



*Shared Resources.
Collaborative Networking.
HECMA.*

ANNUAL REPORT FY 2015-2016

Higher Education Case Managers Association
HECMA

JJ Larson, President
July 2016



ANNUAL REPORT

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Leadership Team for 2016-2017

From the President

Hello.

As I reflect on this past year, the words that flash for me are transitions, growth, and expansion. And I come to words like struggle, tragedy and bravery.

This year has seen me writing to fellow members wishing them well on journeys that none of us hope to be on and gaining membership in institutional phenomenon that none want to join. However, in the face of these trials for our communities and campuses, our members rise. They rise. They support. And they help heal.

I have also been privileged to see the seeds planted by our founders, and first President, Dr. Ashley Blamey, come to light. HECMA applied for and was granted membership in the Council for the Advancement of Standards in Higher Education. The Leadership and support of our Training & Development Director and our Membership Director guided us to that point. And as a founder who remembers those long ago dreams, a proud moment for sure.

HECMA also embarked on formalizing Corporate Sponsorship opportunities. Welcoming Acadia Recovery Healthcare, flowed by the Center for Discovery, into our HECMA family. Acadia, Tom Bennett has been a strong advocate of our work and is tireless in his efforts to help promote the good works that all of you do on your campuses.

Your HECMA Leadership Team will continue to work on plans to advance our field. We will be expanding mentorship opportunities, launching webinar and education programs and continue to enhance the scope and depth of offering through our Annual Roundtable. It is your active participation in the listserv, in providing sample documents for the library, in responding to our surveys of the state of the field and in helping to test rubrics and guidelines that ensures HECMA continues to thrive and grow as does our field.

HECMA strives to be accessible, strives to be meaningful, and strives to be relevant. Shared Resources. Collaborative Networking. HECMA.

Wishing you all the best for the coming year.

Peace,

JJ Larson

Your HECMA President

2016-2018

2014-2016

Leadership Team – 2015-2016

JJ Larson

President

Katherine Zilmer

Director for Membership
& Conferences

Lauren Oe

Director of Finances

Beth Riley

Director of Quality
Improvement

Nina Critz

Clinical
Case Manager
At Large

Jennifer Henkle

Non-Clinical
Case Manager
At Large

Alysson Satterlund

Director of Operations

Makenzie Schiemann

Director of Training &
Professional
Development

Karen Minero

Director of
Communications

MEMBERSHIP & CONFERENCE



Katherine Zilmer

Director for Membership & Conferences
2014-2016

Senior Assistant Dean of Students
BIT Case Manager
University of Illinois, Urbana-Champaign

The 2015-2016 Membership and Conference Committee is responsible for coordinating national and regional recruitment, managing the approval and activation of new and renewing members, assisting with website issues and monitoring the listserv, identifying and cultivating corporate sponsor relationships, and managing/coordinating all aspects of the annual Roundtable.

Active committee members include:

Name	Title	Institution	First membership year
Sharon Howell	Assistant Dean of Students	University of St. Thomas	2013
Dawna Jones	Student Assistance Coordinator	University of North Carolina, Chapel Hill	2014
Maryjane McNabb	Clinical Care Manager	Indiana University	2014
Sara Peacock	Student Advocacy and Intervention Manager	Coastal Carolina University	2013
Marisel Perez	Associate Dean of Students	Tufts University	2013
Amy Powell	Associate Dean of Students	Duke University	2013
Leslie Riley	Case Manager	University of Alabama, Birmingham	2013
Sarah Ritter	Case Manager	Baylor University	2015
Valerie Shayman	Academic Advisor	Gonzaga University	2014
Carrie Smith	Student Affairs Case Manager	University of Georgia	2015
Therese Smith	Director, Community of Concern	University of Kentucky	2013
Jasmine Stallworth	Graduate Assistant	University of Illinois at Urbana-Champaign	2015
Andy Tew	Case Manager	Amherst College	2014
Nicky Wallace	Student Success Coordinator	Furman University	2013

Accomplishments

The 2015-2016 Membership and Conference Committee focused efforts on our three major areas of responsibility: membership recruitment, the development of corporate sponsor relationships, and planning the 2016 Roundtable.

Specific to membership, we have shown tremendous growth from 2015-2016. Since switching to a 12 month membership based on the month of original membership, we are showing a steady rate of members of new and renewing members. On 6/30/2014, our formal roster included 189 members. Directly comparing January-April 2015 to January-April 2016, we demonstrate a 98% increase in total memberships. As of 5/12, we are at 365 members and June has typically been a large month for our organization for new and renewing memberships. I fully expect that our organization will be 450 members strong before the end of 2016.

