

Joining a Non Profit Board of Directors (360p)

GEOFF KROUSE: All right. Welcome, everybody. I think there's a couple more people being admitted from the waiting room, and we'll get started.

All right. Why don't I kick it off? We'll continue to admit a few people in the waiting room, but let's go ahead and get started. First of all, thanks to everyone for joining our program today.

For those of you who don't know me, my name is Geoff KROUSE. Like all of you, I'm a Duke Law graduate, Class of 1997, 25th reunion coming up this spring. And I returned to law school about five years ago after almost 20 years of private law practice, corporate M&A Securities in New York and in Raleigh, and rejoined the law school team back in August of 2016.

And I've had the privilege of working with our Alumni Development Office. I'm Assistant Dean for Alumni and Development. And I also teach an M&A class every spring, which I've done now for five years, which is a lot of fun, a great way to see the students and many of whom a lot of you hire-- thank you very much-- at your firms and your companies and businesses. So that's a little bit about me.

Just so you all know where this event idea came from, we have a Law Alumni Association Board of Directors. And I think this is a topic that came up at one of the board meetings. How are there ways that we can, particularly with our younger alumni, encourage them to use their skills to help in their communities and in the profession?

And so we decided to put on this program today about non-profit board service. Based on some feedback and conversations with the board, I think we'll also be doing one around serving as a director on a for profit board in the future, hopefully some time in next year's program and schedule. But today, the focus is non-profit board service.

And just a reminder for all of you. First of all, four of our panelists today are members of the Alumni Association Board of Directors, and all of you who are Duke Law alumni are members of the Law Alumni Association. The board of directors is the governing body for all of our alumni that help come up with networking and programming and other opportunities for our worldwide alumni base. So thanks again to the four panelists, not just for joining us today, but for your service on the Alumni Association Board of Directors.

A few quick technical details. Today's program and the chat is going to be recorded. Number two, if you experience any technical difficulties, you can either mention that in the chat if that's possible, or if not, contact our alumni development office. Conner's going to throw something in the chat with the details of how to do that, and you can just email us and we can try to work with you on any of your technical issues. And also one other point, and I really encourage this because we want this to be conversational. We're going to keep the chat open during the program today. So if you have any specific questions or issues you'd like the panelists to address as we go or at the end, let us know, and we'll try to keep an eye on that throughout the program.

We know many people on this call have a lot of experience serving on non-profit boards themselves. And so the idea is really to share with each other and make Duke Law alumni really well suited and prepared and able to seek opportunities a non-profit board service. So please feel free to chime in and share experiences and share questions.

I think on that note, it looks like we're ready to go, and I would like to start introducing our four panelists for today. So first up is my classmate and friend, Diana Allen. We were in the same small section at the law school at Judge Everett back in 1994. I can't believe it.

So Diane and I have also had the privilege of working together when I'm back from New York to Raleigh. Diana was at the LED lighting company, Cree, assistant GC there. We got to work together professionally as well, which a lot of fun. So currently, Diana is actually the VP and General Counsel as well as Secretary of ChannelAdvisor, which is a Triangle based company. She oversees all worldwide legal functions, including regulatory compliance, commercial affairs, M&A litigation, you name it, a lot of IP management.

She serves on a lot of non-profit boards, and over the years I've seen her in action. She's a great committed non-profit board director. And currently, she's on the Board of Directors of OnBoardNC, which is an organization that seeks to increase opportunities for qualified women on corporate boards. She's also served on the Research Triangle area's chapter of the Association for Corporate Counsel for a number of years, including at one time she was president. I think a lot of you are familiar with ACC. And she's also a section council member for the North Carolina Bar Association for the international law section, which dovetails nicely with a lot of her professional experience.

Diana received her Bachelor of Arts degree from Columbia University, and of course, her J.D. from Duke. So welcome, Diana. Thank you for joining us.

And let's see. Next up is Michelle Park Chiu. There's Michelle. Good morning, Michelle. She's on the West Coast.

Michelle Park Chiu's a partner at Morgan Lewis in San Francisco, and Michelle represents corporate clients facing all sorts of complex consumer protection claims and class actions and law enforcement actions. She's a very well seasoned antitrust litigator, represents clients facing both federal and state antitrust litigation, alleged cartel, and monopolization claims. In terms of her firm's service, she serves as the San Francisco office's Hiring Partner, and I think, has a role in hiring some of our Duke Law graduates from time to time. And she's also the Deputy Leader of the firm's litigation practice.

She's also been very active in non-profit work and has had several leadership roles on the board of the Asian-American Bar Association of the Greater Bay Area where she actually is currently serving as President. Most importantly, other than going to Duke Law school and graduating like all of us from Duke, she received her bachelor's degree back on the East Coast from Boston University. So again, welcome, Michelle. Thanks for joining us today.

And speaking of Boston, is Mark ready to go? There he is. Good afternoon, Mark. So Mark is currently serving as a Managing Director and General Counsel of the Bulfinch companies, which is a real estate investment development and management firm headquartered in Boston. Mark's been a member of a number of professional and industry type organizations, including the ABA, Massachusetts Bar Association, Boston Bar Association, Real Estate Bar Association, National Association of Industrial and Office Properties, and AIOP.

