

2013

Evaluation of the Marketing Strategies of the Case Management Society of America

Veronica Chepak

Dyson College of Arts and Sciences, Pace University

Follow this and additional works at: http://digitalcommons.pace.edu/dyson_mpa

 Part of the [Other Political Science Commons](#), [Public Administration Commons](#), [Public Affairs Commons](#), and the [Public Policy Commons](#)

Recommended Citation

Chepak, Veronica, "Evaluation of the Marketing Strategies of the Case Management Society of America" (2013). *Master in Public Administration Theses*. Paper 9.

http://digitalcommons.pace.edu/dyson_mpa/9

This Thesis is brought to you for free and open access by the Dyson College of Arts & Sciences at DigitalCommons@Pace. It has been accepted for inclusion in Master in Public Administration Theses by an authorized administrator of DigitalCommons@Pace. For more information, please contact rracelis@pace.edu.

**EVALUATION OF THE MARKETING STRATEGIES OF THE CASE MANAGEMENT
SOCIETY OF AMERICA**

BY

VERONICA CHEPAK

**SUBMITTED IN PARTIAL FULFILLMENT OF REQUIREMENTS FOR THE
DEGREE OF MASTER OF PUBLIC ADMINISTRATION
DEPARTMENT OF PUBLIC ADMINISTRATION
DYSON COLLEGE OF ARTS AND SCIENCES
PACE UNIVERSITY**

DECEMBER 2013

APPROVED BY _____

Abstract

The Affordable Care Act has specifically identified care coordination as a major component of many of its health reform initiatives. Case Managers are ideally suited to organize care coordination programs and implement these activities. The Case Management Society of America (CMSA) created the Model Care Act to promote the skills, qualifications and role of case managers in the healthcare industry.

There is extensive literature that illustrates the challenges nonprofit organizations face in incorporating business concepts such as strategic marketing. Some barriers to developing and implementing strategic marketing plans include: identity or “professionalism” in professional nonprofits, organizational culture and understanding of marketing concepts.

The purpose of this study was to assess whether there is a perceived value of case management to the public and other healthcare professionals. Additionally, the study identified existing barriers and recommendations to improve the current marketing strategy. A review of CMSA’s current promotion of case management was performed via questionnaires to case managers of the local CMSA chapters located within the lower New York geographic area. Additionally, leaders in the healthcare industry and at the national and local geographic CMSA organization were interviewed regarding the impact of promoting the case management profession.

The findings evidenced the need for the Case Management Society of America to expand their marketing strategies to the general public and the rest of the healthcare market. The value of case management to the public and other healthcare professionals has not been substantiated.

Key words: care coordination, case management, strategic marketing, and nonprofits.

ACKNOWLEDGEMENTS

I would like thank my professors at Pace University: Professor Mastronardi, Dr. Hormozi, Dr. Timney, Dr. Holtz and Dr. Knepper for their support and encouragement. Your words of encouragement corroborated that I made the right decision when I chose Pace University as the place to continue my education.

A special thanks to my friends in the Case Management Society of America and the Case Management Foundation for their assistance as I prepared my capstone proposal.

To my friends in the Hudson Valley and New York City Chapters of CMSA: your words and actions of encouragement throughout the process of completing my Master's degree meant the world to me.

To the management team at the CMO, Montefiore Care Management: Daniel Alexander, Ana Gouldborne, Sandra M. Mitchell, Kathe Byrne, Cathy Lynch, Janet Kasoff, and Anne Meara: I am gratified to work for a company that exemplifies the values of RESPECT in assisting employees achieve their educational goals.

Kathleen Francis-Harris, June Stewart, Kris Becker, Patricia Held-DiFabbio, and Rita Orlando: a very special Thank-You to all of you. You inspired me take to go back to school and further my education. The nursing profession is better because of people like you and I am honored to work with you every day.

To my family- I am so blessed to have you as my family but also as my friends. This journey could not have been completed without your love and support.

To my parents: You taught me that education and perseverance lead to the realization of your dreams. Thank you for all the love and encouragement you have given me each and every day.

Last, to my husband, John A. Chepak: who believed in me more than I believed in myself. Your love and encouragement has been one of the many gifts given to me and I am thankful every day to have you in my life.

Table of Contents

Abstract	2
Acknowledgements	3
List of Figures	5
Chapter 1. Introduction	6
Chapter 2. Literature Review	9
Chapter 3. Methodology	20
Chapter 4. Findings	24
Chapter 5. Data Analysis	37
Chapter 6. Recommendations	42
Chapter 7. Conclusion	47
Appendices	49
Appendix A	49
Appendix B	50
Appendix C	51
Appendix D	52
Works Cited	53

Table of Figures

Figure 1. Professional Background of Attendees	24
Figure 2. Are you a Case Manager?	25
Figure 3. Certification in Case Management	25
Figure 4. Years of Case Management Experience	26
Figure 5. Membership in CMSA	26
Figure 6. The Promotion of Case Management is important to you.	27
Figure 7. CMSA Promotes the Profession of Case Management effectively to other healthcare professionals.	27
Figure 8. CMSA promotes the profession of Case Management effectively to the general public.	28
Figure 9. CMSA has effectively defined who can provide case management.	28
Figure 10. CMSA has effectively defined the role of case management.	29
Figure 11. Case Management in an integral component of healthcare reform initiatives.	29
Figure 12. How can CMSA improve the promotion of Case Management?	30

Introduction

Nonprofit organizations are facing rising demands to function as business entities due to today's shifting economic trends. As a result of current economic conditions there is greater competition for funds available to nonprofit agencies. Nonprofit agencies have to modify their marketing strategies in order to increase consumer awareness of their mission, thereby, improving their sustainability and growth (McDonald, 2007).

Nonprofit agencies, historically, have had minimal exposure utilizing marketing concepts. As per Sosin (2011), nonprofit agencies have a tendency to “operate in institutional environments”. This mentality may benefit professional nonprofit agencies as consumers equate service with reputation. However, this environment can hinder an agency due to limited vision or strategic thinking outside their normal scope of practice and experience. A second barrier for nonprofit agencies is organizational identity. For purposes of this research paper, identity will be the perception of a specific agency's services, how those services are delivered to its consumers and how both of these are conveyed to the public (Sosin, 2011).

The Case Management Society of America (CMSA), a nonprofit organization for professionals in case management has initiated a marketing plan designed to promote how case managers can meet the demands of care coordination demanded by the Affordable Care Act. CMSA has defined “case managers as licensed healthcare professionals who provide assessment, planning, coordination, and advocacy to the patient and their families” ([ww.cmsa.org](http://www.cmsa.org), 2013).

In 2009, CMSA introduced the Care Management Model Act which included the standards for case management services with requirements on staff qualifications, case management role, authorized scope of services, payment of services, and training requirements.

It also included outlines for quality management programs and anti-fraud and consumer protections. On a national level, the organization concentrated their efforts of promoting case management through public policy initiatives and programs. Local chapters of the Case Management Society of America were encouraged to increase and improve their public policy efforts as well as increasing the education of consumers (www.cmsa.org, 2013).

There are over seventy local chapters of CMSA throughout the United States. In recent years, health care reform has created an increased need for case managers. Hospitals, health care agencies and insurance companies have had difficulty in staffing case management positions as a result of a reduced number of qualified professionals. While the career outlook for case managers has risen, local chapters have had difficulty retaining or augmenting membership. New York State, for example has four chapters: Albany-Capital, Long Island, New York City and Hudson Valley. Hudson Valley and New York City Chapters have had public policy committees for the last three years and have consistently held monthly meetings for their members and allied professionals for educational and networking purposes. The New York City Chapter covers the geographic region of all five city boroughs: Bronx, Brooklyn, Queens, Staten Island, and New York City. The Hudson Valley Chapter covers the following geographic area: Westchester, Rockland, Orange, Putnam and Dutchess Counties.

This applied research study will utilize summative evaluation research methods to examine and explore the marketing efforts of the Hudson Valley and New York City Chapters by analyzing the answers to the following questions and provide recommendations:

1. What have the New York City and Hudson Valley Chapters of CMSA done to promote the case management profession?

2. What is the level of awareness of this issue for members of the New York City and Hudson Valley Chapters of CMSA?
3. What is the level of awareness of marketing the case management profession for leaders in healthcare?

Literature Review

Nonprofits

Nonprofit agencies are facing mounting demands to become more business-like in their operations. McDonald (2007) indicates that “innovation plays a central role in the ongoing success of an organization.” However, there is concern that this emphasis on performance will adversely impact the mission of the non-profit agency. Despite these concerns, there has been limited research done regarding innovation in nonprofit agencies or achievement of their missions. Peter Drucker as cited by McDonald (2007) describes innovation as “one of only two basic functions of any business enterprise, the other being marketing.” McDonald (2007) was able to find that nonprofit organizations that used their core mission statement to motivate innovation were successful in achieving their organization’s mission goals. The mission statement, however, needs to be “clear and compelling” as well as foster an environment in which innovation can thrive.

Dart (2004) indicates that in order for nonprofits to become “business-like” they must first come to an understanding of what constitutes business behavior in a nonprofit organization.

As per Dart:

The basic distinctions between the nonprofit and business-like terms should be clear. From this basic characterization, nonprofit is understood to be organized around an interconnected nest of prosocial and voluntaristic values and goals with few references to the means and structure by which these values are enacted. Business-like activities are generally understood to be those characterized by some blend of profit motivation, the

use of managerial and organization design tools developed in for-profit business settings, and broadly framed business thinking to structure and organize activity. (Dart, 2004, p.294)

Additionally, Dart (2004) stated that nonprofits becoming business-like should also consider how this activity is carried out. Nonprofits need to organize differently in order to meet their goals. “Thus, business-like activities by nonprofit are activities that need not only different motivation or goal than traditional and/or institutionally legitimated nonprofit activity but also a different collection of tools to achieve these goals.”

