

# Margolis Scholars Program Handbook

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## 1. Program Overview

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, health equity, and health care. 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 part of the next generation of health policy leaders.

Margolis Scholars is a selective program open to students at multiple 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 2<sup>nd</sup> year at Duke for a two-year experience beginning in their 3<sup>rd</sup> year. The program is open to undergraduates from all schools and majors.

**Graduate & Professional Scholars** apply from the following programs (see table below). All engage with the program for two years except for **Medical Student Scholars**, who participate with the Margolis Scholars program for one year (the Duke SOM Scholarly 3<sup>rd</sup> year).

Field	Degree	Scholars 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 (2L and 3L years)
Nursing	DNP	2 years
	PhD	
Population Health Sciences	MSPHS	2 years
Public Policy	MPP	2 years
	PhD	
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 robust foundation for a variety of professional roles in health policy: **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.
- 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 and Duke Health Policy 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. Program Activities

### A. Required 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 highly encouraged. Requirements differ between **Undergraduate Scholars (U)**, **Graduate & Professional Scholars (G)**, and **Medical Student Scholars (M)**. Unless indicated as noted, program activities are required of all Scholars.

The Scholars Program Key Components targeted by each aspect of the program are designated as K (Knowledge Building), S (Skills Enhancement and Training), P (Professional Development), and C (Community Building and Networking).

Activity	Details		Key Components			
Health Policy Coursework <i>See Appendix A</i>	U	Take 3 courses total during the program	K	S	P	C
	G	Take 2 courses total during the program				
	M	PUBPOL 862: High Value Health Care				

Activity	Details		Key Components			
Scholars Orientation	<p><u>Purpose:</u> To orient new Scholars to program requirements and processes, update current Scholars on new program changes, and give new Scholars the opportunity to get advice from continuing Scholars.</p> <p><u>Requirement:</u> All Scholars are required to attend orientation each academic year.</p>		K	S	P	C
Fall Intensive	<p><u>Purpose:</u> To build health policy knowledge and skills through sessions at a day-long community-building event.</p> <p><u>Requirement:</u> All Scholars are required to attend the Fall Intensive each academic year</p>		K	S	P	C
Spring Intensive	<p><u>Purpose:</u> To build additional health policy knowledge and skills through sessions at a day-long community-building event.</p> <p><u>Requirement:</u> All Scholars are required to attend the Spring Intensive each academic year</p>		K	S	P	C
<b>POD meetings</b> <i>See Appendix B</i>	<p><u>Purpose:</u> To provide opportunities for Scholars interact with each other and Duke-Margolis researchers in a small group setting to discuss health policy issues and health policy careers.</p> <p>POD meetings will take place approximately monthly throughout the academic year. Every Scholar will be part of a multi-disciplinary POD. Some POD sessions will be Scholars-only, while others will provide opportunities for faculty-Scholar interaction.</p> <p><u>Requirement:</u> Each Scholar must attend a minimum of 6 POD meetings per academic year.</p>		K	S	P	C
<b>Health Policy Seminars, Convenings, and Events</b>	<p><u>Purpose:</u> To advance Scholars’ exposure to and knowledge of a variety of emerging health policy topics, trends, and research.</p> <p><u>Requirement:</u> Attend a minimum 8 convening hours per academic year.</p> <p><u>Options include:</u> Margolis Seminars (virtual, two Fridays per month, 12-1:30 p.m.); Duke-Margolis public workshops/convenings; Scholars program “meet an expert” opportunities; or other health policy-related seminars, panel discussions, and events (Duke or external). For non-Margolis events, health policy must be the clear and central focus of the event.</p>		K	S	P	C
<b>Margolis-led Research and/or Bass Connections Project Engagement</b>	U	One year of engagement during the program.	K	S	P	C
	G	One semester of engagement during the program <b>or</b> a graduate/professional Scholar can elect to pursue a health policy internship experience instead ( <i>see internship/fellowship guidance and placement below</i> ).				
	M	One year of engagement during the program, as part of the 3 <sup>rd</sup> year SOM Scholarly Experience.				

