2012 annual report
The year 2012 was one marked by many accomplishments in CMSA's carrying out of its strategic vision and mission. The CMSA Board of Directors ensured that all projects, programs, and business planning activities were well-aligned with the organization's strategic objectives regarding education and career development, industry partnerships, public policy initiatives and performance outcomes. By focusing on these four strategic objectives, the Board demonstrated commitment to assuring the continued growth, sustainability and continued success of CMSA.

SIGNIFICANT ACCOMPLISHMENTS ACHIEVED DURING 2012 INCLUDED:

• **New Terms of Office Implemented** — New officer terms went into effect including 2-year term for President and Secretary and 3-year term for Treasurer.

• **2012 Annual Conference in San Francisco** — Over 2,400 attendees, nearly 250 exhibitors, and dozens of top-notch educational sessions and speakers made this one of the most successful conferences ever.


• **Annual Public Policy Summit in Washington, DC** — Engaged members in legislative process, with focus on promoting CMSA's public policy initiatives.

• **Quarterly All Member Calls with the CMSA President** — Webcast for members to highlight the ongoing activities, events, and projects with which CMSA is involved.

• **CMSA Today™** — Published eight issues of CMSA's very own magazine, focused on supporting and improving professional case management practice throughout the care continuum.

• **National Case Management Week** — Provided CM Week promotion guides, logos, media kit, and promotional products for chapters to plan CM Week celebrations and recognition.

• **Inaugural Case Management Advocate Award** — New award launched to recognize a non-case manager who promotes the value of case management through significant contributions to the profession.
Highlights of the Year

- **CMSA Career and Knowledge Pathways™** — Work continued on concept development for a customized career pathway structure of learning and mentoring to help individuals progress along the clinical and case management experience continua.

- **Ongoing Engagement of Industry Partners and Stakeholders** — CMSA continued to collaborate with industry organizations, professional associations, and government agencies—such as CMS, DHHS, AHRQ, NQF, CCA, NCQA, and URAC, among many others—to provide input and direction on the key issues and concerns at hand.

- **Established Annual Board of Directors (BOD) Leadership Meeting** — CMSA’s BOD came together for an initial Leadership Meeting to refine and enhance the strategic vision of CMSA and plan for future directives and initiatives.

- **CMSA’s Social Networking** — CMSA’s LinkedIn™ Community grew to over 7,700 members.

- **Chapter Outreach** — CMSA’s National Presidents provided over 17 chapter presentations in 2012 and supported the development of several new chapters.

- **The National Transitions of Care Coalition (NTOCC) becomes a distinct organization** — Initially supported through a strong relationship with CMSA, NTOCC has become a separate 501(c)(4) organization dedicated to addressing a serious U.S. healthcare issue: filling the gaps that occur when patients leave one care setting and move to another care setting.

- **Integrated Case Management Training** — This CMSA program continues to enhance case managers’ skills in coordinating care for medically complex patients addressing the health complexity of patients through assessing four key domains: medical, behavioral, psychosocial and health system. Two classes were offered in 2012, training 197 case managers.

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**Top 10 CMSA Supporters**

CMSA is proud to recognize our TOP SUPPORTERS for 2012! As a result of their support, CMSA is able to provide a number of free and low cost tools and resources. In 2012 alone, companies who value the reach and impact of case managers provided over $1.5 million in funding (through corporate partnerships, annual conference exhibit booths, sponsorships and tool creation). The companies shown below contributed the highest level of financial support to the organization in 2012.

We would also like to thank the CMSA Corporate Partners for their generous contributions in advancing the profession of case management and CMSA’s mission. A full list of CMSA Corporate Partners can be found on the Association’s website (www.cmsa.org/partners) and we encourage members to support our Partners, Conference Exhibitors and Sponsors.

We look forward to continually building strong relationships with our partners and creating even more exciting and innovative resources for case managers and CMSA Members!
CMSA’s Evolving Strategic Framework

OUR MISSION | WHY WE EXIST
The Case Management Society of America is the leading membership association providing professional collaboration across the health care continuum to advocate for patients’ wellbeing and improved health outcomes through:
1. Fostering case management growth and development
2. Impacting health care policy and
3. Providing evidence-based tools and resources

OUR VISION | WHAT WE SEEK
Case managers are recognized experts and vital participants in the care coordination team who empower people to understand and access quality, efficient health care.