Guo and Acar (2005) discovered that some nonprofits especially those in the case management community have formal collaborations for information sharing and client referrals. In spite of this, nonprofit agencies in the education, research, or social service industry usually have informal collaborative activities as they may require less strategic restructuring. The lack of formal collaborations for these nonprofits decreases the opportunities for resources, institutional and network perspectives. Guo and Acar (2005) hypothesize that more formal collaboration may lead to loss of autonomy and control.

Sosin (2011) further elaborates on this issue of relationships and the social expectations and constraints that nonprofit agencies operate under. Most nonprofits choose “...relationship strategies by which they seek to establish and preserve an image or status.” Nonprofits need to utilize strategic marketing in order to increase their value to the public:

This theory originally grew out of resource dependency theory (Pfeffer & Salancik, 1978), which posits that agencies that produce valued and scarce goods and services obtain power over their environment and thus avoid disruptive dependency on outsiders.

Those without such power become dependent on the outsiders and are forced to produce the output demanded by outsiders on the outsider's terms. (Sosin, 2011, p.1232)

This strategy allows nonprofit agencies to be innovative in not only increasing market position but also analyzing potential threats to their power source- the value of their services.

As per Hsu and Hannan (2005), identity plays a huge part in organizational forms or rather how the organization is viewed by audiences. Organizations need to strive for "institutional consolidation" of identity or an agreement about the expectations of that organization's identity:

A low degree of institutional consolidation creates conditions for conflicting demands on organizations, which causes confusion and ambiguity for organizational decision makers and hampers an organization's ability to negotiate its external environment. (Hsu and Hannan, 2005, p. 476)

Hsu and Hannan (2005) illustrated that creation of an identity makes it easier for the organization to measure satisfaction based on perceived values on that identity. They also illustrated that organizations need to pay attention to their environment to assess factors that can impact their identity as societal, economic, or ecological changes occur. An organization with an institutionally consolidated identity needs to be fluid while maintaining its value to their audience.

Nonprofit agencies have had issues with incorporating market orientation into their strategic planning. As per Alvarez Gonzalez, Santos Vijande, and Vazquez Casielles (2001), this occurs due to their internal orientation. This type of orientation is usually typified by internal management. The marketing plan in these organizations usually flows down from the

organization and what it hopes to offer. However, research has indicated that the process should be the opposite with the members determining the organization's mission. Alvarez Gonzalez et al. (2001) state:

In short, the essence of marketing is that it should begin with the "customer," not the organization. Marketing from the interior to the exterior should be replaced by marketing from the exterior to the interior. It should also be noted that these orientations do not appear to be the most appropriate for an organization that wishes to survive in the long term. (Alvarez Gonzalez, Santos Vijande, and Vazquez Casielles, 2002, p. 57)

Alvarez Gonzalez et al. (2001) illustrated that nonprofit organizations must achieve market orientation from both a cultural viewpoint and an operative one in order to demonstrate improvement in reaching their goals.

Shoham, Ruvio, Vigoda-Gadot, and Schwabsky (2006) indicated that most research has studied the impact of market orientation on performance and outcomes in the for-profit world. One of the barriers in researching the same for nonprofits is the need to find the "for-profit performance equivalent for welfare organizations or for advocacy groups." Additionally, nonprofits will need to utilize innovative market strategies due to their societal relationships and perceived values. These barriers give credence to the criticisms leveled at nonprofits that they do not manage market mechanism appropriately. Per Shoham et al. (2006), these issues have not given nonprofits the belief that the use of market orientation will improve performance.

Another issue affecting nonprofit organizations in the medical professions is the concept of "professionalism." Per Evetts (2003) "the concept of professionalism is an ideology used by a wide range of occupational groups in their claims for status and fame. This concept has at its

core “the concept of legitimacy and of professions as systems of control.” Professionalism is not just a method of “re-labeling” but can help define work identities as well as allow control of the discipline by people who are labeled in that profession’s identity.

Nonprofits need to build relationships as well as nurture ongoing relationships in order to be successful in their endeavors. Nonprofits are recommended to comprehend the needs of the community. Nonprofits need to become knowledgeable about any issue they tackle.

Additionally, they need to be “clear and organized” when talking about their organization (Zweibel and Golden, 2007). Furthermore, nonprofits need to improve their organizational capacity by developing a board with a comprehensive set of skills. Nonprofits can no longer work in a vacuum in order to survive. They need to build relationships with other agencies with similar missions in order to work effectively.

Relationships are also a major component in developing market orientations in nonprofit service organizations. Per Gainer and Padanyi (2003):

In a marketing environment, there is a basic division between those who consume the services or the messages the organization produces and those who provide the resources that are used in that production (Lovelock and Weinberg, 1989). (Gainer and Padanyi, 2003, p. 855)

Often the success of a chosen market orientation is easy to measure. However, in the nonprofit world, success is often measured utilizing a wide-range of quantitative measures. For-profit organizations often utilized a measurement tool such as return on investments (ROI’s) to evaluate success. Nonprofits, conversely, score success in terms of satisfaction or public opinion.

Gainer and Padanyi (2003) also illustrated that nonprofits can utilize the market orientation-performance relationship as long as the client culture relationship is incorporated in the action or behavior of that market orientation. They further recommended that it would be beneficial for agencies to start client-oriented activities before introducing client-oriented culture. This eliminates the critique of a top-down management style from those who provide the service and message and from those who receive the services from the non-profit organization.

Marketing and Nonprofit Organizations

Modi and Mishra (2010) illustrated that market oriented nonprofits were more successful in accomplishing their organizational mission than those that had minimal market orientation. Nonprofit organizations have historically been reluctant about the establishment of marketing practices in their organizations. This belief was influenced by the limited amount of research illustrating the importance of marketing to nonprofit organizations. Narver and Slater as cited by Modi and Mishra (2010) indicated that market orientation has three behavioral elements: customer orientation, competitor orientation and interfunctional coordination. Modi and Mishra utilized a modified scale with some agreed upon components of nonprofit market orientations such as beneficiary orientation and donor orientation to measure nonprofit market orientation. This study allowed nonprofits to view empirical data to validate the integration of market orientation.

Chad, Motion, and Kyriazis (2013) demonstrated how the use of a praxis framework can assist nonprofits to implement market orientation philosophies. Nonprofits have institutional barriers that they must overcome in order to implement market orientation successfully. The use

of such a framework will allow the nonprofit to transcend from an internal orientation to one that is customer focused. This particular framework allows for the development of skills and mindsets needed in the organization for market orientation implementation.

Nonprofit organizations should also utilize a tool such as the Program Evaluation Grid to evaluate programs. The Program Evaluation Grid evaluates programs on five specific values areas: strategy, effectiveness/quality, financial, program importance to key stakeholders, and marketing (Kluger, 2006). Nonprofits need to evaluate their marketing efforts in an increasingly competitive world in order to be more successful:

A market survey with external groups, such as the funder, client, community key stakeholders, will provide perspective on how the agency compares with others offering the same service. A program that is viewed as the best, or one of the best, providers of a particular service, receives a high rating on this factor. A program that does not compare well with other providers of the services receives a low rating. Additionally, what can be done to improve service quality for a low-rated program and capitalize on a highly-rated program to its competitive advantage? (Kluger, 2006, p.40)

The importance of marketing of nonprofits in healthcare related organizations was illustrated by Rutowski, Guiler, and Schimmel (2009). Marketing is seen as a necessary element for nonprofits to succeed in a competitive world. However, the marketing must demonstrate an organizational commitment to the mission and value of the clients they serve. Rutowski, et al. (2009) recommend benchmarking as a way to develop marketing strategies. Furthermore, these benchmarking efforts need to be re-tested periodically to assess their ongoing validity to their customers.

Transferring marketing knowledge to nonprofit organizations needs to be evaluated in terms of understanding how this process occurs. Andreasen, Goodstein, and Wilson (2005) state:

“If marketing is going to play a larger role in nonprofit organizations, it is critical that outsiders promoting marketing appreciate the uniqueness of the environment. They will find the transfer of concepts and tools a challenging task because of resource constraints and culture differences and because the offerings are different in important ways. As our respondents suggested, it takes a special type of person to navigate the new environment and bring the concepts with them. Thus the transfer of concepts is itself a marketing challenge.” (Andreasen, Goodstein, and Wilson, 2005, p.57)

Nonprofit organizations need to assess how other nonmarketers learn about marketing theories and tools in order to educate themselves and/or private marketing firms in transferring marketing skills.

Case Management

Tahan and Campagna (2010) studied the practice of case management across various settings with an emphasis on the roles and functions that they perform on an average work day. The study cited fundamental skills and knowledge required by those practicing case management. Additionally, the study projected practice changes that may occur in the future. Based on this study and previous function and role studies the Case Management Society of America (CMSA) developed the Case Management Model Act (www.cmsa.org):

The Case Management Model Act establishes the key elements of a comprehensive Case Management Program that should be implemented at both the federal and state levels.

The Case Management Society of America (CMSA) encourages public policymakers to

review and use the provisions of this CM Model Act for legislative and regulatory initiatives geared to reducing health care costs, improving the coordination and transitions of care, enhancing quality, and promoting better clinical outcomes.

www.cmsa.org

The promotion of the model act and the profession has been limited to those who attend CMSA meetings at the national and local levels and select politicians. Therefore, the value of case management remains ambiguous to employers of case managers and to the public that they serve.

