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Advancing Best Practice.
HECMA



ANNUAL REPORT

FY 2016-2017

Higher Education Case Managers Association
HECMA

compiled by:
JJ Larson, President
July 2017

ANNUAL REPORT

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HECMA History

With over 100 new members since June 2016, it seems a good time for a stroll down HECMA memory lane. Many of you know that the first Roundtable was held in October 2008 at Virginia Tech. There were approximately 16 schools represented there. They in part had found themselves through a google group that was begun by Amy Powell at Duke and Erica Woodley at Tulane. These two events would lay the groundwork for the culture that would become HECMA.

In April 2010, Ashley Blamey of the University of Tennessee ant Knoxville hosted the 2nd roundtable gathering for case managers at post-secondary institutions. During that gathering the 65 participants came to realize even more the power of this collective camaraderie. The opportunity to share our challenges, strategies, and growing understanding of our roles on campus led to increased use of the Google group listserv and the development of our first web-based "library."

In June 2011, a group of folks came together at the end of the University of Michigan Roundtable to talk about our emerging field and develop further the idea of a professional identity and association for the work we were all doing. By the May 2012 Roundtable at Iowa State, Ashley Blamey was presenting the combined work of the task group and further discussion was held prior to the Roundtable. An initial leadership team was installed and the next year was spent creating initial documents to support an association. And also was the year the first membership survey was conducted on HECMA's behalf.

We arrived at the 2013 Roundtable in LA hosted by UCLA and UCSB ready to move HECMA to the next phase. Those transition goals included moving to a membership access model to resources and the listserv, establishing a more robust website than the early "IHECMC" Google site Consortium library, and with our 9 Leadership Team members signing up as the *first* \$50 professional HECMA members creating a budget and the means to buy our domain, "hecma.org." As we have ventured from 2014 to 2017, the association has continued to expand its value to members and the field. HECMA strives to be good stewards of the field and a valued resource for its members.

We look forward to celebrating 10 years in 2018 and cannot wait to see how this decade rounds out and the next one begins.

Thank you for another great year of collegueship, emerging ideas and dedication to the field.

JJ Larson
Your HECMA President
2016-2018; 2014-2016

Leadership Team for 2016-2017



JJ Larson

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Dawna Jones

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Committee Report: Membership & Recruitment

Description:

The Membership and Recruitment Committee serves to coordinate national and membership recruitment. We work closely with other committees to manage communications, build relationships and ensure member needs are met.

In 2016-2017 the Membership and Recruitment Committee was comprised of:

- **Emma Dovi**, Senior Case Manager at Syracuse University, Member since 2013
- **Sharon Howell**, Assistant Dean of Students at University of St. Thomas, Member since 2013
- **Michell Jaworski**, Assistant Dean of Students/Case Manager at Washington St. University, Member since 2015
- **Salma Loo**: Assistant Director for Residence Life and Student Conduct at California Lutheran University, Member since 2016
- **Mike Martinez**, Wellness Care Coordinator at University of San Diego, Member since 2014
- **Tiffany Pendleton**, Case Manager at University of Northern Colorado, Member since 2014
- **Therese Smith (Chair)**, Community of Concern Director at University of Kentucky, Member since 2013

Accomplishments:

In the past year the Membership and Recruitment Committee has focused on standardizing membership processes and reviewing membership management software systems. Accomplishments in 2016-2017 include:

- Establishing review and renewal criteria for HECMA's Corporate Sponsorships;
- Updating Corporate Sponsorship forms;
- Recommending to HECMA's Leadership Team new categories for membership and membership qualifications (for inclusion in bylaws);
- Collected membership information, including quotes for use in a HECMA brochure;
- Reviewing membership management software and website hosts and recommending to Leadership Team a software system compatible with the website and payment sources that HECMA utilizes.

Challenges:

The only major challenges the Membership and Recruitment Committee has faced this year is one we all experience, **not enough time**. As with all HECMA

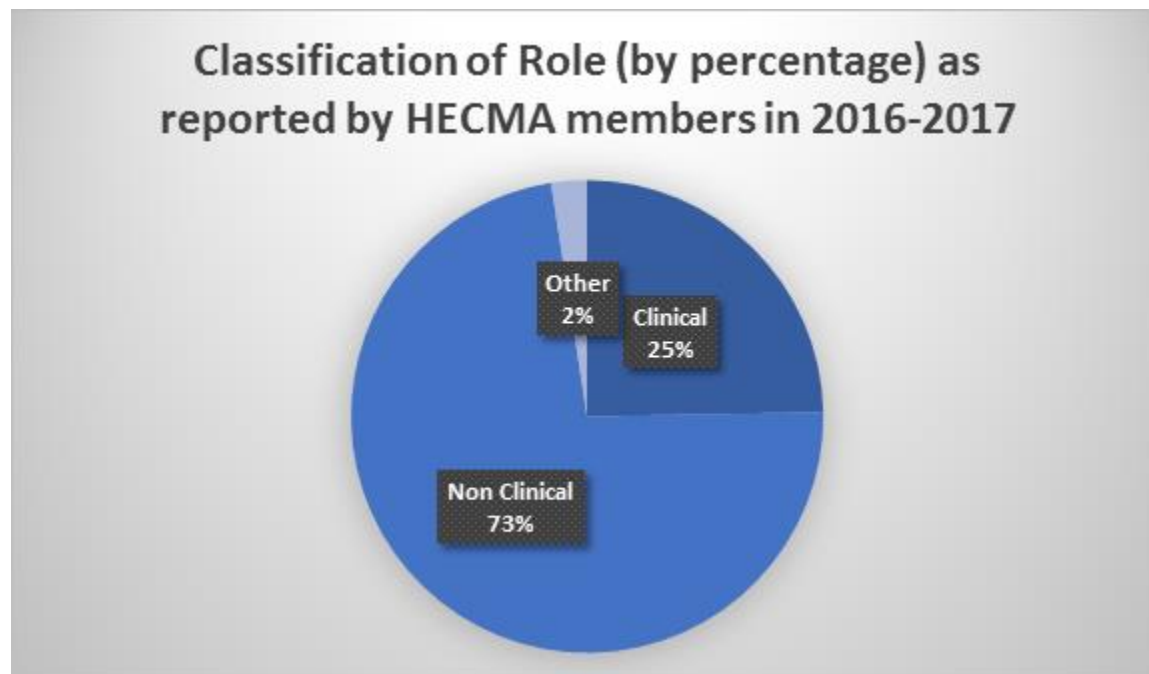
leadership positions, we are volunteering our time in addition to our regular work duties. Therefore, we often experience delays as “real life” gets in the way. Despite that, all major projects were managed this year and goals set for 2017-2018.

