# Table of Contents

**Introduction**

Overview of the HAPF experience ................................................................. 2

**HAPF Checklist** ......................................................................................... 3

**Travel, Time, and Reimbursement as a Fellow** ............................................ 5

**Chapter 1: Finances** .................................................................................. 6

**Chapter 2: Examples of Fellowship Placements** ....................................... 9

**Chapter 3: Mentors and Networking** ........................................................ 16

**Chapter 4: Fellowship Orientations and Training** ................................. 17

  American Political Science Association Congressional Fellowship Program (CFP) ..................... 17

**Chapter 5: Fellows’ Group Project** ............................................................. 19

**Chapter 6: Policy Symposium & Alumni Network Meeting** ..................... 20

**Chapter 7: The Canadian Fellowship** ....................................................... 21

**Chapter 8: Communication** ..................................................................... 22

**Chapter 9: Additional Enrichment Opportunities** .................................. 24

**Appendix A: Sample HAPF Introductory & Capstone Meeting Agenda** ........ 27

**Appendix B: Sample HAPF & APSA Orientation Agenda** ..................... 31

**Appendix C: Sample HAPF Communications Workshop Agenda** ............. 40

**Appendix D: Fellows Network Meeting** .................................................... 43

**Appendix E: Reimbursement Documentation Examples** .......................... 45

  Funding for Travel Outside of HAPF-organized Events .................................... 46

**Appendix F: Individualized Learning Plan** ............................................... 48

**Appendix G: Post-Fellowship Opportunity Award** ................................. 50

**Appendix H: 2019 Survey of Non-Residential Fellow Alumni** .................. 52

**Appendix I: Acronyms** ............................................................................. 55

**Appendix J: Federal Aging Policy Organization Chart** ............................ 56

**Appendix K: Glossary of Common Health Policy Terms** ......................... 58

**Appendix L: Alumni Opportunities** ............................................................. 59

**Appendix M: Acknowledgements** ............................................................. 60

**Appendix N: Contact information for HAPF Fellow Alumni** .................... 62
Introduction

Congratulations on your selection as a Health and Aging Policy (HAPF) Fellow! You are embarking on a phenomenal year that will surely be life-changing. During this year, you will learn a tremendous amount about policy, politics, and procedure, and will build a network that will last a lifetime.

Your experience will be rich with formal training in health policy through orientations with AcademyHealth, HAPF Program, and the American Political Science Association’s (APSA) Congressional Fellowship Program. You will enhance your expertise by working with your fellow colleagues during the traditionally held HAPF Capstone Meeting, Communications Workshop, Alumni Retreat, and Spring Symposium. You will meet with your HAPF mentors and your placement mentors throughout your Fellowship year.

You will also have an opportunity to learn about state and international political systems. The APSA-Canadian Parliamentary Exchange provides a week-long comparative study of the Canadian and U.S. political and health care systems.

This will be an exciting and fast-paced year. Get ready to soak it all in. Keeping a journal, pictorial history, or some other method to chronicle your experiences will help you to record these experiences that you will reflect on for years to come.

Overview of the HAPF experience

<table>
<thead>
<tr>
<th>June</th>
<th>Sept</th>
<th>Oct-Dec</th>
<th>Feb-April</th>
<th>May-June</th>
<th>Sept</th>
</tr>
</thead>
<tbody>
<tr>
<td>Congratulations on your acceptance!</td>
<td>Capstone Meeting highlights past year’s fellows</td>
<td>AcademyHealth Policy Orientation, HAPF Aging Orientation, APSA Congressional Program</td>
<td>Communication Training Workshop HAPF Networking event</td>
<td>Spring Symposium</td>
<td>Capstone Meeting</td>
</tr>
</tbody>
</table>

Activities throughout the year

- Placement
  - Placement Interviews
  - Dec/Jan Placements begin
- Mentorship
  - Meet with assigned mentors (two HAPF alumni) and expand network throughout the year
- Symposium
  - Spring Symposium Planning
- Group Project
  - Group Project Activities
- Optional APSA activities
  - Host Canadian Interns
- Canada Trip
- NPO Meetings+
  - Monthly NPO Meetings
- Cohort Meetings
  - Monthly Cohort Meetings

Note: This rough timeline may differ for each Fellowship Cohort.
* National Program Office
HAPF Checklist
The HAPF year is full of many opportunities, networking, and meetings; some are scheduled for you, and others are initiated by you or your cohort.

Capstone Meeting
When: September (2 days)
Where: Washington D.C.
NPO: Reserves a block of rooms
Fellow responsibilities: make travel arrangements

AcademyHealth Policy Orientation
When: October (3 days)
Where: Washington D.C. (possibly virtually)
NPO: Pays for your membership to AcademyHealth and enrolls you in the policy orientation
Fellow responsibilities: Make travel arrangements

Health and Aging Policy Orientation
When: Late October (2.5 days)
Where: Washington D.C.
NPO: Reserve a block of rooms
Fellow responsibilities: Make travel arrangements

APSA Congressional Fellowship Program (CFP) Orientation
When: November-early December (1 month) (not required to stay during Thanksgiving week)
Where: Washington D.C.
Fellow responsibilities: Make travel arrangements as indicated by orientation format

Fellowship Placement Interviews
When: Late November - December
Where: in person or virtual
Fellow responsibilities: Arrange interviews with a variety of organizations and governmental offices where you may be interested in spending your fellowship year

Monthly Cohort Meetings
When: Monthly
Where: Virtually
Fellow responsibilities: Coordinate time and virtual meeting as a group
These meetings are for the cohort to share experiences, troubleshoot, discuss group project(s) and symposium; each cohort uses these meetings as they wish. The NPO will ask for the meeting schedule.

Monthly NPO Meetings
When: *Monthly
Where: Virtually
NPO: Coordinates and sends invites
Fellow responsibilities: Attend
*One on one meetings with program director or deputy directors may also be scheduled

Cohort Group Work
When: Throughout the year
Fellow responsibilities: The HAPF cohort may select to divide into small groups to accomplish the required group project (due by summer), spring symposium (to be held May or June), and handbook revisions (due by end of June)

Mentor Meetings
When: Late October – September
Where: virtually
NPO: Matches 2 HAPF alumni mentors with each Fellow
Fellow responsibilities: Establish a meeting schedule with assigned mentors and identify a mentor at your placement site to meet with regularly
Travel, Time, and Reimbursement as a Fellow

Travel
When do you need to be in DC?

- A few days in September – HAPF Leadership Retreat. Lodging arrangements will be made by HAPF Program Office and you arrange your transportation.
- Late October through early December – Orientation.
  - Yes. You may fly home for weekends and the entire week of Thanksgiving, or you may remain in DC.
  - No. You cannot skip Fridays when there are orientation lectures, trainings or tours scheduled.
  - The program office sends out training dates. You arrange for your flights and lodging.
  - Many fellows choose to stay in a hotel (for the points and/or for booking convenience).
  - Some choose Airbnb for the amenities (kitchen, laundry, space) or the opportunity to reside in a particular neighborhood.
  - Fellows sometimes opt to share Airbnb accommodations for orientation and/or as residential fellows. This is fine as long as the cost is no more than hotel alternatives.
- A few days in February (or March or April) – Communication training workshop.
- A few days in May (or April or June as decided by the fellows and HAPF leadership) – Spring Symposium.
- A few days in September – Capstone Meeting

Time Commitment

Non-residential fellows. Determine how much time you can dedicate to projects. Beyond the fall orientation activities (which necessitates near full time engagement), non-residential fellows should determine what amount of time is feasible for placement activities as well as other HAPF events outlined above. This may exceed 20% at various points throughout the fellowship year.

When you are assigned a placement or HAPF project, you can usually work on it by scheduling your time as needed (and by ensuring you are available for weekly or recurring phone conferences). Some placements require additional time commitments (e.g. CMS). Be clear about how many hours per week you can dedicate.

Residential fellows. Live in Washington D.C. or near their placement site and dedicate full time to the fellowship. Note, for those interested in a CMS placement, their offices are located in Baltimore, MD.
Chapter 1: Finances

Travel
The NPO reserves blocks of rooms at a negotiated rate for all required in-person meetings, which fellows pay for and are then reimbursed. Other expenses, including transportation, food, and related costs will be reimbursed through the NPO. Sample travel forms are found in appendix G.

Housing
Residential fellows
Residential Fellows are expected to live in or near Washington, D.C., with the exception of fellows at CMS, the Social Security Administration (SSA), or other placement sites outside of the DC metro area. Residential fellows are eligible for up to $5,000 for moving expenses; as the reimbursement policy states, receipts and proof of payment are required for reimbursement. In Washington, a range of living options are available, including a range of choices from one-room studio apartments to free-standing houses. Many of the apartment complexes advertise a 12-month lease but have flexible policies and are willing to accept shorter term leases. House sharing among professionals is common in DC. Here are some good resources:

- Airbnb, VRBO, Nest-DC, Facebook Marketplace, Craigslist, and Apartments can be great resources for Fellows who may to lease and/or share a residence during their fellowship.
- Neighborhood Scout – information about neighborhoods and housing options

Before settling on an apartment, consider where you will be completing your placement, proximity to Metro stations, and grocery stores. For those who have an interest in working at the CMS campus in Maryland, the commute by car from Washington DC is about an hour; public transportation is not feasible for commuting to CMS from D.C.

Consider the commute to your placement site (DC Circulator, WMATA metro, Rideshare). Some larger apartment buildings offer free shuttle buses to metro stations.

Past Fellows can offer advice about living in DC or Baltimore. Feel free to reach out to former HAPF Fellows (see Appendix A).

Non-residential fellows
During the 6 week orientation, non-residential fellows may choose to stay in a hotel or Airbnb. Prior to orientation, a travel budget will be provided by the NPO.

Non-residential fellows. You have a maximum $10,000 stipend to fund travel expenses associated with the program (e.g. travel to DC, project-related conference fees, or related fellowship travel). Travel expenses for HAPF-specific activities (Capstone, Orientation, Communications Workshop and Spring Symposium) are reimbursed separately from your fellowship travel stipend. If you have an opportunity related to your fellowship for which you did not allocate funds, you should discuss the potential availability of supplemental funds with the HAPF directors. Example project activities include:

- Travel and accommodations to work at placement site or network with HAPF mentors.
- Travel and participation in conferences related to an aging policy or policy project, with brief description of relevance, activities, meetings/sessions. Routinely covered conferences include Gerontological Society of America, American Society of Aging, and American Geriatrics Society.
In addition to regular visits to your site placement, you will be expected to be in DC for the following:

<table>
<thead>
<tr>
<th>Month</th>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>September</td>
<td>1 week</td>
<td>Capstone Meeting, CMS orientation, and graduating fellow presentations</td>
</tr>
<tr>
<td>Late October to early December</td>
<td>6 weeks</td>
<td>Academy Health, HAPF, and APSA orientations</td>
</tr>
<tr>
<td></td>
<td>Time will be built into the schedule for placement interviews.</td>
<td></td>
</tr>
<tr>
<td>February or March</td>
<td>2 Days</td>
<td>Communication Training Workshop</td>
</tr>
<tr>
<td>May (or April or June)</td>
<td>2 Days</td>
<td>Spring Symposium and Alumni Network Meeting</td>
</tr>
<tr>
<td>September</td>
<td>TBA</td>
<td>HAPF Capstone Meeting</td>
</tr>
</tbody>
</table>

**Transportation**

Washington is not the most car-friendly city. We recommend the following:

- The Metro. If you plan to use the Metro regularly, buy a SmarTrip card or SmarTrip app. It can be reloaded with significant cost savings. Buses. Buses service areas outside of Rail area, but they are less frequent and sometimes less reliable. Explore and download available apps. Tip: Once you have your SmarTrip card, visit the [WMATA website](https://www.wmata.com) to set up Auto Reload to avoid refilling at stations.
- Taxis, Uber, and Lyft. To use Uber or Lyft, download the app onto your mobile phone and get set up. Taxis are typically available at marked stations or can be flagged from the street.
- Car rentals. Hourly rates are available through Getaround, Zipcar, and other services can be used for hourly or daily car rentals. They typically include an annual fee and hourly rate.
- Bicycle. Bring your own, buy one off Craigslist, rent one, or use the [Capital Bikeshare](https://www.capitalbikeshare.org) program. You can purchase a monthly or annual pass to save money. There are “stations” all over DC where you can pick up a bike, ride it to a station near your destination, and leave it there. The bikes have 3 speeds, good fenders and lights. Check one of the many “apps” that provide station, bike availability and routes.
- Scooters. Several rental companies offer the ubiquitous scooter to get around town. Find one using an app and take off!