OUR VALUES | WHAT WE DO
CMSA connects case management professionals, employers of case managers, and legislative and regulatory bodies to inspire growth and development of the practice of case management.

OUR PROMISE | HOW WE SERVE OUR STAKEHOLDERS
CMSA provides exceptional experiences, a vibrant case management community and essential tools and resources that enable case managers and case management organizations to be more successful.

Membership Demographics

Number of Members in 2012 .................9,808  •  Number of Chapters in 2012.........72

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*Data sourced from the 2011 Industry Survey completed by CMSA members
GOAL 1 - Knowledge

- CMSA will be the definitive, trusted source for ideas, tools and resources for the case management profession.

- Desired Outcome - CMSA is the first choice for knowledge and information for the case management profession.

- Enhance the quantity, quality and relevance of the case management tools and resources offered by the society.

- Strengthen our capacity to explore new ideas and approaches for the profession, and foster greater innovation within a global business environment.

- Continue to develop and promote professional standards and best practices.

GOAL 2 - Learning

- CMSA’s exceptional learning experiences will enable the case management community to consistently produce superior results.

- Outcome – Professionals in the case management community attribute their enhanced performance to CMSA’s learning experiences.

- Produce learning experiences that incorporate new approaches and model best practices in adult learning.

- Offer learning options that address the different needs and preferences of a diverse group of participants.

GOAL 3 - Community

- CMSA will engage case management professionals, health care professionals and industry partners in an ethical, inclusive, diverse, and welcoming community.

- Outcome – CMSA is the preferred community of value for case management professionals and industry partners.

- Help those in the case management community connect with others who share their interests.

- Promote and nurture a culture that supports ethical conduct, transparency, inclusion, and diversity in the health care team.

- Collaborate both inside and outside the community of case managers to extend and enhance CMSA’s value.

GOAL 4 - Advocacy

CMSA’s advocacy and communications efforts will enhance recognition for the professional and result in positive legislative and regulatory climate for the case management community.

- Outcome – A legislative and regulatory climate favorable to the practice of case management and the role that case management organizations and professionals play in advancing the effective delivery of health care.

- Increase awareness within the case management community, amongst consumers of health care, policy makers, payors and providers of the critical role case management plans in the effective delivery of health care.

- Identify key public policy priorities for the profession and work to enact legislation and policies that benefit the case management community.
Greetings from the financial area of CMSA! As Treasurer, I am pleased to report that we have weathered the storm and met several financial challenges in 2012. CMSA continues to remain strong in two main revenue areas: membership and annual conference, despite the economic downturn and government cutbacks. We also have to remember that NTOCC became its own corporate entity, so all of the related financials have been moved appropriately. We can consider 2012 as a near breakeven year with all of the factors mentioned above. CMSA remains strong, viable and sustainable for years to come, which is something that many other similar organizations can’t state.

The CMSA finance-audit committee, board of directors and association management team remain committed to address challenges in 2013. The collaboration with our partners will work diligently to address these challenges head on.
Initiatives

CMSA Resource Toolbox
The CMSA Resource Toolbox is now in its second year as an online resource for members. The Toolbox was designed to provide case managers in all areas of expertise and care settings with resources to help support and strengthen their individual practice. Through the Toolbox, members can easily find descriptions and links to valuable case management resources in a wide variety of categories and work settings. The categories range from aging/eldercare to transitional care resources; work settings range from Accountable Care Organizations to Workers’ Compensation. Criteria to accept new content into the Toolbox continues to be implemented to ensure that all resources are credible, accurate, objective (non-biased and commercial-free), current, and easy to navigate. The Resource Toolbox advances the mission of CMSA by promoting education and awareness, upholding the standards of practice, and supporting exceptional case management practice across the care continuum.

Learning Management System
The Learning Management System (LMS) from Peach New Media contains 118 courses in the Educational Resource Library (ERL). These courses offer 170.8 continuing education units from the Commission for Case Management Certification (CCMC) and 204.6 contact hours from the California Board of Registered Nurses. Two free webinars, presenting the 2012 Health Information Technology survey results, were also added this year. In the beginning of 2013, the courses in the ERL were provided to members free-of-charge as an added member benefit. The LMS also provides the Extended Conference, slides and synchronized audio of 54 courses that were presented at the 22nd Annual Conference and Expo in San Francisco.

