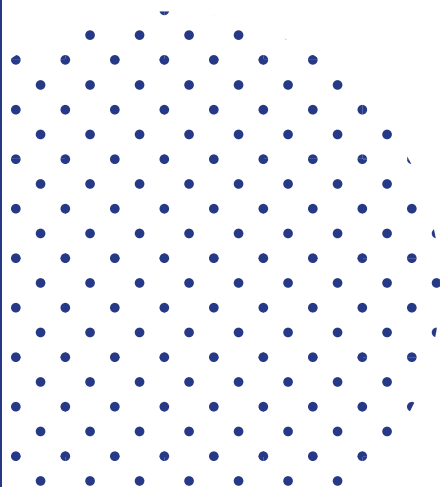




HECMA

Annual Report 2018–2019



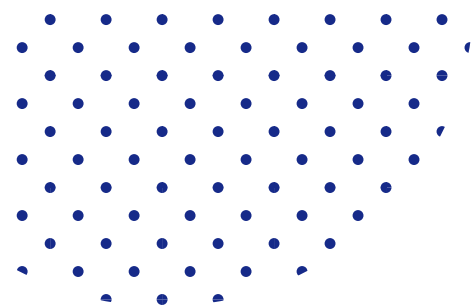


TABLE OF CONTENTS

LETTER FROM THE PRESIDENT	1
STRATEGIC PLAN 2019 - 2021	2
LEADERSHIP TEAM 2018 - 2019	6
CLINICAL CASE MANAGER AT LARGE	7
CONFERENCE & SPECIAL EVENTS	9
DIVERSITY, EQUITY, AND INCLUSION	11
FINANCE	13
MARKETING & COMMUNICATIONS	15
MEMBERSHIP & RECRUITMENT	17
NON-CLINICAL CASE MANAGER AT LARGE	19
OPERATIONS & STRATEGIC PLANNING	21
TRAINING & DEVELOPMENT	23
SCHOLARSHIP RECIPIENTS	25
AWARD RECIPIENTS	26





A MESSAGE FROM THE PRESIDENT



Dear HECMA Members,

2018-2019 has been another year of continued growth. As a Leadership Team we spent time planning for the future beginning by revising our mission and vision statements after the 2018 annual conference. These changes set the tone for goal-setting, team building, and the expansion of future member benefits.

In December, the Leadership Team met and developed a 3-year Strategic Plan for 2019-2021. We focused on three primary objectives: equipping our members with resources, exemplifying professional standards, and solidifying HECMA as the professional home for all higher education case managers. One of our first priorities was to re-evaluate our branding and the accessibility of the amazing amount of resources that HECMA members have gathered over the years. Led by David Wiltshire and Mona Dugo respectively, the Marketing & Communications and Operations & Strategic Planning committees worked tirelessly to deliver an easily searchable library hosted on a newly designed and maintained website. If you have not had a chance to take advantage of the website and library, I encourage you to do so. It is an incredible reflection of the expertise and innovation our members display at their institutions.

Over the past year, HECMA members Katherine Snyder and Nina Critz continued to represent HECMA with CAS (Council for the Advancement of Standards in Higher Education). As you may know, Katherine has overseen our involvement with CAS for several years working tirelessly with other HECMA members to develop CAS Standards for Case Management as well as a Cross-Functional framework for Identifying and Responding to Behavioral Concerns. CAS published and released both of these this year, which marked an incredible achievement for our organization. Thank you to the following individuals and organizations for their hard work and dedication in continuing to advance the field and assisting with this instrumental project.

Case Management Standards: Jan Hillman (Chair), Katherine Snyder, M. Keener Scott, Noah Henry-Darwish, Alfred Day, Katie Boin, JJ Larson, Amy Powell, Therese Smith, CAS Standards Management Committee, and CAS Council.

Cross-Functional Framework for Identifying and Responding to Behavioral Concerns: Cathy Cocks (co-author), Rachel Boldman (co-author), Katherine Snyder, Barbara O'Connor, Laura Bennett, Raime Thibodeaux, Sompaa Adhya-Taylor, Denise Davidson, JJ Larson, Therese Smith, Amy Powell, Chris Silva, Peter Lake, Charles A. Dana, Dr. Robert Fein, in addition to representatives from the following associations: ASCA, ACCA, ACUHO-I, IACLEA, NASPA, and ACPA.