He's also, like a lot of us, been active in serving local community as a sports coach, a trustee at the Board of Winchester Community Music School. He's actually chaired the board there for several years and can speak to that leadership service as well. Mark received his bachelor's from Colgate University, upstate New York, and, of course, his J.D. from Duke. Welcome, and thanks for joining us today.

And finally, last but not least, where's Corey? There he is. So Corey's a partner at Jones Day in Cleveland, and has been a Strategic Legal Advisor for many years for clients involved in litigation corporate investigations.

He's actually been the national thought leader in e-discovery best practices and policy, which obviously you litigators know has really exploded in recent years. He's represented clients in litigation from information security, data breach incidents, contract disputes, class actions, business torts, securities, products liability, you name it. Corey's a member of the ABA as well, the National Bar Association.

He's a member of the Yale University Alumni School Committee, so he's involved with his undergrad alma mater as well. He's worked with Sedona Conference, a working group around electronic document retention and production, and he's a fellow of the Leadership Council on Legal Diversity. Corey received his bachelor's degree from Yale University and his J.D. from Duke. So welcome, Corey.

All right. I think we've got all the panelists on board ready to go. Conner's going to kick things off for us with something that we'd like all of the participants to join in. We're going to kick off a poll here just to get a sense of the level of experience and expertise our audience has.

CONNER COOK: We'll give everyone just another second, and then we'll end the poll. And here are results.

GEOFF KROUSE: All right. Let's take a minute to digest that. So actually, based on the registrations, I think this is pretty consistent with what we anticipated, that we would have a good portion of people who never served on a board, which is also what drove us to put in this panel together.

And then a number of who have served on multiple boards, so that's great. So again, we encourage those of you who have this type of experience to feel free to chime in and share your thoughts as well on the chat as we go. And hopefully, this is helpful and informative to those of you earlier, perhaps, in your careers or who are now finding time in your careers that you can dedicate to this type of service.

All right. So why don't we go ahead and kick it off. I'm going to go around and ask each of the panelists one particular question, and then we'll sort of see how we can all chime in at the end about our final Q&A. So first of all, I'll with Diana, and I have sort of a two pronged question for you. So first of all, how do you even learn about organizations where you can serve a non-profit? Presumably in your area, but these days you probably can serve all across the country thanks to Zoom. But how do you learn about those organizations in particular that connect with your strengths and your interests that might be a good fit for you to serve? How do you even come across in first place?

DIANA ALLEN: And actually, if you want to ask the second part, I'll sort of answer them together.

GEOFF KROUSE: OK. So related to that, how do you even position yourself in general for opportunities to serve on boards? How does that all come together?

DIANA ALLEN: Thank you, Geoff. I really appreciate the opportunity to participate on this panel. I am very passionate about increasing the representation of diverse members on boards of directors, so I'm really happy to be part of this really important discussion to learn about organizations that might be a good fit. I strongly recommend starting with some soul searching. Take the time to think about, what are you passionate about? What are you willing to spend your precious time on? In my case, that included a lot. So then, I focused on the top ones for me. That includes Duke Law, international, in-house practice, and promoting diverse directors. I serve on boards representing each of my interests.

Once I identified my top areas of interest, I looked for potential organizations for those interests both online and by networking. Once I identified suitable organizations, I spoke with current members to learn about their activities. And I then joined the organizations as a member and let it be known from the very beginning that I am very interested in participating.

I then participated. I attended meetings. I went to activities. I have found that one of the best ways to transition from being a member to serving on a board is by joining committees.

Many organizations encourage non-board members to join committees, which are run by the board. This is a way that members can support the organization and board members can get to know you. Boards need to work collaboratively, so it's very important for board members to feel that new members will be able to work collaboratively with them. And the best way for them to know that is for them to know you.

Once I let organizations know I was interested in joining committees and eventually the board after a time of actually participating, I was then invited to join a committee and then the board. I'm in the Raleigh area, which undoubtedly makes that easier than in a larger area. But as Geoff said with the rise of remote everything, it is now possible to join boards anywhere.

In my experience, non-profits and association boards are desperate for doers. There are loads of people who want to join a board just to pad their resume. And good boards, the ones you actually want to join, will see right through that and look for people who are passionate about the organization's goals and will participate, which will be you because you first thought about what you're passionate about and then you participated.

There is also likely a financial commitment for non-profit boards, which is another reason to be really thoughtful about which boards you want to join as you'll likely need to put your money where your mouth is. In an area like Raleigh or Iowa City, where I'm from, the financial obligations are extremely reasonable, and they are not a barrier to entry. I have found it to be extremely rewarding to be on a few boards because I can really make a difference to the organization, plus the networking is much more effective.