The goal of the Extended Conference is to provide an opportunity for everyone (members, non-members, conference attendees, and non-attendees) to “attend” the virtual conference anytime, anywhere, and at their convenience. The sessions are offered in ticket packages of 5, 15, 25, or a full package consisting of all 54 courses. Conference attendees received a 50% discount and members received an additional 15% discount off the non-member cost. A special promotion was offered to all military personnel on Veterans’ Day, allowing them to purchase Extended Conference packages at an “attendees” price, even though they may not have attended the conference. In addition to this 50% discount, if they were CMSA members they also received an additional 15% discount. The Extended Conference courses provide 99 nursing contact hours from the California Board of Registered Nurses and 81 continuing education units from the Commission for Case Manager Certification (CCMC). Based on feedback from users, the overwhelming majority of participants felt the personal and professional value of the sessions was “very worthwhile.”

Integrated Case Management Training Program
In 2007, CMSA began developing the Integrated Case Management training program to assist case managers to better address the complex medical and behavioral needs of patients. In conjunction with physicians in the U.S. and Europe, a training manual, training program and assessment tool have been developed and launched to the case management community. Master trainers for the program are Dr. Roger Kathol, Deborah Gutteridge, Rebecca Perez and Teresa Treiger. To date, over 400 case managers have been trained and 4 health plans have implemented the program. Trainings are conducted by CMSA bi-annually and training is available for organizations outside of the bi-annual training.

In 2012, the master trainers conducted Instructor training for two large health plans. This allows these organizations to conduct ICM training within their respective organizations.

CMAG
The CMAG Committee focused on major revisions to the Case Management Adherence Guidelines. The enhanced product was renamed Case Management Adherence Guide 2012. The CMAG Committee and task force did a complete review and revision of the tool, as well as developed an enhanced conceptual model identifying factors influencing patient behavior, adherence and health complexity. CMAG 2012 was launched and is available on the CMSA website. A new addition to the CMAG Disease States was also launched in 2012: Pain Case Management Adherence Guide which is available in English and Spanish. Improving medication adherence is a key intervention for case managers. A major goal of the CMAG Committee is to regularly evaluate CMAG products to ensure that they are:

• Aligned with CMSA’s mission and strategic initiatives;
• High-quality, relevant, and of value to the case management profession; and
• Focused on best practices, industry trends, and practice innovations.

Career and Knowledge Pathwayssm
Career and Knowledge Pathways (CKPsm) is a new approach to professional education. CKPsm leverages multiple delivery methods to address the various learning styles of a variety of users including case managers, social workers, nurses, and other health care professionals. Success of this approach will open the door for providing educational content to healthcare consumers as well. CMSA is intent on delivering meaningful programs that address the needs of the case management and health care community in a real-life manner. The Conceptual Learning (CL) approach is decidedly unique in today’s otherwise competitive market in that it draws content from across the care continuum, not simply focusing on a narrow care setting or on one segment of client demographic.

The first course to be launched in CKPsm is the CMSA Standards of Practice: The Foundation for Professional Excellence in Coordination of Care Across the Continuum. This in-depth look at the CMSA Standards of Practice is the product of countless hours dedicated by over forty (40) contributing authors and reviewers from all settings of case management practice. The course provides essential information about definition, practice settings, roles, functions, activities, process, philosophy and guiding principles, as well as each of the standards themselves for individuals working in case management and coordination of care fields. It is anticipated that beta sites will commence enrollment in August 2013. General enrollment is expected to begin in the last quarter of 2013.

Subsequent expansion of the CKPsm library will be at the direction of the CMSA Board of Directors taking into consideration user recommendations and priorities of the case management industry.
In 2012, CMSA continued to raise the visibility of case managers and the value of case management in health care public policy. Through CMSA’s Public Policy Committee, the organization worked to advance policy initiatives impacting the case management community.

Key 2012 Initiatives
- Gaining congressional support for the Case Management Model Act
- Outreach to congressional advocates for a CM Week Resolution
- Hosting a Public Policy Summit in Washington, DC
- Supporting chapters and six states with active legislation through the Multistate Licensure Taskforce educational/working group
- Improving communications and outreach to chapters and members.

