

# ANNUAL REPORT 2014-2015



Prepared by:  
Jennifer "JJ" Larson  
HECMA President  
June 2015  
[info@hecma.com](mailto:info@hecma.com)

## Introduction

Higher Education and Student Affairs has experienced significant changes this past year. As case managers we continue to develop services that meet rising demands, complicated needs and legislative mandates to better serve our students and communities. Over the past year the HECMA Leadership Team has worked to broaden our footprint in meeting the professional and practice needs of our field.



Our work in higher education case management continues to provide the higher education community with multiple ways distress impacts individuals and their institutions of higher learning and the supports needed to buoy success. Further, with roles in clinical practice settings, student services, behavior intervention teams or elsewhere, we represent a cross-section of perspectives that in working together can shape the direct services provided and policies developed to reduce risk to individuals and their living and learning environments in post-secondary settings. To quote Ashley Blamey, “We are the architects of our own work.”

It has been my pleasure to serve as the second President of HECMA. I continue to be impressed by your creativity and drive in solving service needs and in addressing rising trends. The Leadership Team has accomplished amazing things this year in our effort to move HECMA forward and expand our footprint. The one-year increase in membership by 82% is reflective of this effort. The work of the Leadership Team and their committees is summarized in this report.

Thank you for sharing your ideas and inspiring us to grow further.

Peace,



Jennifer “JJ” Larson

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## Mission / Vision / Definition

**Mission:** HECMA is a professional membership organization for individuals that provide case management services within a post-secondary educational environment.

**Vision:** HECMA, as the founding organization of higher education case managers, provides members with professional identity and resources to advance best practice, knowledge and research in order to promote and enhance the well-being of campus communities.



**Case Manager:** Higher Education Case Managers serve their University and individual students by coordinating prevention, intervention, and support efforts across campus and community systems to assist at risk students and students facing crises, life traumas, and other barriers that impede success.

To that end Higher Education Case Managers\*:

- Arrange for appropriate medical or mental health care
- Monitor compliance with treatment plans and/or university behavioral expectations
- Evaluate threat and assess risk to self and/or the community
- Maintain contact and meet with students to address needs
- Foster self-advocacy in students to manage their academic, personal and fiscal responsibilities.
- Advocate for students individually and systemically

\*Case Management in Higher Education is a hybrid of the Expanded Broker Model of Case Management and the Personal Strengths Model of Case Management. Case Management in Higher Education may incorporate one or all of the responsibilities listed depending on organizational structure and expertise.

## HECMA History

In 2008 Virginia Tech invited individuals from across the nation to meet on their campus in Blacksburg, Virginia to discuss the changing landscape of higher education and specifically the evolution of Case Management. The meeting was called the Case Management Roundtable, and thirteen unique institutions attended. The meeting addressed communication challenges, data management, legal concerns and team hierarchy. The conversations spanned two days and provided the foundation for all future Roundtables. The meeting also laid the groundwork for HECMA.

Virginia Tech's willingness to share their model of Case Management and their experiences also set the standard for future expectations- *the work of Case Management is collaborative and to be successful it must also be shared*. The fundamental belief of shared responsibility is what makes HECMA and the Roundtable experience the premiere event for post-secondary case management.

Subsequent Roundtables have been hosted or cohosted by:

2010 - University of Tennessee

2011 - University of Michigan

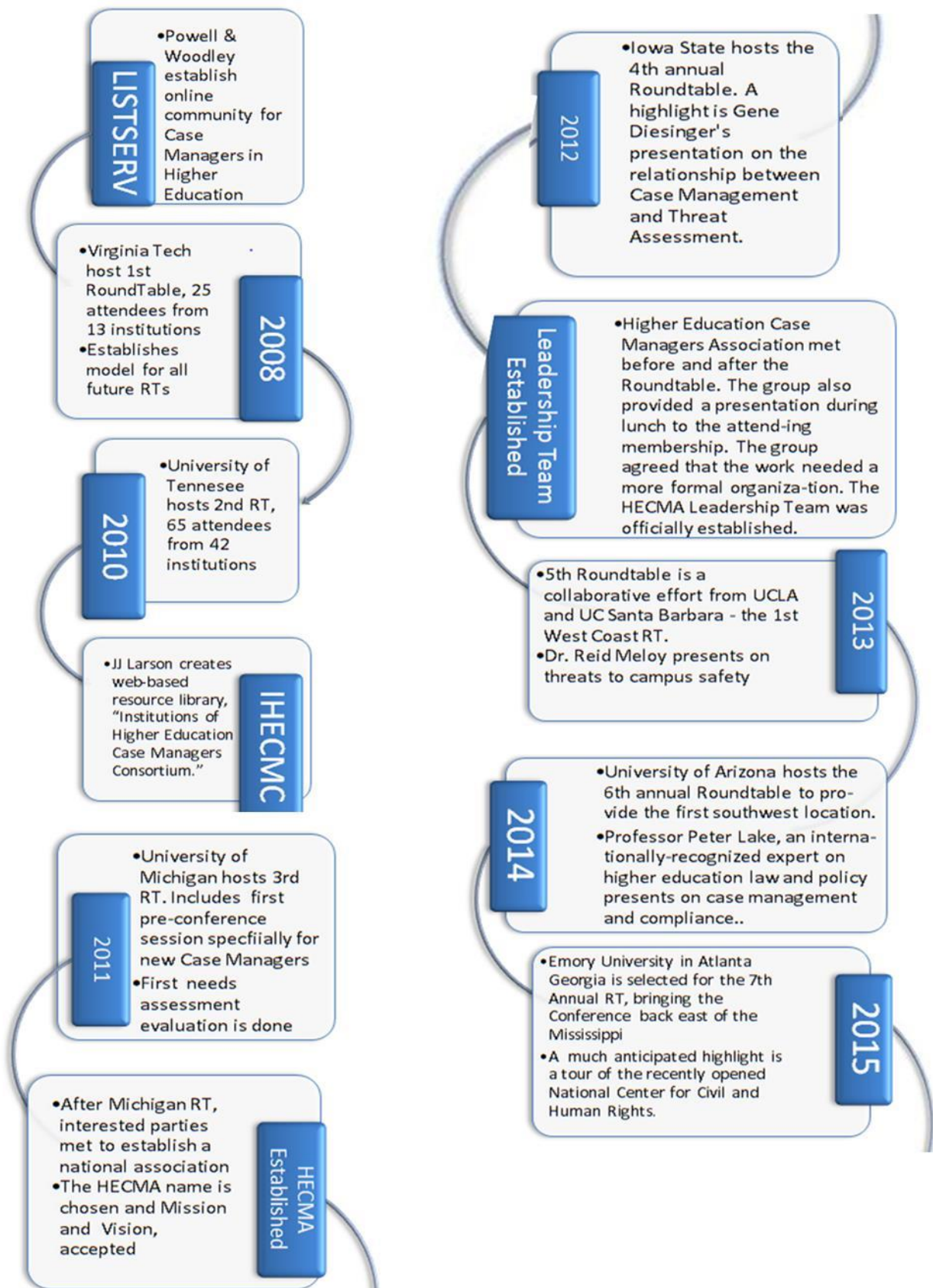
2012 - Iowa State University

2013 - University of California Los Angeles & University of California Santa Barbara

2014 - University of Arizona

2015 - Emory University

## HECMA History Timeline





## HECMA Leadership Team, 2014-2015



Jennifer "JJ" Larson  
President



Christine Pesetski  
Finance Chair  
*Duke University*



Katherine Zilmer  
Membership &  
Conference Chair  
*University of Illinois at  
Urbana- Champaign*



Sharrika D. Adams  
Standards &  
Advancement Chair  
*Virginia Tech*



Jennifer Henkle  
Student Affairs Case  
Manager at Large\*  
*University of Tennessee –  
Chattanooga*



Beth Riley  
Quality Improvement Chair  
*Binghamton University*



Phillip Van Saun  
Operations Chair  
*University of California,  
Office of the President*



Karen Minero  
Communications Chair  
*University of California,  
Los Angeles (UCLA)*



Nina Critz  
Clinical Case Manager at  
Large\*  
*James Madison  
University*

\*Sarah Solomon, Student Affairs Case Manager At Large, Syracuse University  
June –October 2014. Vacated leadership position due to enhanced work responsibilities

\*RJ McNicholl, Clinical Case Manager At Large, University of Illinois at Urbana-Champaign  
June 2014 – March 2015. Vacated leadership position due to leaving IHE for private practice