Activity	Details		Key Components			
Health Policy Internship	U	One internship/fellowship relevant to health policy. <i>(This is separate requirement from the Margolis-led research and/or Bass Connections project engagement above)</i>	K	S	P	C
	G	One internship/fellowship relevant to health policy <b>or</b> a graduate/professional Scholar can elect to pursue a health policy-related research experience instead ( <i>see Margolis-led research and/or Bass Connections project engagement above</i> ).				
	M	No internship/fellowship requirement.				
Health Policy Leadership	<p><u>Purpose:</u> To build Scholars’ skills and potential as health policy leaders.</p> <p><u>Requirement:</u> Each Scholar must hold one leadership role per year</p> <p>Opportunities include, but are not limited to: Leading the Scholars Social Committee, serving as a Scholars Event Lead, designing or teaching an undergraduate health policy house course; serving as a student leader of a Bass Connections project, organizing or mentoring for the annual SCOHP Health Policy Case Competition; organizing a “meet an expert” session for fellow Scholars; participating in the planning committee or related activities for the annual Margolis Health Policy Conference</p>		K	S	P	C
Health Policy Translation & Dissemination Experiences	<p><u>Purpose:</u> For Scholars to gain professional experience in communicating to an audience about health policy and enhance skills such as poster or slide deck development.</p> <p><u>Requirement:</u> Each Scholar is required to present or publish once per academic year.</p> <p>Possible presentation venues include: Margolis Seminars, professional conferences or meetings, and school or departmental seminars or events. Potential opportunities for publications include: white papers, blog posts, policy memos, or peer reviewed articles.</p> <p>Content for presentations/publications may be derived from relevant coursework, internships, research projects, Bass Connection projects, independent studies, theses, Master's projects, and/or dissertation work. Other options may be considered and approved by the Faculty Director.</p>		K	S	P	C
Margolis Scholar Events <i>See Appendix C</i>	<p><u>Purpose:</u> To bring Scholars together to collaborate as interdisciplinary teams, share expertise, exercise thought leadership, and serve as ambassadors of health policy and the Margolis Scholars program.</p> <p><u>Requirement:</u> Each Scholar must participate on a team to design, plan, and execute an event on a health policy topic of their choice (subject to faculty director approval) each academic year.</p>		K	S	P	C

Activity	Details	Key Components			
<b>Surveys/Reporting Tools</b>	<p><u>Purpose:</u> To provide program feedback and document program progress.</p> <p><u>Requirement:</u> Complete each year-end Scholars Program Survey in a timely manner</p> <p>Report completion of program requirements through the Scholars Portal in a timely manner</p> <p>Make a reasonable effort to read and respond when appropriate to all other Scholars Program communication and information requests</p>	K	S	P	C

## B. Additional Supportive Activities

<b>Advising Meetings with Program Coordinator</b>	<p><u>Purpose:</u> To ensure each Scholar is on track for program completion and has an opportunity to receive individualized program support.</p> <p><u>Requirement:</u> Scholars should meet with the program coordinator once each semester while in the program if at all possible.</p>	K	S	P	C
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## C. Optional Opportunities

<b>Duke-Margolis Annual Retreat</b>	Scholars are expected to attend the Duke-Margolis Annual Retreat (typically held in September) except in the case of immoveable obligation (such as academic class meetings).	K	S	P	C
<b>Local Community Engagement/Service</b>	Scholars are encouraged to engage in the community through service, such as involvement at a Durham health care-related organization or participation in a Durham/Triangle or NC-focused Bass Connections project with a community partner. Participating in community engagement or service can also be integrated into POD meetings or Scholars Social Events.	K	S	P	C
<b>Margolis Scholars Social Events</b>	Scholars are encouraged to attend social events organized by the Margolis Scholars Social Committee and Margolis Scholars program team throughout the year.	K	S	P	C

## 5. Program Completion

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

Each Scholar's progress toward fulfilling program requirements will be monitored and reviewed regularly. Continuation in the Margolis Scholars program each academic year is contingent upon meeting the requirements and maintaining active engagement in the program. At the end of the first year in the program, if a Scholar has not met expectations, their program involvement, including access to stipends, may be discontinued. Similarly, if a Scholar does not fulfill all requirements by the end of their final year, they will not officially graduate from the Margolis Scholars program and will not receive the transcript notation.

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

## 6. Scholars Health Policy Education and Training Stipends

Each Scholar has access to two stipends per year:

- **Professional Development Stipend:** \$2,500 per program year
- **Supplemental Experience Stipend:** up to \$3,500 per program year

### A. Professional Development Stipend

Each Scholar can receive a stipend of \$2,500 per year to be used for educational, research, and professional development activities related to health policy.