Public Policy Committee Actions
- Per CMSA BOD approved PPC Charter, solicited/reviewed applications for PPC membership now serving with time limits. Returning members have a 3-year term and new members will serve a 4-year term. Each member paired in a team with a prior member and a new member for ongoing mentoring.
- PPC Member meetings via conference calls, at the CMSA Annual Meeting and through the newly developed PPC forum.
- PPC Liaison Network, which meets quarterly via teleconference and continues to increase in membership.
- Multi-State Licensure Task Force Educational Presentation offering CEUs for Nursing, and CCM was developed and is available for presentation by PPC members to all CMSA Chapters.
- Campaign to “Get out the Vote” was sent to membership for the November 2012 election.
- PPC poster presentation at CMSA’s Annual Conference in San Francisco.
- The number of chapters with Public Policy Committees grew from 32% to 44%; efforts are ongoing with a target of assisting each chapter in implementation.

PPC Outreach Efforts
- The Public Policy Committee will continue working to increase communications from the Committee to the membership. In 2012, the Committee’s increased outreach efforts included:
  - Outreach to chapter Presidents to determine ways we can add value to improve their efforts or to assist them to establish/enrich their PPC.
  - Public Policy updates via CMSA Today™, National President’s Updates, Chapter Newsletters, educational/conference activities, etc.
  - Dissemination of action alerts to members on voter engagement issues.
  - Informational materials available to members at: www.cmsa.org/policy-makers to download and use in chapter public policy efforts.
  - Expanding case management public policy advocacy via social media sites.
  - Presence at CMSA conference events to educate membership.
  - PPC Liaison Network updated online application process, with goal of each chapter having 2 representatives.
Over the last few years we all have experienced significant change within the healthcare industry, particularly with the implementation of healthcare reform. Most importantly to our community at CMSA, reform discussions and legislation have led to increased recognition of case management by healthcare professionals, legislators, regulators and consumers and a better understanding of the vital services case managers provide. In 2012, I had the privilege of speaking multiple times to case/care managers, social workers, nurses, physicians, pharmacists, allied health professionals and in some cases patients and family caregivers. I was asked to address the issues surrounding healthcare reform, case management, care coordination, patient engagement and communication, building a collaborative team model and reducing avoidable hospital readmissions through improving transitions of care. Without fail at every presentation, someone would ask me about how they could participate within the CMSA community. Nurses and social workers entering the profession would ask about developing good case management skills. Veteran case managers would ask about how they can stay up-to-date and remain relevant in a rapidly changing healthcare environment. Several times I was asked about the value of belonging to a professional association like CMSA.

I would like to share some of the answers I provided because I believe they say a lot about what CMSA offers to case management professionals. CMSA is the only multidisciplinary professional organization working in collaboration with many industry partners to support the full services offered by case managers across the healthcare continuum. We bring tools and resources to case managers with the focus on enhancing their skills so they are more effective, efficient and competitive in the market. Case managers are an integral part of the new and emerging collaborative care models. Collaboration is a tough job, but CMSA is committed to promoting increased awareness and education to the public, legislators and regulatory entities about the focus of case/care management.

As our profession grows, so does our community and our dedication to embrace all case managers regardless of practice setting, certification or patient focus. There are a wide range of options for participation within CMSA. There are professionals who access resources through the CMSA website. Others maintain their connection primarily through CMSA social networks including LinkedIn™ and Facebook. We have industry partners who provide support, information and tools to advance the practice of case management. There are case managers who enhance their knowledge and skills through purchasing various products, participating in online learning or attending programs such as the CMSA Annual Conference & Expo and local chapter meetings. And then there are those who have officially joined CMSA as members, volunteering their time to their local CMSA chapter, participating in workgroups or tasks force projects, serving on committees, and holding seats on the national CMSA Board of Directors.

To address the many varied needs of the CMSA community, the association continues to:

- Enhance education, tools and resources, effectively arming case managers in a changing environment no matter where they practice;
- Develop social networks for the community to discuss new and innovative ways of care coordination, training, access to clinical experience and open forum conversations;
- Defend the practice of case management and assess regulatory provisions, laws and bills being brought forward that affect case management professionals;
- Bring validation to case management through the development, implementation and research of care coordination and case management measures and outcomes;
- Provide open forums for evaluating new models and ideas for improvement within the case/care management community including association engagement;
- Support the next generation of professional case/care managers and develop the workforce of the future;
- Encourage new and innovative leaders in the case management profession;
- Create a dynamic and skilled workforce in a shorter timeframe;
- Build consensus among multidisciplinary partners where dissention is evident and build collaboration to change the culture, behavior and processes to meet the needs of the industry.