**Reimbursement**

The HAPF Program Office will provide you with detailed instructions for obtaining reimbursement for HAPF activities. The NPO funds HAPF-specific activities and may have additional project funds available to Fellows for placement-related travel expenses. Non-residential fellows may find it most cost-effective to schedule D.C.-related placement activities around the times of HAPF program activities.

The reimbursement process through the HAPF Program Office (Research Foundation for Mental Hygiene) requires attention to detail. For reimbursement associated with airfare, you will need to provide receipts with proof of payment (such as credit card activity or credit card statement). Keep copies of receipts and passes especially if utilizing a mobile device. Appendix G includes reimbursement requirements. You will be responsible for covering upfront costs (travel, lodging, etc.) and will receive full reimbursement upon filing and submitting expense forms. Plan for up to 8 weeks to receive reimbursement; if you do not receive reimbursement within 8 weeks, contact Brigitta, Mica, and Alfa. If this is a hardship, please speak to Brigitta.
Spaeth-Rublee (brigitta.spaeth@nyspi.columbia.edu) about alternatives for payment and reimbursement.

**Reimbursement Process Overview:**

Please submit the following items within 2 weeks of your travel:

1. Travel voucher: complete the most updated version of the travel voucher
2. Reimbursement cover page: include the expense breakdown on the cover page for all your expenses
3. Receipts: Scanned/e-mailed receipts or print receipts should be submitted for travel and accommodation. First class tickets or travel upgrades are not reimbursable.
4. Proof of Payment: Scanned and e-mailed proof of payment for all lodging and travel costs is required (credit card activity or credit card statement)
5. Meals: Travelers are automatically reimbursed the per diem rate by location and timing of your travel. Please refer to the General Services Administration (GSA) website for details. There is no need to include receipts!

The above items should be e-mailed to Alfa Garcia, cc: Mica Muir and Brigitta Spaeth or mailed to the address below (please note that you must mention room #5318 and Unit 9 in the mailing address so mail is delivered without delay!):

Mica Muir  
Program Coordinator, Health and Aging Policy Fellows Program NYSPI – 5th floor, Room 5813  
Research Foundation for Mental Hygiene 1051 Riverside Drive, Unit 9  
New York, NY 10032

Reimbursement requires a completed W9 form, so be sure to complete it and send it to the Business Office prior to submitting your first reimbursement request.

Overall, please allow between 4-8 weeks for the reimbursement turn around after we have received all needed documentation. If you do not receive reimbursement within 8 weeks, contact Brigitta, Mica, and Alfa. For further information, consult the examples in Appendix G.
Chapter 2: Examples of Fellowship Placements

A policy-focused placement is required of all Fellows. Fellows may work in legislative or executive offices, as well as in other health policy organizations. Placement options include:

1. Legislative branch (Congressional placement) on committees in the House or Senate, a Congressional Member’s personal office, or the Congressional Research Service (CRS)
2. Executive branch agencies such as Office of the Assistant Secretary for Planning and Evaluation (ASPE), Agency for Health Research and Policy (AHRQ), the Centers for Medicare and Medicaid Services (CMS), US Department of Veterans Affairs Central Office (VACO), or Office of the Surgeon General (OSG)
3. Policy and advocacy organizations such as the Urban Institute, Commonwealth Fund, AARP, National Academy of Social Insurance, Altarum Institute, LeadingAge, National Council on Aging, American Society on Aging, Eldercare Workforce Alliance, and others
4. State government offices such as State Representatives, Senators or State committee offices, state agencies on aging, state departments of health, state ombudsman, etc.

The Health and Aging Policy Fellows website provides a record of all HAPF Fellows and their Fellow placements.

Most Fellows work on one or more projects at their placement. You can approach the Fellowship as an opportunity to focus on an area of interest. Alternatively, you can use the placement to be exposed to new policy questions or issues, perhaps integrating multiple placements or multiple experiences into one policy placement.

**Types of placements**

1. Congressional Placement

   Although Congress is often viewed as a monolith, it is more accurately characterized as hundreds of small businesses with Representatives and Senators as their CEOs. Experiences in Member offices are different from placements with Congressional committees which are, in turn, different from Congressional support agencies such as the Congressional Research Service (CRS) or the Congressional Budget Office (CBO). Even individual experiences in the same settings will differ dramatically based on individual supervisors, office culture/temperament and the goals and experience base of the Fellow.

   Work in a Majority or in a Minority office impacts what you do each day. You will have a different experience in a partisan office than you would in a more centrist member’s office.

   The APSA Congressional Fellows Orientation will provide information for those who have an interest in working in a Congressional setting. Since each office has Fellows from a variety of programs, the timing of when an office may have the ability to bring in a Fellow will differ from office to office. Once a formal placement offer is made, the office may want you to start within days.

   There are individual Member and committee offices that, on paper, may appear intriguing. The best experience will support your career goals. Interview widely to get a sense of different offices and opportunities. Talk with past Fellows (including Robert Wood Johnson Foundation Fellows) and Meghan McConaughey, Director of the APSA Congressional Fellowship Program. Meghan has significant Congressional experience and will provide you with unmatched, wise advice.

   **Congressional Member offices**

   Most people who work in Member offices will have some responsibility for meeting with constituents and
answering mail. Fellows often cover policy briefings provided by policy staff and outside organizations, providing summaries for legislative staff. Fellows are also asked to provide short summaries of proposed legislation with recommendations for other legislative staff.

Past Fellows have been fortunate to participate in major legislative efforts, such as those who worked for Members on the Senate Finance Committee during passage of health reform. Some offices use Fellows as jacks-of-all-trades, others integrate Fellows into the office as legislative staff with their own portfolio of topical areas. Some Fellows have less responsibility, but more time to network and learn; other Fellows have more responsibility within the office, but less time to network and attend briefings.

There are also differences between Senate and House offices. Fellows may have more responsibility in House offices because staff size is smaller for House Members. The conventional wisdom is that staff on the House side cover more issues, but these are at a more surface level, versus the Senate where fewer issues are analyzed more deeply.

Members with seniority generally have more power, yet that may not necessarily make for a better experience as a Fellow. Sometimes a Fellow in freshman or more junior office may assume more responsibility than they would likely get in a more senior Member’s office.

Interview widely. Think about whether you would rather have your own portfolio or whether you’d like to cover varying issues and policy areas. Importantly, consider the personality of the staff you meet during your interview process. Be perceptive and consider how you relate with staff interpersonally.

**Congressional Committee staff**

Unlike personal office, committee staff may not have the same responsibilities of constituent engagement (e.g. responding to mailed letters or constituent meetings). They typically focus more deeply on specific issues being addressed by the committee. Committee staff will spend more time planning and preparing for hearings and markups of legislation. They may also attend briefings on behalf of the office, meet with staff from member offices that are seeking a committee hearing, meet with stakeholders and may participate in drafting legislation.
<table>
<thead>
<tr>
<th></th>
<th>House</th>
<th>Senate</th>
<th>Committee</th>
<th>Applies to all settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Duties</strong></td>
<td>Meeting constituents; answering mail; writing memos</td>
<td>Meeting constituents; answering mail; writing memos</td>
<td>Planning hearings; identifying witnesses; meeting with stakeholders; marking up legislation; drafting reports, letters, and memos</td>
<td>Writing policy briefs; researching issues of interest to boss; writing talking points; attending briefings</td>
</tr>
<tr>
<td><strong>Portfolio</strong></td>
<td>Jack of all trades; highly responsive to events and media</td>
<td>More specialized; less responsive to external events</td>
<td>Even more highly specialized; unlikely to respond to issues outside of jurisdiction</td>
<td>Must be prepared to tackle issues outside of portfolio at any time.</td>
</tr>
<tr>
<td><strong>Partisanship</strong></td>
<td>Usually more partisan</td>
<td>Usually less partisan, although this has changed in recent years</td>
<td>Chairman has more staff than Ranking Member and sets the agenda for hearings and legislation</td>
<td>The party in majority sets the agenda. More centrist member offices may feel less partisan</td>
</tr>
<tr>
<td><strong>Hours</strong></td>
<td>Usually around 9a-6p; when House is in session, legislative staff with germane bills on the floor may stay longer</td>
<td>Usually around 9a-6p; when Senate is in session, legislative staff may stay until the floor closes because non-germane amendments can be added</td>
<td>Usually 9a-6p; when a bill is on the floor, a hearing is approaching, or markup occurring relevant staff may stay longer</td>
<td>If Member is on the West coast, hours may run 10a-7/8p; standard East coast offices run 9a-6p; offices may close earlier during recess</td>
</tr>
<tr>
<td><strong>Culture</strong></td>
<td>The boss sets the tone and culture. It trickles down from senior staff to staff assistants. Aspects of the Member’s district/state may permeate culture creating enclaves of Southern vs. New England atmospheres depending on the region.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Seniority</strong></td>
<td>Power is less evenly distributed</td>
<td>Power is more evenly distributed</td>
<td>Chair and Ranking Member make most decisions</td>
<td>Fellows serving with a more junior office may assume more responsibility than they would likely get in a senior Member’s office</td>
</tr>
</tbody>
</table>
2. Executive Branch Placement
The HAPF portion of the Fellowship, training as well as the AcademyHealth training, will expose you to a variety of executive branch agencies. Like placements in Congressional Member offices, your experience will vary depending on the fit between your objectives for the Fellowship and the needs of the office. This may include operating or staff divisions within HHS (like CDC or ACL), as well as other departments like Department of Justice.

NOTE: If you want to work with an executive branch agency, past Fellows have learned that you may need a home institution with which the agency can enter into an interagency personnel agreement (IPA). It may be more challenging to work with an executive branch agency if you have no other institutional affiliation. However, there are alternatives to a formal IPA, and Fellows should work with their potential placements, mentors, and HAPF staff on finding alternative mechanisms. (For example, one route at NIH is to be appointed as a “Special Volunteer.”)

CMS Placement
A number of previous Fellows have obtained placements at CMS. The Fellowship offers an on-site introduction to CMS and its many Divisions in September. This is an excellent opportunity to learn about the various placement opportunities at CMS and meet Division leaders and ask questions. It is helpful to confirm your placement at CMS soon, because the IPA and ethics review process typically takes 3-4 months. Non-residential placements at CMS can work well, since their teams use conference calls and webinars.

Veterans Affairs (VA) Placement
The Department of Veterans Affairs (VA) has recently increased its commitment to supporting Fellows who are VA employees. There are growing collaborations between CMS and VA that are excellent opportunities for interested fellows. Fellows have had opportunities to work at VA Central Office. Interested fellows, especially Residential Fellows, are encouraged to connect with leaders in VACO once they are accepted to the program (i.e. prior to arriving in DC in October). Since the VHA Office of Academic Affiliations has a Memorandum of Understanding with the VA/Health and Aging Policy Fellows program, we received guidance from the VA Office of General Counsel that travel support that is given pursuant to a contract or other agreement is not considered “donated.” Consequently, no VA Form 0893 is needed and Ethics Specialty Team approval is not required. In light of this-you as a participant will work directly with the Health and Aging Policy Fellows Program leaders (Drs. Pike and Pincus) to arrange your travel, expenses, and reimbursement directly to you and not involving and exchange of funds or approvals by VA. Any questions should be directed to Deborah Ludke: Deborah.ludke@va.gov, the National Operations Officer at the VA Administration.