Below please find a break-down of basic demographic information about our membership based on our current roster (effective 5/12/2016):

- Members in 42 states
- Members in Ontario and Saskatchewan, Canada
- Member in the West Indies
- 72% of members report their role is non-clinical
- 28% of our member reports they may provide clinical services in their role
- Of our members with active licensure:
 - 34% are licensed counselors
 - 7% are licensed psychologists
 - 60% are licensed social workers

"Serving on this committee has been incredibly rewarding, both professionally and personally. It has allowed me to contribute, in a meaningful way, back to the organization that has given me so much."



In addition to the work we did with respect to individual membership, the committee processed HECMA's first ever corporate sponsorship application resulting in our first Gold Level Sponsor, Tom Bennett and the Recovery Division of Acadia Healthcare. This has already proven to be a mutually beneficial partnership. We also reviewed and approved a Silver Level Sponsorship from the Center for Discovery, a residential eating disorder facility. We are so excited for this new partnership and how we will each benefit.

The HECMA Leadership Team, with the UCF Planning Team, took an active role in coordinating and managing the 2016 Roundtable. We are thrilled that it is our largest yet, and believe the content offered by our presenters will be top quality. As of the writing of this report, we have applied for CE hours with NASW and await their decision.

Challenges

The committee faced one major challenge associated with each area of primary responsibility. We experienced some “growing pains” during the application, review, and approval process of our first corporate sponsor. Never having undertaken the process before, there were issues that we could not have anticipated. Thankfully, our corporate sponsor was beyond understanding and gave us the grace we needed to sort things out. We are now prepared for these issues and questions in the future.

The second challenge is related to Roundtable registration and payment. We set up a registration and payment system that we thought was intuitive and user-friendly. However, we

Katherine’s “Go To”:

We cannot solve
our problems with
the same thinking
we used when we
created them.
-Albert Einstein

learned that many encountered difficulty in understanding the process. For some, they registered and did not pay, anticipating an invoice we did not plan to send. Others only paid and did not complete the registration. This required dedicated time to follow-up with everyone who only completed one portion of the registration process. For the future, I would recommend exploring whether or not it is possible to have an automatic email “receipt/invoice” generated following registration. That email could contain an invoice for those paying by check, or directions for online payment for those paying by credit card. This process would also prove beneficial for membership as well.

The final challenge is our growth. It is a wonderful “problem” to have, but we are growing in members so quickly that it has been difficult to keep up with activations, renewals, and terminations of access (for those who do not renew). It was my goal to activate all new memberships within 5 business days and to send at least one renewal reminder. The reminders happened, but I cannot say with confidence that all new memberships were activated so quickly. This will be remedied, at least in some part, by the separation of the Membership and Conference role.

Assessment and Data Analysis

One major change HECMA has made as a result of the growth of our organization is to split the Membership and Conference Committee into two, distinct roles/committees: Vice President for Conferences and Special Events and the Chair for Membership and Recruitment. This is a valuable change as the two roles have grown unmanageable for one person. This will permit each chairwoman to focus efforts throughout the year on their respective areas rather than having to split time and energy between two important responsibilities.

A second change for HECMA was taking more of a responsibility for the planning and execution of the Roundtable. In prior years the host site had complete and total control of the Roundtable. This meant the attendee experience could vary significantly from year to year. By taking a more active role in the planning and management of this experience, we can ensure a consistent high standard for our members and others that plan to attend this yearly event. However, this change also required more time throughout the planning process.

I expect that the management of the Roundtable will become increasingly difficult as we have grown in attendees each year. This year, we surpassed 170 attendees, by far our largest number yet. Managing and coordinating all of these logistics requires the dedicated energy of several people. I recognize that maintaining our connection to an institution of higher education is important, but I think it will be critical to consider moving to an all-in-one location where attendees can stay, sessions can be housed, and the location will provide catering, etc. This will decrease the coordination time required by all involved.

HECMA members also experience their fair share of technical difficulties with our website and listserv. The website challenges have significantly decreased since switching to the Weebly site. However, because the listserv is still google-hosted, people still encounter difficulty with posting and access. It would be worth exploring moving to another type of listserv that does not require to be signed into a google account to access.

