

  
**THE ROBERTSON**  
SCHOLARS LEADERSHIP PROGRAM



SCHOLAR HANDBOOK  
2023-2024 ACADEMIC YEAR

## **The Robertson Scholars Leadership Program: Practicing Transformational Leadership**

Welcome to the Robertson Scholars Leadership Program, a bold and unique program designed with your growth and leadership centered at the heart of all we do. We believe that the world is calling for a new type of leader - one who goes beyond transactional to transformational, one who knows the path to profound impact starts by exploring deeply within, one who approaches the complexity of the world with unbounded curiosity, one who creates space for creativity and connection, and one who is committed to being in community. We believe that you hold the key to that type of leadership. We believe in you.

Our Program exists because of the vision and generosity of Julian & Josie Robertson, our late benefactors and founders, who were committed to investing in young leaders capable of making transformational contributions to society. This is our mission - to invest in each of you as you explore and deepen your relationship with yourself, your community, and the world around you.

Being a Robertson has been described as “having the audacity to believe that change is possible.” We believe that true transformation occurs at the self, group, and system level, and is an ongoing practice. This practice is rooted in being conscious of what is happening within us and around us, consistently examining the relationship between who we are, what we are committed to, and the choices—large and small— we make in any given moment. This practice is at times deeply introspective and personal, and is fueled exponentially by being an active member of a community of belonging – a community that supports us, encourages us, and invites us into the accountability needed to take risks and show up as our full, powerful selves.

**We will make bold requests of you.** We ask you to be fully present and open to exploring all that our community has to offer. We believe that our community and shared experiences work best when all members feel welcomed, celebrated, and heard. Within your cohort, you’ll have a variety of formal programming and experiences available to you: each one carefully curated with you and your continued development in mind. RSLP provides the opportunity for you to be part of building and experiencing a true community of belonging - showing up as your authentic self and learning from the emerging collective wisdom of the group. Each one of you has something incredible to offer our community. We want you here, and we need you here.

**We will ask you to honor your word.** “An individual is whole and complete when their word is whole and complete, and their word is whole and complete when they honor their word,” according to Harvard Business School professor Michael C. Jensen. When we honor our word, we benefit as individuals and as a community. We can find workability in any circumstance when we are in communication and honest with ourselves and those around us. What this means is keeping our promises and commitments, and when we cannot do so, clearly communicating to those impacted in advance and restoring workability when inevitable breakdowns occur. As a

community, we commit to honor our word with you, and we boldly request that you commit to honor your word as well.

**We will ask you to remain curious.** What we do matters, and how we do it matters. As a community of Scholars, we are committed to examining four key questions: Who am I? What am I committed to? What choices am I making, and are they aligned with who I am and what I'm committed to? What are the results and impact of my choices on me and others? Transformational leaders constantly and consistently examine and question the world around them. They are curious about themselves and their motivations. They are curious about complex systems and they are excited by new concepts and ways of being - seeking a deep understanding from those with proximity to and knowledge of those systems. There will be times when we are challenged to think differently, to feel deeply, and to critically examine the world and systems around us and our agency within them. We encourage you to lean into these moments, notice the questions raised by them, and distill their meaning for yourselves. You won't be alone. We'll do this work together.

This handbook is a reference for you. It's a guide for the year to come, and it's a living agreement amongst our community members to do what we are called to do by our founders: make a transformational contribution to the world.

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## **I. ROBERTSON PROGRAM MISSION AND VALUES**

Mission: The Robertson Scholars Leadership Program invests in young leaders who strive to make transformational contributions to society.

Values: Purposeful Leadership | Intellectual Curiosity | Strength of Character | Collaborative Spirit

As a staff we are committed to upholding the mission and values of the Robertson Scholars Leadership Program. **We firmly believe in what we do, and more importantly recognize that how we do it matters.** We work directly with each other and each of you to ensure that the Robertson Scholars Leadership Program is first and foremost a community grounded in support and dedicated to investing in your growth and leadership.

### **ROBERTSON PROGRAM STAFF**



**Andrew Lakis**, Executive Director  
[lakis@robertsonscholars.org](mailto:lakis@robertsonscholars.org)

Andrew Lakis joined the Robertson Scholars Leadership Program in March 2020. He brings with him 17 years of experience in education, leadership development, fundraising and organizational management. In 2004, Andrew joined Teach For America as a teacher at Friendship Public Charter School in Washington, D.C. A native of North Carolina, he worked as an instructional coach in Durham Public Schools and served in multiple leadership roles within Teach For America over the past decade. From 2015 to 2021, Andrew led Teach For America's largest rural region, working with his team to recruit, train and support over 400 new teachers and partner with almost 1,000 alumni leaders working toward educational equity across eastern North Carolina. During his tenure as executive director, he also oversaw the launch of Teach For America's first rural regional summer teaching institute, Eastern NC Residency, and the redesign of Teach For America-Eastern North Carolina's leadership development program. Andrew received his BA in History from Duke University, where he was a Trinity Scholar, and his Masters in Elementary Education from American University.

Andrew is committed to strengthening community, expanding access for youth and addressing inequity. He currently serves on the PAVE Southeast Raleigh Charter School board, the North Carolina Education Human Capital Roundtable and is a member of the Racial Equity Institute's Groundwater Leadership Basecamp. Formerly, he served as the chair of the Educator Preparation Program Accountability subcommittee as a member of North Carolina's Professional Educator Preparation and Standards Commission. Andrew and his wife, Kristen, live in Durham with their two sons, Abe and Sam.