CMSA continues to set high standards while providing pathways to achieve all that is possible and within reach of every case manager. The commitment must be to ensure that we do not leave passionate, committed and innovative nurses or social workers behind because someone said "that is how it has always been done" or "that's just the way it is." The wave of change is never easy and requires new models, thinking, ideas and behavior. Jules Verne wrote, “anything one man can imagine, other men can make real.” Those who can imagine that we can change and do more than we have done in the past will find the value in being part of the mission and vision of CMSA – and they will make it real for all who want to make a difference.
The coming year is dedicated to a celebration of the profession of case management and the practice of care coordination. Never before has the role of the case manager been incorporated into so many national mandates, employer initiatives, and local innovations. Case managers are care coordinators who have gained recognition and achieved a significant role in advancing the quality of care to individuals and patient populations in a cost efficient manner. This advances the National Quality Strategy and, in doing so, brings the roles and functions of care coordination to the national stage.

Case managers have been recognized as the “glue” that holds healthcare together and the “linchpin” to the successful implementation of value-based, outcomes-driven models of care and reimbursement such as Accountable Care Organizations (ACOs). Within these new systems of healthcare delivery, CMSA will remain focused on advocating for case management models that are consistent with our professional Standards of Practice. CMSA will continue to have a direct influence on the many transformational efforts and innovations underway in healthcare. By staying focused on our strategic objectives, CMSA will continue to directly influence the value of case management within evolving patient-centered models of care coordination, care transitions, primary care and patient advocacy.

It is our hope that by dedicating the coming year to a celebration of case management, every current and potential member of CMSA realizes the value of this organization as evidenced by a continued focus on the following:

- Advancing additional social networking opportunities that focus on current developments in healthcare delivery, reimbursement for those activities and innovations in case management/care coordination;
- Building on past public policy actions and education while scanning legislative activities that may impact the case management professional in the future;
- Promoting opportunities to educate the healthcare consumer regarding the roles and functions of the case manager;
- Offering an educational pathway for healthcare professionals to enter the profession of case management with the necessary knowledge and skills to meet the needs of their clients;
- Opening lines for communication across all case management practice environments with an enhanced focus on care coordination in acute care facilities, integrated delivery systems, Accountable Care Organizations and Patient-Centered Medical Homes;
- Collaborating with governmental agencies to explore, clarify and define case management interventions that advance the National Quality Strategy;
- Collaborating with other professional organizations and associations that present a like vision regarding the role, function and limitless future of the practice of case management;
- Partnering with case management employer groups to support professional case managers through educational support and other opportunities;
- Partnering with industry representatives to promote educational opportunities for the case manager;
- And, finally, maintaining a consistent focus on CMSA’s Strategic Vision, which is: “Case managers are recognized experts and vital participants in the care coordination team who empower people to understand and access quality, efficient healthcare.”

In 2013-2014, we will also seek to develop a smooth transition to the leadership that Kathleen Fraser and her team will bring to this organization.

We will be called on to educate and empower consumers and provide tools that encourage them to take responsibility for their healthcare more than ever. Case management is neither linear nor a one-way exercise. The Patient Protection and Affordable Care Act has expedited the learning curve of healthcare professionals across all industries to effect change. To be ready for these opportunities, we must pursue professional excellence and maintain competence in practice. This can be obtained through national certifications and membership in CMSA, the gold standard of associations for case management. Case Management is the true future of healthcare reform, and what a bright future it is!

CMSA stands out and remains strong with increasing membership, a growing network of partnerships and resources, and an ever-expanding sphere of influence in the healthcare industry and public policy arena.
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PRESIDENT-ELECT
Nancy Skinner, RN-BC, CCM

SECRETARY
Betty Overbey, RN-BC, CRRN, CDMS, CCM, CRP, MSCC

TREASURER
Jose Alejandro, RN-BC, PhD, MBA, CCM, FACHE

EXECUTIVE DIRECTOR [Non-Voting]
Cheri Lattimer, RN, BSN

DIRECTORS
Kathleen Fraser, RN-BC, MSN, MHA, CCM, CRRN
Connie Keene, RN, BSN, CCM, CBIS
Rebecca Perez, RN, BSN, CCM (member at-large)
Carol Smith, RN-BC, MSN
Cristina Walter, MS, RN-BC, CCM, CCP

CHAIR, CHAPTER PRESIDENTS’ COUNCIL
Cathy Campbell, RN-BSN, MBA, CHC, FACHE

2012-2013 CMSA Board of Directors

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