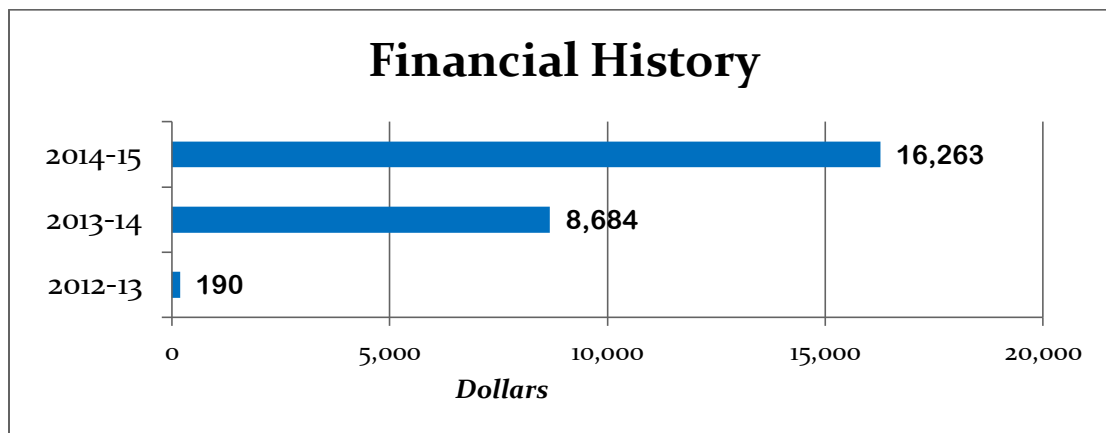
## FINANCE COMMITTEE

Since July 2014, HECMA has continued to expand our fiscal foundation. To that end we have:

- We are now a recognized 501c3 non-profit through the Internal Revenue Service. This means we are a tax exempt non-profit.
- We began accepting payment for membership dues online through Pay Pal. We have also set up banking through Wells Fargo.
- HECMA purchased a website service and a domain name enabling us to have a greater online presence. These services were renewed and will expire in 2020.
- HECMA established a basic budget in 2013.

Future goals for the Finance chair

- Consider using Wells Fargo as the service for collecting online membership payments instead of Pay Pal. Several member schools are not allowed to make payments through Pay Pal.
- Continue to develop and revise budgeting efforts and an annual budget planning process.
- Look at investments as a way to ensure the longevity of HECMA.
- Identify and develop corporate sponsorships.



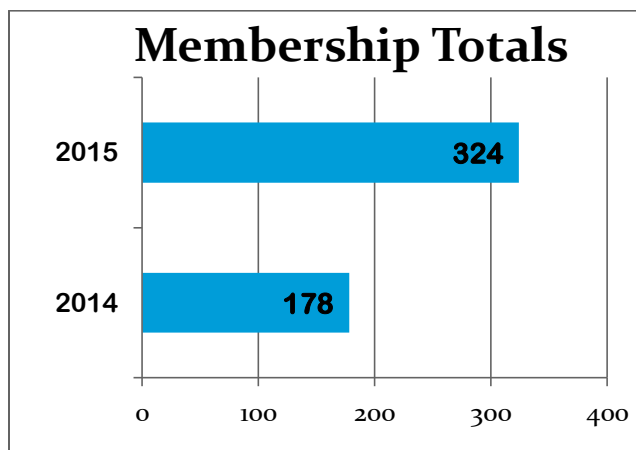
Our current balance (June 2015), after paying our debts is **\$16263.00.**

The area of Finance was led by Leadership Team member, Christine Pesetski, Duke University.



## MEMBERSHIP & CONFERENCE COMMITTEE

As of June 2014, HECMA had 178 registered members. As of May 2015, the committee has successfully recruited and enrolled a total of 312 members and is awaiting payment from an additional 12. Including the 12 pending memberships, this is an 82% increase in the size of our organization!



**82% ↑ in one year**

HECMA members currently represent 185 institutions, 40 states, and 2 Canadian provinces.

Committee members conducted direct outreach to 85 individuals/institutions for recruiting and checking-in with current members.

