Thank you for allowing me to serve as your CMSA President in 2012-2014. The past year has been a busy one for CMSA Leadership, our Management staff and our members. Looking back over the years, each day has been filled with both opportunities and challenges and CMSA has continually sought to meet those challenges and embrace those opportunities in order to advance the profession of case management across all practice settings and at each transition of the patient journey.

We have tried to listen to your “asks” and, in doing so, in 2013 we paved the path to introduce a number of new programs. One such program is “Considering Certification? A Pathway to Recognition and Validation of Your Professional Expertise”. This series of webinars and conference sessions is designed to assist case managers in moving toward certification. Three webinars are being provided at no cost to all case managers and five concurrent sessions are offered during the 2014 Annual Conference to assist attendees in understanding many of the concepts that might assist them to be successful in achieving certification. This is the first time CMSA has offered this type of program and we are excited to do so.

We have also begun to offer a number of other webinars – some having a related fee and some offered at no charge — including a recent webinar on the Two Midnight Benchmark which over 650 of your colleagues found of value.

During 2013, CMSA’s community spanned across the world, including more than 30,000 members, subscribers and social followers. The online community presents current topics that impact the practice of care management and often seeks the opinions of the group on many topics including patient-friendly definitions of case management and a discussion on the essential professional knowledge and skills.

Over the past year, I have traveled to over 50 events as your representative. I have spoken at local chapter conferences and meetings, been one of your representatives in Washington, DC, brought educational programs to your place of employment, sought educational dollars to enhance your case management toolbox and, sometimes, was just present at meetings to remind those around the table that case management remains an essential element of healthcare delivery in America and across the globe.

In collaboration with one of our supporting partners, CMSA will be offering a Public Service Announcement that presents the healthcare consumer with information regarding the role case managers play in advocating for their patients and assisting those patients and their support systems to navigate the sometimes confusing transitions of care that are common to the healthcare experience. It is our hope that one day the patients we serve will realize the value of working in partnership with a case/care manager.
Other achievements for 2013-12014 include:

- Recognition of National Case Management Week by the United States Senate
- Exponential growth in the Integrated Care Management programs
- Introduction of the Career & Knowledge Pathways
- Development of the Inaugural Certification Roundtable that brought together a number of certification bodies and professional organizations to advance the ability of the case management professional to achieve recognition of their knowledge and expertise.

And, one of the most important initiatives accomplished in 2013-2014 is a project the enables CMSA to serve as a trusted source of case management, care coordination and transitional care information for the healthcare professional as well as the healthcare consumer. This enhancement to the information offered on cmsa.org will provide information regarding the roles, functions and purpose of case management in a unique and engaging way.

It will include a lexicon of case management terms and detail the skill sets necessary to provide our patients with the information necessary to assist them in navigating the sometimes confusing steps necessary to move toward self-management of their disease state or healthcare condition.

The past year has been an amazing and successful year for CMSA, our members and our case management colleagues but the best is yet to come. Our future is paved with recognition and opportunity.

Thank you so very much for allowing me to serve as your 2012-2014 President.

Nancy Skinner, RN-BC, CCM
CMSA President, 2012-2014
Engaging Community in a New World

As we sift through CMSA’s aggressive goals and its accomplishments from 2013, its obvious: our world is changing in ways we might never have predicted. With health care reform continuing to evolve, no one is ever quite sure what the practice of case management might look like in the near future…only that it has a very important role to play. The uncertainty alone is bewildering, even frightening. At least from CMSA’s perspective, however, there are a few things we know for sure.

Rapid advances in technology have changed and continue to change the way we communicate with each other. For the first time, entire generations that have never known life without technology are entering the workforce. For all professional societies, technology has been a game changer, giving people access to information and networks of people often bypassing the traditional association.

From now till 2030, every 8 seconds someone turns age 65. It is estimated that by 2025, the number of Americans over 60 will increase by 70%. This shift of human capital represents the largest in our country’s history with potentially epic consequences on traditional workforce development practices.

