1. What is the history of the organization and what has been Duke’s involvement to date?

1. Has any other institution hosted the organization?

1. Does Duke host the organization’s website? Is it clear from the website that it is a separate entity?

1. What is the mission of the organization?

1. Is the organization incorporated?

1. Does the organization intend to seek 501(c)(3) status? (Is Duke expected to receive donations that are made to the separate organization? Will Duke issue receipts to the donors?)

1. What are the major functions of the organization?

1. Who benefits from the organization’s activities?

1. Where does the organization do business?

1. How is the organization funded?

1. Does the organization file tax returns? Is it contemplated that Duke will file the tax returns as part of the proposed arrangement?

1. Does the organization have its own paid employees?

1. Where is the organization housed?

1. Will it be using Duke office or other space? If yes, provide details. Will rent be paid? If not, why not?

1. If agency funds are requested, has this been discussed with Finance (specifically Rachel Satterfield)?

1. Is there a Board of Directors?

1. Are there officers or other managers?

1. Are there separate advising functions and decision-making functions?

1. Who has the ultimate decision-making power?

1. Who has the final authority to approve spending and enter into contracts?

1. Identify the proposed role, function, responsibilities for each party (the other organization and Duke).

1. What is the extent of Duke’s proposed involvement?

1. What is the benefit to Duke of the proposed arrangement?

1. Will Duke be compensated for the services it will be providing?

1. Who would be the Duke “responsible person” for managing the relationship?

1. Would any Duke employees be decision-makers for the organization?

1. If yes, would they be acting within the scope of their Duke employment or do they/will they have a separate agreement with the organization?

1. Must agree to how the organization describes itself and in what ways it can or cannot use the Duke name or refer to Duke or use any other Duke trademarks.

1. Corporate Risk Management will specify insurance and indemnification requirements, based on the specifics of the proposed relationship.

1. Who at Duke has approved entering into this arrangement? (This type of arrangement should be approved by the Provost.)