The issue of identity has plagued case management professionals since its inception. Some of the confusion is related to the fact that there are a variety of professionals labeling themselves case managers. Additionally, case managers are found under many different titles such as care coordinator, patient navigators, health coach, etc. As per Powell (2011), the confusion is a problem for case management as they have two levels of clients: professionals and consumers. Powell also indicates this confusion has not aided efforts to educate consumers about who case managers are and what they do:

“Names are important. And as some say, ‘words are things.’ But on a deeper level, words are symbols, as well. They capture entire concepts and sometimes they portray a ‘promise’. For example, although many consumers are not clear what a ‘case manager’ is and does, a case manager holds the promise of support and help during their experience in a complex, scary, and ever-changing healthcare environment.” (Powell, 2011, p.49)

Watson (2010) illustrates that the issue of identity has a greater impact if case management is to be a key player in health care reform. Health care reform is calling for improved care

coordination. However, there is still discussion on whether case management is clinical and impacting the health of patients or is administrative limited to utilization review type services. Watson strongly recommends that case managers as well as their allied professional organizations advocate for their profession. Per Watson:

“Case Management is far more than ‘paperwork,’ of that we have no doubt. The issue, however, is not what we believe, but what the public perceives. The Commission for Case Management Certification will continue to do whatever it can to promote case management and the distinction of certified professionals. Case managers, certified or not, also have an important role to play by demonstrating their value to employers, client/patients and the public. Together, all of us can powerfully advocate not only for ourselves, we can also educate and empower good choices in health care that protects the public and promote quality.” (Watson, 2010, p.303)

Carter (2011) concurs with the need for case managers to advocate for their profession. The 2009 Case Manager Role and Functions Study illustrated that case managers provide their knowledge and expertise to patients that not only meets the needs of the patients but provides sought after outcomes such as increased patient satisfaction.

“As case managers we need to ‘toot our own horn’ individually and collectively to promote our practice to our patients/clients, our employers, the healthcare teams with which we collaborate, and within the broader community of healthcare practitioners. Case Managers from every discipline and background must capitalize on the ongoing healthcare discussion and become informed and empowered participants in the debate. Unless we make our voices heard, we run the risk of getting lost in the ever widening

chorus of job titles and roles, such as care managers, care coordinators, patient navigators, guided care nurses and the like. We need to draw attention to the important roles case managers fulfill as patient advocates and stewards of scarce and costly care and treatment resources.” (Carter, 2011, p. 16)

Summary

The literature review has illustrated a multitude of reasons why nonprofit agencies need to market their mission more effectively. Additionally, the literature review demonstrates the need for proactive promotion of professional organizations, such as case managers in order to legitimize their importance to the changing healthcare market. Furthermore, the literature review reveals the many barriers that nonprofit agencies face from their internal organizational structure as well as from external factors in establishing and implementing effective marketing strategies. This research will evaluate the level of marketing of the case management profession from the pools of attendees at the Hudson Valley and New York City based CMSA Chapter meetings. Additionally, this research will also evaluate the level of awareness of leaders within healthcare upon marketing exposure to the case management profession. Furthermore, this research study postulates that leaders in healthcare will have a higher awareness of the profession and the potential need for improved marketing strategies for the promotion of case management from both the local and national Case Management Society of America.

Methodology

This applied research study will utilize summative evaluation research methods to examine and explore the marketing efforts of the Hudson Valley and New York City Chapters by analyzing the answers to the following questions and provide recommendations:

1. What have the New York City and Hudson Valley Chapters of CMSA done to promote the case management profession?
2. What is the level of awareness of this issue for members of the New York City and Hudson Valley Chapters of CMSA?
3. What is the level of awareness of marketing the case management profession for leaders in healthcare?

Data Collection

The data regarding awareness levels of members of the Hudson Valley and New York City Chapters of CMSA will be collected via a questionnaire that will be given to attendees at a monthly meeting. Data will also be collected by interviews with the Assistant Vice President of Network Management at a major medical center, the Director of Continuing Education and Training at a major medical center, a member of the National Board of the Case Management Society of America and Chapter leaders of both the Hudson Valley and New York City Chapter. The data collected will be collected to determine the following questions:

- 1. What have the New York City and Hudson Valley Chapters of CMSA done to promote the case management profession?**
 - The interviews with both chapter leaders of Hudson Valley and New York City will be the primary source of the information for answering this question. In

researching the answer to this question it will be necessary to ask these leaders the following questions:

- What programs or education has your chapter created to increase awareness of the case management professional?
- Did you utilize any materials offered by the National CMSA?
- Why did you feel it necessary to develop these programs?
- Did you develop programs that were previously offered by other chapters?

2. What is the overall level of awareness of this issue for members of the New York City and Hudson Valley Chapters of CMSA?

- This question will be answered by administering a questionnaire to attendees at a Hudson Valley or New York City Chapter monthly meeting. This part of the study can be classified as a post test control group design. The group will be made of attendees at the meeting who are usually members of the chapter, non-members, and allied professionals such as vendors who may have sponsored the meeting. The independent variable will be the program implemented by each of the chapters and the dependent variable that will be measured is the effectiveness of the program. This will be achieved by asking participants if they are aware of the promotion programs; how effective they feel the program is and also if they feel this is an issue for case management.

3. What is the level of awareness of marketing the case management profession for leaders in healthcare?

- This question will be answered by interviews with the Assistant Vice President of Network Management at a major medical center, the Director of Continuing

Education and Training of the CMO at a major medical center and a current member of the national Board of Directors of the Case Management Society of America. In researching the answer to this question it will be important to ask each of the participants the following questions:

- How would you define the case management profession?
 - Are you aware of the programs developed by the Hudson Valley and New York City chapters to promote the profession of case management?
 - Do you feel there is a need to promote the profession of case management?
 - If not aware of these programs, what do you feel are barriers to promoting case management?
 - What recommendations would you give to improve the effectiveness of such programs?
- In interviewing a member of the national Board of Directors of the Case Management Society of America, it will be critical to ask the following:
 - What is your vision of case managers in the current and future health care market?
 - Does your view of case managers differ from your predecessors or anticipated successor?
 - Have you and the national Board of Directors developed a marketing plan on a national level?
 - What efforts have been made to assist local chapters in developing programs?

The interviews with the leadership and members of each chapter will be completed within a two week period as their monthly meetings are usually a week apart. The interviews of the local chapter Presidents will be carried out prior to the meetings in order to gain background knowledge of the programs offered at the meetings. Based upon this background knowledge changes may be made to the questionnaire administered to attendees of the meeting.

During the same timeframe, face to face interviews will be set up with the Associate Vice President of Network Management at a major medical center and the Director of Continuing Education and Training of the CMO at a major medical center, this may be subject to change depending on the participant's schedules. A telephone interview will also be set up with a member of the national Board of Directors of the Case Management Society of America during this time period.

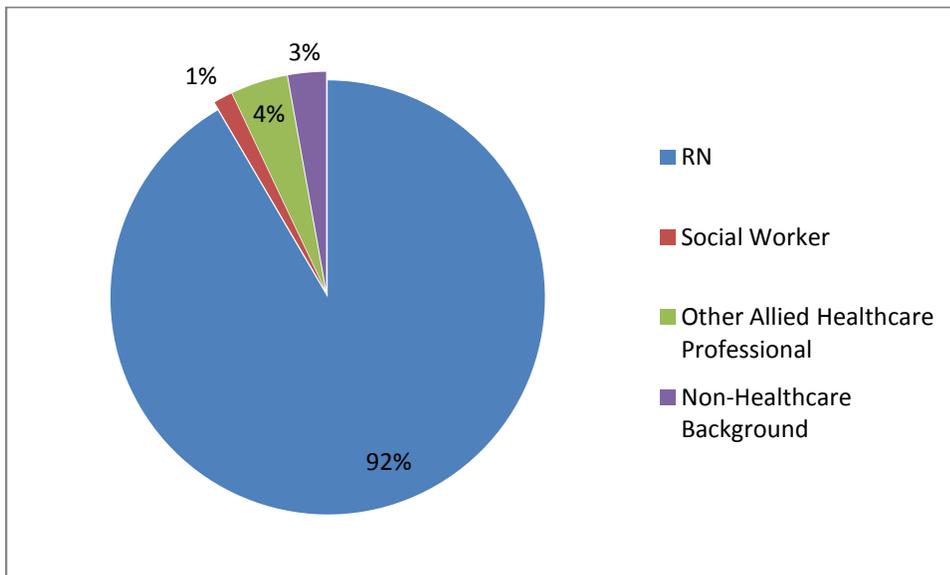
The questionnaire will have a disclaimer that the results and data will not display any identifying information of any of the participants. The interviews with each participant will be limited to a maximum length of 30 minutes.

Findings

In order to assess the level of awareness of the need to promote the case management profession, a survey was handed out at a Hudson Valley Chapter and New York City Chapter meeting of the Case Management Society of America. At the New York City meeting seventy-six (76) surveys were handed out of which fifty-one (51) surveys were returned but only forty-three (43) were utilized to analyze the findings due to issues of validity. At the Hudson Valley meeting, forty-seven (47) surveys were distributed of which thirty-nine (39) were returned but only twenty-eight (28) of the returned surveys were used as a result of issues of validity. Despite written and verbal instructions involving question twelve, both groups had respondents who did not answer the question correctly thereby impacting the validity of the response.