We want to thank all of you who attended our Annual conference in Cleveland, Ohio this year. The conference was our largest yet, with more than 325 attendees. During our business meeting, the Leadership Team introduced our Strategic Plan. We have included it, along with reports from our member-driven committees, in this annual report. As you will see, we hope to continue to expand the opportunities for training, involvement, and communication among HECMA members. We hope that you see your voice reflected in this plan moving forward. I am confident that this next year will be our best yet. Thank you for all that you do on your campuses, and thank you for helping us to build the largest network of higher education case managers possible.

Sincerely,

Laurel Donley Banks





HECMA

HIGHER EDUCATION
CASE MANAGERS ASSOCIATION

STRATEGIC PLAN 2019-2021

TO EQUIP

higher educational professionals and
their institutions with high quality
education and resources.

TO EXEMPLIFY

professional standards for higher
education case management.

TO SERVE

as a professional home for all higher
education case managers.



STRATEGIC PLAN 2019-2021

GOAL 1 : TO SERVE AS A PROFESSIONAL HOME FOR ALL HIGHER EDUCATION CASE MANAGERS.

- Recruit new and diverse members from both clinical and non-clinical case manager roles
- Develop new resources and curriculum to engage and retain current and emerging senior leadership
- Increase transparency in communication and information sharing within the organization
- Create an inclusive and equitable environment





STRATEGIC PLAN 2019-2021

GOAL 2 : TO EXEMPLIFY PROFESSIONAL STANDARDS FOR HIGHER EDUCATION CASE MANAGEMENT.

- Create and utilize consistent messaging and branding across all platforms of the organization
- Commit to ongoing and intentional integration of diversity, equity, and identity into all aspects of our organizational structure, programming, and decision making
- Create a culture that encourages innovative research and practice
- Provide relevant, professional, and educational content grounded in research for all stakeholders





STRATEGIC PLAN 2019-2021

GOAL 3 : TO EQUIP HIGHER EDUCATIONAL PROFESSIONALS AND THEIR INSTITUTIONS WITH QUALITY EDUCATION AND RESOURCES.

- Curate and organize diverse and current resources to increase functionality and accessibility for members
- Create and disseminate emerging knowledge and practice to meet changing needs of the profession
- Enhance opportunities for connection and collaboration among stakeholders
- Provide continuous education and support for professional development of members



LEADERSHIP TEAM 2018-2019



President

Laurel Banks
*University of North Carolina
School of the Arts*

Director, Membership & Recruitment

Liz Stevenson
University of Central Florida

Director, Operations & Strategic Planning

Mona Dugo
Northwestern University

Director, Finance

Dr. Carrie Smith
University of Georgia

Non-Clinical Case Manager at Large

Dr. Rachael Stark
Temple University

Vice President, Conferences & Special Events

Dr. Jacqui Tisdale
University of Rhode Island

Director, Communications & Marketing

Dr. David Wiltshire
Duke University

Director, Diversity, Equity, & Inclusion

Sean Joy
Gonzaga University

Director, Training & Development

Kipp Van Dyke
Iowa State University

Clinical Case Manager at Large

Alicia Talbird
University of Georgia



COMMITTEE REPORT



CLINICAL CASE MANAGER AT LARGE

The Clinical Case Manager at Large and committee focus on identifying and meeting the needs of clinical case managers in HECMA as it pertains to professional development needs, conference needs, information related to work completed by clinical case managers and fostering community among clinical case managers in Higher Ed.