3. Policy and advocacy organizations
Another option that some fellows select is a placement with a non-governmental organization (NGO) that engages in policy development and/or advocacy. Placement with an NGO might entail working in collaboration with one or more Executive branch agencies or with Congressional committees or member offices (i.e., non-partisan lobbying). Working with an NGO could provide the opportunity to partner with national and regional advocacy groups to improve health care for vulnerable populations. Examples of organizations where fellows have done placements include: Eldercare Workforce Alliance, Community Catalyst, American Planning Association, and AARP. During the HAPF Aging orientation, one of the panels includes representatives from a variety of NGOs that work in the aging space. Fellows should consider connecting with these individuals (even if you don’t see yourself fitting there), as it is a great way to network with leaders in NGO agencies.
**Finding a placement(s)**

Once you have been selected as a Fellow, the HAPF NPO Director and Associate Director (along with staff from the APSA Congressional Fellowship Program) work with each fellow to identify appropriate projects, placements, and mentors.

During the October/November orientation, you will meet with leaders and staff at potential policy placements. Do not feel compelled to commit to any placement in October. Most Fellows identify and commit to their placement by December or January. The orientations, HAPF leadership, and former HAPF Fellows are helpful resources to guide you as you explore placement options.

When you interview, discuss the options available in placement settings of interest to understand whether the placement is offering an approach that appeals to you.

For Fellows who develop a special project in your Residential placement, you and your office supervisor, and possibly your office or HAPF mentor, will work together to develop a project that fills a need or a gap for the organization. It is possible that an office has a specific project that it is looking for a Fellow to address. This is true in both legislative and executive branch settings. If you are in a large setting with many different programs and departments, try to attend meetings of the smaller units to round out your knowledge of the place and the work. It is a good idea to always ask your supervisor if attendance at a particular meeting is appropriate.

**Residential, Non-residential, and Global Fellowships**

Residential fellows reside in DC for their experience; in certain instances – though not required – they may start at their placement site prior to the Fall health policy orientation activities. In general, the non-residential model is organized around a specific health policy project with placement opportunities tailored to the fellows’ individual policy interests and background.

**Residential Fellowship**

The residential model provides fellows with hands-on policy experiences in settings that offer exposure to a wide range of policy issues. In addition to policy immersion, residential fellows learn and master a new living environment and workplace. The residential track allows you to immerse yourself in the policymaking process that is unique to Washington, D.C. If you are comfortable with big changes, the residential program will be challenging and exciting. To obtain more specific information, feel free to contact previous residential Fellows and ask many questions.

Once selected as a residential fellow, don’t feel pressure to rush into a placement decision, the journey is an important part of the fellowship. During the six-week Orientation, you will have ample opportunities to set up interviews with key people in the various organizations and governmental offices where you seek to spend your Fellowship year.

Residential fellows typically work full-time at their placements, though some Fellows may work in more than one placement site during the year and can sequence their Fellowship accordingly.

**Non-residential Fellowship**

A non-residential Fellow remains, for the most part, at his/her home institution and focuses on a project addressing a key policy issue with brief on-site activities at the placement(s) throughout the year, supplemented by telework and conferencing as directed by the project or mentor. Non-residential Fellows set their own schedules for placement activities including travel to Washington, DC (often scheduled around other HAPF events and DC conferences) to do brief placements in government agencies or other settings that meet their project or Fellowship goals. The health policy projects may be national, state, local, or institution-based. Non-
residential Fellows often develop part-time placements with federal agencies and Congressional offices as well. Don’t feel pressure to rush into a placement decision; the journey is an important part of the fellowship.

For insights and tips from alumni on the non-residential experience, see the Appendix J for the 2019 Survey of Non-residential Fellow Alumni.

Community Non-Residential Fellowship
Community non-residential Fellows remain, for the most part, at their home institutions, and focus on projects addressing a state or local policy issue with brief placement(s) throughout the year at relevant policy settings. This program is designed to focus on policy issues that directly influence the way health and social services are delivered at the state, local, and organizational/provider level, given that so many policies that impact older adults are refined and implemented at these more local levels. By participating in the fellowship, fellows will not only expand their own professional networks, but they will also serve to strengthen the network of professionals in that community working in the field. Moreover, Community Fellows will serve as potential links to federal agencies and institutions to support implementation of policies at the local level. Potential placement sites could be state and local agencies and non-governmental organizations, or federal congressional offices or agencies with linkage to important local issues.

Global Policy Fellowship
A global policy Fellowship is a non-residential model where Fellows remain, for the most part, at their home institution, and focus on a project addressing a global policy issue with brief placement(s) throughout the year at relevant policy settings. Global Health and Aging Policy Fellows will develop policy projects in collaboration with international agencies (e.g., the World Health Organization or the World Bank), funding agencies, and foundations that focus on the global shift in demographics and the related policy implications. These Fellows may identify successful health policy models, may compare national policies on particular aging issues, or work on global policy recommendations with international organizations. In all cases, the policy project will have practical policy implications for adaptation and implementation that will enable populations to age better – not just live longer.

Possible placements include organizations such as the World Health Organization, the Pan American Health Organization, ministries of health, labor and social affairs, or private foundations and other non-governmental organizations focused on global issues related to health and aging.

*Non-residential Fellows are an active part of the Fellowship program. It requires effort to maintain connection to the HAPF and APSA programs. For example, non-residential Fellows must take initiative to participate in the APSA Canadian Parliamentary Exchange or the Wilson Series Seminars (see below). To do so may require extra trips to DC. In general, there are two categories of non-residential placements: single and multiple.

Single or Multiple Fellowship Placements

Single Placement
There are three possible approaches to a single, non-residential placement. One option is to work with a single placement site, such as a division of Health & Human Services (e.g., CMS, ASPE, AoA), the Congressional Research Service, or a non-governmental policy or advocacy organization. Note: Certain placements such as the White House or CMS may have up to a 3-4 month clearance process, so you may want to start conversations early or plan on another placement. For CMS, the most straightforward way to get clearance (which is still a long process) is to go through an institutional participation agreement. The IPA route means you must have full-time/career employment with an institution on CMS’s list of cleared institutions. For the IPA, you
cannot be adjunct or part-time faculty at a cleared institution.

A more difficult option is to find a Member’s office in the House or Senate. Many Members’ offices are not accustomed to working with a non-residential Fellow and most have never had one. Don’t let that dissuade you from pursuing a placement if it fits in well with your project idea. Talk with the Member’s Chief of Staff or Legislative Director and be clear on your skills, gifts, interests and availability. Discuss how you can help the policy efforts of the Member from your home base and how you will communicate when not in DC. Because of the unusual and valued professional backgrounds of the Health and Aging Policy Fellows, some Members may be willing to take a chance with a non-residential Fellow.

The final option is placement with one of the House and Senate Committees. Committees are involved in producing a lot of research on various health-related topics, and a Fellow can add enormous “real world” value to the work that committee staff are doing. Similar to members’ offices, most committees have not worked with non-residential Fellows, so open discussions about your limitations, as well as the many skills you can bring to the committee is important. It also helps if the committee Chair or the Member is from your state! (Expect to go to Washington, DC a number of times for 7 to 10 days to work directly with the staff, and plan accordingly in your budget proposal.)

Multiple Placements
These non-residential fellows either have a topic-based Fellowship or are interested in meeting with more than one agency on shorter duration projects. These may include travel for short periods to DC, but most work occurs within the home state. Fellows find a theme within the placements and projects such as “quality in health care” or “financing services.”
Chapter 3: Mentors and Networking

After selecting your placement, Fellows should identify a mentor within your placement setting and a mentor outside that setting who has experience or subject matter knowledge that would help support your Individualized Learning Plan; see appendix. Different Fellows seek different traits or areas of expertise in a mentor. The HAPF program office can help you to identify a mentor. You may even select more than one mentor if that best meets your needs.

The HAPF program office will also assign two alumni mentors outside of your placement setting. You can anticipate being introduced to these individuals in the fall and can then work with them on identifying your goals for working with a mentor and a meeting schedule to support those goals.

Mentors and Fellows generally meet regularly, according to a schedule that fits your needs. In addition, the Program Director and Associate Director will have teleconferences with you approximately quarterly during the Fellowship year and are available as needed for mentoring and advice.

It may be useful to devote a short amount of time on each of the monthly Fellows calls to share your mentorship experiences.
Chapter 4: Fellowship Orientations and Training

Annual HAPF Capstone Meeting
In September, HAPF holds its Annual Capstone Meeting where the outgoing Fellows present on the health policy topics that they have been working on during their Fellowship year. In addition, the Fellows’ mentors or placement supervisors present after the Fellows’ presentations as Discussants or Reactors. Incoming fellows have the opportunity to meet HAPF Fellows and HAPF partners and see just what they will be doing one short year from now.

AcademyHealth Health Policy Orientation
Fellows participate in the AcademyHealth Health Policy Orientation. This meeting has been facilitated fully in-person (in DC) and fully virtual over three days in late October to early November. Future Health Policy Orientations may take one of these formats or some hybrid format. AcademyHealth is a leading national organization serving the fields of health services and policy research and the professionals who produce and use this important work. AcademyHealth brings stakeholders together to address the current and future needs of an evolving health system, inform health policy, and to translate evidence into practice. More information can be obtained at http://www.academyhealth.org. You will become a member of AcademyHealth, paid for by the HAPF program.

The HPO consists of an intensive introduction to health policy in the U.S., with topics ranging from federal budgeting, Medicare, and the role of the Courts. This is an open orientation of 50-75 participants with other fellows, such as from Robert Wood Johnson joining in. Generally, our HAPF cohort will be the primary participants representing the aging community. All materials are provided by AcademyHealth, Fellows need to only “show up.” Breakfast, lunch, and networking events are included in the agenda of in-person HPOs. Get good rest and be open to learning about health from multiple perspectives.

Health and Aging Policy Orientation
After the AcademyHealth Health Policy Orientation, the HAPF program provides a series of orientation events focused specifically on aging policy; they may be consolidated (e.g., over 2 ½ -days in-person) or spread over a few weeks of virtual meetings. This orientation provides a high-level perspective regarding organizations that may serve as good potential placement sites or for recruiting HAPF mentors.

American Political Science Association Congressional Fellowship Program (CFP)
When you become a Health and Aging Policy Fellow, you also become a Congressional Fellow of the American Political Science Association (APSA). The APSA CFP includes a month-long intensive orientation (November through early December) which focuses on the legislative process and Congressional affairs. Past orientations have been conducted fully in-person (in DC) and fully virtual; future orientations may take one of these formats or some hybrid format. You and your APSA cohort of journalists, political scientists, federal executives, native, international, and health policy fellows will engage in seminars with legislators, Congressional staffers, journalists, lobbyists, political scientists, and policy specialists. The APSA CFP includes an excellent Congressional Training Program provided by the Congressional Research Service (CRS). CRS provides a remarkable introduction to the legislative process that is quite similar to the training that newly-elected Members of Congress receive. CRS focuses on critical topics such as: considering measures on the House Floor, the Amending Process, Committee Hearings, Markups, and reports and Tactical Use of Floor Procedure. You’ll want to come to these sessions rested and ready to learn.
During the month-long orientation, Health and Aging Policy Fellows have opportunities to interview at potential placement sites in alignment with their professional background and career focus and to establish a diverse network of mentoring experts related to their policy interests. The month-long seminar also provides fellows with ample opportunity to connect with APSA’s Congressional Fellows.

**Gerontological Society of America and Thanksgiving Break**

**Gerontological Society of America Annual Conference**
Many Fellows participate in the annual Gerontological Society of America (GSA) conference, which is typically held two weeks prior to Thanksgiving. This conflicts with the APSA Congressional Fellowship month-long orientation. Fellows should be prepared to miss some APSA sessions if they plan to attend the GSA conference.