Figure 1 illustrates the professional background of the attendees at both meetings:

Figure 1. Professional Background of attendees



One of the purposes of the Chapter meetings is networking among case managers and those who work in the field of case management. Figure 2 indicates how many of the

respondents of both meetings identified themselves as case managers. Figure 3 further breaks down how many of those who identified themselves as case managers are certified case managers. Figure 4 shows the years of experiences of those currently in the case management field. Membership in CMSA is denoted in Figure 5.

Figure 2. Are you a Case Manager?

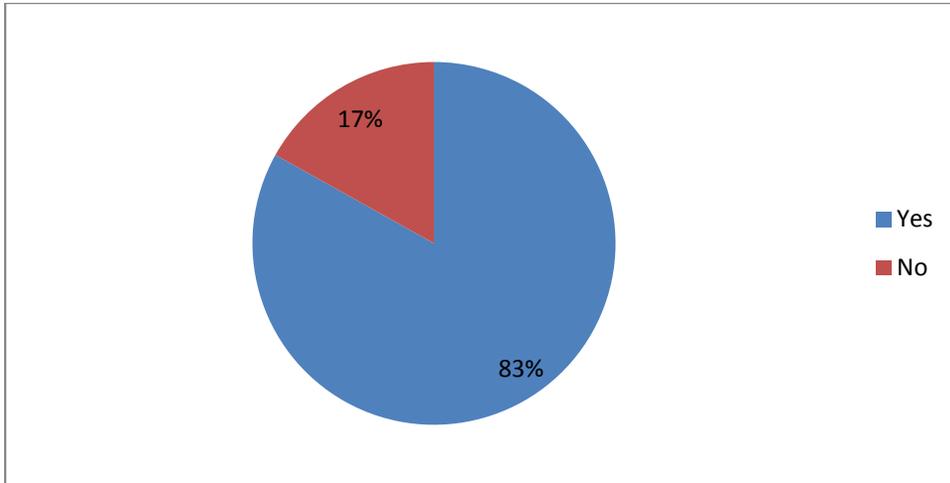


Figure 3. Certification in Case Management.

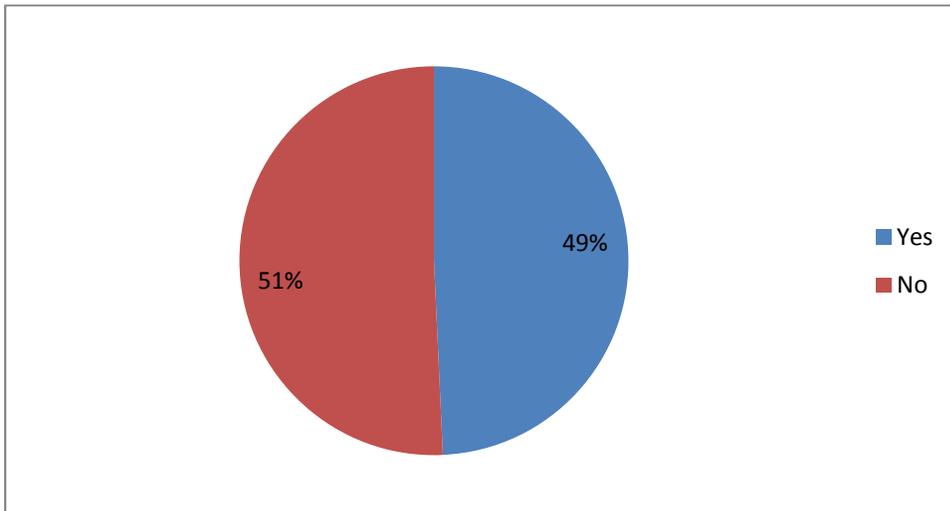


Figure 4. Years of Case Management Experience.

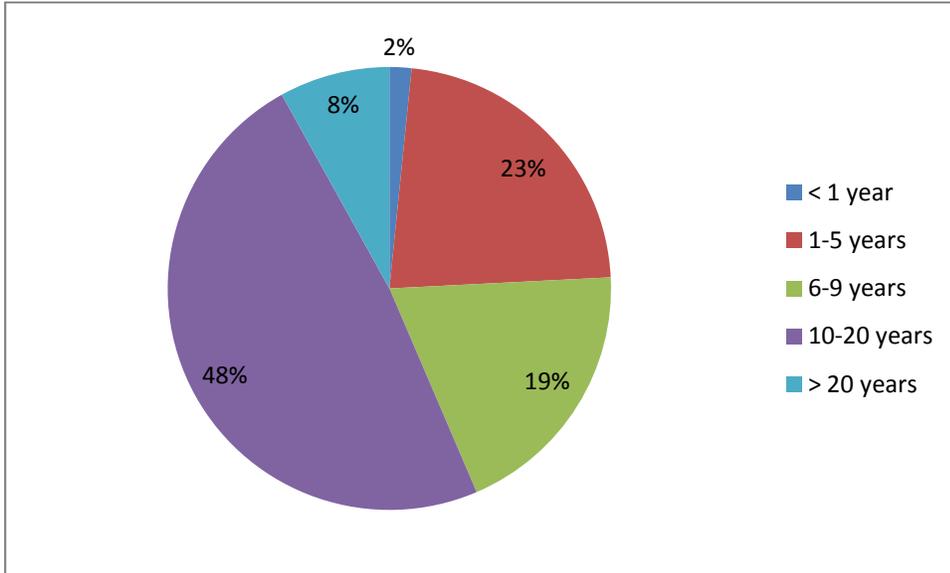
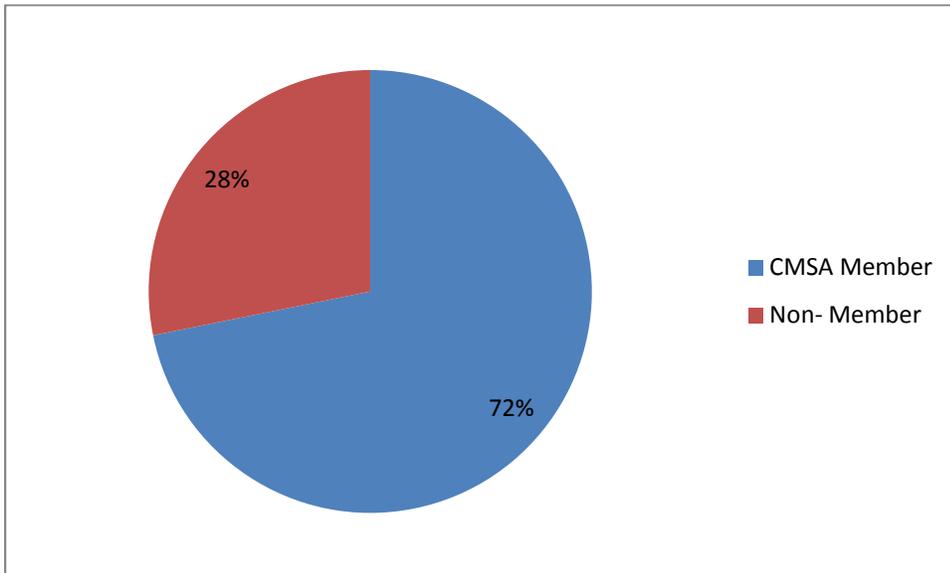


Figure 5. Membership in CMSA.



The survey also asked respondents to indicate the importance of the promotion of case management as shown in Figure 6. Respondents were asked to rate how well CMSA promoted the profession (Figure 7 and 8) as well as, utilizing the definition of case management as outlined by CMSA, how well CMSA defined case management (Figure 9).

Figure 6. The Promotion of Case Management is important to you.

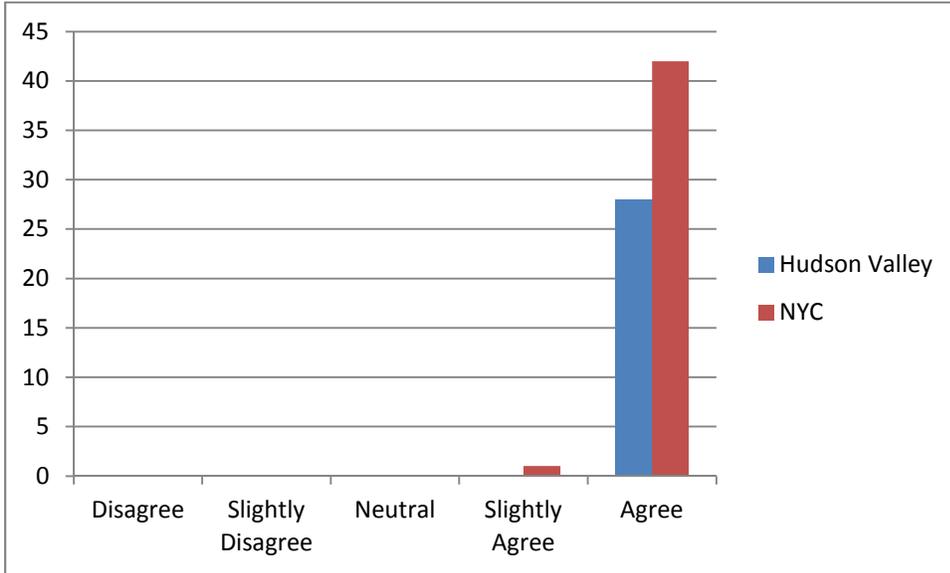


Figure 7. CMSA promotes the profession of Case Management effectively to other healthcare professionals.