Individuals will need to rearrange their approach to their careers, family life and education to accommodate these demographic shifts. Increasingly, people will work long past 65. Multiple careers will be commonplace and lifelong learning to prepare for occupational change is likely to see major growth. Industries will need to rethink their traditional career paths to take advantage of this experienced and still vital workforce by creating more diversity and flexibility. At the same time, few organizations are considering the shifting values of younger groups. Most organizations remain governed and supported by baby boomers. Few have, or are embracing the societal movement away from conformity towards individuality. In other words, a millennial generation with dramatically different needs, values, wants and expectations.

October 6, 2008 began the Great Recession. With the resulting economic impact, everyone began scrutinizing the value of everything. Although the economy will eventually recover, the new generation that is about to inherit workforce power will continue to scrutinize value. In fact, they demand a return on investment unlike any other generation that has come before them. According to Generations and the Future of Association Participation by the William E Smith Institute for Association Research, younger people seek and demand a return for membership that includes tangible member services, high levels of accountability, identifiable career advantages, a sense of professional community and opportunities to serve within the association.

That’s a tall order! However, your CMSA Board of Directors has been intently focused on these issues, collecting and analyzing data, conducting focus groups, and evaluating 21st century delivery models. All this, with you, the case manager, in mind. In fact, “you” are the only reason CMSA exists. As our Strategic Framework suggests, our primary goal is delivery of products and services of value to case managers. For more than 2 years now, we have been developing a new framework that will begin to roll out at CMSA’s Annual Conference in Cleveland. Changing course takes time and involves the talents and expertise from many of you in the case management community. Expect some exciting new information coming soon…all with the goal of helping you become a more efficient, effective and competitive case manager.

Your CMSA Board of Directors

Community Demographics

- **What year does your birth date fall?**
  - Age: 73-82: 1%
  - Age: 63-72: 18%
  - Age: 53-62: 51%
  - Age: 43-52: 25%
  - Age: 33-42: 5%
  - Age: 32 or younger: 1%

- **Years of Experience in Health Care**
  - # Years: 0 - 5: 1%
  - # Years: 6 - 10: 2%
  - # Years: 11 - 20: 13%
  - # Years: 21 - 30: 31%
  - # Years: More than 30: 53%

- **Years in Case Management**
  - # Years: 0 - 2: 6%
  - # Years: 3 - 5: 10%
  - # Years: 6 - 10: 19%
  - # Years: 11 - 15: 25%
  - # Years: 16 - 20: 21%
  - # Years: More than: 19%

- **Number of Members in 2013** ................. 9,406
- **Number of Chapters in 2013** .................. 74

- **Work Settings**
  - Setting: Health Plan (HMO/PPO/ IPA/Insurer, etc.) .......... 32%
  - Setting: Hospital/Acute .................. 29%
  - Setting: Occ. Health, Disability Mgmt., Workers Comp .......... 9%
  - Setting: Other Answers .................. 30%

*Data sourced from the 2013 Industry Survey completed by the CMSA community.*
Social CMSA

CMSA’s online community continues to grow, providing the case management community with a digital platform to engage and connect. In October 2013, CMSA’s group on LinkedIn™ surpassed 10,000 individual members, encompassing a dynamic mix of case managers, employers and the larger health care community invested in the future of case management. CMSA’s presence on Facebook and Twitter continue to develop, offering CMSA stakeholders a place to connect wherever they are online.

Top 2013 @CMSANational updates based on engagement: clicks, retweets and replies

CMSA Social Profiles by the Numbers ending December 31, 2013

Facebook page followers
827
www.facebook.com/cmsanational

LinkedIn™ members
10,461
www.linkedin.com/groups?gid=954567

Twitter Followers
742
www.twitter.com/cmsanational
## Statement of Activities

### Years ending December 31, 2013 and 2012

**Revenues and Support**

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<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Revenues and Support</td>
<td>$1,994,914.00</td>
<td>$2,043,332.00</td>
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<tr>
<td>Conference Revenue</td>
<td>$1,745,903.00</td>
<td>$2,199,841.00</td>
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<tr>
<td>Leadership Revenues and Support</td>
<td>$249,793.00</td>
<td>$392,762.00</td>
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<tr>
<td>Other Miscellaneous Revenue</td>
<td>$4,892.00</td>
<td>$10,996.00</td>
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<tr>
<td><strong>Total Revenue and Support</strong></td>
<td><strong>$3,995,502.00</strong></td>
<td><strong>$4,646,931.00</strong></td>
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</table>