HAPF Fellows who attend GSA are asked to help staff the HAPF booth and to attend the HAPF reception while attending the conference. The Fellowship does not directly pay for transportation to the conference, but rather, these costs can be reimbursed from the Fellowship budget if the expense was originally allocated or if the non-residential Fellow would like to utilize Project Funds to cover the costs. In the year after the fellowship ends, the program office does support some costs if Fellows participate in a Fellow-organized panel and/or staff the HAPF booth.

**Thanksgiving Break**
The APSA Congressional Fellowship Program Orientation is often complex to schedule for the APSA team – particularly coordinating and aligning speakers. As a result, the APSA schedule is not often available until the week before their orientation begins. As a general rule, you should plan to be in DC full-time during the APSA Congressional Fellowship. If there's a free block of time, you can schedule informational and networking appointments. A sample schedule can be found in Appendix F. Note: the orientation schedule may change dramatically from year to year.

You can anticipate that the week of Thanksgiving is a free week when Fellows can return to their home states.
Chapter 5: Fellows’ Group Project

During your Fellowship year, your cohort is expected to work together on at least one group project. The project requires that Fellows work together to produce a document, prepare a conference, or develop something of interest to your group that might be of continued value and use.

Examples of previous Fellows’ group projects are: this HAPF Manual, a Fellowship Blog, a group paper, a HAPF promotional video, a schematic chart illustrating links among legislative branch agencies, and a discrete project for an executive agency (e.g. a small group of the 2015-2016 HAPF cohort conducted a qualitative data analysis about Adult Protective Services).

Additional ideas for group projects include: a Wikipedia page for the Fellowship, a Health and Aging Policy Resource List, publishing articles in a scholarly or trade journal, or putting on a symposium in addition to the required Spring Symposium.

Start thinking about your group project(s) before orientation ends so you can decide on a project and divvy tasks. Establish a method of communication (see Chapter 9) that your group will use to stay on task. Your group project should be complete by the summer. A cohort may complete a few group projects if their cohort is large.

The goal is to work together and be involved. There is no specific format or criterion to follow. Simply focus on a tangible deliverable. Don’t stress about the “right” way to do things. Just make sure to run your ideas by Harold and Kathy for their feedback.
Chapter 6: Policy Symposium & Alumni Network Meeting

You will be responsible for working with your Fellow colleagues to prepare the agenda for your Policy Symposium, which is delivered somewhere from spring to summer. As a group, you will be responsible for deciding on the policy topics to address in all of the Symposium panels, the symposium format and for inviting the panel speakers. Fellows may serve as facilitators or discussants for the symposium panels; usually a subgroup of Fellows plans and facilitates the symposium. The specific date of the Spring Symposium will be decided at least 6 months before the Symposium.

It is a good idea to start discussing your Symposium agenda topics with your Fellow colleagues during your winter Fellowship meetings. During these meetings, you can discuss symposium topics and assign responsibilities. It is also a good idea to establish a communication schedule so that planning stays on track despite fellowship obligations. You will need to ask the HAPF Program Office how much funding is available to use for Symposium speaker travel so that you can plan for your Symposium speakers accordingly.

Tip: It is helpful to have Symposium co-chairs to provide leadership and direction for symposium planning. As with the group project, the purpose is collaboration and network-building. Fellows should build skills as well as relationships and contacts.

There is no specific format to follow. There is no need to stress about the “right” way to do things. Just ensure you review your theme and program with Harold and Kathy for their feedback. The symposium is usually a one-day event.

Previously (2019) the spring Alumni Network Meeting was held in conjunction with the Symposium. Regardless of when the symposium is held, all current Fellows should plan to attend both the Policy Symposium and the spring Network Meeting. This is a great opportunity for current Fellows to learn from previous classes about how to maximize and leverage the Fellowship experience upon completion of the Fellowship year.
Chapter 7: The Canadian Fellowship

HAPF Fellows may participate in the Canadian Parliamentary Exchange that affords the opportunity to learn about the government and politics of our northern neighbor. The exchange between the APSA Congressional Fellows Program and the Canadian Parliamentary Intern Program (PIP) began in 1973 and has been ongoing for nearly fifty years. When health and international circumstances permit, the one-week study tour in Ottawa is scheduled in the spring and follows the Canadian interns’ visit to Washington, DC.

The APSA Canadian Exchange is a rewarding experience. The Parliamentary exchange parallels and complements the APSA orientation in the fall, providing an overview of the government and political process in Canada. The 2021-2022 HAPF cohort had sessions with Members of Parliament, Senate, and the Clerk of the House. They also met with leaders from the Canadian Global Affairs Institute, Health Canada, Public Health Agency of Canada, and StartUp Canada. There is much value in gaining insights into the strengths and limitations of another political system that has many differences from our own. Misunderstanding in both countries of each other’s health systems are common. Learning what is related to the challenges in delivering effective and efficient care to aging populations and what is specific to the different systems of finance provides insights useful to both sides. Many Fellows were surprised to learn that the flight to Ottawa from Reagan is just over an hour. If the weather cooperates and schedule permits in-person meetings, you will also be treated to the annual tulip festival which takes place in Ottawa in May and is a feast for the eyes.

The most meaningful aspect of the exchange is the opportunity to learn about, learn from, and learn with the PIPs! The Parliamentary interns are a dynamically brilliant group who offer thoughtful insights and are incredible hosts during the Ottawa trip.

Fellows interested in participating in the exchange should let both the HAPF and APSA program offices know of their interest, since spots are limited and participation is not guaranteed. Fellows earn their opportunity by participating in the planning and coordination of the itinerary for the Canadian intern visit to DC. HAPF NPO supports HAPF selected to participate in the exchange with a $2000 budget. This opportunity is available for residential and non-residential fellows.
Chapter 8: Communication

Networking is a critical component of your Fellowship experience. During your Fellowship, you will network with thought leaders, former HAPF Fellows, and your own HAPF cohort!

After orientation, cohort Fellows remain in contact through monthly conference calls. These calls help you to maintain contact among Fellows to support one another, plan your group project, and plan the spring policy symposium. There are a number of options to help facilitate communication; the cohort coordinates these calls, notifies the program office of the scheduled calls, and hosts them.

**Communication resources**

- Zoom and Microsoft Teams are likely as familiar to you as your own face as of 2020.
- WhatsApp or other messaging apps makes for easy accessibility and connections. [whatsapp.com](https://whatsapp.com) with calls and messaging.
- E-mail Listservs. Set up a listserv early on. You can register a list name and then subscribe people. This is helpful in that you do not have to recall everyone’s email addresses. It is the discretion of the group to include HAPF staff on the listserv.
- Doodle [www.doodle.com](https://www.doodle.com) is a website that allows you to schedule meetings without having to email dates to several people and collect responses. It does this automatically. Doodle generates a link you send in an email (i.e., over your listserv).

**Policy News and Briefings – Information Sources**

There are many policy opportunities in Washington, beyond your residential placement. Here are high-quality health policy briefings:

- The Alliance for Health Reform [www.allhealth.org](https://www.allhealth.org), which also offers briefings on a range of topics.
- MedPAC offers 1.5-day public meetings 6x per year which are worthwhile to attend. For future meeting dates and agendas, visit: [www.medpac.gov/meeting/](https://www.medpac.gov/meeting/)
- In addition – AARP, the Pew Charitable Trust, Kaiser Family Foundation and others offer educational opportunities around the city.

Electronic policy updates are also readily available, including e-mail updates –

- CQ Roll Call – Congressional news and analysis to help organizations monitor and impact legislative change. [http://cqrollcall.com/](http://cqrollcall.com/)
- Health Affairs Blog – At the intersection of health, health care, and policy. [http://healthaffairs.org/blog/](http://healthaffairs.org/blog/)

**Understanding Capitol Hill Language**

- [Understanding Capitol Hill Jargon _Updated (squarespace.com)](https://www.squarespace.com)
Use of HAPF Logo and providing acknowledgements

In presentations and publications:
[Name] is a 20**-20** Health and Aging Policy Fellow. S/he/They would like to acknowledge the support of the Health and Aging Policy Fellows Program for the completion of the work represented in this publication/presentation/etc. All views represented in this article/presentation/etc are her/his/their own.
Chapter 9: Additional Enrichment Opportunities

**Spring Seminar Series**
The Spring Seminars are a series of roundtables and interactive talks organized by APSA to expand Fellows' understanding of Congress. They take place approximately once a month 3:00 – 4:30 PM either virtually or in the Capitol in a meeting room on the House or Senate sides. Information on the speaker, topic and location for each seminar are e-mailed in advance. Spring Seminar speakers have included: House Parliamentarian, Mr. Thomas Wickham; Political film critic and former Foreign Service Officer, Mr. Michael Canning; Staff of the House Press Gallery, Periodical Press Gallery and Radio Television Correspondents’ Gallery; Former Press Secretary for President Bill Clinton, Mr. Mike McCurry; and Editor and Publisher of The Cook Political Report, Mr. Charlie Cook.

**HAPF Alumni Network**
The growing number of Health and Aging Policy Fellows (166 Alumni Fellows and Incoming Fellows admitted to the program to date) constitutes an extended network of individuals who, individually and collectively, have a proven track record to shape policies that improve the lives of older Americans across many different levels of the US health care system.

Through the establishment of an active alumni network the HAPF Program seeks to strengthen the existing network and advance the capacity of our alumni to individually and collectively drive policy change that broadens and sustains the impact of the program. Each year the alumni community grows as a dynamic network that advances important initiatives in a rapidly changing health and aging policy environment. The alumni network now includes 166 Fellows who are spread around the country promoting changes that will enhance health, dignity and rights for older Americans.

Our partnership with West Health enables us to pursue important initiatives that broaden and sustain the impact of the Program by:
1. Providing post-fellowship support through an active alumni network, attendance at alumni meetings that are held annually in conjunction with the annual Policy Symposium and/or current Fellows’ Capstone meeting, and provision of transitional/post-fellowship mentoring;
2. Utilizing alumni Fellows as speakers at meetings organized by the Program (Orientation Seminar, Communication Seminar, Spring Symposium) and as peer mentors to current Fellows; and
3. Incorporating the Health and Aging Policy Fellows into other organizations’ alumni networks with eligibility to participate in their programs and events (e.g., John A. Hartford Foundation, American Political Science Association, etc.)
4. Identifying and supporting common projects for post-fellowship collaboration on policy and advocacy for older Americans among teams of alumni across cohorts.
Career Coaching Opportunity

One of the many goals of the Health and Aging Policy Fellows Program is to provide career development opportunities for Fellows, and we recognize the need for further skill development following the completion of their fellowship year. To that end, the Health and Aging Policy Fellows Program provides the opportunity for Fellows to apply for supplemental funding to engage a career coach. Current and Alumni Fellows may apply for this funding support.