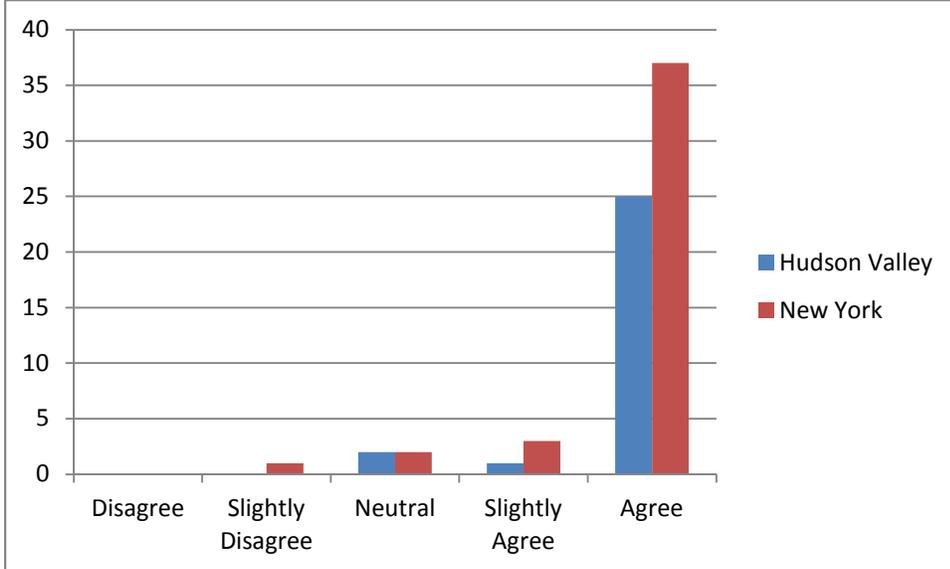


Figure 8. CMSA promotes the profession of Case Management effectively to the general public.

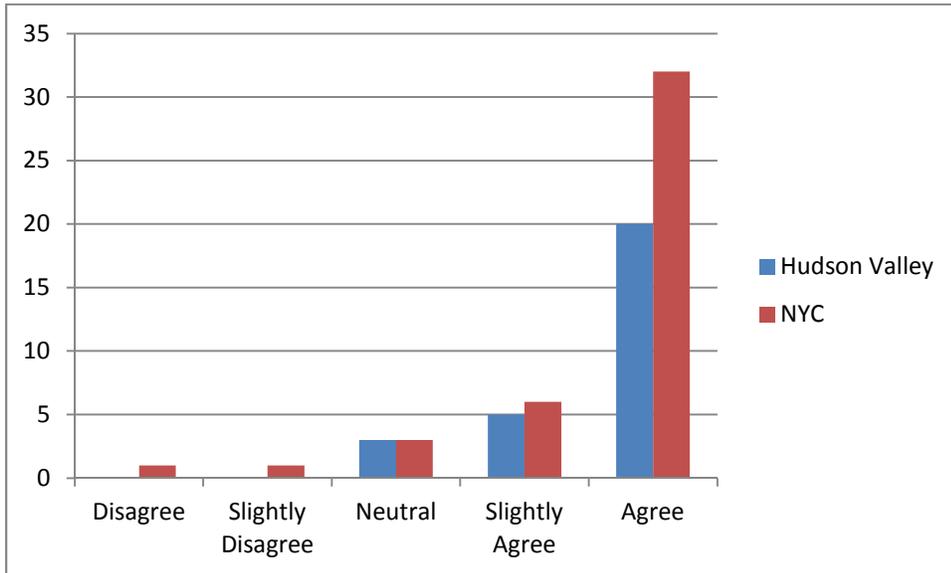
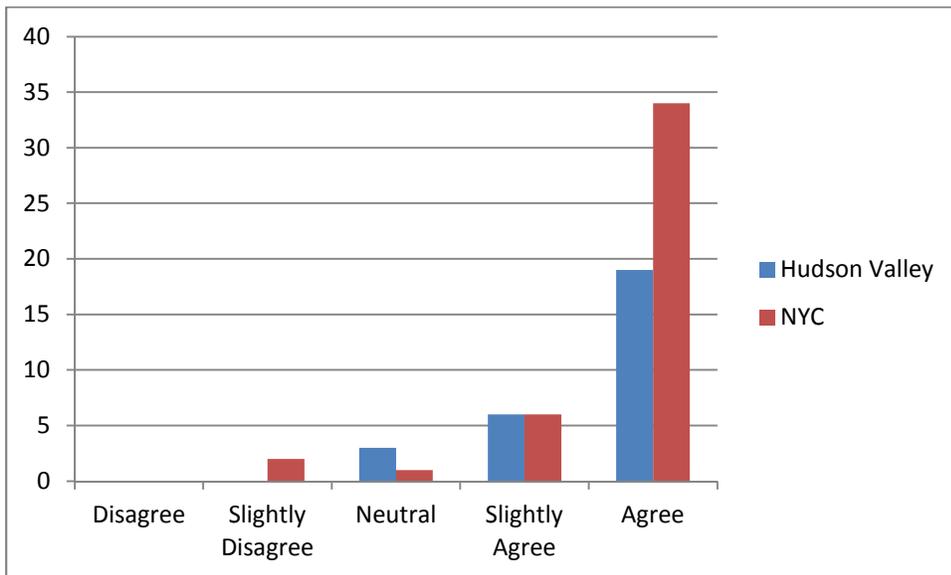
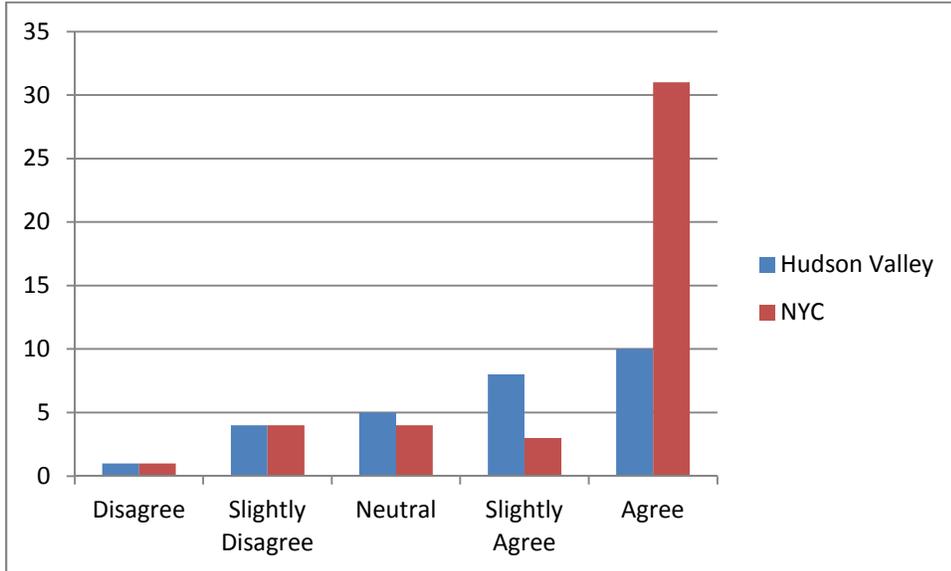


Figure 9. CMSA has effectively defined who can provide case management.



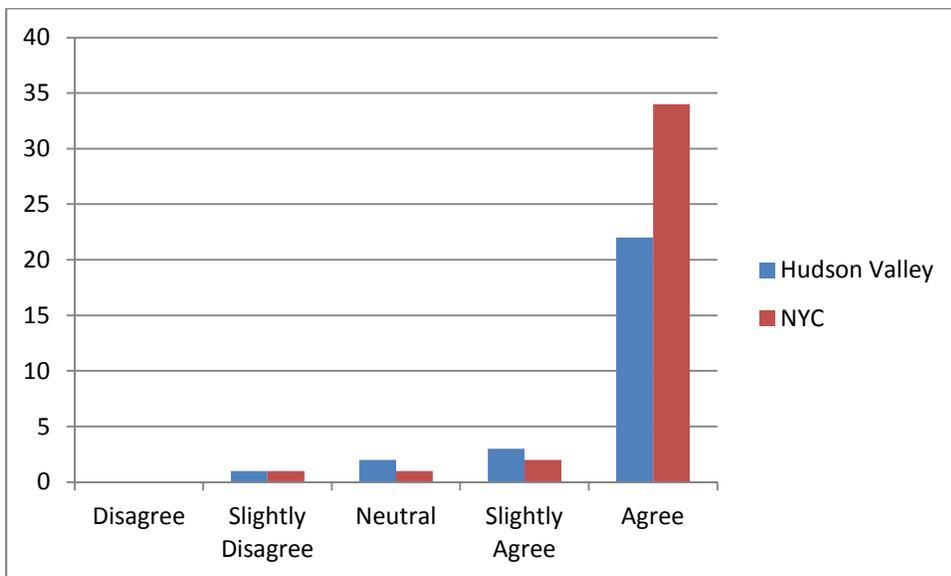
Furthermore, respondents were asked based on their knowledge of the case management role as defined by CMSA, how well they explained the role of case management as shown in Figure 10.

Figure 10. CMSA has effectively defined the role of case management.