#### Allowable types of expenses:

- Educational Activities:** Expenses for health policy-related courses, workshops and trainings; subscriptions to health policy-related academic journals and publications; fees for professional skills-based trainings and certifications. *Examples:* Course fee for HLTHMGMT 716 (for the "week in DC" component), STATA or NVivo training workshop, subscription to *Health Affairs*, health equity trainings.
- Research Activities:** Expenses related to a health policy research project under the oversight of a Duke-Margolis faculty or senior staff member. *Examples:* fees for data access, new software purchases, presentation poster costs, or participant incentives.
- Professional Development Activities:** Expenses related to building a Scholar's health policy-related professional network and skillset. *Examples:* professional organization memberships, conference attendance (e.g., Academy Health Annual Health Policy or Research Meeting), leadership skills training, taking a fellow Scholar or faculty member out to lunch or coffee.

**Exclusions:** Scholars cannot use their stipends to purchase equipment that can be classified as a personal item such as iPads, Air Pods, computer monitors, computers, workstation stands, chargers, and other such items.

#### Process and Reporting Requirements:

At the beginning of each academic year, Scholars are required to submit a plan outlining how they anticipate using their professional development stipend. The Margolis Scholars program team will provide guidance on creating the plan. Scholars can also reference **Appendix D**.

Scholars must submit their plan via the [Margolis Scholars Portal](#). **Plans for the Professional Development Stipend must be submitted by September 30<sup>th</sup> for the funds to be released in the fall.** Otherwise, the Scholar has until January 30<sup>th</sup> to submit a plan for funds to be released in the spring. We strongly encourage Scholars to submit their plans by September 30<sup>th</sup>.

Once the plan is reviewed and approved by the Faculty Director, the Professional Development Stipend of \$2,500 will be transferred directly to the Scholar's student account. Scholars are free to make their own purchases out of their stipends.

Scholars' professional development plans may change over the course of the year, as new opportunities arise. For the Professional Development Stipend, as long as purchases follow the guidance above and are directly related to health policy, no further action is required (i.e., no need to seek approval or review from the Faculty Director for spending changes).

At the end of each academic year, as part of the required year-end survey, Scholars will submit a brief summary outlining how they spent their professional development funds and how those expenditures supported key health policy education and professional development goals and interests outlined in their annual funding plan.

## B. Supplemental Experience Stipend

Each Scholar may request a stipend of up to \$3,500 per year to be used for unpaid or underpaid internships, research assistantships, and teaching assistantships. Underpaid is defined as paying less than the current Duke-designated student hourly rate at the appropriate level (e.g., undergraduate or graduate).

### Allowable types of experiences:

Examples include, but are not limited to:

- a. A summer internship in which a Scholar will gain valuable and relevant health policy 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.
- b. A research assistantship with Margolis Core Faculty or staff on a health policy-focused research project.
- c. A teaching assistantship for a Margolis-affiliated health policy course.

Exclusions: Supplemental experiences must have a significant and clear health policy focus to be approved for funding support. Internship placements or research projects focused on health, health care, and/or health care delivery more broadly will not be approved.

### Process and Reporting Requirements:

Scholars must submit a request to use their Supplemental Experience Stipend through the [Scholars Portal](#). Scholars may request up to \$3,500 in Supplemental Experience Funds at any time during the program year, but **funds must be requested and allocated prior to June 30**. Available funds do not roll over and cannot be combined across academic years. No requests will be accepted/reviewed between June 30 and the start of the academic year.

Scholars will submit a formal request via the Margolis Scholars Portal for review by the Faculty Director. The request must include the organization, the supervisor's name and email address, the start and end dates of the experience, the anticipated total hours the Scholar will commit to the experience, and the hourly wage the Scholar will receive from the organization.

If approved, and the supplemental experience is at Duke, or involves a Duke faculty member (including adjunct faculty members), the stipend will be paid on an hourly basis and the Scholar will need to complete and submit a biweekly timecard.

If approved, and the supplemental experience is entirely external to Duke, and does not involve any Duke adjunct or full-time faculty members, Scholars will receive a one-time transfer of the approved stipend amount. The internship or fellowship can transpire during the summer or any time during the academic year.