### REGIONAL ROUNDTABLES:

May 14<sup>th</sup>, 2015, the 3<sup>rd</sup> annual "Mini Roundtable" for VA Counseling Center Case Managers (VACCCM) was held at the annual VA Counseling Center Conference held at University of Richmond, co-hosted by Committee Member Nina Critz and Tori Keel (VCU). This year 4 current VACCCM's attended. In past years this roundtable also included universities who were interested in beginning a CM position, so this year's attendance allowed CM's to focus on discussions around existing policy and procedure. Topics discussed included: maintenance of community referral lists, function of having CM interns or trainees, attendance at HECMA roundtable, review of updated VA legislation, and logistics around 2<sup>nd</sup> annual regional CM meeting. Additionally, the past July 2014 Nina hosted the first annual VACCCM all-day meeting. This year, it is scheduled to be hosted at VCU.

November 13, 2015, the 5<sup>th</sup> Annual Midwest Case Management Roundtable, was held at St. Catherine University. Committee Member Sharon Howell was integrally involved in the planning. The Midwest Committee Chair is HECMA member Heidi Anderson-Isaacson and all colleges and universities in the region (Minnesota, Iowa, Wisconsin, N. Dakota and S. Dakota) were invited to attend. Other HECMA members involved include Stephen Bennett (Gustavus Adolphus College) and Keith Robinder (Iowa State University) with JJ Larson, HECMA President, providing HECMA updates and trends.

Other Higher Education Case Management Drive-In Conferences were held as follows:

*California* – annual Case Managers gathering for UC and CSU systems

*North Carolina* – Case Managers of the Carolinas (includes North & South Carolina schools)

*Florida* – Annual one-day drive-in for HECMs hosted by the University of Central Florida

## ONGOING ACTIVITIES & UPDATES:

*Application Modifications:* The committee recommended modifications to the membership application in order to collect valuable data about the field. Modifications included education/credentials, licensing provider, institutional organization, and titles

*Conference Host Selection:* Committee members reviewed three outstanding proposals to host the 2015 Roundtable and selected Emory University to host. The committee worked closely with the host site to coordinate planning and marketing with HECMA.

## NEW INITIATIVES:

*Corporate Sponsorship Amendment:* Committee members Amy Powell and Therese Smith conducted a careful review of professional organization sponsorship policies and with a commitment to the goals and values of HECMA, wrote proposed amendments to the corporate sponsorship process in the bylaws. Proposed changes include establishing two primary categories of corporate sponsorship (\$1,000 and \$1,500 fee). These changes will be up for vote at the Annual Roundtable.

*Continuing Education Hours:* Committee members submitted a successful application to the NASW CE Approval Program and were approved for 8 (social work) continuing education contact hours. With so much professional development funding dependent on the ability to earn CE's, this was an important step for HECMA to increase accessibility of the Roundtable for all who would like to attend.

## ABOUT THE COMMITTEE:

The Membership and Conference Committee was chaired by Leadership Team Member Katherine Zilmer (University of Illinois at Urbana-Champaign).

The 2014-2015 Membership and Conference Committee included the following members:

- Ashley Hurand (University of Arizona)
- Nina Critz (James Madison University)
- Therese Smith (University of Kentucky)
- Amy Powell (Duke University)
- Scott Howard (Amherst College)
- Sharon Howell (University of St. Thomas)
- Denise Tijerina (Texas Tech University)
- Leslie Riley (University of Alabama at Birmingham)
- Jennifer Lang (Ohio State University)
- Hilary Love (University of Colorado, Boulder)
- Eric Casares (University of Colorado, Denver)
- Nicole Boymook (Whitworth University)
- Marisel Perez (Tufts University)
- Nicky Wallace (Furman University)
- Gregory Toya (California State University, San Marcos)
- Dawna Jones (University of North Carolina, Chapel Hill)
- Jennifer Henkle (University of Tennessee, Chattanooga)
- Maria Lonsbury (University of Maryland, College Park)
- Leslie Riley (University of Alabama, Birmingham)
- Paul Tongsri (North Carolina State University)
- Sara Byczek (Wayne State University)
- Sara Peacock (Coastal Carolina University)
- Tiarra Wade (Duke University)
- Nicole Boymook (Whitworth University)

## OPERATIONS COMMITTEE

The Operations Chair position was initiated in 2012 to construct the Constitution and Bylaws that lay the groundwork for the grassroots association known as Higher Education Case Managers Association or HECMA. Since then the Operations Chair has served a key role in keeping Leadership mindful of our statutes as we move forward in discussion and planning.

This year our Operations Chair developed a Leadership Team survey to assist us in identifying priorities and shaping our vision for the association. Through his work we have positioned ourselves to formulate a Strategic Plan to outline HECMA's trajectory over the next several years.