**Kay-Frances Brody**, Recruitment and Selection  
[brody@robertsonscholars.org](mailto:brody@robertsonscholars.org)

Kay-Frances Brody joined RSLP in March 2016. Prior to Robertson, Kay spent six years as an Admissions Team Lead at the Fuqua School of Business at Duke University where she led regional and international admissions teams. Her previous professional experiences

included serving as Director of Development for the UNC Women's Hospital and as Associate Director of Development at Durham Academy. Kay received her BA from The University of North Carolina at Chapel Hill and her JD from The Beasley School of Law at Temple University.

Kay has extensive experience as a community volunteer including serving as Chair of the Wake County Luncheon for the UNC Children's Hospital, Philanthropy Liaison for National Charity League Cardinal Chapter, and member of the Triangle United Way Children's Committee. She currently lives in Cary with her husband, Mike, and their children.



**Sydney Echols**, Learning & Development

[echols@robertsonscholars.org](mailto:echols@robertsonscholars.org)

A native of Columbus, Ohio, Sydney Echols earned her Master's degree in Higher Education & Student Affairs from Indiana University, and is highly skilled in college student development theory and leadership studies. Sydney attributes much of her successes and most transformative experiences to her time as an undergraduate student leader at Bowling Green State University where she earned her Bachelor's degree in Human Development & Family Studies. It was there that Sydney's passion for leadership began. Sydney's student affairs practice is rooted in her passion for helping and serving others. Sydney entered higher education as a result of wanting to create a positive impact in the lives of the next generation of leaders. Sydney's program responsibilities include leadership development programming and the overall Scholar experience.



**Vicki Stocking**, Experiential Learning

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As the veteran staff member, Vicki serves as the Director of Experiential Learning, which includes RSLPs summer programs. Vicki Attended Duke University as an undergraduate and earned her Ph.D. at Stanford University. She has pursued her interests in research, teaching, and civic engagement by leading the research division of the Talent Identification Program (TIP) and then working with Duke's Program in Education and the Kenan Institute for Ethics. As much as she enjoys teaching (she taught courses in Education and Psychology for many years), she enjoys her role with Robertson Scholars even more.



**Audrey Walker Womble**, Communications & Alumni Community

[walker@robertsonscholars.org](mailto:walker@robertsonscholars.org)

Audrey is a graduate of Washington & Lee University with a BA in Journalism & Mass Communications, and earned her M.Ed in Higher Education Administration at North Carolina State University. After working for several years in television production in NYC, Audrey discovered her true passion for working with college students through her employer's internship program. Audrey is responsible for creating and maintaining a thriving alumni community and amplifying the stories of the Robertson Scholars Leadership Program. She also serves as a conduit between current scholars and alumni helping to foster deep relationships, mentorship, and friendship across cohorts.

## **ROBERTSON PROGRAM OFFICES**

The Robertson Scholars Leadership Program maintains two offices, one located near East Campus at Duke University and the other located on North Campus at UNC. Scholars are welcome to visit our offices any time during office hours. We will use the Scholar Bulletin to share any updates on office hours. Staff typically split their time between both locations and relish connecting with Scholars in person on an informal basis. Staff are also available by appointment to connect directly with Scholars.

### **Duke Office**

Smith Warehouse, Bay 7 North 2<sup>nd</sup> Floor  
114 S. Buchanan Blvd  
Durham, NC 27701

*The Duke Office is open and available any time for Scholar use. Scholars have Duke Card Access to Smith Warehouse from 7:30am-11:00pm daily. Please note that RSLP staff is available at Smith on Tuesdays or by appointment on other days of the week.*

### **UNC Office**

Graham Memorial Building, Suite 023  
210 E. Franklin Street  
Chapel Hill, NC 27599

*The UNC Office is open Monday, Wednesday, Thursday, and Friday from 10am-4pm. Please note that RSLP staff rotate which days they'll be available at UNC.*

## **II. PROGRAM EXPECTATIONS: WHAT IT TAKES TO BE A SCHOLAR**

Over the course of your time as an undergraduate Robertson Scholar, we will focus on creating and curating signature Robertson experiences that support you as you explore big questions around leadership and be in a community of others who are similarly on the journey of becoming transformational leaders.

We hope to kick-start (or advance!) your journey by focusing specifically on:

- Creating the conditions for you to shift your being, or how you show up in the world from...
  - conditioned fear to chosen courage & authenticity by being open-willed
  - conditioned cynicism to chosen generosity by being open hearted
  - conditioned judgement to chosen curiosity and compassion by being open minded
- Focusing on growing a small number of habits that transformational leaders have in common...
  - **Integrity:** your relationship with your word and commitments
  - **Agency:** seeing it, creating it, and being it
  - **Responsibility:** for your choices and your impact
  - **Self-Reflection:** noticing and listening to your inner and external landscapes and the impact you're having
- Centering your experience in the formation and continued effort of being in a community who practices this kind of leadership together
  - Creating and holding space that is truly about connecting
  - Belonging as a member of the community
  - Restoring breakdowns in your commitments and agreements

- Celebrating breakthroughs and successes
- Manifesting joy and deep care for one another
- Listening openly and sharing authentically

Just as important as it is to name what we *do* develop and why, we think it's also worth noting a few specific elements of leadership that we *don't* develop. These are things we know are top of mind with a lot of potential Scholars as they consider our program and compare it with others.

We don't focus on developing your:

- Achievement: you are already incredibly well skilled in high achievement; you wouldn't be here if you weren't
- Impact: we care a lot about impact and our responsibility and agency for it; where we care a lot less and don't focus our attention is on ensuring your impact is at a particular scale or in a particular role or in a particular field
- Pre-Professional Tracks: we won't spend time focusing on "how am I going to get ahead in \_\_\_\_\_ goal with this program;" instead, we choose to focus on developing who you are and how you show up in the world

## **TERMS OF THE SCHOLARSHIP: SIGNATURE EXPERIENCES**

### **First-Year Orientation Retreat & NOLS**

Before the start of the first-year fall semester, all incoming Scholars take part in a leadership retreat facilitated by instructors from the National Outdoor Leadership School (NOLS) at the Nantahala Outdoor Center in Bryson City, NC. During the four-day retreat, Scholars develop leadership and communication skills while participating in guided hikes, a ropes course, and river rafting expeditions in the mountains of Western North Carolina.

