

Margolis Scholars Program Handbook

Table of Contents

1. Overview of Scholars Program.....	2
2. Application & Selection.....	2
3. Learning Objectives.....	2
Knowledge Building	3
Skills Enhancement and Training	3
Professional Development.....	3
Community-Building and Networking	4
4. Core Program Activities	4
5. Program Completion.....	6
6. Scholars Supplemental Funds	7
Eligible uses of Scholars funds (if approved by Faculty Director):.....	7
Research Activities:	7
Professional Development Activities:	7
Summer Internship:	7
Funding process:	8
7. Scholars Updates.....	8
8. Continued Engagement of Scholars Alumni	9
Appendix A: Margolis Faculty	9
Appendix B: Health Policy Courses at Duke & UNC.....	12

1. Overview of Scholars Program

The Margolis Scholars program is a prestigious program for Duke University students that demonstrate a strong interest in and commitment to a career in health policy and management, as well as leadership potential to improve health policy. Named in honor of Robert Margolis, M.D., the founder of Duke-Margolis and a pioneer of innovative integrated care delivery models, the Margolis Scholars program provides promising students with the necessary knowledge, skills, and abilities to be the next generation of health policy leaders.

Margolis Scholars is a competitive program open to students at all learner levels. Selected Scholars are engaged in the program for 1 to 2 years, depending on their program of study.

2. Application & Selection

Undergraduate Scholars apply in their 2nd year at Duke for a two-year experience beginning in their 3rd year. The program is open to undergraduates from all schools and majors.

Graduate & Professional Scholars apply from the following programs. All engage with the program for two years except for **Medical Student Scholars**, who participate with the Margolis Scholars program for their 3rd year only.

Field	Degree	Program Length
Business	MBA	2 years
Engineering	MS, MENG-MBE	2 years
Environment	MEM	2 years
Global Health	MSc-GH	2 years
Law	JD	2 years
Nursing	DNP	2 years
	PhD	
Population Health Sciences	MSPHS	2 years
Public Policy	MPP	2 years
Science & Society	MA	2 years
Medicine	MD	1 year

Potential Scholars are evaluated holistically across multiple dimensions: academic interest in health policy, health policy-related experience, effective communication of interest in the Scholars Program, and the potential to bring unique and positive qualities to the Scholars community.

3. Learning Objectives

The Margolis Scholars program has four key components, together designed to create a foundation for a career in health policy leadership: **knowledge building**, **skills enhancement and training**, **professional development**, and **community building and networking**.

The Scholars program aims to achieve the following learning objectives for each Scholar:

Knowledge Building

- Describe the structure, organization, and financing of the U.S. health care system and how it affects system performance in terms of effectiveness, efficiency, and equity.
- Identify and explain emerging health care issue(s) at local, state, national, and global levels.
- Describe existing or proposed policy actions to improve health and the value of health care.
- Discuss the roles and perspectives of different stakeholders in the health care system.
- Summarize the policy-making processes and the economic, social, political, and organizational considerations that influence and control the development and implementation of health policies.
- Identify various ethical considerations for understanding the values and consequences of health policies and decisions.
- Outline the structural inequalities that impact health and health care and how health policies can address (or exacerbate) them.
- Understand the role of data, evidence, and analytics in the development, implementation, and evaluation of health policy.
- Identify sources of information and evidence about health and health care issues and past, current, and proposed policy solutions.

Skills Enhancement and Training

- Integrate, synthesize, and apply the knowledge and competencies from your program coursework to a real-world health policy problem or issue.
- Analyze the quality of research or policy analysis findings and assess their applicability to policy and practice.
- Conduct original qualitative and/or quantitative research or policy analysis to inform evidence-based solutions to health and/or health care issues.
- Develop and/or evaluate policy options to address health care challenges (at local, state, national, or global levels) and critically assess their effectiveness, efficiency, equity, and feasibility.
- Synthesize and translate complex health policy issues and solutions to different stakeholder audiences through verbal, written, and visual communication mediums.
- Prepare professional-quality health policy memos, reports, and presentations that are informed by skillful use of evidence and are appropriate for their purpose and intended audience.

Professional Development

- Develop a network of faculty, staff, and peer mentors.
- Hone confidence and proficiency working in interdisciplinary, multi-learner level teams.
- Develop leadership capabilities for health policy-related professional roles.

