vice Chair), John Staddon, Lewis Williams, John Burness (*ex officio*), and Robert Shepard (*ex officio*).

Others attending the meeting included: Donna Hubert, Executive Assistant to the Senior Vice President for Public Affairs and Government Relations; David Jarmul, Associate Vice President for News and Communications; Ellen Medearis, Executive Director for University Development; Mary Jane Morrow, Special Assistant to the Vice President for Alumni Affairs and Development; Michael Palmer, Director for Community Affairs; Susan Ross, Director of the Financial Aid Initiative; Peter Vaughn, Executive Director for Alumni and Development Communications; and Sterly Wilder, Executive Director for Alumni Affairs.

Board Chair Robert Steel was a guest of the committee.

Dr. Jenkins opened the session by welcoming all members and guests. She noted that the members represented an array of experiences and expertises, all of which will enhance the committee's work. Dr. Jenkins said that the hope is for CIA meetings to be interactive, candid conversations with full committee participation. She emphasized that presentations should be concise in order to allow ample time for discussion. She cited the charge to the committee as described in the University's by-laws, which is as follows:

“The Institutional Advancement Committee shall review, discuss, and, when appropriate and necessary, recommend action on important and substantive issues and proposals emanating from the Offices of the Senior Vice President for Public Affairs and Government Relations and the Vice President for Alumni Affairs and Development. The Committee specifically shall address university-wide policies and practices concerning alumni programming, communications/media relating to government and public relations, and fund raising initiatives.”

Dr. Jenkins recognized Dr. Shepard to give an overview of the Alumni Affairs and Development Offices. Dr. Shepard introduced the three executive directors responsible for the offices within his division: Ms. Medearis, Ms. Wilder, and Mr. Vaughn. Dr. Shepard said that while there are individual challenges for each office, all three share a stake in an overarching goal: Making the “next leap” for excellence on the heels of the successful Campaign for Duke. He said that the question before his division is how to provide the programming and activities that inspire alumni, parents, and friends to increase their giving to Duke and their active participation in University life. To illustrate the difficulties of such a goal he noted that over the past twenty years, only one to three universities had been able to consistently excel in annual fund raising performance. He said that the goal is to achieve annual receipts of \$350 - \$400 million with the understanding that this is not a “numbers” game but rather about relationships with University constituencies. Dr. Williams asked if there was a specific mission behind the goal, noting that sense of mission was an important aspect in the Campaign for Duke. Dr. Shepard, agreeing with Dr. Williams,

noted that in the short-term financial aid and global health initiatives would be the focus projects and the long-term mission would be forthcoming from the Provost's Strategic Plan.

....

Ms. Wilder then described the work of the Alumni Affairs staff and the members of the Duke Alumni Association Board (DAA). In her first year on the job, she and her staff identified two foci for the long-term: the need for restructuring office responsibilities and staffing and devising and implementing a strategic plan. Through studying these two needs, five factors have emerged as critical for Alumni Affairs. First, there needs to be a distinct Duke message, a communication of what makes Duke unique. She cited Messrs. Vaughn, Jarmul and Burness for their assistance in helping her staff and board work to devise this message. A second need is to create and offer educational opportunities on and off campus that attract and engage alumni. She said that Duke's alumni demographic is changing rapidly, and future programming must appeal to increasingly diversified interests. Ms. Wilder cited the Los Angeles club event around the King Tut exhibit, which had faculty support and drew over 500 alumni and guests. A third need is to engage young alumni, including graduate and professional school alumni, recognizing the great variety of interests and concerns within this segment of the alumni population. A fourth need is enhanced career network building, a network that involves alumni in meaningful ways to help current Duke students find attractive employment and eventually become part of the career network. Lastly, she noted the need for an alumni center that would serve the university as an alumni/career/visitors center. It is hoped that this will become part of the plan for the renovated Central Campus.

She noted that this is Homecoming weekend, and a time when many affinity groups are returning to campus for reunions. She said that it is hoped to increase the number of these kinds of affinity reunions, ones that may attract alumni who do not wish to return for class reunions. Ms. Wilder concluded her summary by inviting members to the Homecoming weekend events, especially the "Big Dance" hosted by President and Mrs. Brodhead. Mr. Schwartz said that affinity reunions are the way to go for increased alumni returns to campus. He said often alumni have close friends outside of their own classes, thus affinity reunions draw by common interest in a way that class reunions may not. Ms. Wilder was glad Mr. Schwartz agreed and said that she hopes these reunions draw larger crowds than the traditional class reunions. Dr. Williams asked if there were well-coordinated regional activities that could draw affinity groups on a local level. Ms. Wilder replied that this was an issue on the table, and the present aim is to identify, establish, and sustain active Duke presences on the local level in many areas, extending internationally. Using Web technology is one of the primary means considered for enacting this activity. Dr. Jenkins added that the December meeting of CIA will examine the Alumni Affairs Association's strategic plan.