One of the most important things to remember is that you are not only networking with the person you are actually speaking with, but with their entire network. So when you are passionate about an organization and you're a doer and you contribute something financially, the person you are speaking with is likely to not only think highly of you for the current organization you're working with, but they're also more likely to remember you when they're working with a different organization that you might be a great fit for. And that's exactly how I've gotten on many of my boards, that I've met people from one board, was truly passionate-- I don't make up my passion-- and I was truly passionate about what I was doing, and then they suggested other boards that I could join. So my final statement on that is there is a real dearth of doers. Be a doer, and that is the path to, frankly, great board participation.

GEOFF KROUSE: That's a really good point. And particularly in markets like ours, Diana, where it's a relatively small pond-- I mean, there's a handful of large law firms. There's a number of public companies growing now, but you do tend to see some of the same people.

It's not necessarily because they're recycling the same people, it's because these are the people that are doers and get noticed on one board. And the next thing, they're on another board and then another. So someone like Diana has gotten picked up by multiple boards because of your willingness to engage.

And like you said, it's not just your money where your mouth is, but putting your energy behind it.

Everybody is busy. I mean, we've all picked a profession where, unfortunately, it's a 24/7 type of environment. And so everybody's got more to do than they can always do, so it's a matter of prioritizing.

And so I think you made a really good point about that sort of cross referral network that happens within boards as well.

Well, thanks so much for that. That's a great and very thoughtful answer. And yes, passion and mission is really a huge driver. Obviously, it's the motivator ultimately.

All right. I'm going to move on to ask Mark a question. I see we've got a couple comments in the chat. I will ask my team to continue to monitor that.

OK. So Mark, speaking a little bit to your experience, you have served on a variety of boards, some related to your profession very specifically, generally, some, I'm assuming, unrelated to your profession when it comes to secondary schools or youth sports or things of this nature as well. So what are some of the tangible types of experiences or skills that you've gained from serving on these different types of boards that you're actually able to apply to your legal practice? And obviously, you're in a real estate firm, so it's not a law firm, but there's probably elements of what you've done in your different capacities that translate well into your business practice. Maybe even speak a little bit to that.

MARK DIORIO: Sure. Thank you, Jeff. Glad to be part of this. Thanks for inviting me, and I look forward to hearing everyone else's thoughts because Diana, it felt like her experiences really overlapped mine so significantly.

I do work in a privately held corporation now, in house, so I've been embedded with the client, as I like to say, for quite some time. And I've always had what I'll call two hats. That legal hat business hat that we often speak about, but I was at a large law firm Ropes and Gray for a number of years before I came in house.

I think the thing that I find my board experience is it both substantive skills, and I'll call soft skills. And I think we're always works in progress. So to a certain extent, I feel like every time you work with a board you're gaining all the time in terms of your skills.

So for me, I would say some of the more softer skills very much carry over to my practice because we've got a small firm. But we keep hiring and growing, and we have people who have been with us for a couple of decades, people have been with us for a very short period of time. Boards, you get that natural turnover. You get people who've been with the board for four or five or six years, some who just come on. And to be able to particularly, as chair of the board, to be able to incorporate what I'll call the diverse constituencies you have, give everybody an opportunity to speak, and make sure you get them to contribute, I think is a skill I find that really translates well to my small organization. So that's more of a softer skill in some senses. I think part of what I've learned too over the years is-- it kind of somewhat echoes what Diana said too.

You're volunteering. You want to be very ruthless with your time. We all don't have enough time, so it's hopefully something you're passionate about and willing to spend the time.

And remember, everybody else is in the same boat. So when you're having, whether it be Zoom meetings now or in-person meetings, you want to be efficient. You want to make sure that you manage folks' time.

If you say it's going to be an hour, make it be an hour. Do not go longer than that.

Make sure that you don't have meetings just for the sake of meetings, which seems to be a problem that we've all had in organizations. Maybe now we've all had more Zooms than we need to have. So those are kind of more softer skills too.

I think kind of more the specific skills that translate well to my own in-house practice-- there's a lot of financial business information you get by working at a board, even if you're not in more of a leadership role but just the board member. You're going to learn all about this small company, really. It's a non-profit. So I'm talking about finance. I'm talking about their branding and marketing, their recruiting, employment issues, the facilities. They own buildings, sometimes.

All these things actually I think are important because in my small business, we're basically in the same boat. And so we have all those issues. And I find that I've gotten more in the weeds in ways that, even with my business hat on in my company, I never had, other than by serving in a non-profit board.

The other thing I'll say that's happened, which you do a lot of in-house, you stretch. We're kind of generalists, and a lot of things get tossed at us. And we need to understand what we can handle and what we need to farm out many times.

But even if you farm something out to outside counsel, you're often involved. So you're always learning. It's one of the variety that is the spice of life for my practice. It also is one of the great benefits, one of the drawbacks, because you're trying to take your limited time and manage a number of things and determine what's best handled, as I said, in your house versus outside.

But I find my work on the board is often, you may be the only lawyer on that board, and that puts you clearly in their sights. OK, whatever they think has a legal aspect to it, go to this guy or this woman because that's who they are. They're the lawyer. They'll be able to help you out.