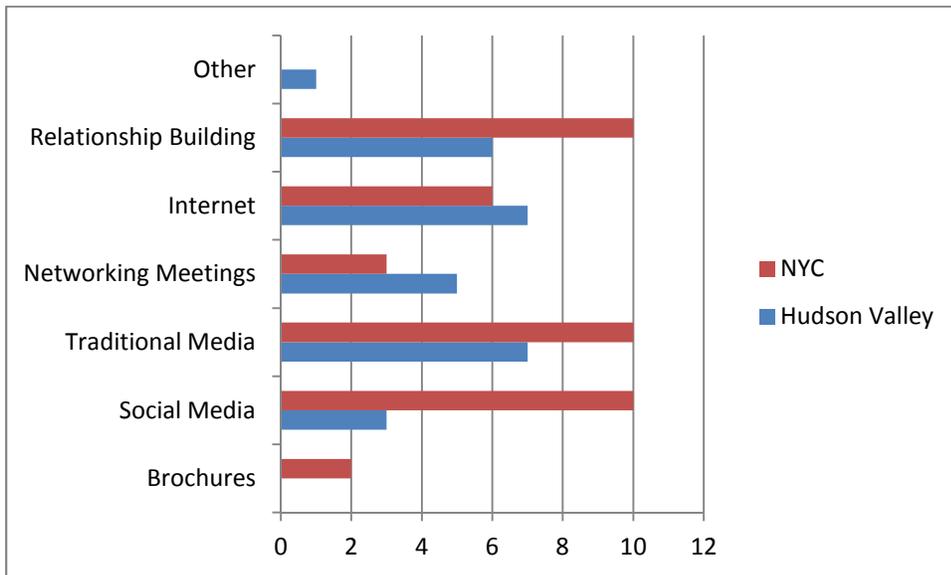
As the Affordable Care Act has delineated care coordination to be a major element in many of its initiatives, respondents were asked if they felt case management was an integral component of healthcare reform initiatives (Figure 11).

Figure 11. Case Management is an integral component of healthcare reform initiatives.



Respondents were also asked how CMSA at the national and local levels can improve the promotion of case management. They were asked to number in order of importance various methods of marketing as well as any other option they believed would improve CMSA’s marketing strategies (Figure 12).

Figure 12. How can CMSA improve the promotion of Case Management?



In Figure 12 other options suggested by respondents included outreach to nursing, social work and medical programs to educate students about case management, encouraging hospitals to add case management to their new employee orientation and increased lobbying in political arenas.

The second phase of this study included interviews conducted with a chapter leader from both Hudson Valley and New York City. The interviews were set up with minimal difficulty as they were conducted prior to the Chapter meetings. The questions were based upon whether the Chapter had a defined marketing strategy. As one chapter had a defined marketing strategy (Appendix A), some of the questions differed from the chapter with no defined marketing strategy (Appendix B).

The following outlines the discussion of both interview sessions, providing a summary of the key points from each of the interviews. Interview I was conducted with one of the chapter leaders of New York City.

Interview I

- Marketing strategy is to inform attendees at monthly meetings about the profession and membership in CMSA and to become involved. It also involves relationship building with others in the case management community such as Workmen's Compensation and Long-Term Care. Additionally there was a case presentation emphasizing how case management was integral during the Tragedy in Arizona.
- Marketing program was designed without any resources from National CMSA.
- Resources to develop and implement marketing programs have come from other case managers and facilities in their jurisdiction.
- As Case Management is integral to healthcare reform it was necessary to build these programs as a forum for the profession.
- In order to promote the profession to the general public, the chapter has participated in health fairs at local hospitals. Furthermore, they have participated in a leadership forum for a Master's in Public Health Program at a local university.
- Speaker evaluations, verbal and informal feedback have been utilized to evaluate marketing strategies. They have also been used to assess issues relevant to the members as well as make changes to the marketing strategy.

The second interview was conducted with a chapter leader from the Hudson Valley Chapter of CMSA.

Interview II

- Promotion of the case management profession is one of the chapter's goals.
- Case Management is integral to healthcare reform initiatives.
- Case managers and those who regularly attend the meetings are assertive about promoting case management. It is unknown if those who don't attend are disinterested.
- At a national level, the organization has not done enough to promote the profession or provide resources to assist chapters or the general membership in their marketing strategies.
- CMSA needs to increase on a national level their political influence.
- CMSA needs to improve their marketing to the general public by defining the profession and who can provide case management services.
- Barriers exist among the CMSA organizational hierarchy. Some leaders appear to have their own personal agenda instead of the needs of the organization as their priority.
- There is no formal marketing strategy to promote case management beyond the reminder to attendees at monthly meetings to promote the profession

Additional interviews were conducted with leaders in the healthcare industry to assess their awareness of CMSA's marketing of the case management profession. Three interviews were conducted. The first interview was with a Senior Director of Continuing Education and Training at a Major Medical Center. The second interview was with an Assistant Vice President of

Network Management at a Major Medical Center and the third interview was with a member of the National Board of the Case Management Society of America (CMSA). Fortunately, as these respondents had been asked and informed of the time period for data collection during the proposal stage of this research study, there were no issues in setting up interview times. The interview conducted with the National Board of CMSA member differed from the interviews with leaders in healthcare (Appendix C). The reason for the difference was to assess the insight of leadership, within the organization regarding the promotion of case management (Appendix D). Highlights of the interviews follow:

Interview III: Senior Director of Continuing Education and Training

- Case Management is defined as a process in which a patient is managed in different phases such as assessment, implementation and evaluation. It is the ability to effectually design a comprehensive plan of care with interval re-evaluation.
- Case Managers utilize skills such as motivational interviewing to improve patient engagement and self-management.
- Currently reviewing case management in order educate, assess and formalize the case management process. This review also includes an assessment of the tools the case managers will need to effectually provide case management services.
- Case Management is integral to healthcare reform initiatives. Care coordination is a major component of many of the Affordable Care Act's initiatives.
- Case Managers are the skilled experts that provide care coordination activities
- The Case Management profession needs to educate the public and other healthcare workers about how a comprehensive care plan can improve outcomes.

- The profession of Case Management needs to promote itself in order to demonstrate its value to the healthcare community.
- Case Management also needs to clearly define who they are by indicating the skills and education with a background of a case manager.
- Case Management must clarify their professional identity.
- Unaware of any marketing strategies for the promotion of case management at the local or National level of CMSA
- Effective leadership with clearly defined goals and agenda are needed within the CMSA organization to promote the profession.
- Recommendations to improve the promotion of case management include: increase web-based presence; improve website, local and national; increase research studies that illustrate the evidence-based improved outcomes of case management; relationship building with other professional organizations, and consulting with marketing experts.

Interview IV: Assistant Vice President of Network Management

- Defines case management as having many moving parts in order to support patients, providers and families in order to establish care plans that encompass medical and psych-social aspects.
- Case Managers are able to identify the real reason people find it difficult to comply not only with complex medical issues but simple medical directions.
- Case Managers empower, when possible, and step in to assist and remove barriers when patient empowerment is not possible in order to help patients adhere to their plans and be as healthy as it is possible for them.

- Healthcare Reform has many moving parts especially with Accountable Care Organizations and population health. Organizations will not be successful if they don't integrate case management into their infrastructure.
- The promotion of the case management profession is important as there is much misunderstanding and confusion among healthcare professionals about case management.
- Some awareness of the marketing strategies of the local Chapters of CMSA due to staff involvement in the organization.
- A barrier in promoting case management is the lack of evidence-based research documenting the effectiveness of case management. Additionally, some of the associated professional bodies do not educate on case management services.
- Recommendations to improve the promotion of case management include partnering with big healthcare systems who may have resources exemplifying case management, outreach to medical, nursing and other healthcare professional programs to do clinical rotation through case management and to improve efforts to let the general public know what case management can do for them.

Interview V: National Board of Director Member

- The role of case management is becoming increasingly important. It is gradually becoming an essential component of healthcare in the United States. Each discipline has their role to optimize a person's health. Case Managers coordinate all these components and interdisciplinary teams in order to maximize their potential and improve the health of the body.

- Case Management is integral to healthcare reform initiatives due to the National Quality standards and studies set forth by the Affordable Care Act which requires better care for individuals and populations. Case Managers can address these issues.
- The National Board of CMSA has a fiduciary responsibility to follow and fulfill CMSA's missions and value statements.
- CMSA wants to be the trusted source for case management intervention and activities.
- Case Management is the best kept secret in healthcare.
- Congress and the Washington bureaucracy espouses the values of case management but has not acted or implemented these activities.
- The National Board of CMSA is currently in the process of developing a strategic plan to bring case management to the general public. The goal of this plan is to have someone from the public say "Is there a case manager available?"
- Local chapter resources and support will be incorporated into this marketing strategy.
- In order to promote the case management profession there needs to be a clear definition of who and what case management is and what it is not. Additionally, an assessment needs to be performed to ascertain how to meet the needs of the members of CMSA. It has to be a multi-layer approach in order to help members and put out the message of CMSA.
- CMSA needs to remember that the membership of twenty years ago is different than today.

Data Analysis

The first goal of this research study is to evaluate the marketing efforts of the Hudson Valley and New York City Chapters of CMSA. The second goal is to evaluate the level of awareness of leaders within the healthcare industry upon marketing exposure to the case management professional. These evaluations will provide evidence that leaders within the healthcare industry have a greater awareness of the profession and the potential need for improved marketing strategies for the promotion of case management from both the local and national Case Management Society of America. The findings will be assessed utilizing the three research questions:

1. What have the New York City and Hudson Valley Chapters of CMSA done to promote the case management profession?
2. What is the level of awareness of marketing the case management profession for leaders in healthcare?
3. What is the level of awareness of marketing of the case management profession from the pool of attendees at the Hudson Valley and New York City based CMSA Chapter meetings.

Local Chapter Promotion of Case Management

The Hudson Valley Chapter did not identify a marketing plan beyond advocating the profession at meetings. The New York City Chapter, however, defined their marketing plans as educational outreach and relationship building. The New York City Chapter also evaluated their methods via speaker evaluations and formal and informal feedback mechanisms. Nonetheless, this plan did not appear to have specific benchmarks or have a goal that they wanted to achieve via the marketing plan as recommended by Rutowski, Guiler, and Schimmel (2009). Despite

lacking a market orientation plan and evaluation, respondents among the pool of attendees viewed these efforts as successful. This may be due in part to respondents having different understandings of what strategic marketing plans should be as discussed by Dart (2004). Conversely, leaders in the healthcare industry were unaware of any specific marketing effort employed to promote case management from either the Hudson Valley or New York City Chapters. They specified a need to improve the marketing efforts of the profession at the Chapter level by improving their strategic plans.