Committee on Institutional Advancement Abridged Minutes

Friday, 9:00 a.m.
December 2, 2005

* Too be added after approval at the February Meeting *

Appendix G

Strategic Planning Participants Staff, Volunteers, Alumni, and Friends

Task Force Volunteers

Alumni Admissions Task Force:

Jill Arnold T '97, AAAC Volunteer, NYC
Dawn Taylor Biegelsen T '89, AAAC Chair, Kansas City
Nancy L. Cardwell WC '69, Duke Alumni Association Board Member
Artyn Haig Gardner T '73, AAAC Volunteer
Christoph Guttentag, Dean of Undergraduate Admissions
Lori Terens Holshouser T '77, JD '80, Duke Alumni Association Board Member
Gina Hubbard, Senior Admissions Officer, Undergraduate Admissions
Stephen R. McLaughlin JD '72, Sr. Assoc. Dir. - Operations, Undergraduate Admissions
Kip Meadows T '82, Duke Alumni Association Board Member
Dana Oliver T '87, AAAC Volunteer
Bruce Ruzinsky T '80, AAAC Chair, Houston, TX
Phyllis Supple, Associate Director, Undergraduate Admissions
Christy Susman T '88, Duke Alumni Association Board Member

Alumni Education and Travel

Peter Burian, Ph.D., Professor and Chair, Classical Studies
Peggy Baker Fern WC '63, Past Traveler
Colleen Fitzpatrick, Associate Dean for Advancement, Arts and Sciences
Jim Gallaher T '79, Past Traveler
Xarmina Haneef MBA '06, Duke Alumni Association Board Member
Cara Holland T '80
Roy Kiefer MBA '78, Duke Alumni Association Board Member
Alex Roland Ph.D. '74, Duke Alumni Association Board Member
Ruth Ross WC '68
Dr. Dale Shaw T '69, MD '73, H '77, Duke Alumni Association Board Member

Career Services

Catherine Conrad-Saydah T '94, Duke Club of New York Volunteer
Sheila Curran, Fannie Mitchell Executive Director, Duke University Career Center
Peggy Fields T '79, Career Center Volunteer
Jim Gayton JD '98
Ellen Bers Johnson WC '72, Duke Alumni Association Board Member
Joel Kliksberg T '07
Jesse Longoria E '06, Duke Alumni Association Board Member
Andrea Martin T '81
Karla Mizelle T '95, Career Center Volunteer
Chalmers M. Nunn, Jr. MD T '76, M.D. '80, HS '85, Duke Alumni Association Board Member
Melanie Oberman T '03, Career Center Volunteer
Michele Sales T '78, JD '81, Past President, Duke Alumni Association
Julien Thuan T '97, Career Center Volunteer

Communications

Daniel Dickinson BSE '83, Duke Alumni Association Board Member

John Felkins BSE '05
Theodore Humphry BSME '62, Duke Alumni Association Board Member
David Jarmul, Associate VP, Office of News and Communication
Dave Kass, Associate Director, Information Technology
Leslie Marsicano T '78, M.Div. '81, Duke Alumni Association Board Member
Peter Vaughn, Executive Director of Alumni and Development Communications
Sue Wasiolek T '76, G '78, L '93, Asst. VP for Student Affairs and Dean of Students, Duke Alumni Association Board

Duke Clubs

Erica Berg T '96, President, Duke Club of New York
Michael Cann T '95, President, Duke Club of Boston
Jonathan Peter "JP" Cardona MBA '00, President, Duke Club of Puget Sound
Thomas C. Clark T '69, President Elect, Duke Alumni Association
Melody Hainline T '82, Events Coordinator, Duke Club of Jacksonville
Allison Haltom WC '72, Duke Alumni Association Board Member
Roseann Hassey T '83, President, Duke Club of Cincinnati
Catherine Hess BSE '96, Duke Club of New York Volunteer
Bharet Malhotra BSE '97, Duke Alumni Association Board Member
Joanne M. O'Connor T '92, President, Duke Club of Palm Beach
Mike Orren T '94, Duke Club of North Texas, Volunteer
Nancy Powers Perry T '81, President, Duke Club of Washington DC
Amy Schick Kenney T '96, MEM '98, President, Nicholas School Alumni Council; Duke Alumni Association Board Member
Kim Schliep-Underwood T '95, President, Duke Club of the Triangle, AAAC Volunteer

Duke Magazine

James "Jake" Akers T '73, Duke Alumni Association Board Member
Anne DeVoe Lawler T '75, Duke Alumni Association Board Member
Tom Dominick T '87, Web & Graphic Designer, The Fuqua School of Business
Jerrold K. Footlick T '85
Devin Gordon T '98
Dave Karger T '95
William E. King T '61, AM '63, PhD '70, Duke Alumni Association Board Member
Page Murray T '85
Nicholas Pope T '70, Duke Alumni Association Board Member
Susan Tiff T '73, Professor of Practice, Public Policy
Hardy Vieux T '93, Duke Alumni Association Board Member