Fiscal Information

This is the first year that the RoundTable was able to meet a break even cost; the resulting profit enabling some expanded philanthropy in our host city, Orlando.

In past years campuses have hosted the roundtable at a loss of \$1,000-\$4,000. Moving financial responsibility to HECMA rather than the host institution was an important step as this is a HECMA sponsored event, not an institution sponsored event. It was our goal to budget to \$0.00; meaning, HECMA did not take a loss or make a profit on the event. However, because we exceeded our registration expectations by over 30 attendees, we yielded a small profit. Some of

our major conference expenses for 2016 included catering, venue fees, speaker fees, and shuttle costs.

I do not anticipate needing an increased budget for the Roundtable so long as we continue to operate a debt-free conference and spend within our means. If we move to mailing certificates of membership, the Membership Chairperson will need a budget for printing and mailing.

Vision for the Next Year

I will be vacating my role as the Membership and Conference Chair. However, the Leadership Team has discussed the following potential new initiatives for next year:

- Targeted, state-specific outreach to states in which we do not have HECMA members. This currently includes Alaska, Mississippi, Nevada, North Dakota, South Dakota, Utah, and Wyoming. This will expand HECMA's reach and contribute to our vision to be the preeminent professional organization for individuals that provide case management services within a post-secondary educational environment.
- Certificates of membership for new members or renewals at the time of membership/renewal. Members have, on occasion, requested certificates as proof of their membership. This will contribute to a sense of connection to the organization once people have joined and to our larger identity as an organization.
- The creation of marketing materials that members can use at conferences when presenting. This can be a valuable tool to further develop our membership.

FINANCE



Lauren Oe

Director of Finances
2015-2017

Associate Dean of Students
Boise State University (Idaho)

The Finance Director is responsible for managing HECMA financial accounts, maintaining our Associations 501 (c) and processing/monitoring all banking transitions.

Accomplishments

In Collaboration with Membership & Conferences:

- Increase Roundtable attendee fee to help cover projected costs.
- Secured two cooperate memberships; (1) Gold (1) Silver.
- The 2016 HECMA Roundtable was the first Roundtable that HECMA did not experience a deficit.

Finance Initiatives:

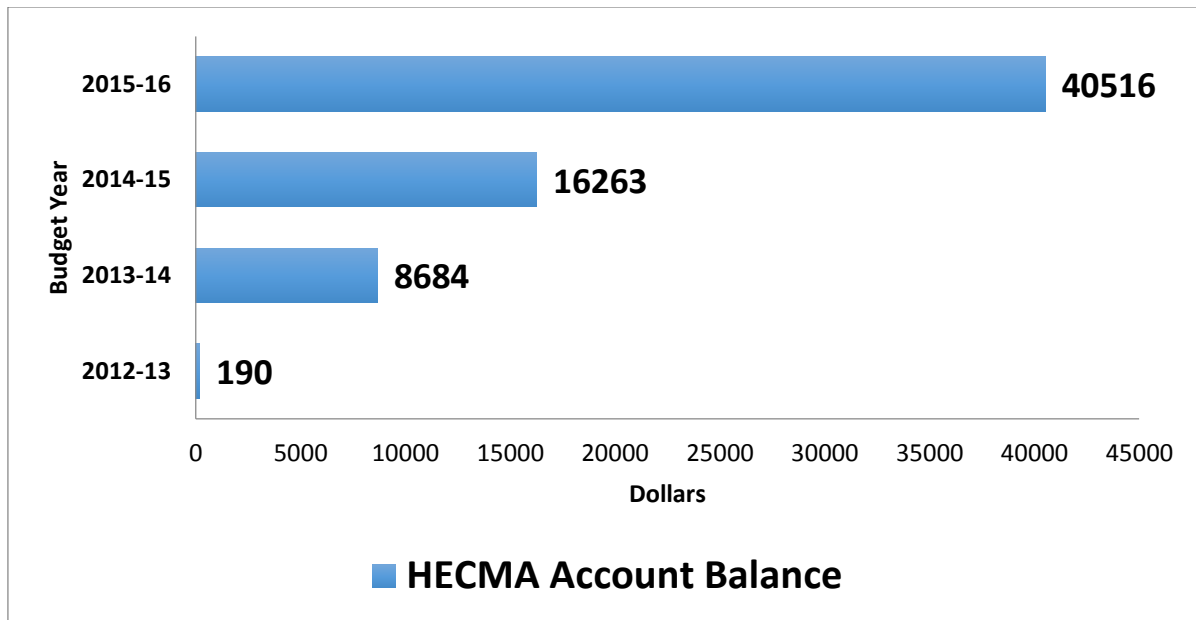
- Transitioned our online payee system from PayPal to Square, which allows for direct deposits to the HECMA banking account.
- Implemented a quarterly expense report.