### **Campus Switch**

Campus Switch is designed to offer Scholars the opportunity to adjust to new situations, to thrive in challenging environments and to build stronger educational and community ties between UNC and Duke. It takes place during the spring semester of sophomore year. RSLP is committed to building a community of Scholars who are meaningfully connected to both campuses, who regularly navigate between them, and who have a sense of allegiance to both universities. During and after Campus Switch, Robertson Scholars serve as ambassadors of cross-campus student collaboration and leadership, encouraging their peers to spend time and develop relationships at the sister campus.

During Campus Switch, Scholars maintain as their only residence a room in an assigned residence hall on the sister campus. There are no exceptions to this policy. Students may not study abroad during the semester in which they participate in Campus Switch.

While on Campus Switch, Scholars are encouraged to enroll solely in courses on the sister campus, though they are not required to do so. Some Scholars choose to return to their home campus to pursue specific coursework in their major. The Robertson Express Bus provides accessible transportation between the two universities. More detailed information and a timeline of Campus Switch events will be distributed the semester prior to Switch.

### **Senior Capstone**

During the spring semester of their senior year, all Scholars will participate in the Robertson Senior Capstone experience. The Capstone is designed to help senior Scholars prepare for the transition from undergraduate scholar to a life-long engaged Robertson alumni. The Capstone includes a weekend retreat in January (**January 19-January 21, 2024**) and a series of



engagements through out the Fall and Spring semester. We design these experiences with the aims of providing senior Robertson Scholars the opportunity to reflection on their four-year experience, explore what it means to lead with a commitment to transformation, and prepare to be life-long leaders in our Robertson community and beyond. Details are announced each fall.

### **Robertson Connection Weekend**

We ask that all Scholars commit to participating in Connection Weekend (**April 3 - April 7, 2024**). Please hold the dates open on your calendar and plan to be in attendance for the entirety of the weekend. The aim of Connection Weekend is to create a vibrant and connective experience for our applicants who have been offered the scholarship, our Scholars and our Alumni. In addition to Connection Weekend events, current Scholars may be asked to contact applicants who are considering our offer to welcome them to our community, share experiences and answer questions about the Program.

### **Summer Programs**

Robertson summer programs provide opportunities for Scholars to expand their academic passions and professional interests while experiencing new places and cultures. RSLP staff work closely with Scholars to plan summers that uniquely reflect their personal goals and interests, and complement on-campus activities. All Scholars participate in the first Robertson summer, *Community Summer*, and all are strongly encouraged to participate in both the *Exploration Summer*, and *Launch Summer*. Robertson Scholars may not use Summer funding to pay for credit-bearing academic activities.

*Community Summer*: Scholars spend the summer after their first year living together and participating in community-based internships in established locations throughout the southeastern United States including: the Mississippi Delta, MS; New Orleans, LA; Tarboro, NC; and Whitesburg, KY. This summer is designed to further strengthen the emergent Scholar community and create the opportunity for our community partners to contribute to Scholars and for Scholars to make meaningful contributions—small and large—to bolster the efforts underway in our partner communities. Additionally, it provides the opportunity for Scholars to increase their awareness of systemic challenges and opportunities for change in the United States. Community summer begins with a retreat in the last week of May (**May 19- May 23, 2024**) and lasts until the end of July.

## **TERMS OF THE SCHOLARSHIP: ACADEMIC EXPECTATIONS**

### **Grade Point Average**

The Robertson Scholars Leadership Program expects all Scholars to uphold high academic standards. Continuation in the Program depends on the maintenance of good academic performance, which is defined as a minimum 3.00 grade point average at the end of the first year, and 3.30 each succeeding year. GPAs are calculated using the weighted average of the fall and spring semester GPAs on a Scholar's home campus transcript at the end of the academic school year (or the average of two consecutive semesters if a Scholar takes a leave). GPAs are not rounded for this calculation. Please note, study away semesters are often reported on a student's home campus transcript as transfer pass/fail credits and are not factored into the GPA.

Scholars who fail to meet this GPA minimum will be placed on academic probation. For Scholars on academic probation, failure to achieve the required GPA at the end of any subsequent year will result in the loss of the scholarship.

### **Course Load**

All Scholars must enroll in a full-time course load each semester, as defined by each University's Registrar. Any less-than-full-time enrollment must be pre-approved by the Robertson Program

staff. A written request must be submitted the semester prior to the one in which the underload is intended. Please be aware that Program approval of an underload is separate from university approval; Scholars must follow appropriate channels at the relevant university. Occasionally, there are circumstances that warrant an underload during a semester that is already in progress. Should this be the case, the Scholar must contact Andrew after consulting with their academic advisor or dean, but before a final decision is made.

If a Scholar decides to underload after a term has begun, the change in enrollment from full-time to an underload may impact that Scholar's account balance. The Robertson Program funds tuition charges at the beginning of each semester. Underloading leads to a decrease in university tuition charges. When the university charge for tuition is changed from full-time to an underload, a temporary credit may appear on the Scholar's account; however, the Robertson scholarship amount will eventually be removed to reflect the actual tuition charged. Scholars must monitor their student accounts, as they are ultimately responsible for any funds due back to the Program. Additionally, underloading may result in Scholars not being on track to meet their minimum requirements for graduation, which may require an additional semester of study. **Scholars should be aware that the Robertson Program only provides funding for eight semesters (six semesters for First Year Matriculate Scholars)** and should always consult with their advisor/Dean, and Andrew about their academic progress.