Member Benefits and Services

Mark Carter, Assistant Director of Iron Dukes
Brent Clinkscale T '83, JD '86, Duke Alumni Association Board Member
Stacey Maya Gray T '95, Duke Alumni Association Board Member
Thomas B. Wall, Director of Public Services, Duke University Libraries
Rebecca Warlick Wilgus MSN '93, Duke Alumni Association Board Member
William Wilson T '76, Duke Alumni Association Board Member
Sean Wilson MBA '00, MP '00
Monika Winchester, Senior Stewardship Coordinator for Endowments, Buildings, and Programs - University Development

Regional Programs

Kate Buchanan T '92, Director of Development, Duke Law School
Susan Callahan T '86
Patricia Dempsey Hammond T '80, Duke Alumni Association Executive Committee Member
Ken Dennard T '81, President, Duke Club of Houston
Dr. Holly Clara Duchene DPT '03, Duke Alumni Association Board Member
Cecilia Ann Gassner BSW '94, President, Duke Club of Idaho
Peter C. Griffith T '78, AAAC Chair, Baltimore; Member, Board of Visitors, Nicholas School; Past President, Alumni Council, Nicholas School
Julie Guest T '85, AAAC Chair, Los Angeles, CA
Ross Harris T '78 AAAC Chair, Greensboro, NC
Steve Himes T '90, Volunteer, Duke Club of Atlanta
Ellen Luken B '83, Executive Director, Medical Alumni Affairs and External Relations
Ann Pelham Cullen T '74, Duke Alumni Association Board Member
Jane Rohlf Boyer WC '70, Duke Alumni Association Board Member
Matt Sample T '96
Dr. James N. Siedow, Duke Alumni Association Board Member
Derek Wilson T '86, MBA '90, Duke Alumni Association Board Member

Reunions and Special Events

Valerie Barnwell T '79, Duke University Black Alumni Connection, President
Terry Chambliss, Director, Office of Special Events
Timothy Davis BSE '92, Duke Alumni Association Board Member
Ann Wooster Elliott T '88, Duke Alumni Association Board Member
Mary Jane Morrow T '80, G '99, Special Assistant to Sr. VP, Alumni Affairs and Development
Susan McLean, Director of Alumni Relations and Special Events, School of Law
Bill Miller T '77, Duke Alumni Association President (2004 - 2006)
Bob Penn T '74, Reunion Planning and Gift Committee Volunteer
Dottie Simpson WC '46, Reunion Planning and Gift Committee Volunteer
Gary Stevenson T '78, Reunion Planning and Gift Committee Volunteer
Tomalei Vess Ph.D. '02, Director of Student Development, Graduate Student Affairs Office
Dr. Melvia L. Wallace T '85, Duke University Black Alumni Connection, Volunteer
Gerald Wilson BD '61, AM '68, Duke Alumni Association Board Member
Hank Woods, Director, Duke Annual Fund

Young Alumni & Student

Todd Adams, Assistant Dean of Students & Dean of Fraternity & Sorority Life
Peter Applebome T '71, Duke Alumni Association Board Member
Brett Bennett MHA '86, Duke Alumni Association Board Member
Heather Bennett T '96, Associate Director, Annual Giving
James Gancos T '99, Young Alumni Development Council
Preeti Garg T '02, MBA '07, Young Alumni Volunteer
Bill LeFew AM '03, Graduate and Professional Student Council President (05 – 06)
Susan Vissers Lisa T '90, Duke Alumni Association Board Member
CJ Walsh III T '02, Duke Student Government President (01 – 02), Young Alumni Volunteer
Jenny Woodruff, Graduate and Professional Student Council, Duke Alumni Association Board Member

DAA Board of Directors (3/4/05; 5/21/05; 10/15/05; 2/10/06)