LEADERSHIP TEAM MEMBER:

Alicia Talbird
Clinical Case Manager at Large
University of Georgia

COMMITTEE MEMBERS:

Christine Ferguson
Luis Balcazar
John Schatzel
Maria Candelaria-Flukas
Amber Tempel
Danielle Beasley
Sam Chan
Laura Schulte
Laura Baldwin
Illana Rosenberg
Ashley Edelstein
Joanna Mittreder



COMMITTEE REPORT



CLINICAL CASE MANAGER AT LARGE

ACCOMPLISHMENTS FOR 2018-2019

- Hosted another year of a successful mentorship program
- Welcomed new HECMA members upon joining the organization via email
- Answered member emails regarding case management and being new to the field in general

INITIATIVES RELATED TO STRATEGIC PLAN

- Research cost and feasibility related to options for expanding Continuing Education Units offerings at the Annual Conference
- Implement the strategic and intentional use of annual survey data to frame and guide more clinical services
- Serve as the representative to the Council for the Advancement of Standards for Higher Education
- Further the recruitment of clinical members

COMMITTEE REPORT



CONFERENCES AND SPECIAL EVENTS

The Vice President of Conferences and Special Events and committee aim to support the networking and professional development needs of HECMA members through the coordination of the annual conference and collaboration on special events, regional drive-ins, and state meetings.

LEADERSHIP TEAM MEMBER:

Dr. Jacqui Tisdale
Vice President
University of Rhode Island

COMMITTEE MEMBERS:

Katherine Hettinger
Megan Higginbotham
John B Caldora
Lindsay Maxam
Quanisha Kumi-Darfour
Samantha Ellen MacKenzie
Danielle Che'ree Haynes
Therese Smith
Amber Miller
Christine Ferguson
Tawanna Brown
Melanie McKoin
Cristina A Battle
Tyrone E. Reese