And it helps you learn, I think, some more substantive skills, but it also helps you, I think, you put yourself in the position to think on your feet, which is really important. And I think kind of stretch, which is always a good thing, I think, whether you're in house or whether you're outside. We're all about developing our skills, and I think that's one of the things that comes out, at least in my experience, of working on several different non-profit boards.

GEOFF KROUSE: Those are great points. This is why there's such a great opportunity for our graduates. First of all, for all lawyers, but you have a Duke Law degree, and you're really sought after by some boards, particularly if they don't have any lawyers or former lawyers on them. So to Mark's point, the same thing.

I was a corporate M&A lawyer and there'd be a dispute with an employee, and they'd asked me how to handle that. At least I have friends that knew that and could kind of bounce things off of them. And like you said, I think just being able to stretch and think a little bit more like a business was helpful for someone like me who was doing corporate and representing companies to understand the financials, the HR issues, real estate issues, things of that nature.

So I think that's a really good point. Well, that's really helpful. And hopefully we can sort of flip the question a little bit out. And Mark, feel free to chime in here, too. Or Diana, I know you thought about this as well.

But I want to kick this over to Michelle because you were sharing, Mark, experiences that you gained from your board work to help you with the practice. And there's probably some relationship here, Michelle. But maybe you can share with us some of your experiences that you've had that you've gained in practice that actually were able to apply to your board service directly or indirectly.

MICHELLE PARK CHIU: Sure. Thanks, Jeff. And it's a pleasure to be here, and thanks for everyone joining and taking time out of their busy schedules to be part of this panel.

I think one of the main things that I was thinking about this question that is translatable that you need in practice that is important for board service are your oral advocacy skills. So if you're on a board that are making decisions, whether they're policy decisions or decisions about what direction to move in, and there's a difference of opinion, you really need to rely on your ability to speak clearly, concisely, and persuade the rest of the board to take a decision if you have an opinion on that. That's something that everyone deals with in practice and learns in practice and can be a really incredible skill that you can bring to a board because then you can effectively advocate for the position that you think is right for the organization.

And just one thing that I wanted to note, especially based on the poll results for our younger graduates, serving on a board is an excellent way to practice the skills that you need to have in your own practice, whether it's a litigator or a transactional lawyer. You get more opportunities to put those skills into practice when you're serving on a board or working on a committee than you may otherwise doing your daily work for your clients. So I think this is a really great way to exercise your skill set, and, like Mark said, to stretch early in your career and just gain those kinds of skills early.

Something else that I think translates well from my practice to being on a board is just basic problem solving. As Mark mentioned, sometimes you can be one of the few lawyers on a board. Lawyers are great at problem solving. We know how to issues spot. We know how to analyze.

And we know how to put together a plan to solve whatever problem your organization is facing. So whether that's trying to accomplish the goal with limited resources, whether that's time or funds, and using your problem solving skills to figure out, do we have connections in our organization to match sponsors to get certain donations for an event that you're planning? Or how to reach out to your network to find some speakers for a panel that you're organizing? I think problem solving that all of us do as lawyers is critical in being a productive and responsible board member.

And then the last thing I just wanted to note is that you do get to practice serving your fiduciary obligation to your client. So as lawyers, we all have ethical obligations to our clients and to do what's best for our client even outside counsel. And so sometimes that can mean the client makes a business decision that you yourself may not decide to do in litigation because you have a difference of opinion, but ultimately, your obligation is to serve what is best for the client's interests. Subsequently or consequently, when you're on a board, you have to do what's right for the organization, even if that might be slightly different from what you personally believe is how you would react in a situation.

As the President of the Asian-American Bar Association, we do engage in a lot of issues that have a lot of difference of opinion and can sometimes be hotly debated. And as my role as a leader on the board, it's not my position to say, well, this is what Michelle wants, and so this is what the organization should do. It's a reminder that you should do what's best for your membership and your organization. So it's a good way to exercise understanding a fiduciary obligation to your organization, which I think fits nicely with understanding how to do that for your clients.

GEOFF KROUSE: That's a really nice point, too. And like you said, that sometimes happens with clients. Sometimes if you were the owner of the business, you might go in one direction, but you can certainly provide the best advice for them, and at some level, they might have to do what they feel is best for them in the moment.

Can I ask one sort of follow up related question, Michelle? Because you've been you've got a leadership position both within your firm and multiple leadership positions as well as at non-profits. I'm curious as to did one come first? Or did one give you confidence that you can handle the other?

MICHELLE PARK CHIU: That's a great question. I actually began in the leadership role at the American Bar Association before I stepped into firm leadership roles, and I think it definitely does develop that confidence. So I became an officer of the board I think in 2016 or 2017, and then I was elected to the presidency this year.

But I think managing an organization-- our organization has over 1,000 members and is a pretty active Bar Association-- but understanding how to achieve consensus, work through difficult issues, especially in the last year with the rise of anti-Asian discrimination and violence. And we've had a lot of challenging discussions about how to best meet our organization's needs.