- Establish an awareness of and readiness for career paths in health policy.
- To strengthen interpersonal and intrapersonal skills for success in professional settings (e.g., self-awareness, adaptability, time management, empathy, teamwork, communication, awareness and respect of differences, active listening, critical decision making).
- Articulate your professional story (e.g., background, interests, current work, future trajectory) to academic and professional audiences.
- Demonstrate competence managing up, down, and across.

Community-Building and Networking

- Design a networking strategy aligned with student's career aspirations and establish a professional network of faculty, staff, and students at Duke and with external health care/policy professionals.
- Contribute to information/idea exchange and shared learning across the health policy community at Duke.
- Practice engaged citizenship with the Margolis Scholars community.
- Assess health and health care in the Triangle region (or North Carolina more broadly) and create unique solutions to address critical challenges faced by the community.

4. Core Program Activities

The Margolis Scholars program includes a variety of activities in each component category to help Scholars achieve the learning objectives outlined above. Some are required for program completion, and others are optional. Several requirements differ between **Undergraduate Scholars (U)**, **Graduate & Professional Scholars (G)**, and **Medical Student Scholars (M)**.

Activity	Required or Optional	Details
Knowledge Building		
Health policy coursework (see Appendix A for some of the possible options)	Required	U Take 3 courses total during the program
		G Take 3 courses total during the program
		M No course requirement
		Noncurricular courses/workshops may be approved to be counted toward this requirement on a case by case basis (using supplemental funds for non-curricular courses is <i>optional</i>)
Health policy Bootcamp	Required	All Scholars attend Bootcamp upon entrance to the program but are encouraged to attend both years.
Journal Club (monthly)	Required	Attend 4 journal club sessions per academic year (minimum).
Margolis Seminars (two Fridays per month, 12:00-1:30pm)	Required	Attend 6 seminars per academic year (minimum).
Margolis-supported events and public meetings	Optional	Scholars may attend, and occasionally may be able to help lead/support various Margolis events and meetings.

Skills Enhancement & Training			
Margolis-led research and/or Bass Connections project engagement	Required	U	One year of engagement during the program.
		G	One semester of engagement during the program.
		M	One year of engagement during the program.
		Director and Scholars program team will help inform Scholars of research opportunities and connect them to faculty/staff working in areas of interest.	
Scholars Skills Labs (SSLs) (monthly)	Required	Attend 5 SSLs per academic year (minimum).	
Health Policy Case Competition (annual, in the spring semester)	Required	U	Participate once (minimum) as a competitor or organizer
		G	Participate once (minimum) as a mentor or organizer
		M	Participate once as a mentor or organizer
Health policy translation & dissemination experience	Required	<p>Support (lead/plan) one experience per year (in addition to the annual Scholars event).</p> <p>Scholars may select one of the following: Health Policy Bootcamp, undergraduate house courses, Scholars Skills Labs, authoring a Margolis website blog post, or another written or verbal communication piece.</p> <p>Other options are possible with Director approval.</p>	
Margolis Scholars peer mentors	Required	Each Scholar will be assigned into a group of peer mentors and mentees within the Scholars program.	
Teaching assistant (TA) opportunities	Optional	Director and the Margolis education team will match interested Scholars to TA opportunities for Margolis-affiliated courses upon request.	
Health policy-relevant training courses/workshops	Optional	Scholars may use supplemental funds for Duke or external health-policy relevant (or proper methods) training.	
Scholars presentations at Margolis seminars	Optional	Scholars are encouraged to give Seminar presentations about their internships, research/Bass Connection projects, theses, Master's projects, and/or dissertation work.	
Professional Development			
Scholars academic & professional advising	Required	<p>Scholars meet with their mentor once per semester (minimum). Scholars may have additional meetings with the Director or Scholars Program Coordinator (optional).</p> <p>The Scholars Program team will also connect Scholars to faculty/staff contacts/mentors throughout the program.</p>	
Conferences	Optional	Scholars may use Scholars supplemental funds to attend/present at conferences relevant to health policy and/or their field of study.	
Internship/fellowship guidance and placement	Required	U	One internship/fellowship relevant to health policy
		G	One internship/fellowship relevant to health policy
		M	No internship/fellowship requirement
		<p>Internship/fellowship choice and timing should align with the Scholar's specific academic program requirements.</p> <p>Scholars may use up to \$5,000 of their supplemental funds to support expenses during an unpaid/partially paid summer internship if approved by the Director.</p>	