Mr. James Francis Akers T '73, At-Large Director
Mr. Peter C. Applebome T '71, Editorial Board Representative
Ms. Emeline Mariam Aviki T '06, President, Class of 2006
Ms. Valerie J. Barnwell T '79, Observer
Mr. J. Brett Bennett B '86, MHA '86, Health Administration Representative
Dr. Jane L. Rohlf Boyer WC '70, At-Large Director
Mr. Thomas C. Clark T '69, President-Elect and Executive Committee Member
Mr. Brent O.E. Clinkscale T '83, JD '86, At-Large Director and Executive Committee Member
Mr. Kendall Rashad Dabaghi T '09, President, Class of 2009
Mr. Timothy Rohrer Davis BSE '92, Pratt School of Engineering Representative
Mr. Daniel McKenzie Dickinson BSE '83, At-Large Director
Dr. Holly Clara Duchene DPT '03, Physical Therapy Representative
Ms. Ann Wooster Elliott T '88, At-Large Director
Ms. Lauren Patricia Garson T '07, President, Class of 2007
Ms. Aisha Gayle L '08, GSPC Representative
Ms. Stacey Maya Gray T '95, At-Large Director
Ms. N. Allison Haltom WC '72, Honorary Member
Mrs. Patricia Dempsey Hammond T '80, At-Large Director and Executive Committee Member
Mrs. Lori Terens Holshouser T '77, JD '80, Law School Representative
Mr. Theodore J. Humphrey II, BSME '62, At-Large Director
Mrs. Ellen Bers Johnson WC '68, At-Large Director
Ms. Amy Michelle Schick Kenney T '96, MEM '98, Nicholas School Representative
Mr. Roy William Kiefer MBA '78, Fuqua School of Business Rep. and Exec. Committee Member
Dr. William E. King T '61, G '63, PhD '70, Honorary Member
Ms. Anne DeVoe Lawler T '75, At-Large Member
Mr. William Rosser LeFew AM '03, President, Graduate and Professional Student Council
Mrs. Susan Vissers Lisa T '90, At-Large Director
Mr. Jesse William Longoria E '06, President, Duke Student Government
Mr. Bharet Malhotra BSE '97, At-Large Director
Ms. Leslie M. Marsicano T '78, M.Div. '81, Divinity School Representative
Mr. Frank Pleasants Meadows III T '82, At-Large Director
Mr. William P. Miller T '77, President and Executive Committee Member
Dr. Chalmers M. Nunn, Jr. T '76, M.D. '80, HS '85, At-Large Director
Mrs. Ann Pelham Cullen T '74, At-Large Director and Executive Committee Member
Mr. Nicholas A. Pope, Esq. T '70, At-Large Director
Professor Alex Frederick Roland PhD '74, Faculty Representative
Dr. Dale R. Shaw T '69, MD '73, H '77, Medical School Representative
Dr. James N. Siedow, Faculty Representative
Ms. Caroline Christy Susman T '88, At-Large Director
Mr. Hardy Vieux T '93, At-Large Director
Ms. Suzanne J. Wasiolek T '76, MHA '78, LLM '93, Honorary Member
Ms. Sterly L. Wilder T '83, Secretary-Treasurer and Executive Committee Member
Mrs. Rebecca Warlick Wilgus MSN '93, Nursing School Representative
Mr. Derek Moody Wilson T '86, MBA '90, At-Large Director
Dr. Gerald Lee Wilson BD '61, AM '68, Honorary Member
Mr. William T. Wilson, III T '76, At-Large Director
Ms. Jennifer Ann Woodruff AM '09, GSPC Representative
Mr. S. M. Hasnain Zaidi T '08, President, Class of 2008

DAA Staff (1/14/05)

Barbara Blackburn MBA '88, Finance & Personnel, Director
Robert (Bob) Bliwise AM '88, Associate Director & *Duke Magazine*, Editor
Marge Bradford, Administration, Receptionist
Jacob Dagger T '03, *Duke Magazine*, Felker Fellow
Rachel Davies T '72, AM '89, Education & Travel, Director
Lisa Dilts T '83, Reunions & Spec. Events, Director
Sharon Donnell, Education & Travel, Staff Specialist
George Dorfman T '85, AM '01, Associate Director & Regional Programs, Director
Kim Hanauer T '02, Young Alumni & Students, Director
Sam Hull, *Duke Magazine*, Assoc Editor/Director of Advertisements
Zoë Ingalls, *Duke Magazine*, Features Editor
Gavin Jocius, IT Manager
Betty Jones, Clubs, Staff Specialist
Kay Ladd, Administration, Admin. Secretary
Carole LeVine T '86, Alumni Admissions, Director
Kellie Lewis JD '00, Clubs, Coordinator
Charlene Matte, Administration, Director's Staff Assistant
DeDe Olson, Reunions & Special Events, Coordinator
Chris O'Neill T '95, Regional Programs, Assistant Director
Nicole Potoshnick, Reunions & Spec. Events, Staff Assistant
Beth Ray-Schroeder T '83, Education & Travel, Coordinator
Tori Rowe, Administration, Receptionist
Nicole Silvanic, Clubs, Staff Specialist
Charlotte Timberlake, Admissions, Administration Secretary
Jennifer Torres, Technology, Systems Analyst
Sterly Wilder T '83, Executive Director, Alumni Affairs
Racquel Williams, Alumni Career Services, Director
Mitch Yelverton T '05, Reunions & Special Events, Coordinator

Senior Officers (1/31/05) and Duke Development Cabinet (2/22/05; 11/16/05)

Krista Bofill, Interim Associate Dean of External Affairs, Nicholas School
Wes Brown, Associate Dean of External Affairs for the Divinity School
Kate Buchanan, Interim Associate Dean for External Affairs for the Law School
Phil Buchanan, Director of Gift Planning for University Development
John Burness, Senior Vice President for Public & Government Relations
Judge Carr, Associate Dean for External Affairs for the Pratt School of Engineering
Karen Cochran, Exec. Dir. for External Affairs for Duke Comprehensive Cancer Center
Tom Coffman, Dir. of Development for Athletics
Brian Eder, Director of Information Technology for University Development
Colleen Fitzpatrick, Associate Dean for Arts & Sciences Development
Jack Fracasso, Director of Principal Gifts for University Development
Ann Gleason, Director of Major Gifts for University Development
Tom Hadzor, Director of Development for the Library
Allison Haltom, Vice President & University Secretary
David Jarmul, Associate Vice President for University News and Communications
Ellen Medearis, Executive Director of University Development