*UNC Scholars:* University policy allows seniors in their final semester of coursework to apply for an approved underload, provided they need fewer than 12 academic hours to complete all graduation requirements. The Robertson Program accepts the approved underload for graduating UNC Scholars who meet the university's criteria.

### **Courses on the Sister Campus**

In addition to the First-Year Colloquium, all Scholars must successfully complete at least **four courses** on the sister campus. *We strongly recommend* this requirement be completed by the end of their seventh semester (typically, halfway through senior year). In order to count towards the cross campus four course minimum, a course taken at Duke must be a full-credit course, and a course at UNC, must carry a weight of three credit hours or more.

**Pass/Fail:** Scholars are **not** permitted to elect pass/fail for graded cross campus courses; however, cross campus courses that are **only** offered pass-fail are exceptions to this policy. Additionally, on their home campus, Scholars **are** permitted to elect pass/fail (UNC) or satisfactory/unsatisfactory (Duke) for a maximum of four full credit graded courses over the course of their eight semesters of enrollment at their home institution.

For more information on cross-campus coursework, please see the *Cross-Campus Academic Opportunities & Policies* section of this handbook.

### **First-Year Colloquium\***

The Robertson First-Year Colloquium is a one-semester, full-credit course at Duke and a three credit-hour honors course at UNC taken during the spring semester of first-year. It provides a philosophy-based forum in which to discuss issues impacting society at large, including ethical challenges facing today's leaders. Scholars will have the opportunity to develop an ethical framework for leading, while they enjoy a unique, Robertson-only space for strengthening intellectual ties among the class.

The Colloquium for the current academic year will take place during the spring semester. Specific details will be sent to first-year Scholars in early fall. Scholars must earn a passing grade in order to meet the Colloquium requirement of the Program. Scholars are not allowed to take the course pass/fail (UNC) or satisfactory/unsatisfactory (Duke). The Colloquium typically meets on one campus for the first half of the semester, and moves to the sister campus for the second half of the

semester. The Robertson Express Bus provides convenient transportation between campuses for Scholars in this course.

*\*First-Year Matriculate Scholars are not required to participate in Colloquium*

## **TERMS OF THE SCHOLARSHIP: BEHAVIORAL EXPECTATIONS**

As a community, we believe that each of us is responsible for contributing to and gaining from our collective experiences as Robertsons. For each Scholar to grow in their leadership journey, establishing a set of norms and values around the ways in which we learn and grow together is paramount to our flourishing as individuals and as a collective. This means that we believe the following to be true:

- Scholars are capable of and have the autonomy to create their own experiences
- Scholars enter RSLP with beliefs, experiences, and motivations reflecting individual and collective contexts.
- Scholars are committed to growth and exploration as members of the RSLP community and as recipients of a generous scholarship and unique learning and development opportunities.
- Scholars are responsible for the impacts of their decisions and actions, and are held accountable for them.

The Robertson Scholars Leadership Program (RSLP) is committed to creating a community where Scholars seek to deepen their connections to each other, the broader Duke & UNC communities, and any other communities of which we are a part. What this means is that we expect Scholars to habitually endeavor to embody the following through their actions and ways of being:

- **Act with Honesty and Integrity:** Scholars understand the relationship between their word, their commitments, and their actions.
- **Take Responsibility:** Scholars examine their choices and the impact of those choices on themselves and others.
- **Uphold Community:** Scholars seek to understand the intricacies of the RSLP community and are committed to ensuring that all Robertsons have the right to learn and grow in ways that do not disrupt the growth, development, or safety (emotional or physical) of others.

We believe that committing to these ways of being and practicing them is what it means to be a Robertson.

In addition to the above ways of being, Scholars are committed to understanding and following the student codes of conduct and various policies at both [Duke](#) & [UNC](#). We expect Scholars to know and abide by both codes of conduct given their unique standing as members of both communities. Additionally, we expect all Scholars to follow the law.

There may be times when we fall short. When those instances occur, RSLP has a responsibility to assess and implement certain measures to ensure the safety of the community and provide a pathway toward resolution for Scholars.

While education and growth are the core aims of our community, there are some actions that may put a Scholar's status as a member of our community at risk – including, but not limited to, loss of program privileges and probation. The Program reserves the right to take action on disciplinary matters in any way that it deems appropriate, in its sole discretion. It is important to note that there may be instances of behavior that are fundamentally antithetical to our values and ways of being, in which case the only appropriate outcome may be dismissal from RSLP. Dismissal from the

Robertson Scholars Leadership Program is not taken lightly – it requires not only Program approval, but also approval by the Robertson Scholars Leadership Program Board of Directors.

When concerns about a Scholar’s conduct arise, RSLP has a responsibility to assess and implement certain measures to ensure the safety of the community and provide a pathway toward resolution for Scholars. Our commitment as a program is to have a clear process for examining and addressing allegations of misconduct, which includes, but is not limited to:

- Notifying the relevant Scholar and other Scholars, in RSLP’s sole discretion, when RSLP becomes aware of allegations of misconduct;
- Assessing RSLP’s ability to investigate and respond directly to those allegations of misconduct;
- Investigate allegations of misconduct by reviewing relevant information at the University level, and interviewing individuals who may have relevant knowledge, including the Scholar in question;
- Making appropriate referrals to and aiding University entities in the course of their own investigations of misconduct; and
- Providing the Scholar in question with the opportunity to review the allegation of misconduct, reflect and respond to it.