COMMITTEE REPORT



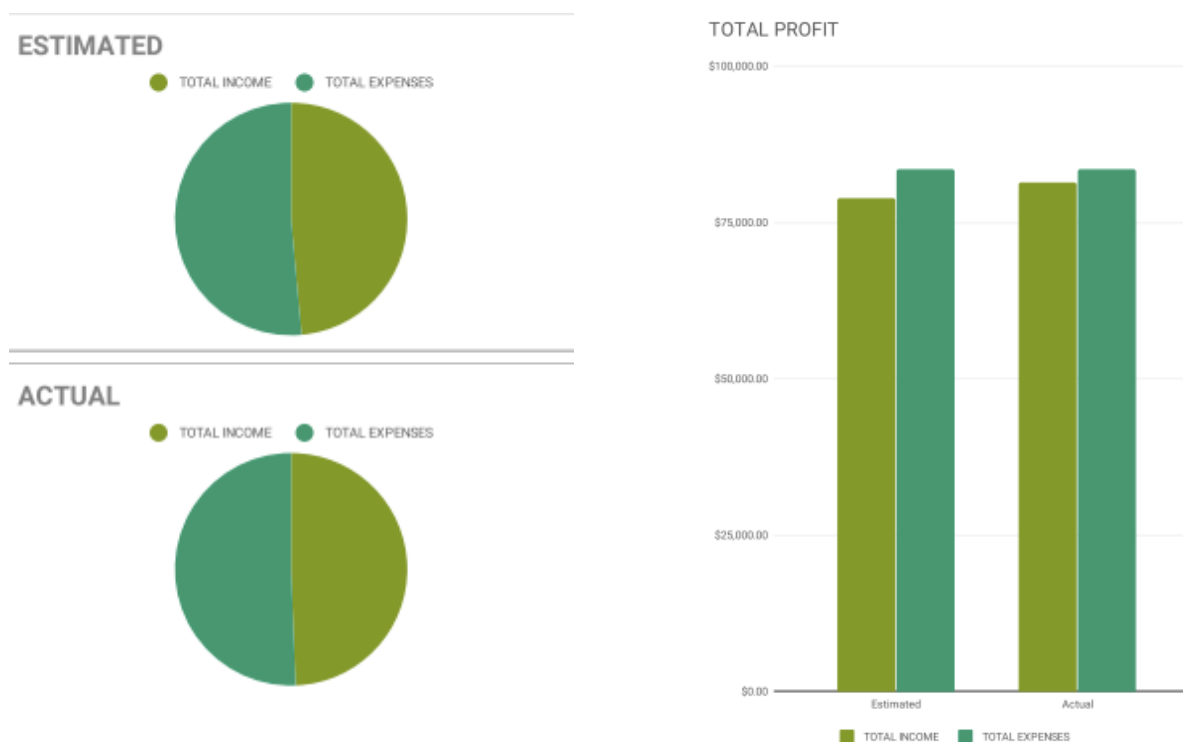
CONFERENCES AND SPECIAL EVENTS

ACCOMPLISHMENTS FOR 2018-2019

- Fully covered cost of conference through Registration and vendor fees (minus MembershipWorks fees)
- Welcomed a Keynote speaker addressing diversity, equity, and inclusion work
- Offered the 1st full day pre-conference
- Signed 2020 contract with a 3% rebate and signing incentive

INITIATIVES RELATED TO STRATEGIC PLAN

- Offer poster session opportunities along with training instruction
- Introduce a half day institute for Deans of Students or VPSAs seeking a case management position
- Designate contracted space for affinity groups
- Work directly with local (Portland) institutions



COMMITTEE REPORT



DIVERSITY, EQUITY, AND INCLUSION

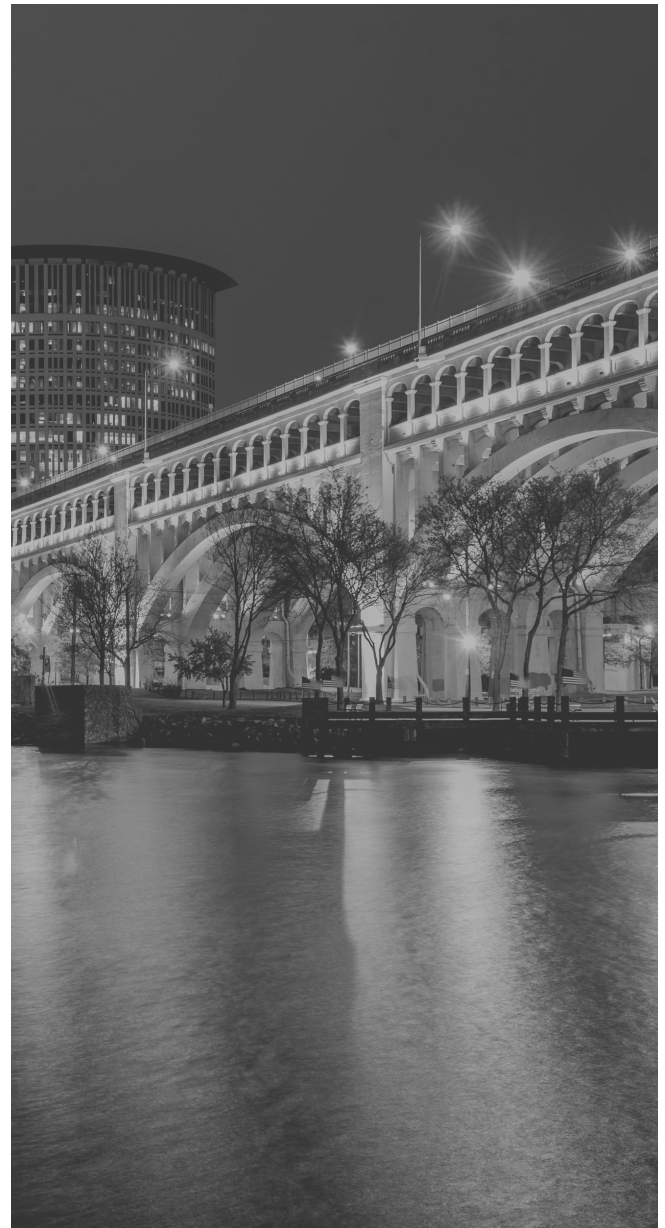
The Director of Diversity, Equity, and Inclusion and committee serve to deepen HECMA's commitment to diversity, equity, and inclusion through intentional and culturally relevant policies, programming, and resources.