And throughout that process as I was in the leadership of ABA, I was gaining skills to understand how to navigate leading a group. And I feel like that gave me a lot of confidence to step into the firm leadership roles when I was asked to become the hiring partner, our practice group leader in San Francisco, because I had had the opportunity to deal with these issues at the organization. So I think it's a great training ground for so many different levels of career development.

GEOFF KROUSE: That's great. Thanks for the follow up. I think that's really interesting.

OK, so let's kick it over to Corey. Let's see if I can find him on my screen. Corey, as I shared early on, you've had a lot of different types of non-profit board experiences.

I guess could you share, maybe, with the audience, what have been some of your most meaningful experiences, either from a professional standpoint or even personal standpoint? I know, again, sometimes service on non-profit arts is very personal to people. It's a mission that they are very strongly behind, so maybe you can share a little bit about your most memorable experiences at serving on boards.

COREY LEE: Sure. Thanks, Jeff. So much like my legal practice, my experience with non-profit boards has been very varied. So I've served on the board as an officer with the Leadership Council for Legal Diversity for their alumni group, doing everything from acting as a treasurer to leading that organization. I'm on the Advisory Board for the Advanced Institute on E-discovery. I'm on the board of my kids' school. But the organization I really like to talk about is AMIkids, which is a organization where I sat with the local board down in Miami. So I just moved to the Northeast Ohio area about a year ago. I was in Miami for 14 years before that.

So the Miami organization I originally came to serve because honestly a client asked me and then eventually ended up being the president of the board was an organization that worked to provide educational, vocational, and counseling services for adjudicated kids, so kids who really need some help, but there's not a whole-- they're not one of the sexy charities where everyone wants to run out and tout how much they're doing for them. So based on a client need and going out and doing a tour of our organization, I saw it was an organization that was doing really great work for a really unrepresented population. We're talking about kids who lived in Miami, who live two miles from the ocean, and had never seen the water.

So this is the kind of population we're talking about that really needed some help. So during the course of working that organization, the financial crisis comes, and it really hit Miami, and Florida, particularly, really hard. And one of the things that the organization had really come to rely on is having the school district

provide transportation so that these kids could come from all across the county to get to the program, to get the skills and services that they really needed.

And with budget cuts going on everywhere, cutting services, adjudicating kids was one of the first things to go. So we find ourselves in a situation where we really had a \$200,000 budget gap. We're really trying to figure out, how do we get these kids to school and allow them to get the services they need?

And as lawyers, one of the things we do really well is we educate and advocate. So using my skills as a lawyer, I was able to go out to a lot of stakeholders within the community and help some organizations find some money they had in their budgets, helped people really reconsider how they thought about our population, and really help our kids get the services they need. And it was really just touching to me to really take these kids who had been honestly doing some horrible hour, hour and a half car rides and get them back to where they needed to be to get the services they need.

So by working on a board, you really can have a profound impact in the lives of the people you're touching. And for me, just giving some hope for kids who really do great things when given just a little bit of attention was really touching and meaningful for me.

GEOFF KROUSE: That's terrific. And it makes it easier if you're doing some of that work over the weekend or in the evenings or in off hours, just to help out when you have that type of mission behind it. That's terrific. Well, thanks for that perspective.

I think at this point there's a few questions in the chat. I'm going to look at them as we launch a second poll here. And I think some of the questions are things we were likely to touch upon anyway, so I'll try to weave that into our sort of final question. But Conner, do you want to run this second poll?

CONNER COOK: Here we are.

We've still got some votes coming in, so we'll give another second or two, and then we'll close the poll.

All right, last chance. And we will end it and here are the results.

GEOFF KROUSE: OK, let's see. Yeah, not surprising. Time commitment. That's where being passionate about the cause comes into play, right, as Diana kicked us off.

Maybe the first thing to do writers think about things that you care about, things that you're passionate about, and/or things that you want to learn more about to be a little helpful. Yeah, there are times when it's not convenient, right, and there are times where you've got a board meeting that's the day before a deal is closing or you're heading to trial. And there's a commitment you make when you take on the board role to still make most of the meetings and engage the best you can.

I get it. And I think as a couple of you touched upon, I think the financial commitment can vary a little bit, depending on both the geography of where you are and the type of organization it is. There's been some questions about fundraising for non-profits as well that maybe I'll touch upon that can kind of tie into that. And I even know one organization, just to throw it out there, that I worked with, was Ronald McDonald House. There were certain board members who didn't have the giving capacity maybe as others, but if they were able to help fundraise, if you will, or find maybe their organization or others that they knew to also chip in and support financially the organization, that sort of satisfy their financial commitments. So I think for younger lawyers in particular who might still be paying off loans and this type of thing, there are some opportunities, and there's often some accommodations that can be made in certain situations if the financial commitments the barrier.

So let me do this. I'm going to start with a question that I actually would love all four of our panelists to chime in on. Kind of going to this, go into the advice, and it kind of goes to some of these questions we've received in the chat. So I don't know if you all saw the last comment about-- this question is going to be sort of, what would you recommend for people who want to get involved? What advice do you have? A really good question about, if you're in private practice, any issues with conflicts checks, right. Again, it depends on the nature of the organization. And also, the issue of Mark's point and Michelle's point-- I think they all make this point. Sometimes if you're the only lawyer on the board, they think you know everything, right. And they ask you sometimes for legal advice when you're really not in a position to give formal legal advice.