Examples of actions that may result in a change in Scholar status are outlined below. Please note that these examples do not constitute an exhaustive list:

- Any instances regarding fraud, theft, misrepresentation, dishonesty or deceit;
- Any instances of violence towards others or destruction of property;
- Any instances of sexual misconduct including but not limited to sexual assault, rape, or gender-based violence;
- Any violation of the Duke or UNC-Chapel Hill Honor Codes, regardless of judicial outcome or imposition of sanctions by the University;
- Failure to maintain good standing at Duke or UNC;
- Failure to treat others within and outside of the Robertson community with respect and dignity; and
- Failure to fully engage as an active and contributing member of our Robertson community.

As a program, our standards are high - and may be higher than those set by other programs and those of Duke & UNC. This is tied to our belief that transformational leaders commit themselves not only to ethical values-driven ways of being, but also understand their commitment to the communities they are a part of, and take full responsibility for the impact of their choices. We place a great deal of faith in each of you and expect you to uphold and represent our core values at all times. Each year, we ask Scholars to recommit to these standards by signing the Scholar Statement of Intent.

### **III. HELPFUL INFORMATION ABOUT THE SCHOLARSHIP**

#### **FINANCIAL BENEFITS AND DISBURSEMENT**

##### **Tuition & Fees**

The Robertson Scholars Leadership Program provides eight semesters of tuition, room, board, and mandatory fees for Scholars attending Duke and UNC-Chapel Hill who are admitted during the high school selection process. Six semesters are covered for First Year Matriculate Scholars.

Tuition support is not available for summer school courses or graduate programs.

**UNC Scholars:** At the beginning of each semester, the Scholarships and Student Aid Office transfers funds to individual student accounts at the Cashier's Office. These funds directly pay for tuition, fees, housing and meal plan charges that may appear on a Scholar's account and any overages will be refunded directly to the Scholar. The Program recommends Scholars to set up direct deposit for receipt of refunds. Scholars who do not establish direct deposit may access the refund at the Cashier's Office. Questions about scholarship disbursement should be directed to the UNC Office of Scholarships and Student Aid.

**Duke Scholars:** At the beginning of each semester, automatic charges will be applied to each Scholar's account for tuition, required fees, room and board. The Duke Undergraduate Financial Aid Office will disburse scholarships to individual student accounts no earlier than ten days before the first day of classes. The Program recommends Scholars to set up direct deposit, which allows the Bursar's Office to transfer any refunds directly into the Scholar's bank account. Questions about scholarship disbursement should be directed to the Duke Undergraduate Financial Aid Office.

At Duke, the scholarship covers the cost of a standard dining plan, which is plan I for first-year students. For upperclass Scholars, plan D is the standard. The Scholar will be responsible for paying the difference if they select a more expensive dining plan.

The Program covers exact on-campus housing charges. If an upper-class Scholar chooses to live off campus, the scholarship will cover the cost equivalent of a standard on-campus room. Exact coverage of housing is subject to change depending on stipulations of merit aid at Duke.

***Non-covered fees:*** The Robertson Program does not cover the cost of the student health plan or non-mandatory fees. Scholars whose questions regarding scholarship disbursement are not resolved by the appropriate university office may contact the Robertson office.

### **Summer Financial Support**

The Program provides funding to all Scholars for up to three summers. Funding for summers depends on the Scholar's proposed summer activities and is contingent on Program approval. The Program currently provides a \$3,000 payment to cover travel, living expenses, and cultural/educational activities for Scholars participating in the Community Summer. The Program directly pays for Scholar housing during Community Summer. Scholars may apply for up to \$6300 each year for costs associated with Exploration and Launch Summer.

International Scholars without a U.S. Social Security Number (SSN) must complete additional paperwork to receive the summer stipend. Please find more information in the *International Students* section below. This process can take several weeks and should be completed well in advance of the summer.

Most Scholars will receive Summer funding through Duke's non-compensatory payroll process, which is under revision at this writing. Vicki will provide instructions in the fall.

### **Other Scholarships and Funding**

At UNC, students are generally allowed to keep outside scholarships that have been awarded to them in addition to their Robertson Scholarship award (excluding university grants or need-based aid).

At Duke, outside scholarships may only be used to meet the unmet need up to Duke's published cost of attendance (for books, travel, and other personal expenses). If the outside scholarship exceeds those costs, the Robertson award will be reduced. Scholars are responsible for contacting their respective financial aid/bursar offices for more information.

## **Tax Liability**

Under U.S. and North Carolina tax law, funds awarded as scholarships, fellowships, benefits, and grants are excluded from the recipient's gross income to the extent that they are used for *required* tuition, books, fees, supplies, and equipment.

Tax liability depends on individual circumstances, Scholars should consult a personal tax advisor with any questions or concerns. The Robertson Program is not able to offer tax advice.

***Special note for International Scholars:*** The U.S. government requires most international students in nonimmigrant visa status to file Federal income tax forms with the Internal Revenue Service (IRS), regardless of whether or not they have earned income from U.S. sources. For more information, please visit the following:

- United States [IRS website](#)
- UNC [International Student & Scholar Services](#)
- Duke [International Students Financial Aid](#)

## **International Scholars**

To ensure compliance with U.S. immigration laws, all international Scholars are required to follow the policies of their home campus for international student check-in. Additionally, Scholars are responsible for maintaining their immigration and visa status. As scholarship recipients, international Scholars may be liable for taxes on the funds that they receive from our Program. For more information, please refer to the *Tax Liability* section above.

To receive a summer stipend and/or file a U.S. Federal tax return, international Scholars must have either an Individual Taxpayer Identification Number (ITIN) or a U.S. Social Security Number (special conditions apply). To obtain an ITIN, Scholars must complete and submit the U.S. Internal Revenue Service W-7 Form.

If you are studying at Duke with a F1 or J1 Visa, enrollment in the Duke student medical insurance plan is mandatory. Neither traveling insurance nor medical insurance policies issued outside the U.S. or Canada will be accepted as a means to waive the Duke student health plan. The Robertson Scholarship does not cover this expense.