Assessment and Data Analysis:

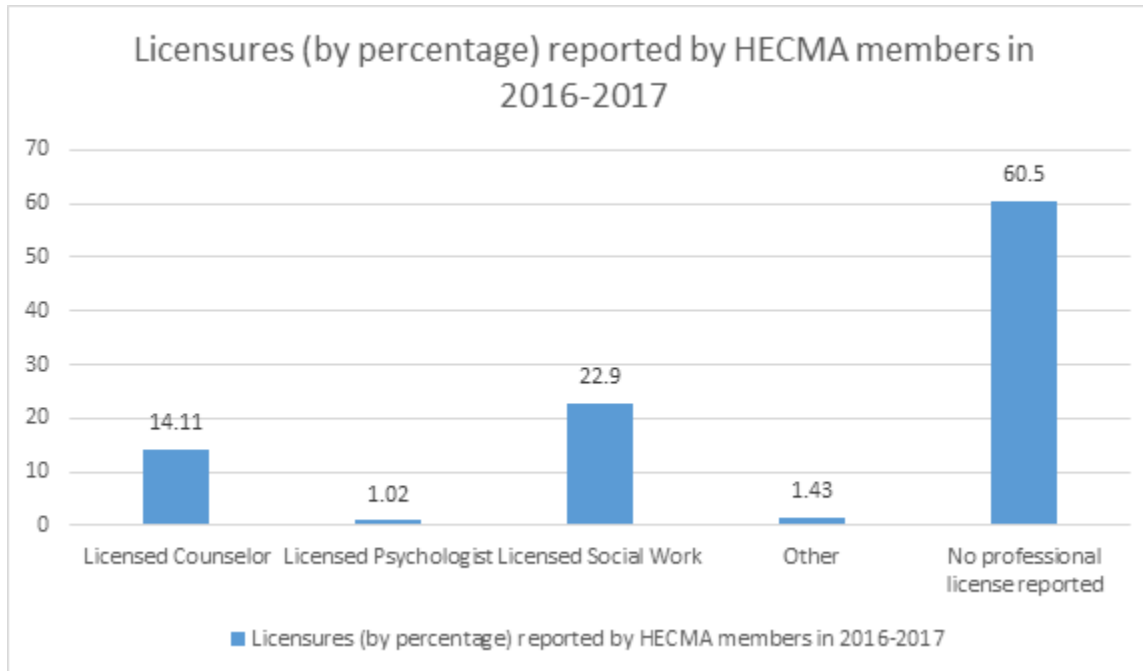
As has been the pattern each year, HECMA continues to show significant growth among its membership. As of May 12, 2016, HECMA's membership was at 365. Exactly (plus a few days) one year later, on May 15, 2017 our **membership is 489**. This is a percentage growth of **34%** in one year. June is typically the busiest month for memberships (both new and renewal) so it is not a stretch to state that we will exceed 500 members before the end of the fiscal year.

Our Membership is made up of individuals representing **43 states, Washington DC, Canada, and the West Indies**. In 2017-2018 the Membership and Recruitment Committee has set a goal of direct outreach to institutions of higher education in the 7 states not currently represented in HECMA. Additionally, the committee plans to do a review of states to assess membership compared to number of institutions by state. Where discrepancies are found (i.e., high number of IHE's in a state but low membership in HECMA) the Membership and Recruitment Committee will focus additional recruitment efforts.

The chart below shows how HECMA members define their institutional roles.



Of HECMA's current 489 members, **193 report holding some sort of professional licensure**. The chart below outlines percentages of licenses.



In addition to our growth in individual memberships, HECMA has been able to continue engagement with corporate sponsors. We are excited to say that **Tom Bennett and the Recovery Division of Acadia Healthcare** has renewed their Gold Sponsorship for an additional year. As of this writing, we are also in communication with **Center for Discovery** regarding the renewal of their Silver Sponsorship.