LEADERSHIP TEAM MEMBER:

Sean Joy
Director
Gonzaga University

COMMITTEE MEMBERS:

Sarah Grace Walters
Analía Cuevas
Cameron Jesse Cox
Sara Peacock
Danielle Beasley
Arianna Holterman
Elsie Johnson
Laura Sandoval-Sweeney
Jennifer Henkle
Angela Harris
Stephanie Thompson



COMMITTEE REPORT



DIVERSITY, EQUITY, AND INCLUSION

ACCOMPLISHMENTS FOR 2018-2019

- First official year of the DEI Committee in existence
- Addressed the past and opportunities for the future through letter to Association
- Creation of affinity groups/spaces
- Established HECMA Commitment to Equity & Inclusion Award
- Consulted and collaborated with expert in mental health disparities within communities of color: Dr. Alfiee Breland-Noble
- Strong integration of DEI into HECMA Strategic Plan and future conference planning (Director of DEI, attending site visit to Portland conference area to support in the equitable creation of the annual conference)
- Connection with other associations' DEI related committees
- Budget line created for committee development and travel for Director of DEI to attend other conferences/professional development experiences to increase what is provided to HECMA members

INITIATIVES RELATED TO STRATEGIC PLAN

- Establish a structured communication plan with Director of Communications for increased transparency related to DEI work within the Association
- Intentional outreach to identity-based institutions (i.e. HBCUs, HSIs, Tribal Colleges, and Universities)
- Further define affinity groups and support provided within those spaces
- Identification of resources for the HECMA Library, including the creation of new resources with the ability to collaborate with multiple HECMA members
- Increased DEI-related webinars
- Continue to identify and implement resources, supports, and changes to increase the equity and access of the annual conference
- Create a presence within critical academic work related to the role of DEI within Case Management
- Creation of an official DEI statement to be adopted by HECMA
- Transitional planning for new Director

COMMITTEE REPORT



FINANCE

The Director of Finance is responsible for maintaining the Association's financial accounts and overseeing the development of the Association's budget. The Director is also responsible for maintaining the association's 501(c)(3) status and overseeing the distribution of funds for the Association.

LEADERSHIP TEAM MEMBER:

Dr. Carrie Smith
Director
University of Georgia



COMMITTEE REPORT



FINANCE

ACCOMPLISHMENTS FOR 2018-2019

- For the first time, HECMA approved a budget in advance of the year that reflect membership needs and strategic priorities.
- In particular, the budget allocated more money towards diversity, equity, and inclusion initiatives, scholarships for conference attendees, increased analysis of annual survey data, and expanded marketing and branding for the entire organization.
- With membership at its highest levels ever, HECMA is primed to become a financially sustainable organization.

INITIATIVES RELATED TO STRATEGIC PLAN

- Prepare for the upcoming 2019-2020 fiscal year by carrying over income from the previous year.
- With the creation of each strategic goal, HECMA has allocated appropriate funds to ensure that these goals become a reality.
- Further, as the organization looks to increase transparency for its members, both financially and as a whole, we are forming the first ever Finance Committee. The committee will be tasked with increasing consistency in documentation related to financial reporting and requests. They will also focus on researching the potential for the diversification of investments to increase organizational stability. Finally, the committee will help to increase representation from the larger membership base in decisions related to fund allocation.

COMMITTEE REPORT



MARKETING AND COMMUNICATIONS

The Director of Marketing and Communications and committee serve to provide expertise in the areas of marketing, technology, and conferencing as they relate to meeting the changing needs of the Association's members. The Communications Team offers feedback, guidance, and support to the Director of Marketing & Communications on a variety of communications and marketing topics.

LEADERSHIP TEAM MEMBER:

Dr. David Wiltshire
Director
Duke University

COMMITTEE MEMBERS:

Arianna Agramonte Holterman
Jennifer Henkle
Austin LaForest
Nicole Logue
Kyle Myers
Liz Stevenson



COMMITTEE REPORT



MARKETING AND COMMUNICATIONS

ACCOMPLISHMENTS FOR 2018-2019

- Developed and released new hecma.org website
- Developed and released HECMA rebranding (logo, color/design scheme, etc.)
- Implemented new Facebook Page and curation of consistent, 3x/week content for Facebook and Twitter streams

INITIATIVES RELATED TO STRATEGIC PLAN

- Pilot a quarterly newsletter
- Continue to make website more robust with content in Library and webpages
- Develop and curate HECMA Instagram
- Bring Conference-related material to hecma.org site (and decommission hecmaconference.org)