We strongly recommend all international students to connect directly with visa services at their home institutions for further clarification and guidance.

## **LEADERSHIP DEVELOPMENT OPPORTUNITIES**

Scholars are highly encouraged to take advantage of as many opportunities as they can during their time as undergraduates. Throughout the year, the Robertson Scholars Leadership Program offers workshops, specialized training, dinner conversations, and a variety of other opportunities aimed at sparking Scholar's curiosity, enhancing their learning and facilitating connections with other members of the Robertson community. This section will highlight some of the personal and professional development opportunities that are currently offered through the Robertson Program.

### **National Outdoor Leadership School (NOLS) Expedition**

Scholars have the opportunity to apply for a Robertson-only, week long backpacking trip through the western United States led by NOLS. This expedition is a powerful way for Scholars to challenge themselves and learn essential outdoor survival skills while bonding with their fellow Scholars. Previous outdoor experience is not required. Additional information about the springtime

expedition and how to apply will be provided during the academic year.

### **Robertson Collective**

A reimagined vehicle for more Scholars to contribute to the collective impact of our community by providing real-life practice arenas for transformational leadership to develop. The RC facilitates connection across cohorts by bringing ideas from the Robertson community to life. The RC provides a platform for Scholar contributions and incubating possibilities for our community, inviting Scholars to contribute their expertise and wisdom, explore their curiosity, and expand their leadership through a variety of experiences throughout the academic year and summers. Examples of RC initiatives include: Robertson Brand Ambassadors & Content Creators, Alumni Council Mentorship, Scholar Agility Team, and Robertson Resource Groups. Throughout the year the RC will invite ideas from Scholars on what they are seeking from the community, and will ask Scholars to consider what their contributions to the community will be.

### **Self-Designed Learning Opportunities: LEAD Grants, Dinners, Coffees**

Robertson Scholars are invited to design and request funding for activities that will promote learning and leadership. These are highly individualized and can take many forms—most involving other Robertsons. Take a risk! Try something new! Take this opportunity to do something out of the ordinary—stretch yourself.

We are finalizing proposal, funding, and reflection processes, but the types of Learning Opportunities that are fundable will be familiar. For example, Scholars can:

- Collaborate with other Scholars to do something uniquely suited to your leadership interests. Make an intentional visit to a particular place, attend a meaningful event, or do a project based on a community need you've observed. (Group Experience LEAD Grant).
- Create a discussion opportunity for Robertsons (including Alumni, if that makes sense) on a topic of interest. (Coffee for 10)
- Invite a community leader to dinner and bring four other Robertsons along for connection and conversation (Dinner for Six).
- Design an individual experience to broaden your perspectives and deepen your leadership (Individual Experience LEAD grant).

Although the process for applying for and funding these different types varies, they all reflect elements of the RSLP model of leadership. These activities are designed to strengthen a Scholar's or Scholars' capacity to do one or more of the following:

- Experience belonging to a community of commitment
- Deepen understanding of who they are and what they are committed to
- Understand their relationship to their word and be in the consistent practice of honoring it
- Experience the power available to them when they take responsibility
- Be curious about the earned lessons available to them through discomfort, breakdowns, and incongruence
- See the impact on themselves and others that is created by getting into action and making choices that are aligned to their values

### **Advising and Staff Check-ins**

*Academic Advising:* Robertson Scholars have a variety of opportunities to explore academic interests at both UNC & Duke. We strongly suggest that Scholars establish relationships with the academic advising offices on both campuses. Additionally, Scholars have the opportunity to form

mentoring relationships with faculty and administrators at both universities and are encouraged to do so early in their academic career. For cross-campus academic support, including guidance on processes and policies, please set up an appointment with Andrew. Scholars should also review [Cross Campus Resources](#) on Robertson Connect.

*Scholar Advising:* Robertson staff members support Scholars in exploring their values, navigating their commitments, planning their summer experiences and examining their overall leadership and personal development. Scholars can also use check-ins to talk with staff about any questions they have, how to make alumni connections and find mentors, as well as share their overall experience in the program. At any point in the year, Scholars should feel welcomed to reach out to any staff member directly to request a check-in.

### **Alumni Connections**

Robertson Alumni serve as a wonderful resource for summer planning, job searches, and general guidance and networking. Scholars are encouraged to use [Robertson Connect](#) to search for Alumni based on their professional or extracurricular interests. Additionally, Scholars have various opportunities to connect with Alumni on campus and are encouraged to take full advantage of these events. Alumni events will be communicated to current Scholars via the Scholar Bulletin and social media. Scholars are welcome to email or connect to Alumni at any time throughout the year. For additional assistance connecting with the Alumni community Scholars should email or schedule a meeting with Audrey.

## **CROSS-CAMPUS ACADEMIC OPPORTUNITIES AND POLICIES**

### **Courses on the Sister Campus**

Scholars are encouraged to take advantage of the course offerings at both schools as much as possible. Robertson Scholars have the unique opportunity to take one or more classes per semester on the sister campus, including courses that are also available at their home institution (except for fall semester of first year). **Scholars must remember that major, minor, and certificate programs require a percentage of courses to be completed on the home campus and Scholars must obtain the appropriate approvals from their Registrar's office for every course taken at the sister campus.**

### **Cross-Campus Course Registration**

Before registering for cross-campus classes, Scholars should consult with their academic advisor about their intended course of study. Scholars have access to the online registration systems on both campuses. Scholars may log in during their registration window and add courses to their schedule.

*UNC Scholars:* The Duke Registrar will grant registration permission. An email with registration information will be sent to your Duke email address in advance of the registration window. Be sure to check your Duke email account or ensure that mail is forwarded to your UNC or personal account.