## 7. Scholars Updates

Margolis Scholars should submit information regarding their engagement in the program activities and requirements via the Scholars Update form in the Margolis Scholars Portal. We recommend doing this after each activity—so, in the case of the annual Welcome Event/Orientation/Fall Module, you would enter your participation immediately following the event. We will be tracking your progress in the program, and these updates will form the basis of your advising meetings with the Program Coordinator. You can also see a summary of your progress in the Margolis Scholars Portal that is based on your submissions.

Margolis Scholars should also submit their achievements and significant activities through the Achievements 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, securing a new internship or job, etc.

## 8. 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 [hilary.campbell@duke.edu](mailto:hilary.campbell@duke.edu).

## Appendix A: Health Policy Coursework

Margolis Scholars may select their own health policy courses to meet the program's coursework requirement (except for Medical Scholars, who have a specific requirement of PUBPOL 862). However, Scholars are strongly encouraged to take at least one course that covers the structure and financing of the United States health care system. Duke courses that cover these topics include PUBPOL 165, PUBPOL 825, as well as others offered in schools and programs outside Sanford.

If you cannot fit one of these courses into your schedule, it is highly recommended that you complete another learning experience covering this material, using your professional development stipend funds for access and/or materials, as necessary.

Medical Scholars should carefully consider pursuing one of these learning opportunities prior to starting PUBPOL 862 if they have not had much prior experience in these topics.

All Scholars are strongly encouraged to take PUBPOL 862: Policy and Management for High-Value Health Care. The course covers key components of value-based care that underly the Duke-Margolis mission of improving health, health equity, and the value of health care through practical, innovative, and evidence-based policy solutions. Class topics often include payment reform, health care delivery transformation, data and analytics, behavioral health, social drivers of health and population health, consumer engagement, and culture and leadership.

On the Duke-Margolis website you can find health policy courses regularly offered at Duke: <https://healthpolicy.duke.edu/health-policy-courses>.

This list is regularly updated but it may not reflect every health policy course offered at Duke. You can speak to fellow Scholars for ideas and reach out to the Margolis Scholars team, the Director of Undergraduate and Graduate Studies at Duke-Margolis, and Duke-Margolis affiliated faculty. Feel free to share with us any course that should be considered for addition to the health policy course list.

## Appendix B: Partnership for Development (POD) Programming Guide

The Margolis Scholars Partnership for Development programming (PODs) is a peer mentorship model adapted from Duke School of Nursing's PhD program. The PODs will provide a mechanism for shared learning and discussion among the Scholars, networking and personal and professional support, and engagement with faculty and senior staff. They will complement the other core programming of the Margolis Scholars program outlined in the Margolis Scholars Program Activities and Requirements Table (pgs. 4-7).

Each POD will be comprised of first and second year Scholars from diverse disciplines. At the start of the academic year, each POD will choose a POD leader. The leader will serve as the POD organizer and will be responsible for coordinating meeting times and locations, developing and sending meeting agendas, and taking attendance. The POD leader will serve as the point of contact for the POD and the program coordinator and provide general updates and share any attendance or engagement concerns with the Program Coordinator and Faculty Director.

### POD Requirements and Guidelines:

- **Frequency and timing of POD meetings:**
  - Each Scholar must attend a minimum of six (6) POD meetings per year. Thus, each POD must meet a minimum of six (6) times per year. *Recommended schedule:* Sept/Oct/Nov and Feb/March/April. More meetings may be scheduled as desired by the POD.
  - POD meetings are expected to run an hour to an hour and a half, depending on session focus and content and POD member schedules.
  - Each POD group will determine its preferred meeting locations, dates, and times.
- **Structure and content of POD meetings:**
  - Faculty/staff guests will participate in three (3) of the six (6) POD sessions per year.
    - Each of the three assigned faculty/staff guests will participate in one (1) POD session each year, with coordination and scheduling assistance from the POD leader.
    - Guest sessions may take such forms as a journal article discussion, a health policy research talk, a health policy issue spotlight, a “meet an expert” session, or a conversation exploring health policy career paths and/or professional development topics.
    - The POD members should collaborate with the guest to plan the session by asking if the guest has a preferred topic or potentially suggesting a format/topic and asking for recommended readings. The POD members are primarily responsible for ensuring there is a plan for the guest sessions.
    - The Scholars program will assign three faculty/staff guests to each POD.
  - All other POD sessions (3 sessions per year, minimum) will be organized, led, and attended by peer Scholar members.
    - As long as the meetings are related to health policy, PODs are encouraged to be as creative as possible. This might entail organizing a field trip, identifying a health policy-related film /podcast to discuss, organizing a “meet an expert” session, planning a community engagement outing, etc.
  - POD discussion topics could include:

- Recent health policy events Scholars have attended (outside of Scholar programming) – key take aways, lessons learned, etc.
- Scholar health policy interests and career goals and trajectories.
- Tips and advice on opportunities available within Margolis Scholars program, Duke-Margolis, and across Duke to advanced health policy knowledge, skills, and networks (including recommended courses).
- The Scholars Program seeks to encourage open conversations within PODs. Only high-level reporting on attendance and topic/guest will be programmatically required, not details of content discussions.

## Appendix C: Scholars Event Guidelines

Each year, **all Scholars** will work in teams to design, plan, and execute several public events on health policy topics of their choice, subject to Faculty Director approval. These events are designed to bring Scholars together to collaborate as interdisciplinary teams while sharing expertise, exercising thought leadership, and serving as ambassadors of health policy and the Margolis Scholars program.

### Event Format and Structure

Events can take the form of seminars, workshops, conferences, and panel discussions. Scholars may also suggest other event types. All Scholars will have the opportunity to submit event ideas and indicate whether they are interested in event leadership.

Each event will have between one and three designated event leaders, and a group of additional event supporters. *Every Scholar on each event team must contribute meaningfully in some way*, whether that entails involvement in planning, outreach, coordination, execution, drafting any accompanying materials, etc.

The event leaders will meet their Scholars Leadership Requirement through leadership of one of these events. The event supporters must be responsive to and collaborative with their event leader(s) to ensure successful event execution.

In suggesting topics and planning the events, please consider the following:

- Policy relevance
- Events should focus on policy analysis rather than policy advocacy
- Multidisciplinary or interdisciplinary nature/focus of issue
- Multiple stakeholder perspectives (e.g., patient, provider, payer, industry, policy maker, community member, societal)
- Relevance to major initiatives of Duke-Margolis:
  - Health care delivery and payment transformation
  - Biomedical innovation and policy (regulation, payment, access, evidence development)
  - Global health
  - State health policy
  - Health equity
  - Health policy education and training
- Feasibility (what can be feasibility planned and executed within timeframe and other commitments)

Past Scholars event topics included:

- The impact of the opioid crisis on foster care in NC
- Strategies to address drug access and affordability
- COVID-19's impact on access to care, food insecurity, mental health, telehealth, pandemic response, nursing workforce, and child welfare
- History-informed approaches to addressing racial health inequities in responding to COVID-19
- Behavioral health expert perspectives
- Addressing social determinants of health in partnership with community organizations

### *Event Audience*

The event audience should extend beyond the Margolis Scholars cohort. The events should aim to bring together Duke faculty, researchers, and/or students to learn about and discuss an emerging health policy issue. The events could target beginner, intermediate, or advanced audiences with respect to the chosen topic – consider at what level the material should be presented with the target audience in mind.

Any of the events may also target a wider local, state, national, or global audience and engage a broader range of stakeholders working across the health care (and other) sector(s), such as providers, payers, policy makers, consumer groups, community partners, the general public, etc.

This is a terrific opportunity to exercise and showcase the thought leadership of the Scholars and promote the program beyond the immediate Duke-Margolis community.

### *Event Support and Processes*

The events are to be Scholar-owned and directed. Scholars will be supported by the Margolis Scholars program leadership as requested or required. Support could take the form of help with solidifying an event/project topic, finalizing the event agenda/communications, identifying speakers and participants, and securing resources (e.g., room, catering, any required travel arrangements), and promoting the event. Scholars will also work with the Duke-Margolis Communications team to promote the event and collaborate on event planning, outreach, and communications strategies.

**The Margolis Scholars Events should be spaced out throughout the academic year, with flexibility on the exact dates.**

The designated event leaders will need to attend collaborative all-event leader meetings with Duke-Margolis staff and receive approval for their proposed event topic and timing.