Healthcare Leader Awareness of Marketing Case Managers

Interviews with leaders in the healthcare industry revealed that there was confusion regarding who and what purpose case management serves. There were also additional differences in how each Chapter leader viewed their marketing efforts and the efforts of National CMSA. This supports Dart's (2004) finding that non-profits need to understand what comprises business activities such as marketing.

Furthermore, all interviewees indicated that identity was an issue for the profession. One of the interviewee's responses elaborated on this issue in relation to the multitudes of titles that may identify a case manager. As per Powell (2011) this becomes a barrier in educating consumers on who case managers are and what they do. This also collaborates Sosin's (2011) finding that nonprofits strive to sustain an image or status and will choose a marketing strategy that will enhance their usefulness to the public.

The interview with the National CMSA board member indicated a high level of awareness of its need to promote the case management profession. While there had always been some level of marketing strategy at the National level, future plans will focus on the mission and vision statement of the organization while maintaining fiscal responsibility. As per Modi and

Mishra (2010), these types of marketing plans have historically been successful. Additionally, the National Board is hoping to evaluate the needs of the consumers of case management services as well as their membership in developing a multi-layered strategic marketing plan. Gainer and Padanyi (2003) recommended that relationship building is necessary among those who receive the services and those who provide the services in order to succeed in terms of satisfaction or public opinion.

The interviews with leaders in the healthcare field specifically indicated an awareness of the need to promote the profession of case management in order to meet the standards of care coordination set forth by the Affordable Care Act. Additionally, they provided recommendations to improve the marketing strategies. Relationship-building was one of the recommendations mentioned by a majority of respondents. Zweibel and Golden (2007) indicated that in order for nonprofits to succeed they need to build and nurture relationships with other organizations with similar missions.

Member Awareness of Marketing Case Managers

Attendees at both meetings believed that CMSA had done a good job promoting the case management profession to other healthcare professionals and to the general public. As most attendees at both meetings were registered nurses or other allied healthcare professionals, their understanding of successful marketing strategies may differ from those in leadership positions.

Furthermore, as most chapter meetings have a networking component in which informal collaborations are built among professionals and entail less strategic structuring, this may lead attendees to assess the marketing strategies of CMSA as successful. Guo and Acar (2005) found this same aspect among nonprofit agencies in the social service industry. Guo and Acar indicated that these types of informal collaboration limited the opportunity for institutional and

network perspectives. Leaders in healthcare who may have to contend with other non-case management healthcare professionals may see more confusion and misunderstanding as to the role of case management in healthcare.

Hsu and Hannan (2005) illustrated that identity is a major component on how organizations or professions are viewed. Although the findings among attendees at both meetings indicated satisfaction in the way CMSA defined case management, there was more level of dissatisfaction noted among respondents.

Overall, the respondents agreed that case management is integral to healthcare reform initiatives and that the promotion of the profession is essential. This further illustrates the need for case management to rectify the issue of identity in order to demonstrate how case management can be a key player in healthcare reform as indicated by Watson (2010).

Among the surveyed respondents, the common methods to improve the promotion in both Chapters were traditional media such as television, print and radio and relationship building. However, the New York City Chapter rated social media as important as the other two recommendations and the Hudson Valley Chapter indicated internet or improving web-based presence. This correlates with the multi-layer strategic planning initiative anticipated to be implemented by the National Board of CMSA.

Key Points of the Analysis.

The findings of this study illustrate a definite need for the Chapters to improve their marketing efforts in promoting the case management profession. Within the organization, there appears to be a fair amount of satisfaction with how case management is promoted, however leaders in the healthcare industry are not aware of these marketing efforts. In addition, they have

indicated a lack of knowledge on the case management profession with other healthcare professionals and the general public.

Leaders in the healthcare industry collaborate with a variety of healthcare disciplines. Healthcare reform initiatives that have care coordination as a major element hope for improved health outcomes while decreasing healthcare costs. CMSA has denoted through their Case Management Model Act and their current marketing plan that case managers are ideally suited to leading care coordination programs. A lack of knowledge on the skills and education needed by case managers as well as their role will not aid CMSA in demonstrating their value to the healthcare industry.

Healthcare leaders have a better understanding of how promoting the case management profession inadequately impacts not only the case management profession but all of healthcare. Therefore, leaders in healthcare have illustrated a greater awareness of the profession and the need to improve marketing strategies for the promotion of case management from both the local and national Case Management Society of America (CMSA).

Recommendations

This study, although limited in scope due to time constraints, overwhelmingly illustrated that case management is integral to healthcare reform initiatives. Furthermore, it supports the notion that case management needs to prove their value to the public and healthcare by emphasizing the promotion of the profession in their marketing efforts.

Applications for Practitioners

Case managers need to advocate for their patients and for their profession. Evetts (2003) indicated that professionalism in the context of nonprofit organizations enhances legitimacy. As one of the chapter leaders interviewed indicated those who attend the meeting are aware of the issues and are advocates for the profession but the attitudes and beliefs of those case managers who do not attend meetings are not known. Additionally, those case managers who attend meetings and are continuously networking may have an idealistic understanding of how other healthcare professionals and the public view them.

Leaders at the Chapter level of CMSA would benefit from additional training on marketing concepts and strategic planning. Both chapter leaders indicated they had limited exposure to marketing programs. Zweibel and Golden (2007) indicated that nonprofits need to enhance organizational competence by improving the skill sets of their board members. CMSA will need to include in their strategic marketing plan education for Chapter leaders on marketing strategies while incorporating organizational mission and values.

CMSA at the national level appears to understand the importance and need of promoting the profession of case management. The literature review illustrated several concepts and tools that nonprofits can utilize to develop marketing strategies. Chad, Motion, and Kyriazis (2013)

recommended the use of a praxis framework. A praxis framework concedes time for organizations to acquire the skills and conceptual thinking required to put forth a market-oriented strategy. Furthermore, the use of marketing experts in formulating and implementing a marketing strategy was recommended by one of the respondents. CMSA will need to heed the warning espoused by Andreasen, Goodstein, and Wilson (2005) that indicated that nonprofits should utilize outsiders who can understand the distinctiveness of the organization. Marketing experts can utilize this awareness to transfer their marketing knowledge and strategic planning within the framework of that organization's cultural environment.

Since the respondent from the CMSA's National Board of Directors indicated a need for fiscal responsibility to uphold the organization's mission and values, benchmarks need to be included in the strategic marketing plan. Rutowski, Guiler and Schimmel (2009) advocate the importance of marketing in the nonprofit sector as long as the strategy remains committed to the organization's mission and values. They further recommend benchmarks in the planning stage as well as periodic re-evaluation of these benchmarks to assess their validity to the client.

Kluger (2006) recommended that nonprofits organizations use a Program Evaluation Grid to evaluate marketing programs. Healthcare has become an increasingly competitive field. The Affordable Care Act has made care coordination a major component in its initiatives. A majority of these initiatives have potential for additional funds attached to them based upon cost sharing and savings. Utilization of the Program Evaluation Grid or similar tool will enable CMSA to assess their marketing endeavors in areas of strategy, effectiveness, finances, importance to customers, and marketing. This will allow CMSA to enhance their message that case managers are the experts in care coordination.

A recommendation that was suggested by both surveyed and interviewed respondents was the potential to build partnerships with other professional organizations such as social work, nursing and other allied health care organizations. Respondents also suggested that case management be included in the curriculum of these professions in lectures and as clinical practice areas. As healthcare delivery gets more fragmented, the interdisciplinary teams need to understand each other's roles and how they can assist the patient to achieve an optimal level of health. Professional organizations compete for member and funds but need to learn to work together. The introduction of the case management concepts need to be incorporated at the college and university level for nurse, social workers, and other allied professionals. Incorporating this will allow these professionals to assess the patient in a more comprehensive matter which will also assist case managers as they work with the patients, families and other members of the healthcare team.

Application to Researchers

Several of the interviewed respondents indicated that further evidence-based research is needed demonstrating improved patient outcomes due to case management interventions. Future research needs to emphasize the skills and functions of a case manager as outlined by Tahan and Campagna (2010) and the CMSA's Case Management Model Act. The Case Management Society of America would benefit from partnering with a variety of health care organizations that perform case management. These organizations should be in different geographic areas and serve different population subsets. This relationship will enhance research opportunities as well as foster partnerships that enhance the case management profession. The healthcare industry will demand evidence-based research that substantiates the rhetoric that case managers are the experts in care coordination activities as espoused by the National CMSA.

Researchers should also assess and evaluate how to involve case managers at every level in the promotion of the case management profession. As Carter (2011) indicated, case managers need to advocate for their profession. Often, case managers who have no difficulty in advocating for their patient cannot advocate for themselves or their profession. Researchers will need to assess what skills and tools case managers need to aide CMSA at the grass root level promote the profession.

In addition, researchers ought to periodically study how the strategic marketing plans have improved the perception of case managers among other healthcare professionals and the general public. Additionally, researchers need to evaluate if case managers are satisfied with the efforts of CMSA to promote the profession. This can be done by a grander scale of this study or as part of the periodic Role and Function study commissioned by the National CMSA. This type of research will assist the organization in evaluating if they have incorporated market orientation into their strategic planning.