*Duke Scholars:* The UNC Registrar will grant registration permission. Notification will be sent to your UNC email address in advance of the registration window. Be sure to check your UNC email account or ensure that mail is forwarded to the Duke or personal account. When sent a notice about an expiring ONYEN password please be sure to change it as soon as possible. Failure to do so can cause complications or delay registration access.

### **Cross-Campus Registration Forms**

**Scholars must complete a Cross-Campus Registration form for *each course* they take on**



**the sister campus.** For most Scholars, this form must be completed regardless of how the course will be used in the Scholar's academic plan (elective, general education, major, minor, certificate, etc.).

Duke Scholars do not need to complete a form for elective credit. This process is different from the Inter-Institutional Form used by other students. Links to these forms can be found by accessing the Robertson Scholars home page, navigating to Current Scholar Resources and then Cross Campus Resources.

Scholars must first register for the course via the sister campus registration system, and then complete the Cross-Campus Registration form and submit it to the home campus Registrar's office. The form is used to obtain approval from the home institution and determines how the course will impact completion of degree requirements. Advisors or Deans must sign the form to approve the course. *Without this form on file, your home registrar will have no record of your cross-campus course and the credit will not be counted on your transcript.*

**Scholars must complete and submit the Cross-Campus Registration form by the course add deadline at their home institution.** Failure to do so may result in the Scholar being dropped from the course.

### **Cross-Campus Majors, Minors, and Certificates**

Robertson Scholars can major, double major, minor, or obtain a certificate in any subject offered at their home institution. Scholars may also complete a second major, a minor, or a certificate at the sister institution *as long as that program is not offered at the Scholar's home institution.* Scholars must complete an application form to seek approval from the proper university officials (form available on [Cross Campus Resources](#) site). A list of previously-approved cross-campus plans can also be found on this site for reference. This list is subject to change as the universities add and drop programs.

Scholars are not considered "degree-seeking" at their sister institution. The secondary degree will show up as a note on their home transcript but will not be awarded in the form of a diploma. The following stipulations apply:

1. "Program II" at Duke University is excluded from this option.
2. The full requirements of the major/minor/certificate must be completed, as determined by the institution offering the program.
3. The home institution's stipulations regarding the total number of permissible major/minors/certificates will apply.
4. The major/minor/certificate cannot be awarded after graduation.
5. A student may not receive a degree from the home institution based on a program completed at the sister institution.
6. The Registrar at the home institution will not be expected to certify completion of the course of study at the sister institution. That certification will be made by the appropriate Dean at the sister institution and communicated to the Registrar at the home institution.

The Scholar's transcript, issued by the home institution, will contain the following information: ***"This student has completed the requirements for the [major/minor/certificate] at [the sister institution] as part of the Robertson Scholars Program."*** No wording will be added to the diploma. Scholars receive their degree and diploma from their home institution only.

*Course Limits:* As a unique privilege, Robertson Scholars may take any number of courses on the sister campus during a semester and throughout the four years. That said, at least half of a Scholar's major, minor or certificate courses must be completed on the home campus.

### **Adding/Dropping/Withdrawing**

Scholars must adhere to the deadlines, policies, and procedures of the *home campus* for adding, dropping, or withdrawing from courses on the sister campus.

## **GENERAL PROGRAM POLICIES**

### **Dismissal or Withdrawal**

A Scholar who is dismissed, withdraws, or is withdrawn from Duke or UNC will lose eligibility for the scholarship. See the [University Bulletin of Undergraduate Instruction \(Duke\)](#) and [Undergraduate Catalog \(UNC-Chapel Hill\)](#) for information on definitions and policies for dismissals and withdrawals.

### **Leave of Absence from the Program**

Scholars are permitted to take two semesters of leave of absence as part of the Robertson Program. Leave of Absence (LOA) is defined as an interruption of studies temporarily for health, personal, or professional/leadership development opportunities. If a Scholar must interrupt their studies temporarily, it is the Scholar's responsibility to ensure compliance with the rules and regulations associated with leave from and readmission to their home campus. In order to ensure continuation of the scholarship upon return, the Scholar must complete the Leave of Absence Form found on [Robertson Connect](#) (under "Opportunities") as soon as the Scholar makes the decision to take a Leave of Absence. Scholars will be required to meet with Andrew prior to final approval. When applicable, supporting documentation from the Scholar's health care provider(s), or other outside agencies, should be included with the request. Additionally, Scholars should meet with their home campus academic advisor/Dean prior to completing the form (and before meeting with RSLP Staff) about the implications of a Leave of Absence on their academic progress.

RSLP will consider each case individually and reserves the right to request additional information prior to making a final decision. If the request is approved and the Scholar takes a Leave of Absence from the Program, the Scholar is required to fulfill all Program obligations upon return. The Robertson Program provides a maximum of eight semesters of academic-year funding (six semesters for First-Year Matriculate Scholars). Scholars on leave who wish to apply for Summer funding immediately following leave must discuss this possibility with the staff and follow all timelines for Summer proposals, etc., while on leave.

### **Study Abroad/Away**

Scholars may participate in Study Abroad programs approved by Duke or UNC-Chapel Hill during any term of enrollment with three notable exceptions: during their first year, during Campus Switch, and during the second semester of senior year.

Study Abroad/Away Applications can be accessed through [Robertson Connect](#), and must include a description of the study abroad program, proof of approval from the Scholar's home institution, and a breakdown of the costs associated with the study abroad program. Scholars are responsible for coordinating with the Study Abroad Office and Registrar at their home institution to ensure that credit is awarded for the classes taken while away. Please note the Program will only cover tuition, room, and board for study abroad programs up to the amount that it would cost for a semester at the Scholar's home institution. Scholars are responsible for any costs exceeding this amount.