Fiscal Information:

In 2016-2017 the Membership and Recruitment Committee did not require use of any HECMA funds. In 2017-2018 it is estimated that we will need \$50 - \$100/month in fees related to a membership management software. These fees cover:

- Website hosting
- Membership system
- Event Calendar
- Membership Directory
- Administration and Support

Committee Chair's Favorite Quotes:

"Fair doesn't mean that everyone gets the same thing. Fair means that everyone gets what they need." Unknown

"People are often unreasonable and self-centered. Forgive them anyway. If you are kind, people may accuse you of ulterior motives. Be kind anyway. If you are honest, people may cheat you. Be honest anyway. If you find happiness, people may be jealous. Be happy anyway. The good you do today may be forgotten tomorrow. Do good. Give the world the best you have and it may never be enough. Give your best anyway. For you see, in the end, it is between you and God. It was never between you and them anyway." -- Mother Teresa of Calcutta

What the Committee has meant to me

Below are quotes from Membership and Recruitment Committee members:

- "I've enjoyed working with this committee because the members take their responsibilities seriously, and enjoy having fun."
- "Participation on the Membership and Recruitment Committee has provided me the opportunity to feel more connected to HECMA organization and build relationships with those members I connected with at Roundtable in a more meaningful and ongoing way. I have enjoyed the opportunity to connect to discuss how we can make the organization better and look forward to continued work with the committee (and possible other committees) in the future."

New Initiatives 2017 and beyond

As mentioned previously, Membership and Recruitment initiatives for 2017-2018 include:

- Direct outreach and recruitment to states and institutions with no representation
- Transition membership management to a membership management software
- Review corporate sponsorship opportunities

VISION for 2017-2018

The Membership and Recruitment Committee continues to support HECMA's vision: *"HECMA is the preeminent professional organization for individuals that provide case management services within a post-secondary educational environment."*

The Membership and Recruitment Committee does this primarily by recruiting and maintaining members from a diverse body of IHE. Additionally, the Membership and Recruitment Committee will continue to work with the Leadership Team to ensure that membership benefits are consistent with costs associated with membership.

Committee Report: Finance

Accomplishments:

- HECMA retained a certified public accountant to assist with 2016 IRS paperwork.

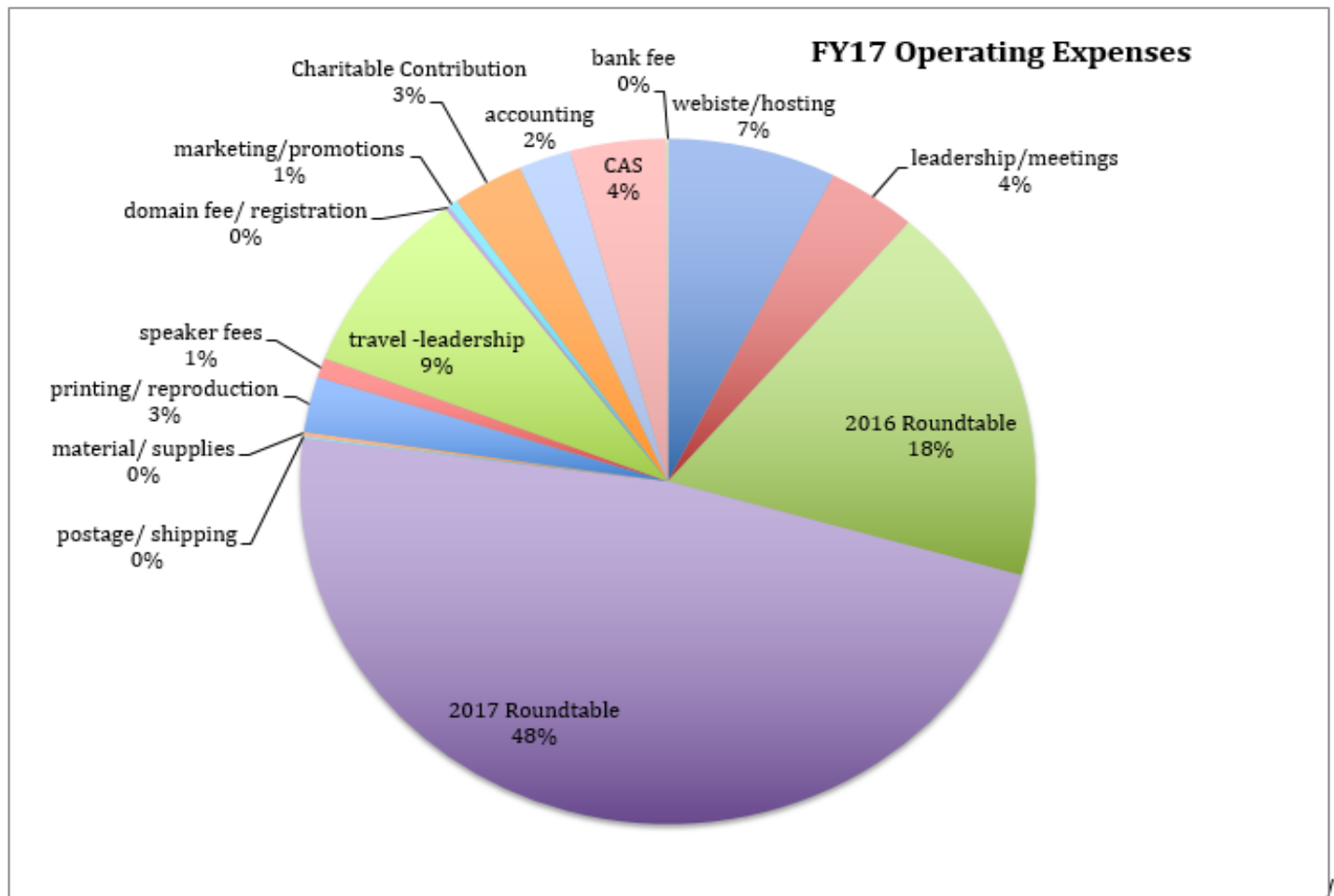
Challenges:

- The Rapid evolution HECMA and impact on finances has, and will continue, to challenge the leadership team to become more strategic in fiscal planning and projection.