Moreover, researchers will need to measure how perceived barriers or obstacles, as noted by the membership, impact the marketing strategies. One of the respondents indicated that there appeared to be members of the National Board of Directors who were more concerned with their personal agendas rather than the needs of CMSA. Alvarez Gonzalez, Santos Vijande, and Vazques Casielles (2001) warn against organizations that have an internal orientation or a top-down orientation. These types of marketing plans often neglect the customer. This neglect can lead to ineffective strategic marketing plan implementation.

The National CMSA will also need to research what methods of promotion are preferred by their membership across different geographic areas. As illustrated in the findings, there may

be areas who may want social media utilized as a method of marketing, while other geographic sectors may prefer traditional media such as television.

Researchers may also want to share some of these studies with the marketing sector to augment current research on nonprofits. The literature review indicated there was a lack of research within the marketing sector about nonprofits. As social entrepreneurship grows as a concept, there will be a desire for research to assist these agencies in their endeavors. Nonprofits can benefit from each other's efforts while they become savvier in developing and implementing marketing strategies.

Conclusion

Healthcare reform, whether in its current or future format, will require care coordination as the basis for a majority of its initiatives. Case managers have the skills and knowledge to develop, implement and perform the functions of care coordination. However, the healthcare industry and the general public are unaware of these facts. Strategic marketing plans will be a starting point for the National Case Management Society of America to promote case managers.

The Case Management Society of America has an obligation to promote the profession of case management effectively in order to fulfill their mission and value while aiding the public. CMSA created the Case Management Model Act to define who are case managers, their skills and qualifications. It also defined their role and function in healthcare which includes care coordination. CMSA needs to promote the profession of case management to the rest of healthcare and the public so that they demand that case managers perform care coordination activities.

The success of the new marketing plan will be dependent on many factors. As this study has shown, evidence based research indicating the value of case management interventions will be needed. Furthermore, CMSA will need to utilize their membership as they implement the marketing program. Lastly, CMSA will need to periodically assess case managers, other healthcare professionals and the general public on the effectiveness of their marketing plan.

Success of CMSA's marketing plan is crucial to the success of healthcare reform initiatives. The alternative would be the usage of non-case managers performing care coordination activities. Non-case managers do not have the skills or knowledge to perform case

management effectively. This will result in poor outcomes and increased cost due to poor care coordination.

Public administrators are taught that our founding fathers built this nation utilizing skilled and knowledgeable people. Case managers have the skills and knowledge to reduce cost while improving patient outcomes, therefore, case managers are integral to healthcare reform. National CMSA needs to illustrate their value to the public and the rest of the healthcare industry by promoting the profession of case management effectively.

Appendices

Appendix A.

Case Management Interview I *(to be used in interview with local chapter leadership)*

1. What programs or education has your chapter created to increase awareness of the case management professional? **

If no Programs have been developed- use Case Management Interview II

2. In developing these programs did you utilize any materials or training offered by the National CMSA?
3. Did you build on programs developed by another chapter?
4. Did you include non-Board members of your Chapter in the development and/or implementation of these programs?
5. Do you think case management is integral to healthcare reform initiatives?
6. Why did you feel it necessary to develop these programs?
7. How did you measure the success of your programs?

Appendix B.

Case Management Interview II *(to be utilized to interview local chapter leadership if no marketing program in place)*

1. What programs or education has your chapter created to increase awareness of the case management professional?
2. Is the promotion of the case management profession one of your chapter's goals?
3. Do you think case management is integral to healthcare reform initiatives?
4. Do you find disinterest among your membership in promoting case management?
5. Do you find sufficient resources available to help chapters in promoting case management?
6. What resources would you like to see introduced by CMSA?
7. How effective do you think CMSA is at promoting the profession of case management?
8. How do you believe CMSA should promote case management?
9. What barriers do you see in the promotion of case management?

Appendix C.

Case Management Interview III *(for leaders in healthcare)*

1. How would you define case management?
2. What has been your experience with case management?
3. Do you feel case management is integral to healthcare reform initiatives?
4. Do you feel there is a need to promote the profession of case management?
5. Are you aware of the programs developed by the Hudson Valley and New York City chapters to promote the profession of case management?
6. If not aware of these programs, what do you feel are the barriers to promoting case management?
7. What recommendations would you give to improve the effectiveness of such programs?

Appendix D.

Case Management Interview IV *(to be used in interviewing the National Board of Director member of CMSA)*

1. What is your vision of case management in the current and future healthcare market?
2. Do you think case management is integral to healthcare reform initiatives?
3. Does your view of case managers differ from your predecessors or anticipated successor?
4. Have you and the National CMSA Board of Directors developed a marketing plan to promote case management?
5. What efforts have been made to assist local chapters in developing marketing programs?
6. What barriers does CMSA have to address to develop and implement successful marketing of case management?

Works Cited

- Alvarez Gonzalez, L.I., Santos Vijande, M.L., and Vazquez Casielles, R. (January, 2002) The market orientation concept in the private nonprofit organization domain. *International Journal of Nonprofit and Voluntary Sector Marketing*, 7(1), 55-67.
- Andreasen, A.R., Goodstein, R.C., and Wilson, J.W. (Summer, 2005) Transferring “Marketing Knowledge” to the Nonprofit Sector. *California Management Review*, 47 (4), 46-67.
- Arozian, Matthew (Summer, 2003) Branding for Nonprofits. *The Public Manager*, 9-10.
- Carter, Jolynne (March, 2011) Revealing the Best-Kept ‘Secret’ of Case Management. *Case In Point* 9, (1), 16-17.
- CMSA’s Case Management Model Act (2009). Retrieved from www.cmsa.org
- Chad, P., Motion, J., and Kyriazis, E. (2013) A Praxis Framework for Implementing Market Orientation Into Charities. *Journal of Nonprofit and Public Sector Marketing*, 25(1), 28-55.
- Dart, Raymond (June, 2004) Being “Business-Like” in a Nonprofit Organization: A Grounded and Inductive Typology. *Nonprofit and Voluntary Sector Quarterly*, 33(2), 290-310.
Retrieved July 1, 2013 from SAGE Publications via
<http://nvs.sagepub/content/33/2/290.refs.html>.
- Evetts, Julia (2003) The construction of professionalism in new and existing occupation contexts: Promoting and facilitating occupational change. *International Journal of Sociology and Social Policy*, 23(4/5), 22-35.

- Gainer, B. and Padanyi, P. (2005) The relationship between market-oriented activities and market-oriented culture: implications for the development of market orientation in nonprofit service organizations. *Journal of Business Research*, 58, 854-862.
- Guo, C. and Acar, M. (September, 2005) Understanding Collaboration among Nonprofit Organizations: Combining Resource Dependency, Institutional, and Network Perspectives. *Nonprofit and Voluntary Sector Quarterly*, 34 (3), 340-361. Retrieved June 18, 2013 from SAGE Publications from <http://nvs.sagepub.com/content/34/3/340.refs.html>.
- Hsu, G., and Hannan, M.T. (September/October, 2005) Identities, Genres, and Organization Forms. *Organization Science* 16(5), 474-490.
- Kluger, Miriam P. (2006) The Program Evaluation Grid: A Planning and Assessment Tool for Nonprofit Organizations. *Administration in Social Work*, 30 (1), 33-44.
- McDonald, Robert E. (June, 2007) An investigation of Innovation in Nonprofit Organizations: The Role of Organizational Mission. *Nonprofit and Voluntary Sector Quarterly*, 36(2), 256-281. Retrieved from SAGE Publications on June 19, 2013 from <http://nvs.sagepub.com/content/36/2/256.refs.html>.
- Modi, P. and Mishra, D. (May, 2010) Conceptualising market orientation in non-profit organisations: definition, performance, and preliminary construction of a scale. *Journal of Marketing Management*, 26(5-6), 548-569.
- Powell, Suzanne K. (March/April, 2011) A Rose by Any other Name. *Professional Case Management*, 16(2), 49-50. Rutowski, K.D., Guiler, J.K., and Schimmel, K.E. (2009)

- Benchmarking organizational commitment across nonprofit human services organizations in Pennsylvania. *Benchmarking: An International Journal*, 16(1), 135-150.
- Shoham, A., Ruvio, A., Vigoda-Gadot, E, and Schwabsky, N. (September, 2006) Market Orientations in the Nonprofit and Voluntary Sector: A Meta-Analysis of Their Relationships with Organizational Performance. *Nonprofit and Voluntary Sector Quarterly*, 35(3), 453-476. Retrieved from SAGE Publications on June 18, 2013 from <http://nvs.sage.pub.com/content/35/3/453/refs.html>.
- Sosin, Michael R. (December, 2011) Social Expectations, Constraints, and Their Effect on Nonprofit Strategies. *Nonprofit and Voluntary Sector Quarterly*, 41(6), 1231-1250. Retrieved from SAGE Publications on June 18, 2013 from <http://nvs.sagepub.com/content/41/6/1231.refs.html>.
- Tahan, H.A., and Campagna, V. (September/October, 2010) Case Management Roles and Functions Across Various Settings and Professional Disciplines. *Professional Case Management*, 15(5), 245-277.
- Warnaby, G. and Finney, J. (August, 2005) Creating customer value in the non-for-profit sector: A case study of the British Library. *International Journal of Nonprofit and Voluntary Sector Marketing*, 10, 183-195.
- Watson, Annette C. (November/December, 2010) Medical Loss Ratio: Health Care Reform Law Requirement Raises Key Issues for Case Management. *Professional Case Management*, 15(6), 303-304.

Zweibel, N.R. and Golden, R.L. (Summer, 2007) What Foundations and Nonprofits Can Do to Foster Productive Relationships. *Generations*, 31(7), 41-46.