Our *Favorite* Lauren quote:

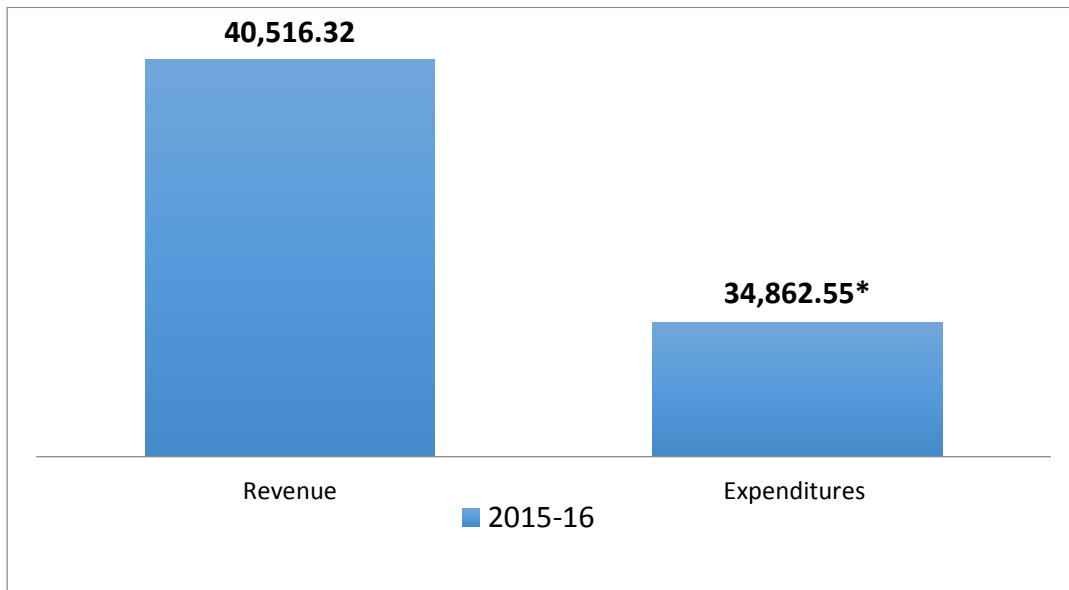
"Let me check the budget to see if that's do able."

"

Fiscal Information



*HECMA's balance as of June 30, 2016 after paying all debts is **\$40,516**.*



** Expenditures reflect monies withdrawn from June 30, 2015 to July 1, 2016 that may include debts (2015 Roundtable) incurred the previous fiscal year.*

New Initiatives & Vision for the Next Year

- Enhance the tracking of HECMA spending/expenditures.
- Have tax records reviewed by a certified accounting professional.
- Explore options for automated invoices for membership dues and Roundtable attendee fees.



Leadership 2014-2015 at Emory



Roundtable Crowd at Emory 2015



Drive-In for NJ-PA-NY

QUALITY IMPROVEMENT



Beth Riley

Director of Quality Improvement
2014-2016

Assistant Dean of Students and
Director of Case Management Services
Binghamton University (New York)

Over the last two years the Quality Improvement (QI) committee has provided leadership, direction in data collection, and professional standards for case managers in their practices. Over this last year, the QI team has accomplished this with initiatives in response to attendees the of previous roundtables who expressing a desire for guidance on satisfaction surveys and peer reviews.

Quality Improvement will be combined with the Operations Committee beginning with the 2016 – 2017 HECMA year, under the leadership of Alysson Satterlund.