Assessment and Data Analysis:

- Revenue increased by 110%. This is likely due to the increase in membership and conference registration.

Fiscal Information: FY17 (July 1, 2016 through June 30, 2017)



Committee Report: Operations & Strategic Planning

Description:

The HECMA Operations and Quality Improvement Committee works to assess and synthesize national best practices for the organization and its members.

Participating Members for 2016-2017:

- Paul Tongsri: North Carolina State University
- Mona E Dugo: Northwestern University
- Ben Falter: San Jose State University
- Jamie Molnar: University of South Florida
- Nicola Bernabe: Gonzaga University
- Amanda Turnley: Emerson University
- Amy Leach: University of North Carolina Chapel Hill

Accomplishments:

In the past year the Membership and Recruitment Committee has focused on standardizing membership processes and reviewing membership management software systems. Accomplishments in 2016-2017 include:

- Establishing review and renewal criteria for HECMA's Corporate Sponsorships;
- Updating Corporate Sponsorship forms;
- Recommending to HECMA's Leadership Team new categories for membership and membership qualifications (for inclusion in bylaws);
- Collected membership information, including quotes for use in a HECMA brochure;

Reviewing membership management software and website hosts and recommending to Leadership Team a software system compatible with the website and payment sources that HECMA utilizes. The committee achieved two major accomplishments throughout the year; these include the redesign and distribution of the Annual Membership Survey and the creation and publication of the HECMA Assessment Cookbook.

2017 HECMA Membership Survey: This year marked the redesign and creation of the Annual Membership Survey. Committee members Ben Falter, Jamie Molner, and Mona Dugo explored topics institutional policies, best practices, and demographic information to create a lengthy and comprehensive survey for members. The survey was distributed over email using an online survey tool. The response rate was impressive, nearing 50% of total membership. Results from the survey were presented at the HECMA 2017 Roundtable in Denver.

HECMA Assessment Cookbook: This year's team focused their attention on providing members with a step-wise introduction to assessment practice in case management. Members collected examples of mission statements, learning outcomes, and assessment practices nationwide and synthesized these results into a publication entitled, "HECMA Assessment Cookbook: A Starter-Kit for Assessment in Higher Education Case Management." This work will be distributed as part of a session presented at the HECMA Roundtable. Initial feedback from the publication has been very positive.

Challenges:

The primary challenge this year has been participation and scope of the activities for the committee. Membership involvement has been very intense for the two projects described, with members devoting many hours of service each month. Still though, several members were non-communicative and did not provide any level of interest or involvement despite signing up for membership. As we move forward, I think it will be important to find projects that everyone can feel some connection to.

Committee Chair's Favorite Quote:

No personal mantra, per se, but a few quotes that have kept me thinking lately:

- Noise proves nothing. Often a man who has merely laid an egg cackles as if she had laid an asteroid. – Mark Twain
- You have learned something. That always feels at first as if you had lost something. – George Bernard Shaw.
- The most potent weapon of the oppressor is the mind of the oppressed. – Steven Biko

New Initiatives:

Going forward, we discussed the following priorities for the committee:

- Continue to explore and synthesize best practices. This year focused on assessment; next year could focus on a number of topics highlighted through the annual membership survey
- Find ways to include clinical case managers in the creation of best practices.
- Encourage members to get into other fields of practice to discuss overlap beyond case management.
- Continue to enhance current publications and practices.

Vision for 2017-18

Our primary vision is to continue synthesizing information from case managers about their roles and initiatives into national best practices that can be applied to everyone. This is the essence of what HECMA strives to achieve.

Committee Report: Training & Professional Development

Description:

The Training and Professional Development Committee aims to support the professional development needs of HECMA members. This is accomplished through identification of the professional development needs of case managers, the coordination of professional development opportunities through HECMA or other relevant professional associations, and providing expertise in the areas of continuing education, professional competencies, and standards.

Committee members: Amy Powell, Camen Curiel, Angie Kneflin, Dawna Jones, Amanda Turnley, Lauren Donley-Banks, Karla Fonner, Tyrone Reese, Amber Miller, Sarah Tobin, Rebecca Blackburn.

Accomplishments:

The major initiative of the committee for the 2016-2017 academic year was the implementation of a professional development webinar series. Part of HECMA's mission is to "provide members with professional identity and resources to advance best practice, knowledge and research . . .", and we felt strongly that relevant and needed training could be provided at no or low cost to membership through webinars. After a brief initial survey conducted to identify the training priorities of our members, we set an ambitious goal to host one webinar per month beginning in October. Though we encountered some challenges, this initiative was an overall success and we hosted **9 webinars** from October-June with **448 registrants**, an average of 49.7 attendees per webinar.