Additionally, his expertise is providing needed perspective as we develop protocols and processes for our Leadership Team and association response to regional and national higher education events and trends. As Leadership, we remain committed to the fundamental belief that for case management (and our association) to be effective and successful, the message and the work must be collaborative and shared.

The area of Operations was led by Leadership Team member, Phillip Van Saun, University of California.

## STANDARDS & ADVANCEMENT COMMITTEE

Standards and Advancement was established to move the organization toward a more formalized national standard and more clearly define Case Management roles. The goals for the Standards and Advancement committee have included examining how to advance case management as a functional area and the development of CAS standards for case management. Much of this work has been research based, as moving forward with CAS has been dependent on acquiring our 501c3 status.

CAS is the Council for the Advancement of Standards in Higher Education (CAS). CAS has developed 44 sets of standards outlining functional areas in specific higher education units or areas that "provide individuals and institutions with means for assessing program and service effectiveness based on the standards." [from <http://www.cas.edu/standards>]

During roundtable meetings this year, the Leadership Team will be discussing ways to balance the peer review and best practice research being completed by the Quality Improvement Committee and the training and professional development needs that are emerging as we expand our membership.

The area of Standards and Advancement was led by Leadership Team member, Sharrika Adams, Virginia Tech.

## COMMUNICATIONS COMMITTEE

Since July 2014, the HECMA Communications Committee has:

- Formalized new committee and expanded membership to 10 members.
- Established point people for tasks.
- Completed four committee conference calls.
- Collected photos from 2014 HECMA Roundtable.
- Created new look and branding of HECMA Newsletter and HECMA brochure.
- Created new Newsletter with valuable new sections.
- Reviewed content and look of HECMA website.



Future goals for HECMA Communications Committee:

- Expand newly created look/ branding to the HECMA website
- Expand content of website
- Distribute HECMA Newsletter quarterly
- Increase communication regarding HECMA through Twitter, LinkedIn, etc.
- Intentional connection/ collaboration with other Higher Ed organizations
- Photograph HECMA events and make periodic requests from HECMA members for photos to be submitted

### ABOUT THE COMMITTEE:

The Communications Committee was chaired by Leadership Team Member, Karen Minero (University of California, Los Angeles).

The 2014-2015 Communications Committee included the following members:

- Michelle Evans, Notre Dame of Maryland University
- Molly Maher, Xavier University
- Rachelle Ang, CSU Long Beach
- Angela Newland, University of Central Florida
- Dawna Jones, University of NC-Chapel Hill
- Therese Smith, University of Kentucky
- Ashley McLaren, University of Arizona
- Nicole Ferguson, University of Arkansas
- Katelyn Rossler, UC Denver
- Lauren Strunk, Florida Gulf Coast University

### CLINICAL CASE MANAGER AT LARGE

The Clinical Case Manager At Large role was created to help ensure the clinical CM voice had an advocate in Leadership as well as to provide us with valuable insight into the trends and changing needs of that portion of our membership. This role may also include connecting new CCMs with seasoned ones and assisting us in identifying webinar and conference topics that are more relevant to those serving in the clinical campus settings.

During Spring of 2015, the elected CCCM-at-large was unable to complete his term. As per the By-Laws, the Leadership Team identified several mid-term candidates. We were pleased to recruit Nina Critz to complete the 2014-2016 cycle, beginning in May 2015.

During RJ McNichol's nine months in the CCCM-at-large position he created and implemented a survey of clinical case managers to help determine what information they would like and how they would like it formatted. The survey will help differentiate between what clinical and non-clinical case managers responsibilities. The survey also sought to provide insight regarding the navigation, balance, and parameters needed when campuses have both types of case managers in place.

### STUDENT AFFAIRS CASE MANAGER AT LARGE

The Student Affairs Case Manager At Large role was created to help ensure the non-clinical CM voice had an advocate in Leadership as well as to provide us with valuable insight into the trends and changing needs of that portion of our membership. This role may also include connecting new SACMs with seasoned ones and assisting us in identifying webinar and conference topics that are more relevant to those serving in the non-clinical campus settings

During Fall 2014, the elected SACM-at-large was unable to complete her term. As per the By-Laws, the Leadership Team identified several mid-term candidates. We were pleased to recruit Jennifer Henkle to complete the 2013-2015 cycle, beginning in November 2014.