Gil Merkkx, Vice Provost for International Affairs
Carol O'Brien, Development consultant
Mimi O'Brien, Director of Corporate and Foundation Relations for Univ. Development
Richard Riddell, Special Assistant to the President
Susan Ross, Director of the Financial Aid Initiative
Bob Shepard, VP for Alumni Affairs and Development and Cabinet Convenor
Gordon Soenksen, Associate Dean for External Affairs for Fuqua School of Business
Peter Vaughn, Executive Director of Alumni and Development Communications
Sterly Wilder, Executive Director for Alumni Affairs
Dottie Williams, Interim Vice Chancellor for DUMC Alumni and Development
Hank Woods, Director of the Annual Fund, University Development
Lisa Worster, Director of Development Services, Univ. Development

Duke Student Leadership (2/23/05; 11/18/05)

Emeline Aviki T '06, Class of 2006 President (04-06)
Jonathan Bigelow T '05, President, Duke University Union (03-04)
Jane Bloomgarden T '05, Campus Council (04-05)
Avery Capone T '05, Class of 2005 President
Will Connolly T '05, Inter-Fraternity Council President (04-05)
Heather Dean PhD '06, President, Graduate and Professional Student Council (04 -05)
Jay Ganatra T '06, Campus Council President (05-06)
Lauren Garson T '07, President of Junior Class (05-06)
Brandon Goodwin T '06, DSG Representative
Katie Jandl T '06, President, Panhellenic Association (05 – 06)
Chase Johnson T '05, DSG Representative
Remington Kendall T '07, Class of 2007 President (04-05)
Joel Kliksberg T '07, DSG Representative
Emily Ladue T '06, Center for Race Relations
Bill LeFew AM '03, President, Graduate and Professional Student Council (05-06)
Jesse Longoria E '06, President, Duke Student Government (05-06)
Michael Mahdi T '05, National Pan-Hellenic Council President (04-05)
Pasha Majdi T '05, President, Duke Student Government (04-05)
Jay McKenna T '06, President, Inter-Fraternity Council (05-06)
Christian Moyer T '05, President, Engineering Student Council (04-05)
Bob Pan T '06, President, Asian Student Association (05-06)
Kevin Parker T '05, President Duke Union (04-05)
Jason Stewart T '05, Center for Race Relations
Brandi Stewart T '06, President, National Pan-Hellenic Council (05-06)
Anthony Vitarelli T '05, President, Campus Council
Brian West T '05
Andrew Wisnewski T '05, DSG Representative, 2005 Young trustee candidate
Jenny Woodruff, Graduate and Professional Student Council, DAA Board Member
Hasnain Zaidi T '08, Treasurer, East Campus Council (04-05), President, Class of 2008 (05-06)

DAA University-wide Constituency (3/2/05; 11/16/05 and 11/17/05)

Todd Adams, Assistant Dean of Students & Dean of Fraternity & Sorority Life
Zoila Airall, Assistant Vice President Student Affairs

Wanda Bazemore, Director of Special Events, Duke Medical Center
 Lana BenDavid, Graduate Student Affairs, Program Coordinator
 Heather Bennett T '96, Associate Director, Annual Giving
 Josh Bond, Formerly, Nicholas School of the Environment and Earth Sciences
 Bridget Booher T '82, AM '92, Assistant Director, Hart Leadership Program
 Tony Brown, Public Policy, Hart Leadership Program
 Peter Burian, Ph.D., Professor and Chair, Classical Studies
 Terry Chambliss, Director, Office of Special Events
 Norman L. Christensen Jr., Ph.D., Professor of Ecology and Founding Dean of the Nicholas School
 Mike Cragg, Associate Director of Athletics, Duke Basketball Legacy Fund Director
 Jennifer Crumpler, Director, Young Alumni and Student Programs, Duke Medical Alumni Affairs
 Shelia Curran, Fannie Mitchell Executive Director, Duke University Career Center
 Carolyn Ent, Director of Special Events, University Development
 Kim Garcia, Assistant Director of Special Events, University Development
 Pamela Hanson, Director of Annual Fund, Pratt School of Engineering
 Carlisle Harvard, Director, International House
 Gregg Heinselmann, Director of Student Life
 Erica Brynes Hill T '98, Director of Leadership Gifts, Duke Annual Fund
 Elizabeth Hogan MBA '04, Director of Alumni Relations, Fuqua School of Business
 Jeanine Holland, Office of External Affairs, Nicholas School
 Amelia Howle, Alumni Affairs and Reunions Coordinator, Duke University School of Nursing
 Eddie Hull, Dean of Residence Life & Executive Director of Housing Services
 David Jarmul, Associate VP, Office of News and Communication
 Dave Kass, Associate Director, Information Technology
 Elizabeth Kiss, Director, Kenan Institute for Ethics
 Jeanne Kirschner, Assistant Director, Duke Event Management
 Donna Lisker, Ph.D., Director, Women's Center
 Jacqueline Looney, Associate Dean & Associate Vice Provost, Duke University Graduate School
 Ellen Luken, Executive Director, Medical Alumni Affairs and External Relations
 Leslie Elaine Madison, Director, Community Service Center
 Susan McLean, Director of Alumni Relations and Special Events, School of Law
 Dr. Melinda Roper, Senior Associate Director, Office of Student Activities and Facilities
 Judith Ruderman G '76, Vice Provost for Academic Administrative Services
 Julian Sanchez, Director, Center for Multicultural Affairs
 Jim Slaughter, Manager, Event Management
 Mike Sobb, Assistant Athletic Director, Marketing, Duke Athletics
 Ann Sundberg, Director of Development, Arts & Sciences Development
 Phyllis Supple, Associate Director, Undergraduate Admissions
 Peter Vaughn, Executive Director of Alumni and Development Communications
 Sandra Walton, President's Office
 Eileen Watts-Welch, Associate Dean, External Affairs, Duke School of Nursing
 Michele Wittman, Nicholas School
 Lisa Worster, Director of Development Services, University Development
 Jim Wulforst, Director, Duke Dining Services