How do you set those boundaries up? How do you protect yourself and, frankly, the rest of the organization, through B&O insurance and otherwise? So let's kind of keep those in mind, and I'll ask this sort of question. And each of you can kind of leave any of that in as you like.

But maybe I'll start with Diane again, just for fun. Maybe in just a few sentences or less, what advice would you give to our alumni, Diana, who are interested in joining various boards? Any specific advice you would give beyond making sure you're passionate about it?

DIANA ALLEN: Right. So it's a little bit of a broken record. I mean, first off, I would say go for it. There has never been a better time. I think one of the questions in the chat was, do we think we'll see more non-profits coming on board given all the struggles we had in 2020?

And so this is a great time. The non-profits that we have today are all struggling. If you think about how hard it was for profit to work through 2020, think about the non-profits where everyone was distracted with their own home life.

In the best case, they were distracted as opposed to having something absolutely tragic happen, which did. We have to remember, this was a pandemic that is among the most awful things that have ever happened. During that time, non-profit needs increased tremendously while attention decreased, so there has never been a better time to help out a non-profit.

As I said before, do some soul searching. Think about what you're really interested in because you do have limited time. And I can tell you right now, there is no value in peanut buttering with boards. Focus what you're really interested in where you can really contribute, and do your research.

There are a number of questions about how can you vet a non-profit? You absolutely should be vetting it, especially if you have not been part of a non-profit before. So I would recommend for your first non-profit, take a hard look at the non-profit. Look at their website. It should have lots of information on there about their status.

Make sure they actually are an organization. Sometimes they're not. Sometimes they haven't bothered to file any of their paperwork. So make sure you have just a good sense of the position they are in.

A really great non-profit for a person to start with is a non-profit that seems very buttoned up, and when you speak with the members, they actually are buttoned up. And make sure to ask about board orientation. An experienced non-profit will have board orientation in which they touch on all of the things that were asked in the chat, and many, many more.

So I would suggest, start with someone who already knows what they're doing because then you will learn from that organization, and that will make it much easier for you to join other non-profits that have good intentions. Make sure they always have good intentions because just like in any other organization,

a lawyer, especially an inexperienced lawyer, can be very attractive as a front for not so good behavior, which can be a little shocking. Here you are leading with your heart, and you want to help.

Not everyone has as good intentions as you do, so do your research and learn. And once you've learned from a non-profit that knows what you're doing, you can then work with other non-profits that, again, have good hearts and good intentions and are not trying to use you to be a front for their bad activities. But then you can help them develop the good information and the good structure and corporate governance that you saw at an earlier non-profit.

GEOFF KROUSE: Those are all really, really good points. I think I saw the other panelists nodding their head as well.

COREY LEE: Just a quick thing to add there. If you're looking at a way to kind of do that research, an easy way of doing it is asking for prior minutes of meetings. And that should give you a guess as to what is going on in the organization. And if they don't have minutes, it's probably a good sign to you that there might be some issues that you either want to delve into a bit more or an organization that may not be ready for you.

MARK DIORIO: If I can jump in on that or kind of echo what Corey and Diane have said. I mean, I think it's like that saying, once burned, twice shy. You want to have that good experience, as Diana said, and then hopefully you can continue to have good experiences and bring your expertise and your passion to a number of organizations.

As Corey said and Diana said, do your research. And part of that, at least if you're in a local setting where it's going to be an in-person circumstance, which we hope we're all getting back to more and more, not only look at whatever you can find online, but if there's a board orientation, they should share with you the bylaws, not only the minutes. You'll get calendars of how often the board meets.

You'll get to understand what the commitment might be, which means you might have to serve on a couple of committees and what that time commitment look like. And I would say no matter what the time commitment is, even if people want to be as candid and I think they are, it's just always tends to be longer, especially if you are passionate and you're someone who likes to cut square corners. And we're all kind of conscientious folks who do a good job.

I would also say to the extent you can, meet with some other board members, current and maybe some who've just come off the board, and find out what their experiences have been. And also, part of that I think is to understand of where the board is. What have they just gotten through? Was there a meeting of fundraising? Was there a big large capital campaign or is that being teed up now?

And so that might give you some insight into the financial commitment that you might have to make or where you may have to do fundraising. And some people aren't comfortable doing fundraising. All that I would try to, like a lot of things in life, communicate, communicate, communicate.

And I think they're going to be happy because as Diana I think alluded to, boards have so much more to do than-- they're always looking for volunteers. And whether it's on the board or elsewhere, most of these non-profits are just happy to have your assistance early on in some capacity. And then maybe move up into board, and that's a good way for you to get to know the board, too, so that's another way to research it. Anyway, my thoughts around that.

GEOFF KROUSE: Again, those are also great thoughts. Michelle, you want to share your thoughts?