If you are interested in requesting fellowship funds to hire a career coach, please submit the following to the HAPF Program Office:

- A paragraph outlining your career priorities and how a career coach would assist you in meeting these goals;
- The name and CV/website of the career coach you would like to hire;
- A statement of the number of hours you would like approved, and the hourly consulting fee of the coach;
- Initial funding request should not exceed $3,500;
- The National Program Office will review your request and approve it if they feel it is a good fit;
- Upon completion of the approved coaching program, Fellows will provide an update to the HAPF Program Office.
Appendix
Appendix A: Sample HAPF Introductory & Capstone Meeting Agenda

HEALTH AND AGING POLICY FELLOWS

2021-2022 Health and Aging Policy Fellows Introductory Meeting
Monday, October 4, 2021
The Foxhall Room at The Dupont Circle Hotel

Agenda

11:30 AM – 1:00 PM  Lunch for current Fellows and incoming Fellows
                      Welcome, brief introductions, and casual conversation among current and incoming fellows

1:00 PM – 5:00 PM    Introductory sessions for 2021-2022 HAPFellows
                      (2020-2021 HAPFellows have a free afternoon to get together casually)

1:00 PM – 2:00 PM    “Telling Your Story: Introductions, Goals, and Aspirations”
                      John Beilenson, President, Strategic Communications & Planning (SCP)

2:00 PM – 2:45 PM    “Big Picture: Overall Political Climate”
                      Norman Ornstein, Senior Fellow Emeritus, American Enterprise Institute

2:45 PM – 3:00 PM    BREAK

3:00 PM – 4:00 PM    Alumni Panel on COVID, Health Equity and Current Policy Priorities

4:15 PM – 5:30 PM    Alumni Panel on Placement Experiences and Current Positions: Where we were and what we are doing now

*RECEPTION AND DINNER TO FOLLOW*
Glover Park Room at The Dupont Circle Hotel
7:00 PM – 9:00 PM
2020-2021 Health and Aging Policy Fellows Capstone Meeting
Tuesday, October 5, 2021
The Foxhall Room at The Dupont Circle Hotel

Agenda

9:00 AM                         BREAKFAST

9:20 AM                         WELCOME
Harold Pincus, MD
National Program Director
Health and Aging Policy Fellows Program

Kathy Pike, PhD
Deputy Director
Health and Aging Policy Fellows Program

9:30 AM                         “Disability Policy Research Fellow: Financial Services Committee Placement”
Sarah Bassett, PhD, MA
Followed by comments from Megan McHugh, PhD, MPP
Associate Professor of Emergency Medicine, Northwestern University Feinberg School of Medicine

10:00 AM                        “Methadone Maintenance in Long Term Care: Policy Barriers and Opportunities for Progress”
Aaron Greenstein, MD

10:15 AM                        Followed by comments from Emily Rosenoff, MA, BS
Director for the Division of Long-Term Services and Supports Policy, ASPE

10:30 AM                        “Aligning Healthcare and Social Services: Boundary Spanning Top Down and Bottom Up”
Kyle Allen, DO, AGSF (Virtual)

10:45 AM                        “Bringing Insights from Organizational Theory to Accelerate Improvements in Clinical Practice for Medicare Beneficiaries: The ACL Discharge from Hospital to Home Ecosystem and the CMMI Change Management Model”
Mattia Gilmartin, PhD, RN, FAAN
Followed by comments from Kelly Cronin, MPH, MS*
Deputy Administrator, Center for Innovation and Partnership, ACL

*Kelly Cronin will be commenting for both Kyle Allen and Mattia Gilmartin
11:15 AM – 12:15 PM  LUNCH

12:15 PM  “Leveraging Data and Evidence-based Research to Impact Health Care Policy”
Keith Chan, PhD, LMSW

12:30 PM  “Dual Placements, Dual Perspectives”
Amber Hsu, PhD, RN (Virtual)

12:45 PM  Followed by comments from Rachel Dolin, PhD (Virtual)*
Professional Staff (Majority), Ways and Means Committee

*Rachel Dolin will be commenting for both Keith Chan and Amber Hsu

1:05 PM  “Working Toward a Bold Vision for America’s Mental Well-being”
Veronica Shead, PhD

1:20 PM  Followed by comments from Santiago Gonzalez
Senior Policy Advisor, Office of US Senator Michael Bennet

1:35 – 1:45 PM  BREAK

1:50 PM  “Transforming Care for People with Multiple Chronic Conditions”
Jing Wang, PhD, MPH, RN, FAAN

2:05 PM  Followed by comments by Arlene Bierman, MD, MS
Director, Center for Evidence and Practice Improvement, AHRQ

2:20 PM  “Checks and Balances: Senate Oversight”
Brynn Bowman, MPA

2:35 PM  Followed by comments from Melissa Dickerson, MPH, RN
Investigator, Senate Finance Committee

2:50 PM  “The Interplay of National and State Health Policy with Advocacy Organizations: Moving the Needle for Older Adults with Dementia and Their Family Caregivers”
Karen Rose, PhD, RN, FGSA, FAAN

3:05 PM  Followed by comments from Karen Marshall, JD (Virtual)
Director of Advocacy and Engagement, National Alliance for Caregiving, and Kerry Branick (Virtual)
Deputy Director of Models, Demonstrations, and Analysis Group, CMS

3:20 – 3:30 PM  BREAK

3:30 PM  “The Room Where It Sometimes Happens: Power, Prestige, and Politics in Policy Making in the House”
Ann McLaughlin, MHA, DMA, LNHA (Virtual)

3:45 PM  Followed by comments from Howard Gleckman (Virtual)
Senior Fellow, The Urban Institute

4:00 PM  “Longing for Long-Term Care Reform”
Asmaa Albaroudi, MSG

4:15 PM  Followed by comments from Lori Simon-Rusinowit, MPH, PhD (Virtual)
Associate Professor, Health Services Administration and Center on Aging, University of Maryland
4:30 PM  “A Centrist-Empiricist Goes to Washington (Virtually)”
Peter Cram, MD, MBA

4:45 PM  Followed by comments from Lori Frank, PhD (Virtual)
Senior Scientist, RAND

5:00 PM  CLOSING REMARKS
Harold Pincus
Kathy Pike

*RECEPTION TO FOLLOW*
Glover Park Room at The Dupont Circle Hotel
Appendix B: Sample HAPF & APSA Orientation Agenda

2021-2022 APSA & HAPF FELLOWSHIP
PROGRAM ORIENTATION SCHEDULES

The APSA Congressional Fellowship Program orientation is a key component of the fellowship year that prepares fellows for diverse placements in congressional offices and executive branch agencies. Designed to serve fellows of different professional backgrounds and levels of knowledge on Congress, the orientation provides fellows with a common-ground understanding of Congress and the policymaking process. The orientation also guides fellows in finding fellowship host offices and equips them to serve successfully in their fellowship placements.

2021-2022 Orientation at a glance

Dates: Monday, November 1–Wednesday, December 8
*No sessions on Nov. 11 (Veteran’s Day) and Nov. 22-26 (Thanksgiving)*

Format:
Nearly all instructional sessions will be held virtually; access information will be shared shortly. Networking and social events will be held in-person at venues near Dupont Circle and Capital Hill. Congressional Research Service training will be held in-person at the Library of Congress James Madison Memorial Building on November 4.

Monday, November 1

12:00-2:00 Welcome Luncheon (In-person)
Location: Mayflower Hotel
Tolson Room
1127 Connecticut Ave NW
Tuesday, November 2

10:00 – 10:45  Program Overview and Timeline
Meghan McConaughey, American Political Science Association

10:45 – 11:00  BREAK

11:00 – 12:00  What to Look for in a Placement

12:00 – 12:30  LUNCH

12:30 – 1:30   Placement Nuts and Bolts

1:30-1:45      BREAK

1:45-2:45      Networking Tips and Exercise

2:45-3:00      BREAK

3:00-4:00      Placement Groups

***

Wednesday, November 3

11:30 – 12:45  Structure of Congressional Offices
Meghan McConaughey, American Political Science Association

12:45 – 1:15   LUNCH

1:15 – 2:30    Congressional Staff Roles and Duties
Recent Fellows Panel: Sarah Bassett, House Committee on Financial Services
Melinda Sebastian, ACLS Leading Edge Fellow Jordan Kujala, University of California, Davis

2:30 – 2:45    BREAK

2:45 – 4:00    Making the Most of Your Fellowship Year
Recent Fellows Panel: Carlos Algara, Claremont Graduate University
Lieke van Heumen, University of Illinois at Chicago
Cathy Winenger, Western Washington University

5:00-7:00      Happy Hour (In-person)
Location: Mission Dupont
1606 20th St NW

Thursday, November 4

8:45 – 4:00    Congressional Research Service Training (In-person)
Location: James Madison Building,
101 Independence Ave, SE, Washington, DC
*Approximate start and end time. This is a full-day event. More information on precise schedule will be provided

***

Friday, November 5

9:00 – 10:30   Congressional Appropriation and Budget Process
Molly Reynolds, The Brookings Institution

10:30 – 10:45  BREAK
10:45 – 11:45  
**Reconciliation**
Matt Glassman, Government Affairs Institute

11:45 – 12:00  
**BREAK**

12:00 – 1:00  
**History of Congressional Procedure**
Christian Fong, University of Michigan

---

**Monday, November 8**

11:30 – 12:45  
**Introduction to Congressional Functions**
Laura Blessing, Government Affairs Institute

12:45 – 1:15  
**LUNCH**

1:15 – 2:30  
**Congressional Delegation and Executive Policymaking**
Ian Ostrander, Michigan State University

2:30 – 2:45  
**BREAK**

2:45 – 4:00  
**Congressional-Executive Relations**
John Tambornino, Office of Disability Employment Policy, Department of Labor

---

**Tuesday, November 9**

11:30 – 12:30  
**What Offices Are Looking For**
Recent Hosts Panel:
Isaiah Akin, Office of Senator Ron Wyden
Stephen Coffey, Office of Representative Matt Cartwright
Christian Lovell, Office of Representative Rosa DeLauro
Jeremy Marcus, Office of Representative Doris Matsui

12:30 – 1:00  
**LUNCH**

1:00 – 2:15  
**Tips for Working in a Congressional Office**
Former Fellows Panel
Marie Gualtieri, Office of Representative Rosa DeLauro
Sarah Khasawinah, Senate Special Committee on Aging
Matthew Patane, House Committee on Oversight and Reform

2:15-2:30  
**BREAK**

2:30 – 3:45  
**How to Talk with Policymakers**
Jordan Tama, American University

3:45-4:00  
**BREAK**

4:00 – 5:00  
**Placement Group Meetings**

---

**Wednesday, November 10**

9:00 – 10:30  
**Coffee and Speed Networking (In-person)**
Location: TBA

11:00-1:00  
**HAPF Session: Aging Issues and Opportunities in Congress and Related Organizations**
Confirmed Speakers:
Alice Burns (CBO)
Rachel Dolin (Committee on Ways and Means)
Elisa Walker (Committee on Ways and Means)
Alison Hard (Committee on Education and Labor)
Phoebe Ball (Committee on Education and Labor)
Kristen Colello (CRS)
Garrett Devenney (HELP Committee)
Abby Duggan (Office of Senator Sherrod Brown)
Melissa Dickerson (US Senate Committee on Finance/Office of Chairman/Senator Ron Wyden)

11:15 – 12:30 Looking Ahead to the 2022 Elections Gregory Koger, University of Miami
12:30-1:00          LUNCH
1:00 –2:30          What to Expect from the 2022 Session of Congress
                Joshua Huder, Government Affairs Institute

***

Thursday, November 11-Friday, November 12: Veteran’s Day Break (No ASPA Programming)

Friday, November 12

11:30-1:00  HAPF Session: Aging Issues and Opportunities in Congress and Related Organizations
Confirmed Speakers:
Sarah Khasawinah (Senate Special Committee on Aging)
Michael Gamel-McCormick (Senate Special Committee on Aging)
Jennifer Baker (Senate Special Committee on Aging)
Santiago Gonzalez (Office of Senator Michael Bennet)
Phoenix Voorhies (CRS)
Anne Schwartz (MACPAC)
Samantha Koehler (Office of Tim Kaine)
*Sarah, Michael, and Jennifer will present as a group

3:30-5:00  HAPF Session: Aging Issues and Opportunities in the Executive Branch and Related Organizations
Confirmed Speakers:
Susan Lynch (DOJ)
Melinda Kelley (NIH/NIA)
Amelia Karraker (NIH/NIA)
Anita Everett (SAMHSA)
Thomas Edes (VA)
Emily Rosenoff (ASPE)

***

Monday, November 15
12:00-1:00 Informal Lunch (In-person)
Location: TBA
2:00 – 2:15 Check-in and Questions
2:15 – 3:30 Congressional Capacity and Staffing
   Casey Burgat, George Washington University
3:30 – 3:45 BREAK
3:45 – 5:00 Executive Branch Staffing and Personnel
   Loren DeJonge Schulman, Partnership for Public Service