Volunteer Leadership Conference (9/17/05)

Meg Allred T '87, AAAC Volunteer
 Fielding Arnold T '0, Nicholas School Alumni Council
 Michael Basta T '96, Reunion Gift Committee Volunteer
 Leif Beck T '56, Reunion Volunteer

Sarah Bell T '01, L '04, Reunion Gift Committee Volunteer
 Thomas Bruce Bell T '78, AAAC Volunteer
 Heather Bennett T '96, Associate Director, Annual Giving
 Erica Berg T '96, President, Duke Club of New York
 Connie B. Bishop N '75, AAAC Chair, Burlington-Alamance
 Robert Bliwise AM '88, Associate Director of Alumni Affairs and Editor of *Duke Magazine*
 Krista Bofill, Director, Annual Fund & Alumni Affairs, Nicholas School of the Environment
 Marvin Botnick T '56
 Susan Bourner, Major Gift Officer, Duke University Development
 Samuel Bradley T '66
 Jane Roycroft Brasier T '80, AAAC Volunteer
 Steve Breckenridge T '83, President, Duke Club of Charlotte
 Pernel S. Brice, III T '96, Reunion Gift Committee Volunteer
 Jonathan Brimfield MBA '05, Duke Club of the Triangle, Volunteer
 Curtis Brockelman T '91, Reunion Planning and Gift Committee Volunteer
 Roger Brook T '84, AAAC Volunteer, Raleigh
 Wes Brown D '76, Associate President for External Relations, Duke Divinity School
 Erica Brynes Hill T '98, Director of Leadership Gifts, Duke Annual Fund
 Carol Danko Burk, MD E '79, AAAC Chair, Durham-Orange County
 Tonya Burwell T '96, Duke Club of the Triangle, Volunteer
 Michael S. Cann, Jr. T '95, President, Duke Club of Boston
 Kirsten Cappel T '04
 Jean Carr WC '61
 Judge Carr E '71, Sr. Assoc. Dean for Development and Alumni Affairs, Pratt School of Engineering
 Thomas C. Clark T '69, President Elect, Duke Alumni Association
 Charlotte Reeves Clark T '79, NSEES '83, Nicholas School Alumni Council, Duke Club of Charlotte
 Volunteer
 Sara Clarkson T '86
 Carlotta "Clem" Clement T '61
 Brent Clinkscale T '83, JD '86, Duke Alumni Association Board Member
 Matthew Cloues T '98, Assistant Director of Reunion Giving, Duke Annual Fund
 Anne Constant T '71, Reunion Gift Committee Volunteer
 Todd Creech MBA '03
 Thelma Crowder WC '56, MAT '57 Reunion Volunteer
 Ken Dennard T '81, President, Duke Club of Houston
 Lisa Dilts T '83, Reunions Director, Duke Alumni Association
 Dale Dixon T '91, President, Duke Club of San Diego
 Michael Dombeck, T '98
 George Dorfman T '85, AM '01, Assoc. Director of Alumni Affairs, and Director of Regional Programs
 Charles A. Dukes, Jr. T '56 L '58, Reunion Gift Committee Volunteer
 Rebecca Weathers Dukes WC '56, Reunion Gift Committee Volunteer
 John S. Eberhardt III T '96, Reunion Gift Committee Volunteer
 Carolyn Ent, Director of Special Events, University Development
 Ann Goodson Faust WC '61
 Priscilla Feinberg T '81, AAAC Volunteer
 Jack Fields, Jr. T '81, Reunion Gift Committee Volunteer
 Charles Finley F '67, Nicholas School Alumni Council
 Colleen Fitzpatrick, Associate Dean for Advancement, Arts and Sciences
 Barbara Flynn WC '67, AAAC Chair, Albany, NY
 Jessica Foley E '01
 Brooke Fried T '89, Volunteer, Duke Club of Southern Florida