**Program Expenses**

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<th>2013</th>
<th>2012</th>
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</thead>
<tbody>
<tr>
<td>Chapter and Membership</td>
<td>$1,072,149.00</td>
<td>$1,092,445.00</td>
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<tr>
<td>Conferences and Education</td>
<td>$1,450,229.00</td>
<td>$1,720,176.00</td>
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<tr>
<td>Leadership</td>
<td>$248,811.00</td>
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<tr>
<td><strong>Total Program Expenses</strong></td>
<td><strong>$2,771,189.00</strong></td>
<td><strong>$3,278,334.00</strong></td>
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**Supporting Expenses**

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<tr>
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<th>2013</th>
<th>2012</th>
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</thead>
<tbody>
<tr>
<td>General and Administrative</td>
<td>$1,489,949.00</td>
<td>$1,428,672.00</td>
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<tr>
<td>Fundraising</td>
<td>$134,962.00</td>
<td>$157,094.00</td>
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<tr>
<td><strong>Total Supporting Expenses</strong></td>
<td><strong>$1,624,911.00</strong></td>
<td><strong>$1,585,766.00</strong></td>
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</table>

### Financials

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Expenses</strong></td>
<td>$4,396,100.00</td>
<td>$4,864,100.00</td>
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<tr>
<td>Increase(Decrease) in Net Assets</td>
<td>($400,598.00)</td>
<td>($217,169.00)</td>
</tr>
<tr>
<td><strong>Net Assets, Beginning of Year</strong></td>
<td><strong>$1,238,370.00</strong></td>
<td><strong>$1,455,539.00</strong></td>
</tr>
<tr>
<td><strong>Net Assets, End of Year</strong></td>
<td><strong>$837,772.00</strong></td>
<td><strong>$1,238,370.00</strong></td>
</tr>
</tbody>
</table>

### CMSA 2014: Changing of the Financial Guard

**BY: Jose Alejandro, RN-BC, PhD, MBA, CCM, FACHE**

It has been my esteemed pleasure to have served as your treasurer for the last four years! I want to congratulate Cathy Campbell, MSN, RN, MBA, CCM, CHC, FACHE, as she assumes the role of Treasurer at the end of CMSA Annual Conference. CMSA will be in great hands for the next three years. I will remain a member of the Finance & Audit Committee for mentorship and guidance.

Fiscal year 2013 was a trying year for CMSA as the government and healthcare organizations continued cutbacks, resulting in decreased annual conference attendees and a slight decrease in membership from 2012 to 2013. I have full confidence in the association management team, CMI, to take the necessary steps to minimize expenses, increase membership and solidify products and partnerships to promote financial sustainability and growth. Strategies have been taken to improve CMSA’s financial health.

I want to recognize David Walker, Chief Financial Officer, and his team for the outstanding work they have done during my tenure. I could not have done this without his team’s collaborative efforts. Finally, I want to thank the membership for allowing me to serve two terms as your treasurer!
CMSA is a recognized leader and trusted professional association that exists to close gaps in healthcare performance by translating the best science and knowledge into effective continuing professional development. Although continuously evolving, here is an update from 2013 on CMSA’s Flagship Products.

### Career & Knowledge Pathways (CKP)
CKP was developed to fill a longstanding gap in case management education. Theoretical content has been available for many years, but practical instruction on basic CM concepts, as well as skills development, has been left to the individual case manager and employers to determine and deliver. This lack of leadership has led to great variation in educational quality, content, and case management skill sets across the healthcare continuum. CKP promises to eliminate the gap through the judicious use of technology blended with traditional and emerging learning models.

With no formal undergraduate curriculum for case management, education and training preparation remains separate and distinct across the respective specialties of health care practitioners commonly found in case management including but are not limited to: nursing, social work, physical therapy, occupational therapy, rehabilitation counseling, and medicine. Ultimately, CKP seeks to help build an effective, long-term sustainable workforce, and address the following concerns as CMSA seeks to provide leadership to a rapidly growing industry.