Additionally, this was the first academic year in which HECMA was represented as a member of the Council for the Advancement of Standards in Higher Education (CAS). The committee chair traveled to Washington DC to participate in the fall board meeting, participated in the spring virtual meeting, and served on two committees for CAS. The additional time commitment necessary for these roles was at times a challenge, and impacted the time spent on committee work.

Challenges:

A primary challenge in getting started with webinars was identifying an affordable, user-friendly platform to provide this service. We have chosen to use GoToWebinar, and after an error for our first webinar, we have learned the nuances of the system and determined how best to set up the trainings.

As noted briefly above, a second challenge was related to the balance in time between CAS committee work and the Training and Development Committee. In the spring semester, HECMA was represented on a standards review committee, which was a substantial time commitment and decreased the amount of time available for committee work.

Assessment & Data Analysis:

This past academic year was the first for the webinar series, so we don't have comparison data for registrants or overall feedback. However, the surveys completed gave us good information about our work, and good ideas for moving forward.

Towards the end of the year we had two webinars with above 70 registrants. Our package with GoToWebinar permits only 100 registrants for any webinar. Should we consistently be approaching that number, we as an association will need to decide if we want to purchase the next level of package (to allow for more registrants), or if we are comfortable capping all webinars to 100 registrants.

Below please find a summary of key results from our post-webinar assessments (please note, for the sake of brevity and space, these are combined results from all 9 webinars):

- **81%** strongly agreed or agreed that the session delivered the information they expected to receive.
- **89.4%** strongly agreed or agreed that the subject matter was presented effectively.
- **95.3%** strongly agreed or agreed that the trainer(s) were knowledgeable.
- **75.3%** strongly agreed or agreed that as a result of the webinar, they gained new knowledge applicable to their work.
- **85%** strongly agreed or agreed that they would recommend that others watch the recorded version of the webinar.
- **87%** responded that they plan to attend future HECMA-sponsored webinars, and 13% responded that it would depend on the topic.

Webinar registration

Case management 101	54
Enhancing your use of Maxient for case management	71
Use of individual and group therapeutic interventions with high risk clients as a case manager in a college counseling setting	23
Evaluating case management programs	60
Assessing student learning through the medical leave and reinstatement process.	57

So you're thinking about running for a leadership team position? Here's what you need to know.	6
Advocating for Solutions: Using Advocate for Effective Case Management from Start to Finish	29
Allies or Adversaries? Making the Most of Parental Involvement	76
Student Conduct Basics for Case Managers	72

Lastly, below please find select comments on potential topics for future webinars:

- "Something that will help conduct case managers understand their unique role in the association and distinctive nature of our jobs."
- "How to build relationships with campus partners (faculty and other support resources)?"
- "The role of the non-clinical case manager and mental health."
- "Administrative withdrawals and process post hospitalization."
- "Cultural humility and working within a diverse campus community; effectively addressing the needs of international students; assisting students with ongoing poverty-related concerns, such as food insecurity and housing and transportation instability."
- "Employee focused BIT."
- "Support for international students; working with international students in crisis (mental health); working with international students and parents."
- "How to promote case management services."
- "Data analysis on Maxient – how to run reports, how to utilize features to best capture data, etc."
- "Motivational interviewing, triaging cases, program evaluation."
- "More advanced Maxient training (e.g. Analytics and Reporting)."
- "Program review, case managers on CARE or BIT teams, outreach and effectively communicating with campus constituents."
- "Case management and Title IX"
- "Medical withdrawal/leave policies, language used for websites or forms, self-care, response processes."
- "Continued conversations about FERPA restrictions and what constitutes a student's educational record."

Committee Chair's Favorite Quote:

"My wish for you is that you continue. Continue to be who you are, to astonish a mean world with your acts of kindness." – Maya Angelou

Or

"I don't understand it any more than you do, but one thing I've learned is that you don't have to understand things for them to be." – Madeleine L'Engle, *A Wrinkle in Time*

Future Vision and New Initiatives:

Moving forward, the committee hopes to continue the webinar series and involve national experts in our training series. This will involve increasing the committee's budget, but there are professionals with expertise in areas critical to case management.

The committee also plans to move forward with completing ethical standards for case managers. This initiative is led by a sub-group of committee members (Jamie Molnar, Angie Kneflin, and Laurel Donley-Banks), and they have done an excellent job carrying on the work of Makenzie Schiemann and Julia Jacobs-Phillips on this project.

I would also like to move forward obtaining provider status with NASW in order to offer continuing education units for professionals who attend our webinars. Lastly, I would like to explore closed captioning for the recorded webinars in order to make them more accessible.

Moving forward with these topics will serve as additional resources for case managers, and continue to place HECMA in a position to provide low-cost, beneficial professional development opportunities.

Committee Report: Non-Clinical Case Manager at-large

Description:

The non-clinical case manager at large role was created to help ensure the nonclinical 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.

Accomplishments:

This year the non-clinical case manager at large and the clinical case manager at large provided leadership to the HECMA mentoring program, providing check-in questions for mentors and mentees as well as creating an opportunity for new mentor matches. The NCCM and CCM also hosted a Case Management 101 webinar for those new to the field. Finally, the NCCM and CCM created an email template to welcome new members to the organization as they join. This effort helped to connect new members to the organization in a timely fashion.