Debbie Fritz T '72, AAAC Volunteer
 Chung-Hong Fu T '93
 Jay Ganatra T '07, Campus Council President (05-06)
 Thomas Gannon T '86, AAAC Chair, Philadelphia East
 Kim Garcia, Assistant Director of Special Events, University Development
 Ann Gleason, Director of Major Gifts, University Development
 Dr. Michael S. Goldwasser T '71, AAAC Chair, Urbana/Champaign, IL, Reunion Giving Volunteer
 Gema Gomez T '86, Reunion Planning Volunteer
 Matthew Gotlin T '96
 Gretchen Gudger T '91
 Albert Gumb T '56, AAAC Chair, Orange County, CA
 Leslie Haines T '75
 Allison Haltom WC '72, Duke Alumni Association Board Member
 Dr. Charlotte F. Hamlin WC '61, Reunion Gift Committee Volunteer
 Judy Hammerschmidt T '76
 Patricia Dempsey Hammond T '80, Duke Alumni Association Executive Committee Member
 Kim Hanauer T '02, Director, Young Alumni and Student Programs, Office of Alumni Affairs
 Pamela Hanson Staff Pratt School of Engineering
 James W. Harbison, Jr. T '56, Reunion Volunteer
 Ross Harris T '78, AAAC Chair
 Leo Hart T '71, Reunion Gift Committee Volunteer
 Roseann Hassey T '83, President, Duke Club of Cincinnati
 Doug Hastings T '71, Reunion Gift Committee Volunteer
 Ginny Joslin Hastings WC '70, Reunion Gift Committee Volunteer, AAAC Volunteer
 Laura Hayman T '01
 Dan Winfield Hill, III T '66
 Jeanine Holland, Nicholas School Office of External Affairs
 Dale Hollar T '76, JD '79, AAAC Volunteer, Wake County
 Katherine Homiller T '74, President, Duke Club of Ashville
 Elizabeth Hopkins T '92, Major Gift Officer, Duke University Development
 Julie Hopkins T '96
 Carson Dowd Howard T '76, Reunion Gift Committee Volunteer, AAAC Volunteer
 Jeffrey Howard T '76, Reunion Gift Committee Volunteer
 Edward Howson T '86
 Eric Imperial T '86
 Zoe Ingalls, *Duke Magazine* Features Editor, Office of Alumni Affairs
 Robert Jacobs T '84, Nicholas School Alumni Council
 Katie Jandl T '06, President, Panhellenic Association (05 – 06)
 Tyson Jennette T '56
 Ellen Bers Johnson WC '72, Duke Alumni Association Board Member
 Kristina M. Johnson, Dean, Pratt School of Engineering
 Betty Jones, Regional Programs, Office of Alumni Affairs
 Jeffrey Kemp T '90, President, Duke Club of North Texas
 Amy Schick Kenney T '96, MEM '98, President, Nicholas School Alumni Council; Duke Alumni Association Board Member
 Roy Kiefer MBA '78, Duke Alumni Association Board Member
 Tracy Killete T '86
 Rev. Wendy Sue Kissa Divinity '97, Vice President and Treasurer, Duke Club of Northern Connecticut
 Sally Kleberg WC '66, Reunion volunteer
 Alexandra Bryan Klein T '81, Reunion Gift Committee Volunteer
 John A. Koskinen T '61, Trustee Emeritus