HECMA'S NEW LOGO & BRANDING:



COMMITTEE REPORT



MEMBERSHIP AND RECRUITMENT

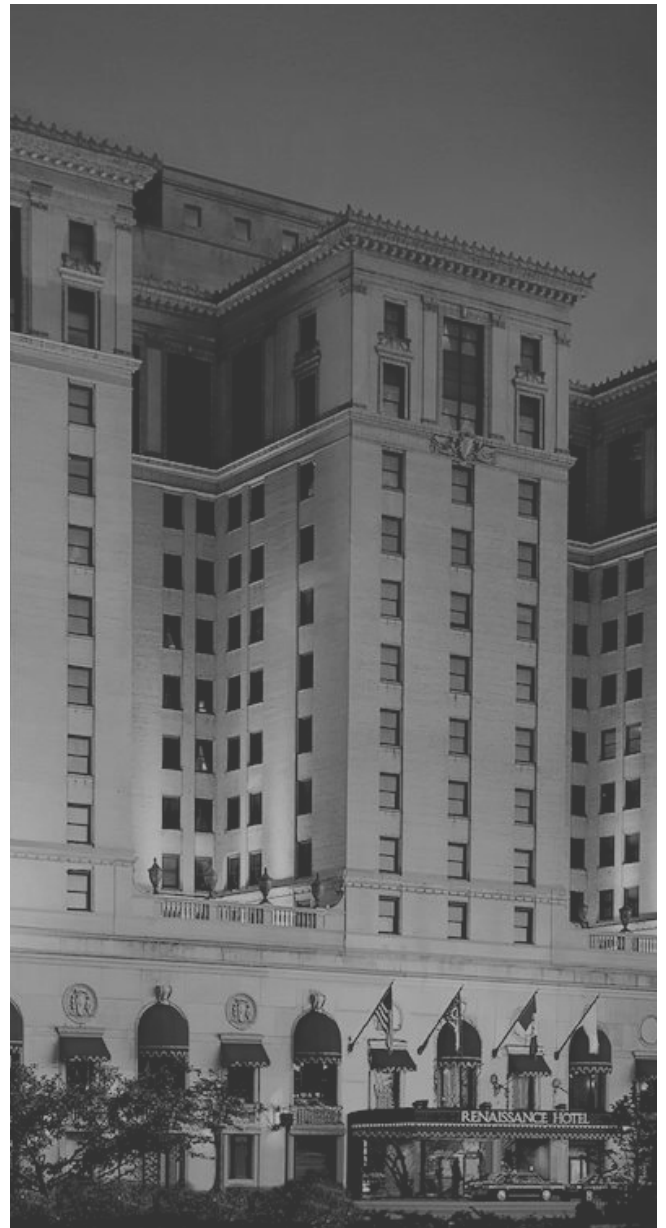
The Director of Membership and Recruitment coordinates the national and regional recruitment of HECMA members and serves as a liaison between members and the Leadership Team. The committee assists the Director in recruitment of new members and the ongoing support of the membership at large.

LEADERSHIP TEAM MEMBER:

Liz Stevenson
Director
University of Central Florida

COMMITTEE MEMBERS:

Quanisha Kumi-Darfour
Christine Ferguson
Jennifer Starks
John Cicchetti
Carrie Glatting



COMMITTEE REPORT



MEMBERSHIP AND RECRUITMENT

ACCOMPLISHMENTS FOR 2018-2019

- Brought forth need and support for raising membership fees by \$10 to the Leadership Team, which was voted and approved. The change in fees will take effect for the Fiscal Year 2019-2020.
- Experienced 32% growth in membership since May 2018. This is consistent with our growth over the last 2 years and we look forward to another successful year of recruitment.

INITIATIVES RELATED TO STRATEGIC PLAN

- Membership fees will be raised to \$60 with the goal to give members access to more resources through the new website as well as additional opportunities to engage with HECMA via online webinars.
- Providing support to HECMA members through regional-drive in opportunities. Institutions will be invited to work with the HECMA leadership team to coordinate their drive-ins and receive financial and logistical support from HECMA.