*UNC Scholars:* The Program will pay for UNC-Chapel Hill Scholars studying abroad up to UNC's out-of-state tuition, room and board, books, supplies and personal expenses for a maximum of two semesters of study abroad. Any additional costs are the Scholar's responsibility.

*Duke Scholars:* The Program will cover all costs up to the amount of Duke tuition, required fees, and room and board plan for any study abroad program the Scholar chooses. Duke Scholars may participate in two types of programs: those administered directly by Duke (“Duke-In” programs) and those sponsored by other universities approved by Duke. Duke Scholars must [review Duke’s financial aid website](#), which includes information for merit scholars studying away. Questions not addressed on this website should be directed to the Office of Undergraduate Financial Aid.

## **INTERNATIONAL SCHOLARS**

In addition to the information for international Scholars regarding the financial benefits of the program and disbursement of funds in this handbook, international Scholars are encouraged to connect directly with resources at their home university for additional support and guidance.

*Duke Scholars:* [The Duke International Student Center](#) provides many services and opportunities for both international and domestic students at Duke.

For visa questions, contact [Duke Visa Services](#):

- Phone: (919) 681-8472
- Email: [visahelp@mc.duke.edu](mailto:visahelp@mc.duke.edu)

*UNC Scholars:* For visa questions, contact [International Student and Scholars Services](#)

- (ISSS): ● Phone: (919) 962-5661
- Email: [iss@unc.edu](mailto:iss@unc.edu)

ISSS promotes international educational exchange through its services and programs. It serves as the principal administrative, programming, and advising office for approximately 2000 international students, faculty, and academic staff at UNC.

## **TECHNOLOGY**

### **Program Communications**

During the academic year, Scholars will receive regular newsletters in the form of the Scholar Bulletin and invitations from the Program to their home university email address. Robertson staff members use newsletters to communicate significant event dates and deadlines, so it is extremely important that Scholars read and act upon information in these communications in a timely manner. When invitations to Program events are sent, we ask that Scholars respond promptly and proactively communicate any conflicts.

### **Robertson Connect Online Portal**

All Scholars have access to the Program’s online information portal, [Robertson Connect](#). Scholars are expected to edit and update their Robertson Connect profile as needed. This site should be used to find contact information for Scholars and Alumni, search for information on previous summer programs, and connect with alumni based on careers, geographic region, and outside interests. All incoming Scholars will receive an invitation to Robertson Connect prior to the start of their first semester. If you experience issues with Robertson Connect, please contact Audrey.

### **Resources for Current Scholars**

The Robertson staff uses [this page](#) to post job and internship announcements, programming, opt-in campus events, summer planning documents, academic forms, and applications for Scholar opportunities. Access the Resources page by going to [robertsonscholars.org](http://robertsonscholars.org), selecting “resources for current scholars” and putting in the password “robbieinfo.”

## **Email Addresses**

All Robertson Scholars are assigned both UNC & Duke email accounts. Scholars should use the email account associated with their home university as their primary email and plan to forward email from the sister campus account to the home university email address. **All RSLP communications will be sent to the home university email address.** Contact Duke OIT or UNC ONYEN Services for information on how to set up email forwarding.

## **University Web Login Information**

All Robertson Scholars have access to both a UNC Onyen (Only Name You'll Ever Need) and a Duke NetID. These are the electronic identifiers (i.e., login names) for all campus network services, including email, computer cluster login, library services and course registration.

Scholars are expected to keep both student accounts active at all times. Scholars must obtain the identifier for the sister campus from the school's information technology office and should do so as soon as possible during the first semester.

*Duke Scholars:* to set up your UNC account, visit the [UNC ITS](#) website. Scholars will need their Personal Identification Number (PID) to set up their account. ONYEN passwords expire often! When notified about an expiring password, change it as soon as possible. Failure to do so can cause complications and/or delay access to the UNC system.

*UNC Scholars:* to set up your Duke account, visit the [Duke OIT](#) website.

## **PROGRAM AND UNIVERSITY SUPPORT**

Scholars are asked to be contributing members of both the Robertson and University communities. To do so, Scholars need to take care of their physical, mental, and emotional wellbeing. When academic, personal, or medical issues arise Scholars should know there are Robertson staff members available to listen and provide support. Both Duke & UNC provide counseling and psychological services and additional resources for students:

Duke:

- Counseling and Psychological Services (CAPS): <https://students.duke.edu/wellness/caps/> or 919.660.1000
- Student Disability Access Office: [access.duke.edu/students](https://access.duke.edu/students) or 919.668.1267
- Duke REACH: <https://students.duke.edu/wellness/dukereach/> or 919.681.2455
- Center for Sexual & Gender Diversity: [students.duke.edu/belonging/icr/csgd/](https://students.duke.edu/belonging/icr/csgd/) or 919.684.6607
- Women's Center: [students.duke.edu/belonging/icr/wc/](https://students.duke.edu/belonging/icr/wc/) or 919.684.3897

Visit [studentaffairs.duke.edu](https://studentaffairs.duke.edu) for a complete list of resources.

UNC:

- Counseling and Psychological Services (CAPS): [caps.unc.edu](https://caps.unc.edu) or (919) 966-2281
- Accessibility Resources & Service: [ars.unc.edu](https://ars.unc.edu) or (919) 962-8300
- Office of the Dean of Students: [dos.unc.edu](https://dos.unc.edu) or (919) 966-4042
- LGBTQ Center: [lgbtq.unc.edu](https://lgbtq.unc.edu) or (919) 843-5376
- Carolina Women's Center: [womenscenter.unc.edu](https://womenscenter.unc.edu) or (919) 962-8305

Visit [studentsuccess.unc.edu/campus-resources](https://studentsuccess.unc.edu/campus-resources) for a complete list of resources.