Topics that event leaders will need to address as part of the event planning process:

- Proposed topic and aims, including how the event and/or project relates to the considerations outlined above
- Proposed location, format, speakers, collaborators, intended audience, etc.
- Estimated budget and justification if there are event costs
- Timeline, including key planning milestones and date(s) of event
- Key roles and responsibilities across Scholars and internal norms (e.g., how you will work together to accomplish event/project)
- Required or desired assistance, if any, from Duke-Margolis to support the effort

The initial all-event leader meeting will be held in late September.

## Appendix D: Professional Development Stipend Plan and Example

### Plan Template

<https://duke.box.com/s/k3ztr862pybw0ixb5vogiva1onxvvubf>

### Sample Plan

Margolis Scholars Professional Stipend Plan			
<b>Name:</b>	Jane Doe		
<b>Duke Unique ID:</b>	9999999999		
<b>Total Requested:</b>	\$	2,500.00	<b>Date needed by: 10/5/2023</b>
Budget Item	Description/Purpose	Amount	Additional information
<b>Professional Development Stipend</b>		<b>\$ 2,500.00</b>	<b>CANNOT EXCEED \$2500</b>
<b>Educational Activities</b>			
<i>Health Policy Course Fees</i>	HLTHPOL 608 offered in Spring 2023 DC Workshop	\$ 400.00	Date of DC workshop
<i>Workshop/Training</i>	STATA Workshop offered by Duke Department of Statistics	\$ 300.00	Dates of training
<i>Journal Subscription Fee</i>	Subscription to American Journal of Health Policy	\$ 250.00	Confirmed that Duke doesn't offer subscription through library
<i>Book</i>	Health Policy Ninja by ...	\$ 50.00	
<i>Certification</i>	STATA Certification: Advanced	\$ 100.00	
<i>Add lines/topics as needed</i>			
<b>Research Activities</b>			
<i>Access to Data Platform</i>	HP Data Now	\$ 500.00	
<i>Software</i>	STATA	\$ 500.00	
<i>Poster Printing</i>	Poster for Retreat	\$ 100.00	
<i>Participant Incentives</i>			
<i>Add lines/topics as needed</i>			
<b>Professional Development Activities</b>			
<i>Association Membership Fee</i>	Academy Health Student Rate	\$ 100.00	
<i>Conference Registration</i>	Health Datapalooza registration at student early bird rate		conference summary
<i>Conference Travel</i>	Round trip flight for Margolis Annual Conference in DC	\$ 200.00	
<i>Post-conference methods workshop</i>	This methods workshop will support my next research project by ...		

## Appendix E: Scholars Social Committee

Each year, 5-7 Scholars will be selected to form the Scholars Social Committee.

The Scholars Social Committee will manage a budget of \$1,000 for planning and implementing at least four (4) social events for current Scholars per year, with at least two (2) being held each semester.

The focus of these events should be community-building for the current Scholars, but faculty, staff, alumni, or other program affiliates may be invited if desired (and the budget allows).

Possible social events could include: trips outdoors (such as walking/hiking somewhere scenic, with snacks), visiting sites of interest (such as climbing the Duke Chapel stairs, having a picnic at the Duke Gardens, or going on a tour of the Duke Lemur Center), community service volunteering (such as tutoring, sorting/packing food, or environmental clean-up), festive celebrations (such as cookie decorating or pumpkin carving), among many others – creativity is encouraged!

The Scholars serving on the Scholars Social Committee will meet their Scholars Leadership Requirement with this service. Scholars should consult with the program coordinator prior to the event to determine how to get reimbursed for expenses and for guidelines on events involving alcoholic beverages.

## Appendix F: Duke-Margolis Community and Contacts

Duke-Margolis brings together a diverse range of faculty, research staff, and external experts. The Margolis community serves as an outstanding resource for Margolis Scholars. We encourage you to reach out to explore shared interests, research opportunities, career advisement, and more!

**Duke-Margolis Leadership:** <https://healthpolicy.duke.edu/duke-margolis-leadership>

**Duke-Margolis Faculty:** <https://healthpolicy.duke.edu/duke-margolis-faculty>

**Duke-Margolis Research Team:** <https://healthpolicy.duke.edu/research-team>

**Duke-Margolis Education Team:** <https://healthpolicy.duke.edu/education-team>

**Duke-Margolis Visiting Fellows:** <https://healthpolicy.duke.edu/visiting-fellows>