COMMITTEE REPORT



NON-CLINICAL CASE MANAGER AT LARGE

The Non-Clinical Case Manager at Large (NCCM) and committee help ensure the non-clinical CM voice as an advocate on Leadership Team as well as provide us with valuable insight into the trends and changing needs of that portion of our membership. This role also includes connecting new NCCMs with seasoned ones and assisting in identifying webinar and conference topics that are more relevant to those serving in non-clinical campus settings.

LEADERSHIP TEAM MEMBER:

Dr. Rachael Stark
Non-Clinical Case Manager at Large
Temple University

COMMITTEE MEMBERS:

Robin Kimberlin, MSW
Joanna Mittereder, LSW
Nicole Logue, LMSW
Lisa A. Steffensen, Ph.D
Leatra Tate



COMMITTEE REPORT



NON-CLINICAL CASE MANAGER AT LARGE

ACCOMPLISHMENTS FOR 2018-2019

- Initiated another successful mentorship program
- Welcomed new HECMA members upon joining the organization alongside clinical case manager at large
- Coordinated member emails regarding case management and being new to the field in general

INITIATIVES RELATED TO STRATEGIC PLAN

These initiatives reflect the goals of the Non-Clinical Case Manager at Large for the upcoming year: **Tawanna Brown**

University of Alabama

- Work with several of constituents to further develop and advocate for non-clinical case managers.
- Continue to develop the mentorship program in order to build a community of individuals working in non-clinical case management. Mentoring is a key, transformative strategy in growing in the field of case management.
- Work with Diversity, Equity, and Inclusion and Membership Directors to recruit more Historically Black Colleges and Universities into HECMA
- Work with the Director of Training and Development to implement webinars that focus solely on unconscious bias. Often, unconscious bias can be the culprit behind unintentional discrimination and unconscious bias can have a long-term effect on students and institutions.
- Serve as the representative to the Council for the Advancement of Standards for Higher Education.

COMMITTEE REPORT



OPERATIONS AND STRATEGIC PLANNING

The Director of Operations and Strategic Planning and committee work to support the members of HECMA by providing research-based practice recommendations in the field of case management. Using data, scholarly research, guidance from the Department of Education and, practice wisdom, the committee strives to help HECMA expand with the field of case management by supporting the strategic initiatives of the organization. Specifically, the committee has developed benchmark data for members to use as they create or grow their programs and define best practices within the structures of their institutions.

LEADERSHIP TEAM MEMBER:

Mona Dugo
Director
Northwestern University

COMMITTEE MEMBERS:

Noah Henry-Darwish
Beth Rubin
Britney Deaver
Allison Leventhal
Amanda Turnley



COMMITTEE REPORT



OPERATIONS AND STRATEGIC PLANNING

ACCOMPLISHMENTS FOR 2018-2019

- Reorganized the HECMA library for the migration to the new website through the work of committee members. The members divided up the more than 600 documents in the original Google Drive and reviewed each document. The documents were put into new categories and given key words so that members can use a search feature to find relevant documents. In addition, the committee discarded outdated documents and URL links.
- Administered the largest HECMA membership survey to date. Members were asked to complete a 91 question survey. 302 members responded. The survey also included a specific section for the clinical case managers. The survey results were shared at the HECMA conference and are now available to all members.

INITIATIVES RELATED TO STRATEGIC PLAN

These initiatives reflect the goals of the Director for Operations and Strategic Planning for the upcoming year: **Noah Henry-Darwish**

University of California, Berkeley

- Focus on strategic content generation for the HECMA Library
- Focus on exploring model and collaborating with Training and Development to implement a Certification Program
- Focus on sharing out key information with members and identifying directions for additional research related to the HECMA survey
- Develop member resources for topic areas of particular interest or identified need through research

COMMITTEE REPORT



TRAINING AND DEVELOPMENT

The Director of Training and Development and committee are responsible for identifying the professional development needs of HECMA members; providing expertise in the areas of continuing education, professional competencies, standards, and professional development; and moving towards the implementation of CAS standards for case management, among others.