***

Tuesday, November 16

11:30 – 12:15 Education Policy
   Mona Vakilifathi, Office of Representative Betty McCollum (INVITED)
12:15 – 12:45 LUNCH
12:45 – 1:45 Politics of Health Policy
   Chris Pope, Manhattan Institute
1:45 – 2:00 BREAK
2:00 – 3:00 Social Determinants of Health
   Gabe Sanchez, University of New Mexico
3:00-3:15 BREAK
3:15-4:00 National Defense Authorization Act
   Charlie Stevenson, Johns Hopkins School of Advanced International Studies
6:00pm Barbara Sinclair Lecture (optional but highly recommended)
   Wendy Schiller, Brown University

***

Wednesday, November 17

2:00 – 3:00 Parties and Partisanship
   Lilliana Mason, Johns Hopkins University
3:30 – 3:45 BREAK and Placement Group Check-ins
3:45 – 5:00 Women in Congress
   Kelly Dittmar, Rutgers University

***

Thursday, November 18: Sightseeing Day

9:00-10:00 Virtual Tour of the Capitol Building (Optional)
   Steven Livengood, Public Historian, United States Capitol Historical Society
12:00-1:00 Tour of Capitol Grounds (In-person)
   Steven Livengood, Public Historian, United States Capitol Historical Society
   Meet at East Capitol Street and First Street NE (on the Capitol side of First St.)
2:00-3:25 HAPF Session: Aging Issues and Opportunities in the Executive Branch and
Related Organizations
Confirmed Speakers:
Yen Lin (OASH/HHS)
Lisa McGuire (CDC)
Anne Ordway (ACL/NIDILRR)
Jovier Evans (NIMH)
Ellen Blackwell (CMS)

3:25-3:35 BREAK

3:35-5:00 HAPF Session: Aging Issues and Opportunities in the Executive Branch and Related Organizations
Confirmed Speakers:
Kelly Cronin (ACL)
Greg Link (ACL)
Judith Steinberg (OASH/HHS)
Joan Weiss (HRSA)
Marianne Shaughnessy (VA)

Friday, November 19

10:00 – 11:00 House Committee on the Modernization of Congress
Marian Currinder, House Committee on the Modernization of Congress

11:00 – 11:15 BREAK

11:15-12:15 Think Tanks
Dan Drezner, Tufts University

12:15-12:30 BREAK

12:30 – 2:00 Congress, Ethics, and Lobbying
James Thurber, American University

4:00– 5:30 HAPF Session: Aging at the State Level
Confirmed Speakers:
Carrie Graham (Center for Health Care Strategies)
Adam Mosey (ADvancing States)
Samantha Scotti (NCSL)
Salom Teshale (NASHP and 2018-2019 HAPFellow)
Judy Zerzan (Washington State Health Care Authority & 2008-2009 HAPFellow)

***

Monday, November 22 – Friday, November 26: Thanksgiving Holiday

Monday, November 29

11:00-12:10 HAPF Session: Aging at the State Level
Confirmed Speakers:
Lindsey Browning (NAMD)
Frederick Isasi (Families USA)
Rajean Moone (University of Minnesota and 2012-2013 HAPFellow)  
Jennifer Wong (Annenberg Foundation/Wallis Annenberg GenSpace & 2018-2019 HAPFellow)  

12:00-1:00 Informal Lunch (in person) APSA  
Location: Hawk ‘n’ Dove  
329 Pennsylvania Ave SE  

12:20-1:30 HAPF Session: Key Aging-related Organizations  
Confirmed speakers:  
Mary Barton (NCQA)  
Cheryl Phillips (SNP Alliance)  
Megan Wolfe (TFAH)  
Nora Obrien-Suric (The Health Foundation for Western & Central New York)  
Renée Markus Hodin (Community Catalyst)  
Latrice Vinson (American Psychological Association & 2015-2016 HAPFellow)  

2:00 – 2:15 Check-in and questions  
2:15 – 3:30 Centralization and Leadership in Congress  
James Curry, University of Utah  

3:30 – 3:45 BREAK  
3:45 – 5:00 Placement Group Meetings

***

Tuesday, November 30

11:30 -12:30 Governing Independent Regulatory Agencies  
Sarah Binder, George Washington University (INVITED)  

12:30 – 1:00 BREAK  

1:00 – 2:00 Procedure and Politics in the US Senate  
James Wallner, R Street Institute (INVITED)  

2:00 – 2:15 BREAK  

2:15 – 3:30 Interest Groups and Lobbying  
Alex Garlick, The College of New Jersey  

3:30 – 3:45 BREAK  

3:45 – 5:00 US Parties and Party Realignment  
Keneshia Grant, Howard University

***

Wednesday, December 1

11:30-12:30 Introduction to the Congressional Budget Office  
Christi Hawley Anthony, CBO  

12:30 – 1:00 BREAK  

1:00 – 2:00 Introduction to the Office of Legislative Counsel  
Warren Burke and Michelle Vanek, OLC  

2:00 – 2:15 BREAK  

2:15 – 3:15 Introduction to the Government Affairs Office  
David Lewis, GAO  

3:15 – 4:00 Check-in and office hours
5:00-7:00  Evening Social Event (In-person)
Location: The Smith
1315 U Street NW

***

Thursday, December 2

10:00-11:00  Political Leadership and the Speaker of the House
Matthew Green, Catholic University

11:00-11:15  BREAK

11:15-12:30  Home Rule: DC and Congress
Michael Fauntroy, George Mason University

12:30-1:00  LUNCH

1:00-2:00  How to Write for Policymakers
Collin Paschall, Johns Hopkins University (INVITED)

2:30-4:00  HAPF Session: Key Aging-related Organizations
Confirmed Speakers:
Michael Reese Wittke (National Alliance for Caregiving)
Amy York (Eldercare Workplace Alliance)
Howard Bedlin (NCOA)
Julie Carter (Medicare Rights Center)
Sarah Tellock (Alzheimer’s Association)

***

Friday, December 3

10:00-11:30  CSPAN
Brian Lamb, CSPAN

11:30-12:15  Lunch

12:15-1:00  Congress, Policy, and Advocacy
Katrina Gamble, Sojourn Strategies

1:00-1:15  BREAK

1:15-2:00  Global Public Health
Nathan Paxton, Office of Senator Angus King

***

Monday, December 6

9:00-10:30  Morning Networking Event (In-person)

***

Tuesday, December 7

11:30-1:00  Congressional Black Caucus and Caucuses in Congress
Menna Demessie, Universal Music Group Task Force for Meaningful Change

1:00-1:30 LUNCH
1:30-2:30 Native American Policy
   Colby Duren, National Congress of American Indians
2:30-2:45 BREAK
2:45-3:45 Native Health and the Indian Health Service
   Julia Wakeford, National Congress of American Indians
3:45-4:00 BREAK
4:00-5:00 Placement Group Meetings

***

Wednesday, December 8

11:30-1:00 Office Hours
1:00-2:15 Covering Congress
   Ron Elving, American University and NPR
2:15-2:30 BREAK
2:30-3:30 A Member’s Perspective
   Victor Fazio, Akin Gump (Former U.S. Representative, CA-3)
3:30-4:00 Orientation Wrap-up
5:00-7:00 Close of Orientation Reception (In-person)
   Location: Zaytinya
   701 9th St NW

**
2022 Communications Workshop
March 17: 2:00-5:15 PM (ET) via Zoom
(Session 1 of 2)
@HAPFellows

Day 1 | Thursday, March 17, 2022 (Zoom)

2:00-2:15 PM  Welcome & Introductions

2:15-3:45 PM  Effective Messaging in a Policy Context
Having a strong message—and being able to convey it—is essential to effective policy communications. This interactive session will help fellows hone their policy messages (for use in subsequent sessions and beyond) for maximum impact.

John Beilenson, MA, President
SCP

3:45-3:50 PM  Break

3:50-4:30 PM  What’s in a Frame?
This presentation will introduce fellows to the concept of framing and how framing and reframing an issue can influence public policy and social change.

John Beilenson, MA, President
SCP

Framing and Reframing: A Policy Perspective

Sarah J. Dash, MPH, President & CEO
Alliance for Health Policy

4:30-5:15 PM  Using Social Media to Advance Policy Aims
Social media is an increasingly prevalent and powerful vehicle for policy advocacy and leadership, as well as for reaching the “traditional” media. In this session, fellows will learn about the benefits, challenges, and best practices of using social media to advance their policy work.

Amy Herr, MHS, PMP, Director, Health Policy
West Health

5:15 PM  Recap & Closing
2022 Communications Workshop
April 4th at The Dupont Circle Hotel
@HAPFellows

Day 2 | Monday, April 4, 2022

8:30 - 9 AM  Breakfast

9 - 9:10 AM  Welcome

9:10 - 9:40 AM  Re-thinking Writing: Short Forms for Policy Audiences
Building off earlier sessions, this workshop will cover the basics of preparing various policy tools—talking points, issue briefs and memos.

John Beilenson, MA, President
SCP

9:45 - 11:45 AM  Developing Effective Policy Presentations
You’ve gathered your facts and honed your message, now it’s time to present. This session will cover the basics of audience and environmental analysis, structuring an engaging presentation, and using slides to support your delivery.

Christine Clapp, MA, Founder and President
Spoken with Authority

Data Visualization: Translating Content for Your Audience
Many of us have access to a plethora of data related to the issues we’re working on. The challenge is to present the most salient of these in a format most suited for our audience(s). In this session, fellows will learn how to present data visually in ways that can help advance their policy objectives.

Andy Krackov, MA, President
Hillcrest Advisory

11:45 AM - 12:30 PM  Lunch
12:30 - 12:45 PM  Introduction to the Consultancy

12:45 - 2:45 PM  Communications Consultancy (2 concurrent groups)
10 min break at 1:45 PM  Each participant will present a communications challenge related to her or his fellowship and receive structured, constructive feedback on this issue. We will follow a very strict timetable so that each person will be able to present, answer clarifying questions, receive feedback and advice from the group, and then have a chance to respond to the ideas presented.

Facilitators:
John Beilenson, MA, President
SCP

Lynn Friss Feinberg, MSW, Former Senior Strategic Policy Advisor
AARP Public Policy Institute

2:45 - 3 PM  Break

3 - 4:30 PM  Hands On: Using Op-eds and Blogs to Communicate Your Policy Agenda and Build Thought Leadership
Op-ed pieces, letters to the editor, and blog posts are great ways to get your message out, helping to advance both your own work and the field of health and aging. This interactive workshop will present best practices for putting complex, important ideas into these engaging, short public forms. Fellows will have time to draft an outline for a piece on a topic of their choosing.

Kathy M. Flke, PhD, Deputy Director
Health and Aging Policy Fellowship

4:30 - 5 PM  Debrief/Discussion/Closing
Appendix D: Fellows Network Meeting

HEALTH AND AGING POLICY FELLOWS

Fellows Network Meeting
Tuesday, April 5, 2022
Glover Park Ballroom, The Dupont Circle Hotel

8:30–9:00 am  BREAKFAST

9:00–9:30 am  Welcome, Connecting & Reconnecting

9:30–10:45 am  Current Priorities and Progress in Health and Aging Policy
This 75-minute session will include 15-minute updates on priorities and progress on the following topics:

1. Age-friendly health systems & Living in Community
   Panelists: Teri Kennedy and Jennifer Wong

2. Nursing Homes and Congregant Housing
   Panelists: Susan Lynch and Ann McLaughlin

3. Aging and Health Disparities
   Panelists: Steven Starks and Keith Chan

*1-2 others TBD

10:45–11:00 am  BREAK

11:00–11:45 am  Keynote address by Jack Rowe
Dr. John W. Rowe is the Julius B. Richmond Professor of Health Policy and Aging at the Columbia University Mailman School of Public Health. From 2000 until late 2006, Dr. Rowe served as Chairman and CEO of Aetna, Inc., one of the nation’s leading health care and related benefits organizations. Before his tenure at Aetna, from 1998 to 2000, Dr. Rowe served as President and Chief Executive Officer of Mount Sinai NYU Health, one of the nation’s largest academic health care organizations. From 1988 to 1998, prior to the Mount Sinai-NYU Health merger, Dr. Rowe was President of the Mount Sinai Hospital and the Mount Sinai School of Medicine in New York City.