		Director, Scholars program team, and other mentors will provide internship/fellowship guidance and placement support upon request.
Community Building & Networking		
Annual Margolis Scholars event/collaboration	Required	All Scholars will work together to execute an event on a health policy topic of their choice. Instead of an event, Scholars may identify other options for substantial group collaboration (e.g., a coordinated thematic blog series with social media engagement), with Director approval.
Margolis retreat (annual, in the fall semester)	Required*	Attendance and engagement expected when possible. Scholars strongly encouraged to participate in the summer experience poster session if the retreat includes such a session. *Some flexibility for pre-existing commitments or class schedules
Scholars social events	Required	Attend 1 event per academic year (minimum).
Durham community engagement project	Required	Each Scholar must engage in one of the following options (minimum): a day of service at a Durham healthcare-related organization, a Durham/Triangle or NC-focused Bass Connections project with a community partner, and/or contribute to the Partnership for Healthy Durham efforts (e.g., helping with their annual assessments, listening sessions, or reports). Additional community engagement opportunities accepted upon approval by the Director.
Meet an expert	Optional	Director and Scholars program team to arrange unique opportunities for Scholars to meet experts who are visiting Duke (or who can be engaged virtually).
SCoHP engagement	Optional	Scholars are encouraged to engage with the Student Collaborative on Health Policy (SCoHP): joining the listserv, participating in "GRUNCHes," etc.
Margolis Scholars alumni events	Optional	Opportunities may be presented for past and present Scholars to meet and network.

5. Program Completion

Scholars who complete all requirements of the Scholars program (see table above) will receive a notation of program completion on their Duke transcript.

Scholars may use the [Scholars Portal](#) to track progress toward program completion, and should regularly discuss progress with the Director and the Scholars Program Coordinator.

6. Scholars Supplemental Funds

Scholars each have access to an individual fund of \$6,000 per year to be used for educational, research, and professional development activities, including possible use as a stipend for Scholars who would like to participate in a summer internship that would otherwise be unpaid or low-paid, subject to Director approval.

Scholars accepted to the program before 2020 should contact the Director to discuss details about their funding.

Eligible uses of Scholars funds (if approved by Director):

Educational Activities:

Expenses related to health policy related courses, workshops and trainings; subscription fees to health policy related academic and professional journals/publications, and skills based trainings and certifications. For example, Health Mgmt 716, taught in the business school, carries with it a \$450 fee for the Washington, DC portion of the course. That fee can be covered by Scholar funds. The Director must approve the use of supplemental funds before any purchase is made.

Research Activities:

Expenses related to a health policy research project under the oversight of a Duke faculty member, such as for data access, software, poster costs, or travel to present at a conference. The Director must approve the use of supplemental funds before any purchase is made.

Professional Development Activities:

Expenses related to building a Scholar's health policy-related professional network and skillset, such as professional organization memberships, conference attendance, or training workshops. The Director must approve the use of supplemental funds before any purchase is made.

Summer Internship:

A summer experience in which a Scholar will gain valuable and relevant experience, and the organization is otherwise unable to provide compensation or a sufficient level of compensation. These internships might commonly be with 501(c)3 nonprofit organizations, or local, state, or federal government agencies. Up to \$5,000 may be used to support a full-time summer internship.

Please note the program is unable to use Scholar funds for equipment that can be classified as a personal items such as iPads, Air Pods, computer monitors, computers, work station stands, chargers, and other such items.

Funding process:

Scholars should keep the Director apprised of their education, research, professional development, and internship goals and plans. Funding requests are more likely to receive quick approval if the Director is already aware of the funding requests the Scholars will be submitting.

When a Scholar wants to purchase something with their supplemental funds, they will submit a Scholars Funding Request form on the [Margolis Scholars Portal](#).

If the Director approves the request, it will automatically proceed to purchase, so the Scholar should be sure they want to use their supplemental funds and that all the information is correct.

The Director may deny the request and ask for additional information, but the request may still be approved after the additional information is provided.

If the Scholar has an immediate, time-sensitive request (e.g., a Scholar just found out about a highly relevant training workshop and the deadline is tomorrow), the request may be marked "urgent," but this option should be used sparingly. **Approval might not be processed on short notice.**

Please note that once a funding request has been submitted, it will take 1-2 weeks for Director approval/rejection. Once the request has been approved, it will take another 2-3 weeks for processing. Please account for this timeline when submitting requests.