MEMBERS OF THE HECMA QUALITY IMPROVEMENT COMMITTEE SPRING 2016

MEMBER	CURRENT TITLE	INSTITUTION	FIRST YEAR OF MEMBERSHIP
Caroline Davis	Assistant Dean for Student Outreach and Support	Boston College	2016
Amy Leach, LCSW	Assistant Coordinator of Training for Social Work Practicum, Referral Coordinator, and Clinical Social Worker	University of North Carolina, Chapel Hill	2015
Taunja Meers, MSW, LICSW	Director of Case Management Program	St. Cloud State	2012
Paul Tongsri	Student Behavioral Case Manager	North Carolina State University	2013

Accomplishments

The QI team worked on four projects during 2015 - 2016:

- A) Referral Satisfaction Surveys
- B) Community Resource Lists
- C) Case Management Program Evaluation Rubric
- D) HECMA Membership Questionnaire

Case Management Program Evaluation Rubric

By collecting referral satisfaction survey instruments from the membership, the QI team accomplishment was two-fold. First, we were able to share the ideas of members who had previously set up satisfaction surveys, thus saving time and spurring ideas for use with other institutions. Secondly, as HECMA members strive to be appropriately responsive, not only to the students with whom they work, but also to their referral sources with a high level of quality.

Community Resource Lists

The QI team gathered database questions used to create community resource lists. This is helpful for reputable case managers to make solid and informed referrals, consistent with HECMA values including arranging “for appropriate medical or mental health care”. Information sought of community resources include the providers’ specialties, insurance they accept from clients, location and contact information, and modalities. By asking additional questions such as “is your office on a bus route,” case managers in a higher education setting can better assist those students needing to use public transportation. In response to the QI request for database questionnaires, conversations began on the HECMA listserv about how and why members use a referral source database.

Case Management Program Evaluation Guidelines (Rubric):

Over the past year, HECMA’s Quality Improvement committee worked to set up a Case Management Program Evaluation Rubric for peer reviews. Being the preeminent professional organization for individuals that provide case management services in the higher education setting, HECMA now sets the standard for program evaluation and encourages use of the rubric for peer reviews.

The committee has developed a method for evaluating campus Case Management Programs. Efforts began by researching CAS standards and additional information was gathered from HECMA case managers, functional areas common to most case management programs, and then identifying minimum guidelines (or "best practices") associated with each functional area. The resulting rubric covers 17 separate functional areas and 108 guidelines of practice.

The rubric has been beta tested by 7 colleges and universities.

HECMA Membership Questionnaire/ Longitudinal Survey:

Initially the QI committee worked on revisions to the membership application, which might become a supplemental membership questionnaire as part of the application. However, evolving thoughts are to develop a comprehensive evaluation of case management programs for longitudinal data. And use the membership application as both an entrée into HECMA, but a place to grab snapshot data to demonstrate the industry baseline and identify trends. By developing a HECMA membership questionnaire, HECMA utilizes current data to demonstrate the industry baseline.

At the 2015 Roundtable, two HECMA members -- Beth Riley and Jennifer Henkle, presented data that was collected of HECMA members by an instrument set up under JJ Larson's guidance of the Quality Improvement committee back in 2013. The data was collected throughout 2013 – 2015 (a.k.a. The Journey) and was presented in comparison of data collected from the membership prior to 2013 (a.k.a. The Landscape).

Information presented at the 2015 Roundtable and the ensuing conversation, along with the focus of new leadership, served as a springboard driving the focus of the 2015 – 2016 Quality Improvement committee work.

From the previous surveys, QI committee members culled the data to mine the most contemporary topics in the world of Case Management in higher education and transformed the survey into one that could be used at the point of membership and paying dues. The topics identified as most important to assess include:

- University size (so that universities of similar size could be compared)
- Job title
- Location of case manager's department
- Initial meeting with student as a result of a referral
- Information about the case manager's role
- Involuntary withdrawals
- Medical withdrawals and leaves
- Continuum of case management services offered
- Goal of HECMA membership

"It has been a great opportunity to feel connected to something bigger- a group outside of my own agency and institution, and to have some space to be thoughtful about best practices. I also enjoyed getting to know the other members of the committee."

Challenges

One of the challenges we faced as a committee this year, was having little membership response to requests. The committee sought information from the membership several times during the last two years. We would have liked to see more survey instruments shared and more volunteers follow through. One example of a challenges was when our committee member requested volunteers to test out the Case Management Program Evaluation Rubric. Several people volunteered. However, only 5 followed through by giving their time to test out sections and then 2 locations tested the instrument in its entirety.

Case managers tend to be understaffed and consistently overworked; given these conditions it is not be surprising if responding to requests for survey instruments and volunteers to test instruments is just not a priority when constituents are crying for our attention.