Dr. Rowe has been focused on issues of aging throughout his career. He was Professor of Medicine and Founding Director of the Division on Aging at the Harvard Medical School, as well as Chief of Gerontology at Boston’s Beth Israel Hospital. He was Director of the MacArthur Foundation...
Research Network on Successful Aging and is co-author, with Robert Kahn, Ph.D., of Successful Aging (Pantheon, 1998). Currently, Dr. Rowe leads the MacArthur Foundation’s Network on An Aging Society.

**11:45-12:00pm**

**BREAK**

**12:00pm-12:45pm**

**Looking Ahead: The Future of HAPF**

This session will be set up as small group discussions and will serve as an opportunity for Fellows to share thoughts and ideas about how we can further improve support for the alumni community and/or implement more structure for the program.

**Group/Table Facilitators:**
Melissa Batchelor, Joan Davitt, Tia Gilmartin, Brian Kaskie, Karen Rose, Sally Stearns, Liece van Heumen

**12:45-1:45pm**

**LUNCH**

**1:45pm-3:00pm**

**SIG Conversations**

We will have small group discussions focused on the following areas based on topic requests from Fellows:

- **Age-friendly health systems & Living in Community**
  Facilitator: TBD

- **Informal Caregivers and Direct Care Workforce**
  Facilitator: TBD

- **Long-term Care**
  Facilitator: Joanne Lynn

- **Palliative Care:**
  Facilitator: TBD

- **Racial/Ethnic/Gendered/LGBTQ+ health disparities**
  Facilitator: TBD

- **Technology, Innovation and Aging**
  Facilitator: Hannah Luetke-Stahlman & Jason Johanning

- **What is Happening on the Hill**
  Facilitator: TBD

- **What is Happening at Health and Human Services**
  Facilitator: Arlene Bieman

- **Mental Health and Aging**
  Facilitator: Madeline Naegle

**3:00pm**

**WRAP-UP**
Appendix E: Reimbursement Documentation Examples

Please submit the following items within 2 weeks of your travel:

- **Travel voucher**: please complete the most updated version of the travel voucher
- **Reimbursement cover page**: please include the expense breakdown on the cover page attached for all your expenses
- **Receipts**: Scanned/e-mailed receipts or original receipts by mail should be submitted – these include travel and accommodation receipts, receipts for flight and transportation (train/bus/taxi/metro). First class tickets are not reimbursable.
- **Proof of Payment**: Scanned and e-mailed proof of payment for all lodging and travel costs is required (credit card activity or credit card statement)
- **Meals**: RFMH will automatically reimburse you for the maximum per diem rate by location and timing of your travel. Please refer to the [GSA website](http://www.gsa.gov) for details and submit the maximum allowed per diem. There is no need to include receipts for meals!

The above items should be e-mailed to Alfa Garcia, cc: Mica Muir and Brigitta Spaeth or mailed to the address below (please note that you must mention room #5318 and Unit 9 in the mailing address so mail is delivered directly to us without unnecessary delay!):

Mica Muir  
Program Coordinator, Health and Aging Policy Fellows Program NYSPI – 5th floor, Room 5813  
Research Foundation for Mental Hygiene 1051 Riverside Drive, Unit 9  
New York, NY 10032

If you are submitting reimbursement claims for the first time, please complete and sign the attached W9 form so our Business Office can enter your information in the system.

Overall, please allow between 4-8 weeks for the reimbursement turn around after we have received all needed documentation.

For further information, please consult the attached Travel Policy Compendium or contact me directly.
Example Travel Voucher:

Be sure to use the most up to date travel voucher form.

Funding for Travel Outside of HAPF-organized Events

Be sure to include a note containing the following information with the travel voucher and required documentation to the NPO.

<table>
<thead>
<tr>
<th>Dates of travel</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>mm/dd/yy - mm/dd/yy</td>
<td>Ex: Travel to Washington DC, to [state purpose] (also include if meetings with specific people)</td>
</tr>
<tr>
<td>Hotel</td>
<td>Hotel Name: $ Total (Include hotel receipt)</td>
</tr>
<tr>
<td>Transportation</td>
<td>Amtrak, Parking, travel mileage, tolls, etc. Include that applies. (include all travel related receipts)</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Meals</td>
<td>Dinner (1) (Please refer to the travel policy regarding meal reimbursement when claiming meals per diem)</td>
</tr>
<tr>
<td>Additional documents attached</td>
<td>Agenda, Conference Flyer, etc.</td>
</tr>
</tbody>
</table>

As a general rule, the HAPF program only covers travel costs for Current Non-Residential Fellows:
to attend meetings that are organized by our office and are part of the fellowship curriculum (covered by the program), and
to make multiple trips to their placement sites during their fellowship year (covered by the individual, $10,000 project-related budget).

Residential Fellows can receive up to $1,500 for up to two (2) placement-related site visits per visit.
If you attend one of our meetings (e.g., Communications Workshop or Spring Symposium), necessary travel (e.g. flights and hotel rooms for these specific dates) will be covered by the program. If you decide to extend your stay in DC in connection with these trips for meetings at your placement sites, any additional hotel fees will come out of your project-related travel funds. Many Fellows compound placement-related trips along with the HAPF program meetings to save money.

Non-residential Fellows who have not fully spent their project-related funds at the end of the fellowship year may use left-over funds to attend other health and aging-related scientific conferences and meetings (after prior approval by our office to do so). Fellows should track their own expenses and reimbursements against the $10,000 budget.
After your fellowship, you may also apply for an opportunity grant which under certain circumstances will cover travel to a scientific meeting. Please refer to the award description in the following appendix (Appendix I).
Appendix F: Individualized Learning Plan

2020-2021 Health and Aging Policy Fellows
Individualized Learning Plan

1. What are your top 3-5 goals for the Fellowship Year? (Please list goals that are concrete and measurable.)

<table>
<thead>
<tr>
<th>GOALS</th>
<th>ACTIVITIES</th>
<th>PROGRESS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. What specific skills/knowledge would you like to gain from the Fellowship experience?

<table>
<thead>
<tr>
<th>SKILLS/KNOWLEDGE</th>
<th>ACTIVITIES</th>
<th>PROGRESS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

48
3. What are your goals for your future career development near-term and longer-term? (Please list goals that are concrete and measurable.)

<table>
<thead>
<tr>
<th>GOALS</th>
<th>ACTIVITIES</th>
<th>HOW CAN HAPF ASSIST?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Near-Term (within the next 5 years):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Longer-Term:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. We encourage Fellows to have several mentors (e.g., at placement site, broad career focus, content area expert, working on specific Fellowship topic or on a complementary topic, at key institution related to Fellow’s interests, etc). Please list specific names and where you are in terms of establishing each person as a mentor.

<table>
<thead>
<tr>
<th>MENTOR NAME(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLACEMENT SITE</td>
</tr>
<tr>
<td>BROAD CAREER FOCUS (academic, non-profit leader, etc)</td>
</tr>
<tr>
<td>CONTENT AREA EXPERT (food insecurity, long-term care, etc)</td>
</tr>
<tr>
<td>OTHER</td>
</tr>
</tbody>
</table>

49
Appendix G: Post-Fellowship Opportunity Award

WHAT?
The Health and Aging Policy Fellows Program is pleased to announce an award that will facilitate ongoing and unique opportunities to participate in policy activities for which Fellows require specific funding support.

WHO?
The opportunity is open to all Health and Aging Policy Fellows after completion of the active Fellowship year.

HOW?
Health and Aging Policy Fellows may apply for funding support that is typically limited to a maximum of $5,000. If multiple Fellows are collaborating on a project, it is possible to request up to $5,000 per Fellow, with a total overall cap of $15,000 per project. If this is the case, Fellows should schedule a call with Dr. Pincus or Dr. Pike to discuss in advance of submitting the proposal. In all cases, budgets need to be justified.

Fellows will submit a 1-2 page proposal that provides a clear statement of purpose, plan, timeline and budget. The proposal should be sent electronically to Drs. Harold A. Pincus and Kathleen M. Pike. Fellows are eligible to receive funding no more than once per year; however, to the extent that funding is available, fellows may apply each year. Other things being equal, priority will be given to Fellows who have not previously received funding support through this mechanism. Applications will be accepted on a rolling basis, and we will respond to inquiries in a timely manner.

HOW MANY?
Multiple awards may be granted each year. The exact number of awards each year will depend on requested budgets and quality of proposals.

PRIORITIES?
• Proposals will be evaluated on their potential Policy Impact;
• Priority will be given to proposals that include collaboration among HAPF Alumni and engagement with HAPF Partners;
• This award is intended to provide targeted funding for opportunities that require timeliness and flexibility and that are not easily funded by traditional mechanisms.

WHAT WILL WE FUND?
• Travel (to be reimbursed according to RFMH travel policy);
• Meeting/Conference attendance where HAPF will be prominently and uniquely represented (beyond standard meetings where HAPF already has a presence);
• Special meetings convened by HAPF Fellows (e.g., AV and/ or catering for meeting, recording/ transcribing meeting discussions, etc.)
• Unique opportunities not easily supported by traditional grant mechanisms (e.g., producing materials for dissemination such as a white paper or other publishable products).

Important: We will not provide funding for salary of any kind (incl. payment of honoraria).
Possible uses of funds include, but are not limited to: supporting travel to Washington, state capitals or other settings to participate in a task force or policy initiative; convening a policy meeting to produce a white paper or similar policy effort; participating in timely policy/research work to expand upon one’s Fellowship project; or taking advantage of other unique opportunities such as developing partnerships with other organizations to advance policy aims.
Appendix H: 2019 Survey of Non-Residential Fellow Alumni

A summary of responses (from 32 alumni) are included below. Questions were:

- How did you pitch yourself as a non-residential fellow to potential placement sites?
- What qualities should you look for in a placement?
- What questions should you ask to evaluate a placement?
- What were effective ways to engage in the tasks and projects of your placement?
- Describe the time commitment.
- How often did you travel to DC and for what duration?
- What advice do you have for balancing placement activities with non-fellowship-related responsibilities?

This summary of responses should not discourage your pursuit of any particular opportunity. Please make the most of your placement experience and share your wisdom!

<table>
<thead>
<tr>
<th>Question</th>
<th>Summary of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>How did you 'pitch' or sell yourself as a non-residential fellow to placements (e.g. how did you explain your availability, other time commitments, travel ability, etc.)?</td>
<td>Highlight the following: You bring expertise and experience – for free! You are available to travel to DC regularly (if possible - most alums said they would travel to DC 2-5 days per month) You are willing to learn and work remotely You are committed to a consistent weekly schedule if that helps them You have a flexible schedule throughout the week (if that is true) You have been given dedicated time away from regular job Discuss ways you can stay connected through the week, based on what you think is possible (most alums said they would have weekly calls and be available via email the rest of the time)</td>
</tr>
<tr>
<td>What are key qualities that non-residential fellows should look for in potential placements?</td>
<td>Flexibility Learning potential Discrete projects for you to work on Someone willing to mentor, feel you can work with, who has the bandwidth</td>
</tr>
</tbody>
</table>
| What are key questions non-residential fellows should ask potential placement sites? | Ability to work remotely
They include you in the general activities of the placement site

| Is there a Memorandum of Understanding, security clearance, or other HR documentation required by the site? (Getting these things can take considerable time and delay getting started)

How will we stay in contact?
How do you work with external experts and/or part-time colleagues?
Are there any other fellows working on this project? (You may not want to work on projects with other fellows; you may want to interface with placement staff as much as possible)
How much work will be in-person vs. online vs. phone vs. asynchronous?
Have you had a fellow before? If so, can you talk to them?
What are the responsibilities of the person I would be working with?
What kind of meetings could I attend? Events I could participate in?
"I am committed to be as involved in your day-to-day work as possible and have some ideas about how we could accomplish that. Would you be willing to discuss so concrete strategies for making that happen?"
Will you proceed with this project if I don’t join (as a measure of whether they actually care about this)?
Are your work times flexible across time zones?
Important for West Coast people.