Scholars are required to submit a Margolis Scholar Funding Request Planning sheet to help plan how they will use their Scholar fund of \$6,000 to support their health policy training at the start of the year. Scholars may monitor their supplemental fund balance and find the Margolis Scholar Funding Request Planning sheet on the [Margolis Scholars Portal](#).

7. Scholars Updates

Margolis Scholars should submit their achievements and significant activities through the Scholars Update form in the Margolis Scholars Portal: updates could include: helping to write a grant, contributing to a publication, giving a presentation, receiving an award or recognition, etc.

Scholars will receive reminders monthly to submit any applicable updates. These updates will help the Director and Scholars Program Coordinator make connections and recommend resources, allow the Margolis Center to join in celebrating Scholar achievements, and help Scholars maintain a record of their accomplishments.

8. Continued Engagement of Scholars Alumni

After completing the program, Scholars are invited to stay involved through activities such as participating in Scholars trainings, attending networking events planned for current and former Scholars, and hosting current Scholars in internships.

If you have an idea for engagement of Scholars alumni, please reach out to sarah.dunn.phillips@duke.edu

Appendix A: Margolis Faculty

Faculty Name	Degrees	School	Primary Department
Gary G. Bennett	PhD	Trinity	Psychology & Neuroscience
Janet Prvu Bettger	ScD	Medicine	Orthopaedic Surgery
Nathan Boucher	PhD	Sanford	Sanford
Don W. Bradley	MD	Medicine	
Jeffrey Clough	MD	Medicine	
Lesley Curtis	PhD	Medicine	
Michael Frakes	J.D., PhD	Law	Law
Ziad Gellad	MD, MPH	Medicine	
Elizabeth Gifford	MS, PhD	Sanford	
Bradi Granger	MSN, PhD	Nursing	
Adrian Hernandez	MD, MHS	Medicine	
Shivanand Lad	MD, PhD	Medicine	

Monica Lemmon	MD	Medicine	Pediatrics
Matthew Maciejewski	PhD	Medicine	Population Health Sciences
Richard C. Mather III	MD, PhD	Medicine	
Mark B. McClellan	MD, PhD	Fuqua	Fuqua
Steven Patierno	PhD	Medicine	
Faculty Name	Degrees	School	Primary Department
Arti K. Rai	J.D.	Law	Law
Shelby D. Reed	PhD, RPh	Medicine	Population Health Sciences
Barak Richman	JD, PhD	Law	Law
David Ridley	PhD	Fuqua	Fuqua
Devdutta Sangvai	MBA, MD	Medicine	Community & Family Medicine
Gillian Sanders Schmidler	PhD	Medicine	Population Health Sciences
Frank Sloan	PhD	Trinity	Economics
Corinna Sorenson	PhD	Medicine	Population Health Sciences
Donald H. Taylor	MPP, PhD	Sanford	Sanford
Peter Ubel	MD	Fuqua	Fuqua
Krishna Udayakumar	MBA, MD	DGHI	DGHI
Courtney Van Houtven	PhD	Medicine	Population Health Sciences
Michael Waitzkin	JD, LLM	Science & Society	Science & Society
Virginia Wang	PhD	Medicine	Population Health Sciences
Charlene Wong	MD, MSHP	Medicine	Pediatrics
Gavin Yamey	MD, MPH	DGHI	DGHI
Syed Yousuf Zafar	MD	Medicine	

Alexander Allori	MD	Medicine	
Hayden Bosworth	PhD	Medicine	Population Health Sciences
Preyas Desai	MBA, MS, PhD	Fuqua	Fuqua
Tong Guo	PhD	Fuqua	Fuqua
Faculty Name	Degrees	School	Primary Department
F. Reed Johnson	PhD	Medicine	Population Health Sciences
David McAdams	MS, PhD	Fuqua	Fuqua
Ryan McDevitt	PhD	Fuqua	Fuqua
Evan Myers	MD	Medicine	
Ann Marie Navar	MD	Medicine	
Emily O'Brien	PhD	Medicine	Population Health Sciences
Osondu Ogbuoji	MBBS, MPH, ScD	DGHI	DGHI
Nimmi Ramanujam	PhD	Pratt	
Jerome P. Reiter	PhD	Trinity	Statistical Science
Charles Scales	MD	Medicine	

Appendix B: Health Policy Courses at Duke & UNC

[the tables that follow are compiled regularly but may not reflect every health policy course offered]