CKP offers a consistent foundation of theoretical knowledge coupled with opportunities for safe and practical development of skills (e.g., critical thinking) to become an essential component of basic preparation for every individual seeking to work in positions focused on coordination of care, the most readily recognized of which is case management. CKP will also assist employer’s better screen job candidates by moving toward more objective and quantifiable skill sets.

More specifically, CKP teaches and measures an individual’s ability to understand and apply the CMSA Standards of Practice for Case Management, and is designed to help employers with the onboarding process by addressing a common gap in new case manager training.

The CKP features content and functionality created through an iterative process which utilized cross-functional, multi-specialty working groups and external review teams. The debut course for product launch is the CMSA Standards of Practice: The Foundation for Professional Excellence in Coordination of Care across the Continuum which is anticipated to provide eighty (60) hours of continuing education credit.

**www.cmsa.org/ckp**

### CMSA’s Extended Conference - Immediate, convenient and portable
As the nation’s largest interdisciplinary association for case managers, CMSA offered the Extended Conference 2013 in an effort to enhance uniformity and synergy for all health care practitioners practicing as case managers. The extended conference option allows individuals who attend the conference to view sessions they may have missed and for individuals who were unable to attend the conference in person to obtain information and knowledge from the event. Users earned up to 62.4 nursing and 52 CCM Continuing Education hours at a great low price and received best practices and the hottest case management-related topics.

Second only to live event conference participation, the extended conference module allows current key topics to be viewed at the learner’s pace and shared with case management colleagues in a work environment; And some learners prefer online education with timely information for re-credentialing. Most importantly, all CMSA educational resources seek to create uniformity and consistency in standards of practice for all case managers.

**www.cmsa.org/extendedconference**

### CMAG 2012
According to recent research by Mayo Clinic, 50% of patients do not take medications as prescribed, and may be responsible for 11%, or more of hospital readmissions. With readmission penalties becoming increasing costly, effective solutions are more important than ever. In fact, the estimated economic impact of medication/treatment non-adherence is expected to reach or exceed $100 billion annually. Clearly adherence behavior is complex, difficult to identify and may well be more important than other therapies. Fortunately, CMSA has made medication adherence a strategic initiative since 2004, as part of its central mission to be the trusted source of resources which support and enable the professional growth of case managers.

Given the key leadership role of case managers in the provision, transfer and coordination of patient information and treatment, CMSA is invested in providing educational materials like CMAG which enable case managers to be more effective in improving care quality. In fact, CMAG was specifically designed to increase case manager effectiveness when dealing with medication and treatment adherence. In addition, disease state specific chapters exist as additional downloads that help case managers understand how to apply the CMAG principals to specific disease states and patient populations. Most importantly, CMAG addresses medication and treatment adherence as defined by The World Health Organization as being one of the primary reasons for readmissions and emergency room visits. New additions to the 2012 version include:

- Cost effective guide can be used to address specific medication adherence issues.
- Variety of assessment instruments to assess and rank patient function
- New tools for assessment and intervention to improve outcomes for patients with medication and treatment adherence issues.

**www.cmsa.org/cmag**

### Integrated Case Management Training Program
Through the Affordable Care Act, states have new opportunities to design and implement programs that better coordinate care for people eligible for Medicare and Medicaid. With implementation of those reforms, CMSA’s Integrated Case Management Program was in big demand during 2013. This one-of-a-kind program helps clinical delivery and managed care organizations improve their assessment and treatment of medically complex patients, specifically individuals who face both physical and mental/behavioral health challenges.

Although patients with health complexity are a small percentage of our total patient population, they can be very costly in time management, resources and financial burden. In fact, the cost of unintegrated treatment can be staggering.

In 2013, CMSA held two training programs for individuals, several on-site employer sponsored programs, a beta program of the newly released pediatric version and a “train-the-trainer” program. CMSA’s Integrated Case Management Program is a comprehensive program including a manual for home-study, on-demand recorded modules and a face-to-face skills implementation session in which participants demonstrate skills competency. A passing score on the final exam allows access to the online ICM-CAG software.