Challenges:

The biggest challenge I faced this year was time. Shortly after taking on the position, I received some additional responsibilities in my Case Manager role. This made it difficult to put as much energy as I would have liked into developing new, and more robust, initiatives for the non-clinical case manager.

Assessment & Data Analysis:

No assessment data was collected for the 2016 – 17 term. In the future, I would suggest that data is collected on the mentoring program including participation statistics as well as satisfaction with the program. Data can also be collected on calls for consultation for both non-clinical and clinical case managers.

Committee Chair's Favorite Quote:

"Right may not be expedient, it may not be profitable, but it will satisfy your soul. It brings you the kind of protection that bodyguards can't bring you."

~Maya Angelou

New Initiatives:

I completed a handful of phone consultations with staff at different universities who were looking to create case manager positions. In hindsight, I think it would

have been useful to HECMA leadership team to have logged the questions that came from those consultations to develop materials or website information for the future. It would also have been helpful in logging time spent to determine if there are additional resources like webinars or open chats for others considering the same. This may be something to consider for future initiatives.

Vision for 2017-18

For the next year I envision the mentoring program expanding and collecting more data to determine how useful the program is for case managers. I hope that more consultations will take place and data from those experiences be collected in order to shape the role of the non-clinical case manager as a support system to those creating new non-clinical positions.

Committee Report: Clinical Case Manager at-large

Description:

The At-Large Case Managers provide a liaison support between the members and Leadership Team and ensure that Clinical and Non-Clinical Case Managers needs are met by the Leadership Team. The At-Large Case Managers provide support in welcoming new members and guidance to current members about ways to become involved in HECMA, how to access HECMA resources, and answer procedural and policy questions.

Nina H. Critz, LPC. Case Manager at James Madison University.
HECMA member since 2013.

Accomplishments:

During this past year, the At-Large Case Managers worked to create a way to welcome and orient new HECMA members to the many resources our organization offers.

The At-Large Case Managers also supported the mentoring program by serving as supports for any issues and prompted ongoing communication between mentor and mentee.

The At-Large Case Managers also provided a voice to the needs of Clinical and Non-Clinical Case Managers during Leadership discussions.

Committee Report: Conferences & Special Events

Description:

The Conference Committee aims to support the networking and professional development needs of HECMA members through the coordination of the annual conference and collaboration on special events.

Committee members:

- Jacqui Tisdale, University of Rhode Island
- Amanda Turnley, Emerson College
- Angie Kneflin, Xavier University
- Debbie Morgette, The University of Alabama at Birmingham
- Nicola Miller, Gonzaga University
- Katherine Hettinger, Auburn University
- Amy Powell, Duke University
- Tyrone E. Reese, Syracuse University
- Sandra Olshak, Texas A&M University
- Lauren Strunk, Chairperson, Florida Gulf Coast University

Accomplishments:

Coordinated the largest HECMA Roundtable to date with 225 attendees.

Expanded pre-conference offerings with well attended sessions by Dr Van Brunt from NaBITA, Kim Tenure from The Autism Society of Colorado, Adam Cebulski from Southern Methodist University as well as our HECMAtes, Paul Tongstri, Makenzie Schiemann and Nicole Morgan.

Invited exhibitors joined us from ASCA, Maxient, NaBITA, and Symplicity

Featured presentations by each of our exhibitors, included the current ASCA President Jill Creighton, as well as a session sponsored by our corporate sponsor, Acadia Recovery Healthcare.

Awarded two Graduate Student Conference Scholarships. This year they were funded by W. Scott Lewis, J.D.

Collaborated with local charity to decorate Meal Delivery bags to thank our host community through our service.

Future Vision:

The Conference committee will look, with its Chairperson to develop a regular time frame for the Roundtable, develop plans for target areas and the use of hotel conference space in conjunction with our traditional partnerships with local colleges and universities.

Graduate Student Scholarship Recipients



The graphic features a blue and white background with a curved design. In the top left corner is the HECMA logo, which includes the text "HECMA" in a blue circle and "HIGHER EDUCATION CONFERENCE OF MICHIGAN" below it. In the top right corner is a gold star with a black graduation cap on top. Below the star are two portrait photos of graduate students.

Nikeya Sharp
Graduate Assistant
University of Dayton

Julia Buwick
Graduate Assistant
University of Georgia

Committee Report: Communications & Marketing

Description:

The Communications and Marketing Committee is responsible for maintaining HECMA's online presence, including the website and social media, through identifying relevant topics to share and finding individuals to contribute to the HECMA Blog. Additionally, the committee develops and disseminates marketing and outreach materials for special events and the organization as a whole.

Accomplishments:

The Communications and Marketing Committee began to solidify relationships with external partners and organizations to aid in outreach efforts, specifically those involving social media.

Challenges:

The Communications and Marketing Committee remained small and, in the end, some of the key members left the organization for other jobs in student affairs. A hope for this next year is to have an active committee of individuals interested in promoting the Organization as a whole.