Committee Member Paul Tongsri submitted the following:

There are two primary issues that I see as impacting the future of the Rubric. First, the Rubric represents today's standard of practice nationally. However, the profession as a whole is shifting and new standards are created and establish frequently. As a result, the Rubric must be maintained as a living document that is reviewed and changed with the times to be relevant to everyday practice. An example of dynamic change include the formation of multi-team approaches to case management - CARE v. BIT - where the Rubric addresses the formation of a single team. Second, although every effort was made to represent the interests of both Dean of Students-style case managers and those housed in Counseling Centers, the Rubric is more tailored to meet the needs of DOS case managers. The mere fact that the Rubric assumes an independent case management philosophy and program is evidence of this fact. The combat this, the Rubric was designed to be taken apart - each functional area is a stand-alone metric that can be removed from the rest. Despite this, many clinical case managers will find it challenging to apply the Rubric in the context of their counseling center's programmatic goals and procedures.

New Initiatives

It is now time to disseminate the Case Management Program Evaluation Rubric. We believe it has been adjusted based upon testing and is now ready for the general membership to use. Paul Tongsri will be presenting it at this year's HECMA conference in Florida.

The Membership Survey is also ready to be put in use and has been shared with the key leaders.

Vision for the Next Year

With the national attention that the current White House administration is bringing, along with that of some state governors, Title IX reports have increased. I would like to see HECMA provide case management standards when it comes to prevention and post-vention of sexual assault, stalking, dating and other gender violence. Each semester more and more students come forward reporting crimes. A common hypothesis is that the crimes are not happening at a higher rate, but actually the reports are happening at a higher rate due to the national attention and our Universities' attention to this matter. This has created a trend in Higher Education Case managers with a focus on working with victims of gender related crimes. To that end, we need a comprehensive set of standards regarding victim support services around the country. I would like to see more attention from HECMA to this special group of case managers.

I am glad to see there is one session on the topic of privacy and confidentiality at this year's Roundtable. It is hot and very important contemporary topic.

Another topic that could be examined is building partnerships with those who do and those who do not have a "need to know."

One of Beth's *favorite* quotes:

***"Be the change that you wish
to see in the world."***

– Mahatma Ghandi

CASE MANAGERS AT LARGE



Nina Critz

Clinical Case Manager At Large
2016-2018

Case Manager, Staff Counselor, &
Ed.S. Training Co-Coordinator
James Madison University (Virginia)



Jennifer Henkle

Non-Clinical Case Manager At Large
2015-2017

Assistant Dean of Students and
Case Manager
University of Tennessee, Chattanooga

Accomplishments

Both the Clinical and Non-Clinical Case Managers At-Large have begun implementing the newly created mentorship program. This program is an opportunity for newer Case Managers to receive guidance and support from seasoned Case Managers (those in their current role for at least a year). Serving as a mentor will provide seasoned Case Managers a unique development opportunity and the ability to not only provide support to someone newer to the field, but also to celebrate and recognize the knowledge that they have already developed in their role.

On April 7th the Case Managers At-Large offered their first webinar training, “Case Management 101,” and plan to continue offering an online webinar training and/or forum discussion each semester. This training opportunity will allow for Case Managers to engage in professional development opportunities to ensure best practice.

Additionally, the Case Managers At-Large continue to maintain email correspondence with the HECMA Case Managers in their area (non-clinical or clinical) and are available for members to reach out with questions, requests, or needs; the Case Managers At-Large will be the voice of Case Managers on the HECMA leadership team and various projects, such as those involving the Training & Development and Quality Improvement committees. These positions will continue to promote the mentorship program and provide assistance and guidance to other committees and projects, while also continuing to reach out to institutions where there is no tie to HECMA to increase membership numbers.

Challenges

The challenges that Nina and Jennifer encountered this past year were mainly due to limited time to complete all they desired.

Assessment and Data Analysis

- *13 individuals involved as mentors and mentees in Clinical Case Management*
- *26 individuals involved as mentors and mentees in Non-Clinical Case Management*
- *50 participants logged in for the first webinar offered (more expressed interest but space was limited to 50)*

Fiscal Information

No budget information for 2015-16; funding for an online forum to allow larger webinars and web-based conversations would be beneficial to the committee and HECMA as a whole.



Favorite Quote

Nina: "Not all of us can do great things. But we can do small things with great love." Mother Teresa

Jennifer: "The problem, often not discovered until late in life, is that when you look for things in life like love, meaning, motivation, it implies they are sitting behind a tree or under a rock. The most successful people in life recognize, that in life they create their own love, they manufacture their own meaning, they generate their own motivation. For me, I am driven by two main philosophies, know more today about the world than I knew yesterday. And lessen the suffering of others. You'd be surprised how far that gets you." – Neil deGrasse Tyson

What the Committee has meant to me..