**www.cmsa.org/icm**
Key 2013 Initiatives
In 2013, key policy initiatives included:

- Advancing the Case Management Model Act to gain congressional support
- Seeking National Case Management Week Resolution
- Supporting Nurse Licensure Compact legislation in non-compact states through the Multistate Licensure Sub-Committee
- Building the Chapter Liaison Network to encourage and support public policy engagement in all chapters
- Hosting a Public Policy & Advocacy Summit in Washington, DC
- Increasing public policy education and communication to membership on pertinent legislative and regulatory issues impacting case management

Public Policy Committee Actions
PPC member meetings were held regularly throughout the year via teleconference calls and at annual conference. Chapter Liaison Network conference call meetings were held quarterly to educate members on public policy initiatives to disseminate to chapter members. PPC members worked to mobilize the Liaison Network and chapter membership in grassroots campaign contacting all Senators to cosponsor S.Res 214, the National Case Management Week Resolution. Multistate Licensure Sub-Committee held six conference call meetings throughout the year to provide a forum for sharing of state grassroots and coalition strategies. Public Policy & Advocacy Summit in Washington, DC was held on October 29-30, 2013. PPC Webinar held for membership in preparation for DC Summit and Hill visits. PPC Poster Presentation held at CMSA’s annual conference in New Orleans. PPC Advocacy and Grassroots Resource Guide was developed and shared with Chapter Liaison Network for members.

PPC Outreach Efforts
Chapter President’s outreach efforts continued in 2013 to establish and grow a public policy committee in all chapters. Sixty-one percent of CMSA chapters had chapter public policy liaison representation. Nine new liaisons were welcomed into Liaison Network in 2013. Senate Resolution 214 passed unanimously in United States Senate declaring October 13-19, 2013 as National Case Management Week. MSL Educational Presentation offering CEU’s for Nursing and CCM presented by PPC members in several states. Six states were supported in coalition building efforts to promote Multistate Licensure. Eighty-six congressional visits were held on Capitol Hill by attendees at the Public Policy Summit in DC to raise awareness on the Case Management Model Act, Transitions of Care, Multistate Licensure, National Case Management Week Resolution, National Nurse Act and Telemedicine Act of 2013. Summit attendees were welcomed by Senator Mark Pryor and Congresswoman Diane Black at the DC Summit. Public Policy updates were provided to membership via CMSA today, CMSA Public Policy News, chapter newsletters and educational activities. Public Policy resources were made available to the membership at www.cmsa.org/policymakers.
All of us who work in healthcare today would have to acknowledge that we are in the midst of huge waves of change. These are unfamiliar kinds of changes and those we may be unprepared to meet. CMSA has been working aggressively to assist case managers in meeting the challenges of today and to ensure that case managers can practice in ways that are most efficient, effective and competitive in order to be prepared for tomorrow’s healthcare market.

Your National CMSA Board of Directors dedicated 2013 to address the issues of a changing business landscape and to developing programs aimed at supporting workforce development for the case management industry. As we continually monitor workforce trends, there is a growing evidence to earlier entry into case management, care management and care coordination. As with any career path, case management professionals require access throughout their careers to resources that will consistently enhance both clinical as well as necessary non-clinical skills required in this complex practice.

To that end, CMSA continues to invest in development of products offering multidisciplinary support for enhancing medication management, improving care for the medically complex patient, supporting new case managers in developing knowledge and awareness about the case management process, pathways towards certification and advanced degrees and access to continuing educational support. Information about the following CMSA resources is available at www.cmsa.org.