New Initiatives:

Initiatives for the 2017-18 year align with the goals set forward by HECMA's strategic plan. The actions/plans are outlined as follows:

- Create an infographic/simple visual summaries of survey data from 2012 and 2014
- Establish a regular schedule for blog and Twitter posts
- Develop a way to highlight projects, initiatives, and activities of each committee beyond just general information
- Develop guidelines for responding to email requests for membership information from non-members
- Continue streamlining and maintaining the website

- Clean up the Library to sort information in a clear way for members to search

Future Vision:

Continue to move forward and develop HECMA from the outside by better reflecting the amazing members and the value of the organization as a whole.

RECOGNITIONS

During our Reception & Business Meeting, we recognized the journey of HECMA through HECMAtes who served as its leaders.

2012-2013

HECMA, President- Ashley Blamey University of Tennessee
Christine Pesetski, Finance Chair, Duke University
Amy Powell, Membership & Conference Chair, Duke University
Keith Robinder, Operations Chair, Iowa State University
Jennie Stewart, Standards & Advancement Chair, Louisiana State University
JJ Larson, Quality Improvement Chair, University of South Florida
Laurel Banks, Communications Chair, University of North Carolina School of the Arts
Sarah Solomon, Student Affairs Case Manager- At Large, Syracuse University
Amanda Byrnes, Counseling Center Case Manager- At Large, University of Michigan

2013-2014

Ashley Blamey, President, University of Tennessee - Knoxville
Christine Pesetski, Finance Chair, Duke University
Amy Powell, Membership & Conference Chair, Duke University
Phillip Van Saun, Operations Chair, University of California, Office of the President
Sharrika D. Adams, Standards & Advancement Chair, Virginia Tech
JJ Larson, Quality Improvement Chair, University of South Florida
Laurel Banks, Communications Chair, University of North Carolina School of the Arts
Sarah Solomon, Student Affairs Case Manager- At Large, Syracuse University
Counseling Center Case Manager- At Large– Vacant

2014-2015

Jennifer “JJ” Larson, President, University of South Florida

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

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

Beth Riley, Quality Improvement Chair, Binghamton University

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

Nina Critz, Clinical Case Manager at Large, James Madison University

Jennifer Henkle, Student Affairs Case Manager at Large, University of Tennessee at Chattanooga

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

Sarah Solomon, Student Affairs Case Manager At Large, Syracuse University

*June –October 2014. Vacated leadership position due to enhanced work responsibilities

2015-2016

Jennifer “JJ” Larson, President, Southern Methodist University

Lauren Oe, Finance Chair, Boise State University

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

Makenzie Schiemann, Training & Professional Development Chair, University of South Florida

Alysson Satterlund, Operations Chair, California State University - San Bernadino

Beth Riley, Quality Improvement Chair, Binghamton University

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

Nina Critz, Clinical Case Manager at Large, James Madison University

Jennifer Henkle, Non-Clinical Case Manager at Large, University of Tennessee – Chattanooga

2016-2017

Jennifer “JJ” Larson, President, Richland College of the DCCCD

Lauren Strunk, Vice President, Conferences & Special Events, Florida Gulf Coast University

Lauren Oe, Finance Chair, Boise State University

Katherine Zilmer, Training & Professional Development Chair, University of Illinois at Urbana-
Champaign

Therese Smith, Membership & Recruitment Chair, University of Kentucky

Paul Tongstri, Operations & Strategic Planning Chair, North Carolina State University

Jennifer Henkle, Communications & Marketing Chair, University of Tennessee at Chattanooga

Nina Critz, Clinical Case Manager at Large, James Madison University

Dawna Jones, Non-Clinical Case Manager at Large, University of North Carolina - Chapel Hill

ANNUAL AWARDS

- **Outstanding Clinical Case Manager**
Tom Miebach, University of Illinois, Urbana- Champaign

"It takes tremendous compassion and commitment to empowerment, cooperation, and access to provide support to students struggling in such difficult ways. Tom has to be flexible, knowledgeable, and resourceful to provide the most appropriate support to everyone involved. Due to the confidential and sensitive nature of Tom's one-on-one work with students, it often does not receive the recognition it deserves. In light of this, it would be wonderful to see Tom recognized for his excellent work and dedication to students, campus safety, and the case management profession; it is an honor he most definitely deserves." – from nomination letter

- **Outstanding New Professional**
Clay Culp, University of Tennessee, Knoxville

"In the short time that Clay has been a member of our team he has built strong relationships with on-campus and off-campus partners and has been a true asset to CHEW and the university. He has worked diligently and with great empathy to support and serve students and the UT community. Clay exhibits strong clinical, decision making, and problem solving skills and is always willing to help in any way that he can. .. He exemplifies professionalism, team work, and service." – from nomination letter

- **Outstanding Mid-Level Professional**
Emma Dovi, Syracuse University

"Emma has the unique ability to be kind and compassionate while also delivering difficult messages and holding truth for students; this is a trait that is hard to come by and one that makes her one of the best case managers nationwide. .. Emma has also dedicated herself to enhance connections across campus in order to provide seamless coordinated efforts to ensure our students have every opportunity for success. Emma has dedicated herself to improving processes for students and continuously works to collaborate across campus and between silos to do so." – from nomination letter

- **Creative Collaboration: Institutional Impact Award**
University of Kentucky & University of Louisville
Key Collaborators: Therese Smith & Geri Morgan