Nina: An incredible opportunity to learn from amazing leaders in the field and a humbling chance to share support with other HECMs.

Jennifer: This experience has given me the opportunity to promote and help contribute to an incredible organization that epitomizes and advances the work that I love and am passionate about!

New Initiatives

We plan to continue growing the mentoring program, offering regular webinar trainings and develop additional opportunities for professional growth and development.

Vision for the Next Year

Nina and Jennifer are each honored to be in their same role next year and plan to seek feedback from HECMA members to gather information about how best to support HECM in both the clinical and non-clinical realm. Additionally, Nina and Jennifer plan to continue to promote the organization with universities bringing on new case management positions; work on building the at-large areas of the HECMA website; as well as advocating for clinical and non-clinical issues within individual HECMA committees.

OPERATIONS



Alysson Satterlund

Director of Operations
2015-2016

Associate Vice President & Dean of Students
California State University, San Bernardino

Description

For the period of July 1, 2015 and June 30, 2016, per the bylaws, the Operations Chair was responsible for 1) Developing and overseeing the implementation of organizational strategic plan(s); 2) Maintaining the HECMA Constitution and Bylaws and 3) Serving as the Parliamentarian at the annual General Membership Meeting.

In accordance with the approved change in bylaws in February 2016 and as of July 1, 2016, the position is referred to as the Operations and Quality Improvement Chair. This new leadership position is responsible for 1) Providing leadership and support for association business practices; 2) Providing leadership and direction in ensuring the association maintains professional standards in its practices; 3) Developing and overseeing implementation of the organizational strategic plan; 4) Establishing and implementing organizational assessment priorities in line with strategic plan goals and initiatives; 5) Coordinating data collection, analysis and distribution on an annual basis to the membership making appropriate adjustments along the way to the strategic plan; 6) Recommending improvements in organizational governance structures, policies, or leadership priorities as needed; 7) Establishing best practices regarding peer review process and rubrics in coordination with the Training & Professional Development chair and committee; 8) Maintaining the HECMA Constitution, Bylaws and Strategic Plan; 9) Serving as the parliamentarian at the annual General Membership meeting; 10) Participating in the decision making processes of the association and 11) Interpreting Leadership Team policies and decisions to members of the organization.

Accomplishments

In August 2015, the bylaws were updated to reflect membership approvals from the July 2015 annual meeting. These included the approval of a Corporate Sponsorship Level Two and the addition of a Membership Cycle. Specifically, it was determined that memberships are on a yearly basis per the month of membership and that members would need to renew in the month of first membership approval or risk a lapse in access to HECMA resources. In addition, memberships will occur electronically before the Roundtable in order to smooth the transition at the annual meeting. Further additions included a new section on Elections and it was determined that elections would follow an annual cycle and process. Specifically, each January there will be a call for candidates to apply with biographical information and interest statements due by the third week of February in order that this information be available to the association membership in March. HECMA will announce the new leadership team in the month of April and the annual June meeting will serve as the transition meeting for the new team. Finally, it was agreed that the constitution and by-law changes could be proposed and voted on electronically throughout the year in an effort to create more responsiveness and flexibility for the association throughout the year. These amendments were officially approved by the President on July 1, 2015.

In December 2015 and January 2016, the President initiated a review of the bylaws and position responsibilities for the members of the leadership team. In this review, it was determined that specific leadership team positions would be modified to reflect the changing needs of the association and to create a more balanced workload for members of the leadership team. These changes were proposed to the membership and were distributed to the membership for a vote in February 2016. The amendments were officially approved by the President on February 10, 2016 with the expectation that the new HECMA leadership roles would begin July 1, 2016.

Assessment and Data Analysis

As the 2015-2016 Operations Chair, the primary duties were attending to bylaw and constitution edits and needed updates.

In addition, I researched the options and costs of potential outside administrative support for the President and Vice President of Membership & Conferences. Our current operating budget did support the use of this option at this time. Therefore, I researched the human resource and legal expectations for future use of independent contractors. With permission of a colleague at a national organization, a contract template was created for the future hiring of independent contractors. Though the association will not be moving in this direction in 2016-2017, having the information available for future consideration is valuable and informs future decisions and opportunities.