MICHELLE PARK CHIU: Absolutely. So I echo and agree with everything that our great panel has said. I would just say that you should treat your board service as an extension of your career, and you'll get more out of it when you treat it that way and not just as sort of an extracurricular.

I know many of, especially our younger attorneys, may be at firms that have a lot of time commitments in terms of billable hours, so it can be difficult to think about adding another obligation to your schedule. But you'll really get more out of it if you put the energy, the passion that Diana talked about, the resources, and the attention to doing a good job as a board member because then people will see that you have the talent and skills and energy to do a lot of great things in your career. And that can show up in a lot of ways that you may not even expect, right, through this network of your organization.

But don't mail it in. Being on a board for many years, there are some people who want to just be part of it so they can put it on their resume. Diana mentioned don't peanut butter the board service. That's not going to do anything for you.

If you're sort of an absent board member, people notice that. We're all trying to do things for that organization because we believe in its mission, and if you're just kind of hanging on to have that line on your resume, it's not going to do great things for your personal brand. So I really encourage you to do the due diligence.

Think about where you want to put your passion and your energy. Why are you doing it? Understand what you're trying to get out of your service, and then treat it as another extension of whatever your day job is. And just think of it holistically in that way.

I did see a specific question about, what do you do if you're an outside counsel to join boards? Most firms will have a fiduciary review committee where you have to provide information. Like is there D&O insurance? Who are the board members? Is anyone involved the client, et cetera?

And they'll evaluate those before they give you the OK to proceed because there are some potential conflict issues, especially on some of the bigger boards. So just wanted to encourage you to look into that if you're interested. To the extent that you're at a law firm, that can be something you can take care of.

GEOFF KROUSE: That's a good point. And there is a related question about boundary setting and all that. My advice again, to Mark's point, is communicate and being transparent, and a lot of times, people--
[INTERPOSING VOICES]

GEOFF KROUSE: I think Cartoon Network just came on or something. A lot of people will seek your help and assistance earnestly, but you're the only lawyer they know. And they just kind of assume that you're a lawyer who knows everything about the law and can handle any sort of legal issue.

So there have been times where I will provide unofficial guidance, I would say not advice, to the board of how to proceed. Sometimes that involved seeking specific counsel, engaging specific counsel that could help with this particular issue. Or other times, saying, let's see how it develops and talking to the HR person of the organization. I think that's where sort of judgment and experience comes in too, and problem solving, and all we're all good at that and capable of that.

I've got a couple other questions about serving, including from one of our most recent graduates, or actually, Class of 2020. Just asking a little bit more about how to vet or speak to the potential financial commitment. Does every organization have a financial commitment? What's the range?

I gave the example in our prep call last week that I was the president of the board of the Ronald McDonald House on Duke's campus here in Durham for six years. It's been a while, back in the early

2010s. And that financial commitment was probably 1/20 of what it would be had I joined the Ronald McDonald House board in New York City, in Manhattan that was there or what it might be in Chicago, for example. So it does vary significantly depending on geography and maturity of the organization.

There's some organizations which have endowments that fund most of their operations, and the additional fundraising tends to come when needed for an expansion or some new services or facilities. And others are very much every year, they're scrambling, and they're scrambling to raise those dollars to meet their budget. Obviously, those are non-profits that are not looking to really profit anything there. They're just looking to pay their expenses and their employees, which is usually far and away a very big part of their expenses. So I think it can vary, but I don't know if Corey, Diana, Mark, if you want to share some ranges. You're all living in different parts of the country, too.

MARK DIORIO: I can jump in. I could say that my experience has been kind of three different aspects on the funding capacity or the financial commitment. I've had boards where they want you to confirm you're going to make this one of your top three charitable donations, if you will, which kind of leaves a lot of discretion.

I've had some boards where they just want you to participate and donate to the extent you're able, and they leave that to your own conscience and your own circumstances. And then I had some boards where basically our expectation is x dollars. So it does run the gamut, and these are all non-profits.

And I'm in the Boston area, so I would say that suburban Boston is where I've been mostly involved with boards, but suburban Boston, close in suburbs where it's not a lot of change from being a large city.

That's been my experience. Others may have different experiences.

COREY LEE: So something I think I would add to that is for younger people, even if there is a somewhat substantial financial expectation, it doesn't necessarily mean you need to write a check. Most of the time they say give or get policies so that you can either give the money yourself or fundraise from others. Corporate organizations and law firms are frequently a good source of getting those funds, so do not let the initial ask for funds scare you off.

MICHELLE PARK CHIU: I agree with that. And from San Francisco, I can say there's a whole variety of financial commitment requirements. I think generally if you're looking at really large national public charities and to serve on the boards of those organizations may require a higher financial commitment, so I can understand how that might be a barrier for many of us.

But if you're looking at bar associations, professional associations, or more local chapters, kind of like Geoff was saying, the financial commitments tend to be much more reasonable because they want you to participate. They want to increase the organization's profile with your network, and they don't want to scare people off by having extremely high financial contributions. So I think it's perfectly reasonable to ask if you're interested in serving on a board to ask the current board of directors and leadership what that'll look like.

