

2013-2014 Annual Report



HECMA

**HIGHER EDUCATION
CASE MANAGERS
ASSOCIATION**

Fiscal Year July 1, 2013- June 30, 2014

Presented by Ashley Blamey, HECMA President

Prepared by the HECMA Leadership Team

Higher Education Case Managers Association

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Thank you

The role of Case Managers began as a small niche community and has grown to serve multiple needs across intuitions. As we travel to the University of Arizona this year for the 6th annual Roundtable, we are again reminded of how we began and how far we have come. Our annual report reflects the growth of state and regional level meetings. We are "at the table" in national dialogues about campus safety, mental health and the challenges of balancing individual and University needs. We are in many ways in position to assist the greater higher education community to understand that balance. As I said last year and continue to believe, we are the architects of our own work.

As I end my term as president, I would like to thank my colleagues and friends. You have helped me through the hard times and taught me more than I ever expected. I am proud to be a member of HECMA and look forward to continued growth. The highlights in this report represent a collection of individuals and the work of many.

Thank you for another wonderful year,

A handwritten signature in black ink that reads "Ashley Blamey". The signature is written in a cursive, flowing style.

Ashley Blamey, President

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 Case Management experience.

Subsequent Roundtables were hosted/ cohosted by University of Tennessee, University of Michigan, Iowa State University, University of California Los Angeles and Santa Barbara and for 2014 University of Arizona.

Amy Powell and Erica Woodley identify the need and establish an online community for individuals serving in Case Management Roles.

JJ Larson creates the resource center website "Institutions of Higher Education Case Managers Consortium". She began the work of collecting protocols, job descriptions, organizational structures and other resources for Case Managers across the nation.

Listserv

2008

2010

IHECMC

Virginia Tech hosts the 1st Roundtable with 13 institutions and 25 attendees. The two day format creates an outline for all future Roundtables.

After a year of online communication and collaboration, the University of Tennessee hosts the 2nd annual Roundtable. The attendance grew to 42 institutions with 65 attendees.

The University of Michigan hosted the 3rd Roundtable in 2011 incorporating a pre-conference session developed specifically for new Case Managers and a needs assessment evaluation.

Iowa State hosts the 4th annual Roundtable. The agenda included a unique training Case Management, but also provided a presentation from Gene Diesinger on the relationship between Case Management and Threat Assessment.

2011
Roundtable

HECMA
Established

2012
Roundtable

Following the formal agenda, interested members met to review the feedback from the needs assessment and to move forward with a national association. The name Higher Education Case Managers was established and Mission/Vision statement accepted.

The Higher Education Case Managers Association met before and after the Roundtable. The group also provided a presentation during lunch to the attending membership. The group agreed that the work needed a more formal organization. The HECMA Leadership Team was officially established.

The University of Arizona hosts the 6th annual Roundtable to provide the first southwest location. Professor Peter Lake, an internationally-recognized expert on higher education law and policy presents on case management and compliance.

Leadership Team
Established

2013
Roundtable

2014
Roundtable

In celebration of the 5th Roundtable, the University of California at Los Angeles hosts in collaboration with the University of California Santa Barbara. The 5th Roundtable is the first west coast location. Dr. Reid Meloy presents on threats to campus safety.

2013-2014 Highlights

- Launched the HECMA 2014 Survey: The Journey & The Landscape
- Purchased a website and domain hecma.org
- Established members only access to over 900+ resources
- Completed application for 501c3 status
- Enrolled 178 members new members
- Developed a donation service integrated into our website
- Promoted HECMA through regional presentations and recruitment
- Selected and supported planning for the 6th Annual Roundtable



Leadership Team Membership & Responsibilities



President- Ashley Blamey

University of Tennessee

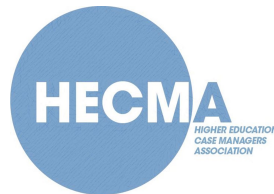
- Annual Report
- Monthly business meetings
- Annual meeting
- Public representative of group
- External spokesperson



Operations Chair – Phillip Van Saun

University of California

- Bylaws
- Constitution
- Strategic Plan





Standards & Advancement Chair- Sharrika Davis
Virginia Tech

- CAS Standard Development
- Course Development



Quality Improvement Chair- JJ Larson
University of South Florida

- Data collection
- Assessment



Counseling Center Case Manager- At Large- Vacant

- Serves as advocate for clinical membership
- Assists to evaluate policy and development from a
- Clinical Case Management Perspective



**Membership & Conference Chair- Amy Powell,
Duke University**

- Membership recruitment
- Coordinate with University hosting the Roundtable
- Organize conference selection committee
- Eligibility / Benefits



**Student Affairs Case Manager- At Large- Sarah Solomon
Syracuse University**

- Serves as advocate for non-clinical membership
- Assists to evaluate policy and development from a Student Affairs Case Management Perspective



Finance Chair- Christine Pesetski
Duke University

- 501C
- Banking
- Membership dues
- Annual Finance Report



Communications Chair- Laurel Banks
UNC School of the Arts

- Website
- Logo Development
- Serves as historian

HECMA Quality Improvement Committee

Quality Improvement is very relevant to the work of Higher Education Case Management work because it is important for case managers to utilize best practice methods and be knowledgeable about best practice policies and procedures in order for us to effectively serve our students in an ethical manner. By sharing information about our practices and programs, we learn from each other and challenge ourselves to advance our own skills. By being knowledgeable about industry standards, we can then advocate for necessary resources that would allow us to serve students in need of assessment, support, linkage with service providers, and help obtaining self-efficacy. The committee's work continues to benchmark the work that we do, and set some initial standards and identify best practices for our profession.