“The purpose of the KY Higher Education Case Managers Drive-In was to ultimately increase knowledge and awareness. The KY Drive-In was coordinated by Geri Morgan (University of Louisville), Tracie Meyer (University of Louisville), and Therese Smith (University of Kentucky). In addition to partnering with case managers, U of L partnered with several other departments for presentations. Additionally, U of L made the event available to individuals that play a support role in care management, such as Housing and the Counseling Center. This provided the opportunity to education those individuals about care management and created collaboration relationships on campus.” – from nomination impact letter

“This program is an example of a creative collaboration aimed at assisting professionals in Kentucky, Indiana, and Alabama with the opportunity to dialogue and discusses best practices as it relates to case management. The University of Louisville Dean of Students Office and Student Care Team served as the main coordinating body for the Drive-In and the University of Kentucky Community of Concern collaborated on the event. In is a strong example of a creative collaboration that impacted higher education professionals through education, dialogue, and networking. This collaboration is sure to impact student success through the strategies that professionals learned at the Drive In.” – from University of Louisville nomination letter

“Personal interactions with these staff members and education on their specific work improves my ability to make effective and authentic referrals. One main take-away for me was the importance of having correct expectations for offices Campus Housing partners with and communicating with students about what they can expect from the offices my team and I refer them to. .. the drive-in included information on mindfulness and the benefits of practicing it related to case management and supporting students. The information received motivated me to enroll in a mindfulness course offered at the University of Louisville. I have begun to see a change in my level of attentiveness to student concerns and to my ability to process challenging information received about student experiences.” – from University of Kentucky nomination letter

- ***Ted K. Miller Achievement of Excellence Award***
Council for the Advancement of Standards in Higher Education (CAS)
Katherine Snyder, University of Illinois, Urbana- Champaign

“Since joining the field of higher education case management, Katherine has taken on multiple projects in her professional capacity that further standards for the work that we do. In her first position at the University of Arizona, Katherine implemented innovative new programs and adapted functions of her office, such as creating and defining Arizona’s structure for case management services; introducing an official student death process; and moving from a “Critical Student Incident Team” to the recommended “Behavioral Intervention Team” in order to fully address the needs of the students on her campus. Katherine’s work helped to define recommended practice in our field at a time when higher education case management was still incredibly new and official standards had not been introduced.

Katherine’s work on the Leadership Team for HECMA has been especially relevant to this award and has majorly impacted us as a field. For the 2015 HECMA Roundtable, she advanced us beyond where we were at the time by obtaining approval for CEU’s from the NASW; this elevated our organization as a whole and made our conference more relevant and valuable for professionals who attended. When she later took on her now current role in Training and Development she immediately began pushing us forward by introducing a relevant and innovative webinar series that allowed us to not only better share our existing strengths as an organization, but to advance the standards of practice that we as an organization have worked so hard to and continue to define.

.. Katherine’s continued efforts to make HECMA and higher education case management a trusted and respected field have been remarkable.” – from nomination letter

- **HECMA Leadership Award, 2017**
Mona Dugo, Northwestern University

“There are few people I believe to be more qualified to receive the HECMA Leadership Award than Mona Dugo, Senior Associate Dean of Students at Northwestern University. Mona is an inspiration to many of us in higher education case management and embodies the definition of the award in how her “professional accomplishments have made a significant impact on the field of higher education case management and whose character and work products have earned the respect and admiration of their professional colleagues.

.. While her resume speaks volumes to her commitment to higher education case management, her application and ultimate election to this position is directly reflective of the definition of this award. She has shown a passion for the organization in her involvement on individual committees since joining HECMA, which is impressive on its own.

Mona's professional work is impressive and her journey to higher education case management is reflective of her immense commitment to this field and to college students as a whole. With almost 15 years of experience in higher education and having spent the last five years as a non-clinical case manager, Mona has continued to develop processes that have made a lasting impact on our field. In just two short years she went from a role where she served on the student of concern team to a role where she is running the non-clinical case management program in its entirety at Northwestern University, one of the most prestigious universities in the United States. When I myself have a question about process at my institution I often think of individuals whom I hope respond via the listserv with feedback and those that I feel confident would have an answer should I reach out to them individually—Mona is among those individuals and I know I can trust her professional judgment and her ability to help us continue to move forward the standards and definitions for best practice our field is developing.” – from nomination letter

Leadership Team: 2017-2018



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HECMA: Summary of Strategic Goals & Initiatives for 2017-18

Goal 1: Professional Development (Advanced Practice)

- Establish onboarding to field curriculum and advanced track
- Publish Evaluation Guidelines & Best Practice Recommendations
- Formalize Toolkit for HECMs

Goal 2: Professional Development (Clinical Case Management)

- Increase support and services for and targeting CCM
- LT licensure for provider status; for Webinars, RT's & Regional Drive-ins
- Establish community through discussion boards

Goal 3: Advancing Quality Control

- Publish membership Survey Results
- Finalize Ethical Guidelines & Standards of Care
- Revise Bylaws and put forth for member voting

Goal 4: Enhancing Regional Connection

- Develop/identify regional coordinators
- Identify regional drive-ins

Goal 5: Streamline and Enhance Member Communication & Resource Access

- Establish blog post schedule (member profiles, 5 for Friday)
- Highlight committee projects, initiatives, activities
- Explore Library configuration and content management

Goal 6: Organizational Sustainability

- Create 2 to 3year annual budget projections
- Enhance Membership and event management systems

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**Shared Resources.
Collaborative Networking.
Advancing Best Practice.**