So you can tell them I'm interested, but that's sort of beyond my reach at this point. But I'll put that sort of into my planning for if I can get to a position, and they might be able to work with you. But I wouldn't be too scared off by that if you're looking to get involved in the community.

GEOFF KROUSE: That's a great point. I think we have time for one more question I'll offer up to you. And I have a related point to what Michelle just said there that I just want to flag for people, someone mentioned in the chat.

Boards often do or organizations often do market or tell the world that we have 100% of giving participation among our board members. Now, it's just a strong powerful statement, and when they're going out and asking others to give to the organization, it's helpful when they themselves have done that. But that can be, in a lot of cases, \$50 or \$100. That doesn't have to be a four or five figure number for sure.

But that is a powerful statement, and it's actually the flip side is not so great when like half your board doesn't even give to the organization that they're trying to raise money for. I just wanted to mention. That was a good point someone made in the chat.

And the last question, I'll throw it out to any of the panelists. We got I guess five minutes left here. But is there a better or best way to approach an organization about one's interest in serving the board? I think a number of you have said certainly once you've had that experience, sometimes you get inquiries from others or overtures from others because they've seen you in action and know that you're good.

But if you're going to be self starting about it, is there a good way to reach out to an organization? Do you contact the board member? Do you contact the executive director? How would you advise to do that?

DIANA ALLEN: I would start by participating because it does seem a little odd to have somebody reach out and say, I want to join the board and I've never participated at all. If you've identified an organization, it can be any organization. I'm looking at these lovely flowers in front of me.

Let's say I decided I'm really passionate about wildflowers. So I would look online for a wildflower group. I'd check out their website. Since this is my first board potential, I want to make sure it looks OK, at least on the website.

And then I would look for their activities. And if they're having a garden show, I would go to the garden show. First look around, make sure I actually like it, and then just start talking with people there.

I don't know of a shortcut. So some of my other panelists may, but to me, it really is getting to know them a little bit first. And again, it's perfectly fine that first day to say, I'm really enjoying your organization. I'd love to participate in committees and a board someday. That's perfectly fine, but it would be a little odd to immediately join a board, in my experience.

MARK DIORIO: If I can jump in quick. I can't remember who said this. It's not about me or you, it's about the board service, right.

I feel that's very akin to having several children. It's not about me, it's always about my kids. And a lot of my board experience resulted from my children being involved, taking music lessons, getting involved in sports, going to a particular University. And I think that that's something that we overlook.

You're going to have these experiences, and it may end up being something you're passionate about. I had several children who took music lessons. I'm an avocational musician. Somebody on the board of this music school knew me and said, you'd be a great fit.

And I hadn't even thought about it. But I had, to Diana's point, I already had that experience and knew about the institution, had already been involved in it in some fashion, as a volunteer in rolling up my sleeves doing a number of things. So but I do think approaching a current board member, especially someone you know, is probably a great way to get involved.

MICHELLE PARK CHIU: I agree. And I get a lot of inquiries from folks who are interested in joining the Asian-American Bar Association. And the question is always, how do I get more involved? And my question back to them is, what's really interesting to you? We have several committees.

And try to find that fit, right. So you want to do as much vetting of the organization as you do just before jumping into the board because you want to make sure that they have the same values and the same goals that you do and their mission aligns with what's important to you before you just start jumping in, giving money and time. So I think there's no shortcut. You really should be involved with them and see if they are a good fit for you before you make that jump.

GEOFF KROUSE: That's great. Well, I want to be sensitive to everybody's time. We're about out of time here, and I just wanted to first of all, on behalf of the whole law school and the Alumni Development Office, thank all of our panelists for joining us today and sharing their advice and their experience.

It's great to hear from them. And then in the chat, so many of our alumni who are really giving back to their communities. And in my mind, really, when we talk about leveraging your law degree, I mean, that's what being a lawyer is all about.

We have our students take an oath the first day of orientation about what it means to be a Duke Law student and part of the community and the legal community at large. And obviously, we all take when we join the bars or various jurisdictions, a lot of that comes back to serving your community. So thanks to everybody for doing that and being interested in doing that if you haven't yet had that experience.

The program was recorded, so there'll be a copy available in the coming days if anybody wants to revisit any of it. And I've got to put on my Assistant Dean for Alumni and Development hat here. We are also a non-profit, Duke Law School.

I know all the panelists and so many of you have already supported the law school this year, which as you can imagine during the pandemic, has been more critical than ever. We're really encouraging participation. Again, it's just a sign of a community that cares about each other.

So if you are in a position to make a gift and you haven't done so this year, you can go online to gifts.duke.edu/law. And if there's ever anything beyond this a specific topic or any other topics that you have interest in hearing about, we'd love to know about it, so please drop us a line at the Alumni and Development Office. Thanks, everybody, for your time.

Thanks, Diana, Mark, Michelle, Corey. It was great seeing you all again. Good luck, and have a great summer, everybody.