Mary Margaret Lang T '81, Reunion Gift Committee Volunteer
 Peter Lange, Provost
 William LeFew AM '03, 2005-2006 Graduate and Professional Student Council President
 Carole LeVine T '86, Director, Alumni Admissions Program, Office of Alumni Affairs
 Kellie Lewis JD '00, Regional Programs Coordinator
 Jesse Longoria E '06, President, Duke Student Government 2005-2006
 Donald Lovett T '56
 Peter Lublin T '86, Reunion Gift Committee Volunteer, AAAC Volunteer
 Dr. Shirley Davis Martin N '56
 Terri Mascherin T '81
 Kenneth E. Mayhew, Jr. T '56, Reunion Gift Committee Volunteer
 Dolly McKenna WC '71
 Sarah McLaughlin T '79
 John McNabb T '66
 Ellen Medearis, Executive Director, University Development
 Debbie Messner T '98, AAAC Co-Chair, Charlotte
 Hofler Milam, Vice President Financial Services
 Bill Miller T '77, Duke Alumni Association President (2004 - 2006)
 Sandra Mooney T '66
 Charles Murphy MF '63, Ph.D. '70, Nicholas School Alumni Council
 Alisa Nave T '01, Reunion Gift Committee Volunteer
 Robert Nichol T '69, AAAC Volunteer
 Tanya Shoenfelt Nizialek T '91
 Charles Nobles BSE '82, MS '84, AAAC Volunteer
 Shirin Odar T '01
 DeDe Olson, Reunions and Special Events Coordinator, Office of Alumni Affairs
 Chris O'Neill T '95, Assistant Director of Regional Alumni Programs
 Helen Pak-Harvey T '89, G '01, Duke Club of the Triangle, Volunteer
 Thomas Paul E '62, AAAC Volunteer
 Brian Payne NSEES '62, Nicholas School Alumni Council
 Ann Pelham Cullen T '74, Duke Alumni Association Board Member
 Michael Pentony BSE '87, MEM '96, Nicholas School Alumni Council
 Anne Perry G '59, Duke Club of Washington, President
 Richard Piech T '70, AAAC Chair, Princeton/Trenton, NJ
 Elizabeth T. Pierson T '85, President, Duke Club of Southern California
 Robert Piotrowski G '74
 Emily T. Powell WC '62, AAAC Volunteer
 Benjamin A. Powell T '99, AAAC Volunteer, Reunion Gift Committee Volunteer
 Richard L. Prager T '81, Reunion Gift Committee Volunteer
 Merry Rabb T '77, MA PPS '80, MEM '80, AAAC Volunteer
 Elizabeth Ray-Schroeder T '83, Program Coordinator, Alumni Ed. and Travel, Office of Alumni Affairs
 Anu Reddy E '95, AAAC Co-Chair, Wake County
 Page Royster Redpath MHA '76, AAAC Chair, High Point/Thomasville/Lexington, NC
 Steven Ridenhour T '86, Reunion Gift Committee Volunteer
 Susan Cranford Ross, Director, Financial Aid Development
 Bruce Ruzinsky T '80, AAAC Chair, Houston, TX
 Sophia Santillan E '01
 Herbert S. Savitt T '52, AAAC Chair, New Haven, CT
 Evelyn Sawicki T '76, AAAC Chair, St. Pete/Clearwater, FL
 Kim Schliep-Underwood T '95, President, Duke Club of the Triangle, AAAC Volunteer
 Dr. Stephen E. Schwartz T '70, AAAC Volunteer

Glenn Seitchek T '90, Duke Club of the Triangle, Volunteer
 Stacy Sempier T '81, Reunion Gift Committee Volunteer
 John H. Shadle III T '98, AAAC Volunteer
 Vijay Shah EMBA '85, AAAC Co-Chair, Wake County
 Bob Shepard, Vice President, Alumni Affairs and Development
 Tiffani Sherman T '95, Duke Club of Tampa Bay, President
 Ivan Shin G '04, Director of Reunion Giving, Duke Annual Fund
 Nicole Silvanic, Regional Program, Office of Alumni Affairs
 Patricia Speth T '77, AAAC Chair, Marion/Florence, SC
 Jeff Spiritos E '76
 Heather Nixon Stevenson NSEES '83, Nicholas School Alumni Council
 Phyllis Supple, Associate Director, Undergraduate Admissions
 Julianna Swanson T '05, Duke Club of the Triangle, Volunteer
 Robert Swennes II T '67, AAAC Chair, Arlington, VA
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 Kym Trimarchi, Development Special Events
 Lauren Troyer T '06, Head Line Monitor
 Glenn Tucker T '77, L'80, Law Alumni Association Board of Directors, Reunion Volunteer
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 Benjamin H. Waldman T '76, AAAC Chair
 Sue Wasiolek T '76, G '78, L '93, Asst. VP for Student Affairs and Dean of Students, DAA Board
 Meredith Watson T '01
 Janet Weber E '81
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 Sterly Wilder T '83, Executive Director, Office of Alumni Affairs
 Robert Williams T '70, AAAC Chair, Roanoke Rapids, NC
 David Williams T '70
 Jacqueline Williams T '76, Reunion Gift Committee Volunteer
 Dr. A. Hope Williams T '76, Reunion Gift Committee Volunteer
 Racquel Williams, Director of Alumni Career Services
 Linda Zaleski Winikoff '76, AAAC Volunteer
 Hank Woods, Director, Duke Annual Fund
 Lisa Worster, Director of Development Services, University Development
 Rusty Wright T '71, Reunions Volunteer
 Mitch Yelverton T '05, Reunions and Special Events Coordinator
 Lynn Dalton Young T '76, Reunion Gift Committee Volunteer
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 Volunteer; Reunion Volunteer; Trustee
 Nancy Burr Zwiener T '76, Reunion Gift Committee Volunteer

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David Jarmul, Associate Vice President for News and Communications
Ellen Medearis, Executive Director for University Development
Mary Jane Morrow, Special Assistant to the Vice President for Alumni Affairs and Development
Michael Palmer, Director for Community Affairs
Susan Ross, Director, Financial Aid Initiative
Peter Vaughn, Executive Director, Alumni and Development Communications
Sterly Wilder T '83, Executive Director, Alumni Affairs.

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Catherine Gilliss '71, Dean, School of Nursing
Gregory L. Jones, Dean, Duke School of Divinity
Kristina Johnson, Professor and Dean, Pratt School of Engineering
Peter Lange, Provost
George McLendon, Dean of Faculty, Arts and Sciences
Richard Riddell, Special Assistant to the President
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