What the Committee has meant to me

After the December 2nd terrorists attack in San Bernardino, HECMA served as a source of incredible resource and comfort to me personally and professionally. Our community is still processing the impacts. Therefore, having a group of colleagues show so much kindness and care went a long way at a difficult time. In addition, I have been inspired by the incredible work that HECMA has done through the years and am excited to support its continued advancement in the field of higher education.

One of Alysson's *favorite* quotes:

""Impossible is just a big word thrown around by small (people) who find it easier to live in the world they've been given than to explore the power they have to change it. Impossible it not a fact. It's an opinion. Impossible is not a declaration. It's a dare. Impossible is potential. Impossible is temporary. Impossible is nothing."

– Mohammed Ali

New Initiatives

For the coming 2016-2017 year, I will be stepping down from my role as the Operations Chair.

However, following the June 2016 annual meeting, the new Operations and Quality Improvement Chair will need to facilitate the on-going comprehensive review of HECMA's bylaws and constitution to ensure that all operational practices and protocols are accurately reflected for membership consideration and approval.

The successor may also consider creating a committee to facilitate the responsibilities of the Operations and Quality Improvement Chair for 2016-2017.

Vision for the Next (Few) Years

From an operational and quality control perspective, I would recommend that HECMA consider 1) infrastructure development to support the goal to bundle services for institutions; 2) a modest future increase membership dues and 3) the development of an operations manual. There will be value in preparing the bylaws and constitution for review by an outside counsel at a future point to ensure that the association is in compliance with best practices and the law.

TRAINING & PROFESSIONAL DEVELOPMENT



Makenzie Schiemann

Director of Training & Professional Development
2015-2017

Director of Student Outreach, Support & Advocacy
University of South Florida

Description

This year Leadership launched a revised role to better capture the associations movement in providing training opportunities and professional development within the field of higher education case management. The committee formerly known as “Standards and Advancement” (and first chaired by HECMA founder, Jennie Stewart of LSU) was rebranded as “Training & Professional Development.” The Standards and Advancement Committee was established in 2011 to work toward a more formalized national standard for higher education case management and more clearly define Case Management roles. The Training and Professional Development title better captures that mission along with the expanded responsibility for establishing training events and programs to benefit our field.

Areas of Focus

1. Coordinates, along with Quality Improvement Chair, the movement towards implementation of Higher Education Case Management CAS Standards
2. Develops training guidelines and professional ethical standards for all iterations of Higher Education Case Management
3. Identifies key topics and develops professional development opportunities through webinars, pre-conference sessions, and other means of continuous education

Accomplishments

The Training & Professional Development Chair coordinated HECMA's application for membership in Council for the Advancement of Standards in Higher Education (CAS); which was supported through the research and efforts of other leadership and committee members. The Chair and the President attended the April 2016 CAS meeting in which the Chair presented information in support of HECMA's candidacy for membership. Both the Chair and President were on hand to field questions from the CAS Board of Directors, representing 42 professional associations in higher education.

New Initiatives

During this past year Training and Development began researching ethical standards in higher education associations as they worked toward creating HECMA's own set of ethical standards. In their research, they reviewed the ethical statements from the *Association for Student Conduct Administration*, the *American College Personnel Association*, and the *Counsel for the Advancement of Standards in Higher Education*. In looking at the ethical statements from these associations we created a list of the most commonly included ethical standards.

In March 2016, the committee created a survey allowing members to rank the most common standards, mentioned above, from 1 – 14. The survey results review for the development of HECMA ethical standards are still in the development phase.

Vision for the Next (Few) Years

Participation in CAS – representing HECMA's interests and perspective.

Finalization and promulgation of HECMA's Ethical Standards.

Development of a certification process for Higher Education Case Managers, based on ethical standards and defined case management roles, both clinical and non-clinical in function.

Establishment of a robust professional training program – through linkage to HECMA members group drive-in conferences and use of webinar systems.

Leadership Team – 2016-2017

JJ Larson



President

Lauren Strunk



Vice President,
Conferences & Special
Events

Lauren Oe



Director of Finances

Therese Smith



Director of Membership
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Nina Critz



Clinical Case Manager
At Large

Jennifer Henkle



Non-Clinical Case
Manager At Large

Alysson Satterlund



Director of Operations

**Makenzie
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Director of Training &
Professional
Development

Katherine Zilmer



Director of
Communications &
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