- Case Management Adherence Guidelines (CMAG)
- Integrated Case Management Program (ICM)
- Online Educational Resource Library holding over 140 hours of CE
- Extended Conference Learning Opportunities
- Career & Knowledge Pathways - CMSA Standards of Practice: The Foundation for Professional Excellence in Coordination of Care Across the Continuum
- Considering Certification? A Pathway to Recognition & Validation of Your Professional Expertise
- Standards of Practice for Case Management
- Public Policy Resources and Engagement

In 2013, CMSA also engaged in a number of focus groups with members to identify significant areas of interest and concern (specifically from the perspective of the practicing case manager). In particular, we looked at the individuals in a variety of practice settings and also with varying levels of experience. Surprisingly, almost without exception, findings were uniform across all focus groups. Armed with focus group results combined with a variety of other data analytics, CMSA’s leadership is intently focused on delivering programs and services of real value. The main difference being… “value” as defined by you!

As expected, some familiar topics emerged (i.e., ROI, Outcomes, Caseload benchmarks, etc.). However, more fundamental issues also surfaced, such as:

- What is case management and conversely, what is not case management?
- How do I become a case manager?
- I’m a new case manager, now what?

To meet and address the questions above, CMSA undertook the task of launching a creative interactive resource this June that will begin to provide the mechanism for healthcare professionals to engage and investigate information and concepts related to defending the practice of case management. Each interaction on the website provides the opportunity for healthcare professionals to explore and investigate issues at their own pace and convenience and choose how they want to further engage the community with action.

CMSA’s strong commitment to enhancing communication and resources to the growing body of professionals providing services in case management, care management and care coordination highlights CMSA’s commitment to ensure there will be a strong qualified workforce that can achieve all that is possible and within reach of every healthcare professional. We should never be fearful of change, rather we hope you will join us in taking the lead in identifying new ways of meeting the challenges facing case management professionals today. Your CMSA National Board is committed to leading that journey and addressing those issues across the continuum at both the national and local levels.
I am both humbled and thrilled to assume the honor of the presidency of this great association. CMSA has an evolving strategic framework just as our medical ethos continues to evolve and each Case Manager needs to be fully invested. We transcend across all aspects to effect change and continue to assist in streamlining our delivery arena. Never before has the role of the case manager been incorporated into so many national mandates and local initiatives. We are no longer the best kept secret of healthcare. We are gaining recognition and achieving significant roles in advancing the quality of client centric care. Case managers are the most common thread whether listed as case management, care management, transitions of care or care coordination.

Case managers lead the critical role to ensure the delivery of care and resources are utilized appropriately. We are also called upon to educate and empower consumers and provide tools that encourage them to take responsibility for their healthcare more than ever. The system is complex and difficult to understand and patients are searching for assistance in its navigation. Case managers must empower the client to problem-solve by exploring options of care, when available and alternative plans, when necessary, to achieve desired outcomes. You have heard me say it before and will hear me say it many times again, over the next two years, “Turn the passenger into a driver”! Empower our patients/clients to navigate their care by being educated in their available resources.

Healthcare trends and challenges can be both energizing and exhausting for case management professionals and we need each other to help reclaim the energy and passion that led us into the healthcare field. But it is essential to quantify outcomes due to direct involvement in order to justify the extra layer of cost associated with a case management intervention. We are starting to be recognized, moving us from having to battle for our respected place to having it officially written into various models of care. As Dr. Martin Luther King pronounced in one of his earlier speeches “Be the thermostat, not the thermometer!” Case Management is the true future of health care reform, and we cannot just sit around giving daily forecasts. It is time we adjust the healthcare climate because we are one of the very few segments capable enough to do so!

The Patient Protection and Affordable Care Act has expedited the learning curve of healthcare professionals across all industries to effect change. In the next year I plan on further partnering with industry representatives to encourage educational and certification opportunities for case managers, because to be ready for these opportunities, we must pursue professional excellence and maintain competence in practice. This can be obtained through national certifications, advance degrees and of course, membership in CMSA, the gold standard of associations for case management.

My mission for this next year is to enhance our support and mentorship to our individual chapters and members and augment their growth. In addition we need to spread this commitment worldwide as the value of Case Management is seen. Case Management is the true future of healthcare reform and what a bright future it is! My ideal for case management is that every case manager is a member of CMSA. Please join us for the exciting and challenging ride ahead of us this year. As Helen Keller stated, “Alone we can do so little; together we can do so much.” That is why I am and have always been, so passionate about CMSA locally, nationally and now internationally!
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