The 2013-2014 Quality Improvement worked centered on the following areas:

At the 2013 Roundtable, the QI Committee shared its recommended group of standardized questions for Satisfaction surveys that Higher Education Case Managers could use to evaluate the experience of their services by student clients and by referral sources.

Work this year centered on developing the next level of questions to further explore the nuances of the field of Higher Education Case Management. In May 2014, the committee launched the **HECMA 2014 Survey: *The Journey***.

The Landscape data is continuing to be gathered under the reconfigured name: **HECMA 2012 Survey: *The Landscape***.

Upcoming Plans:

Develop a central database to collect and collate standardized data points so that national trends can be tracked, and to expand the story regarding the efficacy and value of higher education case management.

Develop program evaluation templates to include surveys and methods of assessment for measuring impact across the following spheres: persons served, our program/department systems, our universities, and our communities (county/state/region).

QI Committee membership for 2013-14 included:

Tanja Meers, St Cloud University

Beth Riley, Binghamton University

Lauren Oe, Boise State University

Tanja Philower, University of Florida

Mona Dugo, Northwestern University

JJ Larson, University of South Florida, Chairperson

Jill Yashinsky-Wortman, Gonzaga University – thru Fall 2013

Patrick Beswick, Slippery Rock University – thru early-Winter 2014

The Quality Improvement Committee met via phone conference on a bi-monthly basis as needed.

HECMA Finance

Since July 2013, HECMA has continued to expand our fiscal foundation. To that end we have:

- Submitted all necessary paperwork to the Internal Revenue Service to be granted 501c3 status. This will allow us to be a tax exempt non-profit.
- We began accepting membership dues in October 2013, and to date we have collected 174 payments. Most of these payments were for \$50. There are a few student members who paid only \$25.00
- HECMA purchased a website service and a domain name enabling us to have a greater online presence.
- HECMA established a basic budget in 2013.

Future goals for the Finance chair

- Purchase, through Wells Fargo, a service to attach to the website that will enable us to accept donations (membership dues) throughout the year.
- 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 sponsorship.

Current balance after expenses: \$8683.51.

HECMA Standards & Advancement

Standards and Advancement was established to move the organization toward a more formalized national standard and more clearly define Case Management roles. The Committee served to review and establish core competencies of the Case Management profession.

The goals of the year for the Standards and Advancement committee included examining how to advance case management as a functional area and the development of CAS standards for case management. As we look forward to the next academic year – the group will look forward to establishing national standards and deciding how those standards apply to case management as a functional area and to us as professionals.

The 2013-2014 Committee membership included Katherine Snyder (University of Arizona), Alan Rasmussen (Appalachian State University), Katie Boin (Georgetown), Jennie Stewart (Louisiana State University), Kendall Plageman (Virginia Commonwealth University), Deana Davies (University of North Colorado), Emma Dovi (Syracuse University) and Sharrika Adams (Virginia Tech).

HECMA Operations

Operations was established to focus on the foundational documents of the organization and to help the Leadership Team with developing a strategic focus. In 2012-2013 the area of operations established the organization's first Constitution & Bylaws (see website for full document). In the 2013-2014 year, Operations has continued to promote HECMA through regional presentations and recruitment.

Future goals for the Operations Committee include development of a 5 year Strategic Plan.

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

HECMA Membership and Conference Committee

The 2013-2014 Membership and Conference Committee formalized fee-based membership and successfully recruited and enrolled 178 members as of June 28, 2014.

Committee members selected the University of Arizona, Tucson to host the 6th Annual Roundtable in Tucson, Arizona. The Committee worked with the host site to coordinate planning and marketing with HECMA.

The 2013-2014 Membership Committee included the following members: Karen Minero (University of California, Los Angeles), Leslie Riley (University of Alabama at Birmingham), Lia Gilmore (Duke University), Diane Davis (Oregon State University), Denise Tijerina (Texas Tech University), Stacey Green (Boston College), Nina Critz (James Madison University), and Katherine Snyder (University of Arizona), Maggie Higgins (University of Wisconsin, Madison), Rachel Start (Temple University). The Membership and Conference Committee was chaired by Leadership Team member Amy Powell (Duke University).

The Membership Committee met via phone conference to select the 2014 Roundtable host and via email correspondence as needed to discuss recruitment efforts.

Thank you to the institutions of higher education who served as committee members and on the HECMA leadership team.

Your support has been instrumental in establishing HECMA as the Higher Education Case Management professional organization.

Notes

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