Since taking on the role in November, Jennifer Henkle has spearheaded the following projects:

- developing a mentoring program for HECMA members
- creating a "cold call" email to reach out to universities that are posting new HECM jobs to invite to organization

### COMBINED EFFORTS:

The Case Managers At-Large will be presenting the HECMA Pre-conference Workshop, "Case Management 101" at Emory this year. They have worked diligently to provide an excellent introduction to the world of Higher Education Case Management.

## QUALITY IMPROVEMENT COMMITTEE

The Quality Improvement Committee took on three major tasks this year:

- Developed competency areas and job descriptions based on the 2013-2014 surveys.
- Researched a rubric for Peer Reviews. Looked at 20 schools and examined trends from both Landscape and Journey Surveys.

Significant effort have been made in interpreting the data from the two surveys, and starting to plan out what the next one will look like and what changes should be made/questions added. We are excited to see this results presented at the 2015 RoundTable.

Additional plans for 2015=2016 include:

- Identifying Benchmarking trends- who's asking what questions and how are they gathering their data.



### ABOUT THE COMMITTEE:

The Quality Improvement Committee was chaired by Leadership Team Member, Beth Riley (Binghamton University).

The 2014-2015 Quality Improvement Committee included the following members:

- Jennifer Henkle, University of Tennessee at Chattanooga
- Lauren Oe, Boise State University
- Taunja Meers, St. Cloud State University
- Paul Tongsri, North Carolina State University
- Molly King, University of Minnesota



## LEADERSHIP TEAM ACTIVITIES

*Election Process Revisions:* It was decided to revise the actual process of elections so that HECMA members had time to familiarize themselves with the candidates prior to elections.

Revised Election Process:

- Candidacy is only open to HECMA members.
- Candidates will be asked to provide a brief bio and their vision for the position to which there are submitting candidacy. The candidate will complete an on-line application to provide this information.
- Candidate Information and Photos will then be posted in Member Resources at HECMA.org, through the Roundtable. Voting will take place at the Roundtable - It is anticipated voting will take place the afternoon of Roundtable Day One.
- New Members of the Leadership Team will be announced at the HECMA Business Meeting, typically held on Day Two. A Transitional Leadership Meeting will be held on the final afternoon of the Roundtable (typically Day Two), after the close of the formal Roundtable.

*Leadership Team Sponsored Sessions:* As an effort to increase the number of clinical session proposals we receive for the Roundtable, the Membership & Conference Committee (with the support of the Leadership Team) implemented “Leadership Team Sponsored Sessions” for the Roundtable. A sponsorship from the leadership team indicates that the session has been designated as outstanding and offering best practice. A sponsorship also means that HECMA will cover for the registration fee of those selected presenter(s) for the Roundtable.

*Leadership Team Award:* Established to honor an individual whose professional accomplishments have made a significant impact on the field of higher education case management, and whose character & work products have earned the respect and admiration of their professional colleagues. The Award was initially named the Woodley-Powell Award after the Case Managers who were catalysts in creating our thriving higher education case management community. After a one year gap, the award was re-conceptualized with additional criteria and renamed the HECMA Leadership Team Award.

The recipient of this annual award will be an individual whose contributions and exceptional dedication have provided a positive vision for the future of Case Management in Higher Education; at their institutional and state level. This prestigious award also seeks to recognize those leadership qualities, both professional and personal, which have encouraged others to develop their own gifts of leadership and whose continuing commitment has played a role in shaping the field.

Past Award Winners:

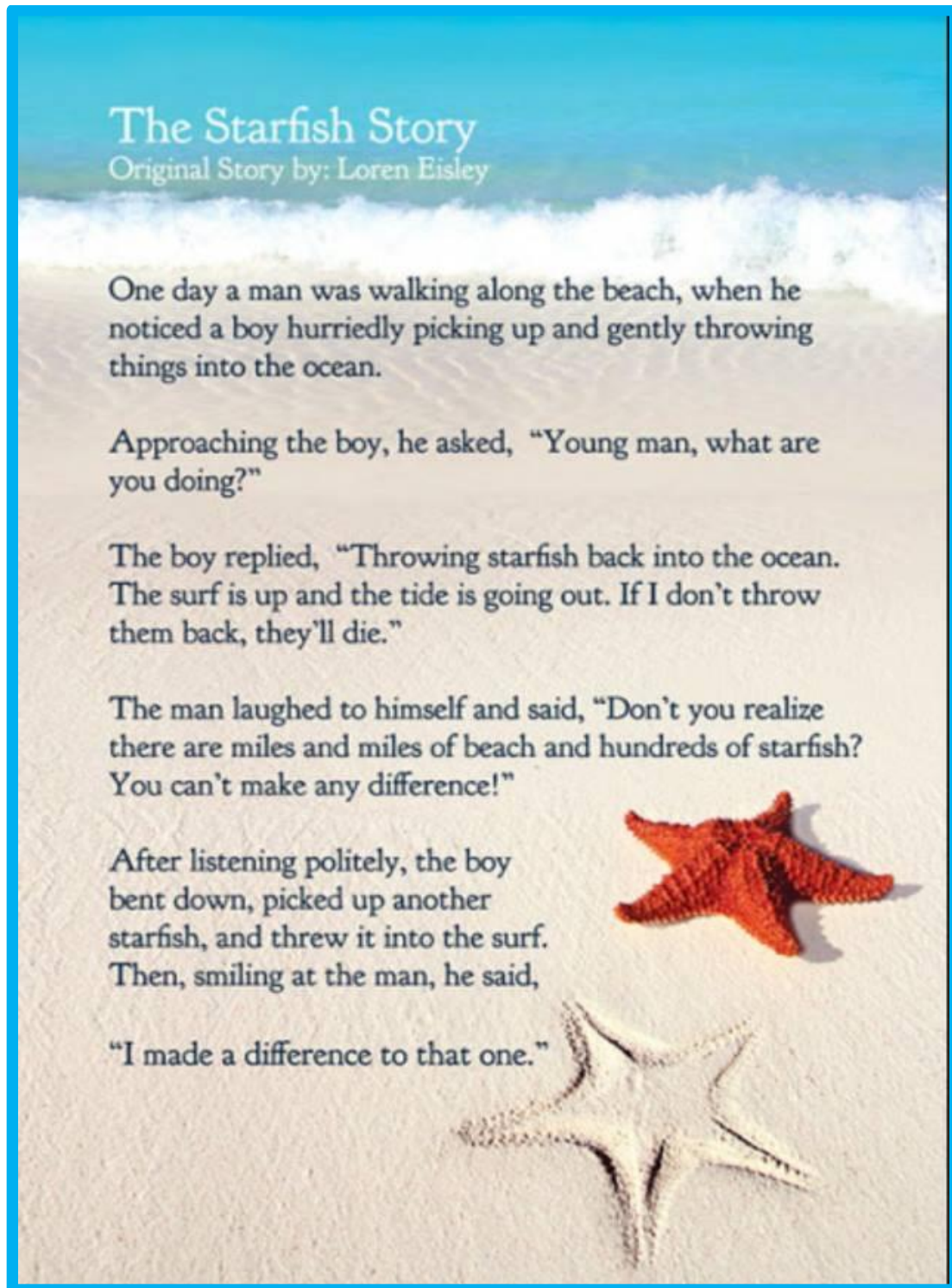
- 2011 – Amy Powell & Erica Woodley
- 2012 – JJ Larson
- 2013/2014 – Ashley Blamey
- 2015 – *To Be Announced*

## HIGHLIGHTS for 2014-15



- 6<sup>th</sup> Roundtable held at University of Arizona
  - Highlights were the presentation by Pima County Community College and the pre-conference service project benefiting Ben's Bells (<https://bensbells.org/>)
- Obtained 501c3 tax exempt, non-profit status
- Increased membership by 82% in one year, 178 members to 324.
- Completed survey of Clinical Case Managers to better target needs from association
- Obtained "Go to Meeting" account to streamline all conference call meeting for committees and leadership team
- Identified key components as best practice for HECM Peer Review processes
- HECMA Leadership Team members presented at NASPA conference
- HECMA inaugural and current presidents designed and provided webinar for Paperclips Communication: "Case Management in Higher Education: 5 Critical Considerations". All presenter stipends were directed to benefit HECMA.
- Selected and supported planning for the 7<sup>th</sup> Annual Roundtable – hosted by Emory University
- Applied for and obtained Continuing Education provider status for Emory Roundtable through NASW

## THE STARFISH STORY



In appreciation for all of those working in the field of Higher Education Case Management and the difference your work makes in the lives of the students and communities we serve.