LEADERSHIP TEAM MEMBER:

Kipp Van Dyke

Director

Iowa State University

COMMITTEE MEMBERS:

Adam Leventhal

Amanda Turnley

Amy Powell

Becca Lopez

Caroline Davis

Christine Olstad

Ellen Mack

Elsie Johnson

Heather Jones

Joseph Contes

Joe Espinoza

Megan Higginbotham

Milly Agai



COMMITTEE REPORT



TRAINING AND DEVELOPMENT

ACCOMPLISHMENTS FOR 2018-2019

- Helped move conference assessment (both session and overall evaluation process) to the Whova app. Also did pre-conference assessment to help measure pre/post conference expectations.
- Worked with the conference committee to help define outcomes for the conference to ensure CEU application process was complete.
- Helped create a budget so, moving forward, this committee can offer some incentives to those that help with professional development/trainings.

INITIATIVES RELATED TO STRATEGIC PLAN

These initiatives reflect the goals of the Director for Operations and Strategic Planning for the upcoming year: **Brenda Anderson Wadley**
University of Arizona

- Begin discussions and research with the Operations and Strategic Planning and DEI committees about collaborations related to offering a credentialing program for Case Management. The focus areas are to include diversity-related training such as implicit bias training, assessment and CAS standards training, and trainings focused on overall membership engagement.
- Work to organize training and professional development resources on the new website, in alignment with CAS standards
- Determining if the current format regarding how training is delivered is still relevant and utilized by our members
- Work to identify presentations to offer to membership not able to attend conference through feedback from conference sessions and from membership.

SCHOLARSHIP RECIPIENTS



HECMA Graduate Student Scholarship

Antonia DeMichiel
University of San Francisco

Antonia DeMichiel received the HECMA Graduate Student Scholarship to attend the HECMA Annual Conference in Cleveland, OH. Antonia is a graduate student at the University of San Francisco, in the Masters of Higher Education and Student Affairs Program with an expected graduation date of May 2020. As a graduate student Ms. DeMichiel serves as a Case Management Assistant at the University of California, Berkeley. In her nomination letter, it was noted that Antonia has demonstrated her enthusiasm and knowledge of case management, and excitement to continue her growth through further professional development.



HECMA New Professional Scholarship

Cynthia Waldek
Northwestern University

Cynthia Waldek, Program Coordinator at Northwestern University, received our New Professional scholarship. Ms. Waldeck is a recent graduate of Northwestern University, with a Masters in Higher Education Administration. Cindy wrote her master's thesis on medical leave and reinstatement processes and has recently developed a new medical leave and reinstatement website for her office. It was noted in her nomination that in her new role, she has filled some critical gaps in service and is unflappable in her approach.





AWARD RECIPIENTS



Outstanding Mid-Level Professional

Kathleen Richardson, *Rice University*

"She has been a fabulous and thoughtful case manager and leader in our team and a huge asset to all students that she works with."



Commitment to Diversity & Inclusion

Elizabeth Gallus, *The College of New Jersey*

"During my tenure in higher education, I have never met a colleague so willing to go above and beyond to support our students."





AWARD RECIPIENTS



Creative Collaboration: Institutional Impact

Embark@UGA, University of Georgia

"What began as a group of students, defined only by experience, has grown into a supportive community through creative collaboration, case management services, and continual assessment and improvement."

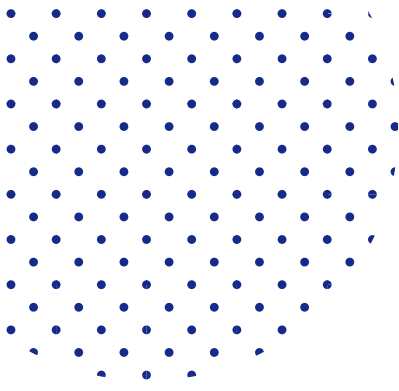


HECMA Leadership Award

Sean Joy, Gonzaga University

"Like many of our students, I know that I have become a better, more thoughtful, and more inclusive person as a result of having worked with Sean Joy."





HECMA

HIGHER EDUCATION
CASE MANAGERS ASSOCIATION