| What were the most effective ways you found to engage with your placement? | Identify a primary project and have roles and responsibilities |
If possible, be on-site, in person regularly (most alums went monthly)  
– weekly calls no matter what  
Be willing to do anything needed, be objective and open to considering things that may not match your opinion  
Be proactive

| Please describe the time commitment you ultimately put in with your placement. Questions to consider: Were you putting in more or less than 20% or 8 hours per week? Would you work more than 20%/8 hours some weeks and other weeks work 0? Were you working sporadically throughout the week answering emails, taking phone calls? Or were you dedicating one full day per week to the placement? | Of the 21 alums who answered this question:  
13 said on average they spent 20% of their week on their placement  
5 said on average they spent more than 20% of their time  
The others said their time was sporadic; sometimes none and sometimes more than 20%  
Only a few alums were able to block off dedicated time each week to their placement and only work during that time. Most alums worked on their projects sporadically throughout the week when it fit their schedules. Some alums worked on their projects on nights and weekends. |

| Please describe how often you traveled to DC and for how long. | Some alums would travel to DC once every two weeks while others would only travel there once every 3-4 months.  
When in DC, some fellows would stay a full week and others would stay 2-3 days. |

| What advice do you have for non-residential fellows on how to balance placement duties with other non-fellowship-related responsibilities? | Be transparent with employer, get their support; be transparent with placement  
Use HAPF DC travel to tack on placement travel  
Identify stumbling blocks in advance  
Plan early |
### Appendix I: Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAA</td>
<td>Area Agency on Aging</td>
<td></td>
</tr>
<tr>
<td>ACL</td>
<td>Administration for Community Living</td>
<td></td>
</tr>
<tr>
<td>AOA</td>
<td>Administration on Aging</td>
<td></td>
</tr>
<tr>
<td>ASPA</td>
<td>American Political Science Association</td>
<td></td>
</tr>
<tr>
<td>CMS</td>
<td>Centers for Medicare and Medicaid Services</td>
<td></td>
</tr>
<tr>
<td>CDC</td>
<td>Centers for Disease Control and Prevention</td>
<td></td>
</tr>
<tr>
<td>EPA</td>
<td>Environmental Protection Agency</td>
<td></td>
</tr>
<tr>
<td>GSA</td>
<td>Gerontological Society of America</td>
<td></td>
</tr>
<tr>
<td>HAPF</td>
<td>Health and Aging Policy Fellowship</td>
<td></td>
</tr>
<tr>
<td>HHS</td>
<td>US Department of Health and Human Services</td>
<td></td>
</tr>
<tr>
<td>n4a</td>
<td>National Association of Area Agencies on Aging</td>
<td></td>
</tr>
<tr>
<td>NIA</td>
<td>National Institute on Aging</td>
<td></td>
</tr>
<tr>
<td>IOM</td>
<td>Institute of Medicine</td>
<td></td>
</tr>
<tr>
<td>SUA</td>
<td>State Unit on Aging</td>
<td></td>
</tr>
</tbody>
</table>
Appendix J: Federal Aging Policy Organization Chart
Appendix K: Glossary of Common Health Policy Terms

**Centers for Medicare and Medicaid Services (CMS)** - federal agency, in partnership with states, that covers over 100 million people through Medicare, Medicaid, Children’s Health Insurance Program (CHIP) and the Health Insurance Marketplace.

**Community Rating** - rule preventing health insurers from charging beneficiaries within a geographic area different premiums based on age, gender, health status or other factors.

**Deductible** - amount a beneficiary pays for health care services before their insurance plan begins to pay. Once this amount has been paid, beneficiaries usually only pay a copayment or coinsurance while the insurance company pays the rest.

**Donut Hole** - refers to the Medicare prescription drug (Part D) coverage gap, commonly referred to as the “donut hole.” After a beneficiary and their drug plan have spent the allotted amount for covered drugs, the beneficiary must shoulder all of the costs out-of-pocket until they reach the yearly limit. Once the yearly limit is reached, a drug plan resumes sharing part of the cost.

**Drug Price Competition and Patent Term Restoration Act** - also known as the Hatch-Waxman Amendments and passed in 1984, Congress passed legislation to establish an abbreviated pathway for generic drug approval.

**Essential Health Benefits** - according to the ACA, as of 2014, all Health Insurance Marketplace plans, non-marketplace and small group plans, as well as Medicaid and Medicare must offer ten “Essential Health Benefits” that include: outpatient care, emergency services, hospitalization, maternity and newborn care, mental health and addiction services, prescriptions drugs, rehabilitation services, laboratory services, preventive and wellness treatment, as well as pediatric care.

**Medicaid** - federal and state health coverage program that covers low-income families, qualified pregnant women and children and the elderly, as well as people with disabilities. As of October 2019, roughly 65 million individuals were enrolled in Medicaid. As of this year, 37 states including D.C. have expanded Medicaid.

**Medicare** - federally funded and state administered health insurance program for people that are 65 years old and older, some younger people with disabilities and those with End-Stage Renal Disease. Medicare is divided into 4 “parts”: Part A, which is insurance for hospital stays; Part B, which covers doctor services, outpatient care, medical supplies and preventive services; Part C, or Medicare Advantage plans (see definition in this glossary); and, Part D, or prescription drug coverage.

**Medicare Access and CHIP Reauthorization Act (MACRA)** - MACRA was passed in 2015 to extend funding for the Children’s Health Insurance Program and Community Health Centers, along with other public programs. Additionally, MACRA created the Quality Payment Program (QPP) to reform how physicians are reimbursed through Medicare. QPP incentivizes quality of care for patients instead of the volume of care provided by repealing the Sustainable Growth Rate, creating the Merit-Based Incentive Payments System (MIPS) and giving bonus payments for participation in eligible alternative payment models (APMs).

**Medicare Advantage (MA)** - private health care option for seniors eligible for Medicare. MA plans cover all Medicare services, but can also offer extra coverage such as vision, hearing and dental coverage. More than a third of Medicare beneficiaries are enrolled in a MA plan. In 2019, MA plans began offering coverage for certain non-medical supportive services to beneficiaries, such as transportation and home meal delivery.

**Supplemental Security Income** - A federal program that provides a minimum income to seniors and the disabled who do not qualify for social security.

**Value Based Purchasing** – Aims to improve quality and value of health care by connecting payments to quality metrics rather than volume of patients or procedures.
Appendix L: Alumni Opportunities

When your fellowship year ends, your opportunities to engage as an HAPF alumni begin. Below are just a few of the ways that you can continue to engage as a part of the HAPF community:

- **Serve as a mentor**
  - Each incoming HAP fellow gets assigned two alumni mentors. Mentors are expected to connect with fellows throughout the fellowship year and may support elements of the fellow’s individual learning plan.

- **Participate in review of applications and interviews**
  - Alumni play a role in the panel interview process to select each year’s incoming HAP fellows. Participation is at the discretion of the NPO and would likely be in late spring/early summer.

- **Book Club**
  - Alumni serve as the organizers and hosts of the HAPF monthly book club, alumni are also encouraged to participate in the book club meetings and discussions.

- **Attend Events**
  - Alumni are encouraged to join the monthly network opportunities as well as participate in the policy symposium organized by current fellows.

- **Present and moderate HAPF Orientation Session**

- **HAPF Ambassador**
  - Alumni are invited to help staff a HAPF table at conference exhibit halls, such as GSA’s annual meeting.
Appendix M: Acknowledgements

This Handbook was created by the 2013-2014 Health and Aging Policy Fellows and has been updated by each successive class.

2021-2022 update
The 2021-2022 cohort may be remembered as the hybrid group. Our cohort distributed the required group work into thirds; we had symposium, project, and handbook teams. Our group hosted a spring symposium in a hybrid format. The group project team surveyed current HAPF to discover what the group wishes they would have known/better prepared for coming into the fellowship. Thank you to the National Program Office staff for your leadership and continued support. Buckle up, it’s going to be a great year full of busy days and many opportunities! Best of luck, welcome to the HAPF family!

2020-2021 update
The 2020-2021 cohort welcomes the new Health and Aging Policy Fellows to the HAPF family! We wish you a wonderful year of learning. Many thanks to the HAPF National Program Office and APSA for providing us with an excellent virtual orientation during a pandemic. Although we were never able to meet in person, we still built lasting relationships and look forward to spending time with our fellow fellows in the future and connecting with all of you.

2019-2020 update
The 2020 cohort of fellows may be remembered as a group of fellows who survived CoVID-19. Through this experience, very different from fellows past, the 2019-2020 team learned creative ways to navigate the health and aging policy arena. This insight has surely been accomplished with each fellow much more knowledgeable about how to be advocates and champions for older adults even in less than optimal conditions. Of course, we couldn’t have done this without our incredible leadership team in Harold, Kathy, Mica, Brigitta and Victoria…and of course Meghan McConaughey of APSA! During this super challenging time these amazing leaders found ways to create educational and social engagement opportunities using technology. During lockdowns and social distancing, we certainly could empathize with the population we are working to support. Zoom sessions and video/telephone conferencing were employed to support the mission of the program and to continue immersion. Several products are underway to strategize and share lessons learned in a less than optimal environment. We know cohorts to follow will have incredible challenges and problems to solve. We want you to know that you WILL be successful with this opportunity. It is like no other!

2018-2019 update
Our cohort began our year with a notable milestone - the 10th anniversary celebration of The Health and Aging Policy Fellows Program. This year saw a reinvigoration of our alumni network as a result. Dr. Janna Deitz joined APSA as Senior Director of the Congressional Fellowship Program and enhanced its rich tradition by diversifying core elements of the APSA CFP Orientation. Mica Muir joined HAPF as Program Coordinator. The 2019 Handbook includes a summary of survey responses from nonresidential alumni that aims to provide valuable insights for fellows based outside the District. We thank Harold, Kathy, Brigitta and Mica for their insights, innovation and steadfast leadership.

2016-2017 update
We join the previous Health and Aging Policy Fellows in expressing our appreciation for this amazing year. We have learned more than we could have imagined about US politics and
policymaking during these interesting times, reminding us that no matter the year, DC is always buzzing with excitement and there is always more to learn.

2015-2016 update
As the 8th and largest cohort of the Health and Aging Policy Fellows Program, our 17-member Fellows cohort appreciates the opportunity to update this Handbook for future fellows, including the 100th fellow who will join as part of the 2016-2017 cohort. Joining the broad and far-reaching network of past, present, and future Fellows is just one of the key strengths of the Health and Aging Policy Fellows program. Welcome!

2012-2013 update
The 2012-2013 Health and Aging Policy Fellowship (HAPF) cohort extends our sincerest thanks to Harold Pincus, MD, Director, Kathleen M. Pike, PhD, Associate Director, Brigitta Spaeth-Rublee, and Heather Jansen, for their leadership, guidance, and tremendous support during our HAPF year. We also thank Jeffrey R. Biggs and Veronica Jones of the American Political Science Association (APSA) Congressional Fellowship Program for their advice and phenomenal educational programming during our Fellowship year. Finally, we extend our deepest appreciation to our individual HAPF mentors who have guided us through our Fellowship year: Lynda Anderson, PhD, CDC; Robert Berenson, MD, Urban Institute; Marie Bernard, MD, NIA; Alice Bonner, PhD, RN, CMS; Bob Hornyak, ACL; Joanne Lynn, MD, MA, Altarum Institute; Oliver Kim, Esq., Mark LeDuc, Esq., Senate Special Committee on Aging; Stacey Knight, United Way Worldwide; Anne Montgomery, Altarum Institute; Anand Parekh, MD, MPH, HHS; Judy Salerno, MD, MS, IOM; and Kathy Sykes, EPA.
Appendix N: Contact information for HAPF Fellow Alumni

A directory of all Fellows and their email addresses is located in the locked portal of the Health and Aging Policy Fellows website, only accessible by Fellows and the HAPF NPO: 
https://www.healthandagingpolicy.org/protected-posts/.