

Introduction

In January 2018 the CMSUK Board strategy planning meeting was held and the year's strategy plan was created. This is available online at www.cmsuk.org/about/cmsuk/board-activity/strategy. Updates on the strategy plan will be presented as part of this report.

At the strategy meeting in January 2017 the Chair/Vice Chair positions were reaffirmed by the Board following Sam Harris' resignation as Chair in November 2016. Adam Shelverton, voted new Chair as of 15th December 2016 and Teresa Shaw, were reaffirmed as existing Chair and Vice Chair respectively.

CMSUK - Who we are:

Name	CMSUK Role	Company
Adam Shelverton	Chair	QBE
Teresa Shaw	Vice Chair	Teresa Shaw Associates
Devdeep Ahuja	Non-Executive co-opted Director	RTW Ltd
Karen Burgin	Director	Karen Burgin Ltd
Chris Bartlett	Communications Committee Chair	Overland Health
Carole Chantler	Educational Pathway joint project	Carole Chantler Ltd
Victoria Collins	Events Committee joint Chair	Chroma
Karen Elsmore	Events Committee joint Chair	Head in the Right Direction
Jo Evans	Director	Unite Professionals
Sue Ford	Membership Committee Chair	Bridge Case Management
Nicola Irwin	Director	Harrison Associates Ltd
Andrew Pepler	Director	Health & Case Management
Jackie Salvidge	Treasurer	Innovate HMG
Heather Roberts	CMSUK Administrator	
Wendy Loosley	CMSUK Administrator	

General Objectives for 2018:

- To continue to grow our membership base to 700+ members and 18+ Corporate Members.
- To continue the development of the CMSUK website and to complete a resources section of the Member Area.
- To continue with a Digital Marketing project to improve website traffic, online applications and event bookings as well as ensuring anyone wishing to understand more about case management is easily able to find the CMSUK website.
- To communicate useful articles and information to the membership and contacts list regularly via email, website and social media.
- To raise the CMSUK profile on social media via Twitter, Facebook and Linked-In.
- To continue our work within the specific committees of Research, Events, Communications and Membership & Links.
- To run a successful Celebration Lunch event in September 2018, incorporating the new extended Awards programme for Case Managers and associated industry collaborators.
- To run 10-12 online 'lunch-n-learn' webinars free of charge to members on relevant professional development subjects.
- To run the 'Introduction to Case Management' study day in Spring 2018.
- To continue to provide presentations to NHS organisations on how case management can contribute to and support statutory services, where possible.
- To run a successful 2 day conference including a dedicated exhibition area, a multi streamed programme of talks, a Dinner Dance and general networking. Event to be run 22nd & 23rd November 2018
- To continue the joint working alongside BABICM and VRA towards an industry educational pathway for case managers.
- To continue discussions with BABICM and VRA on whether to run another Together Conference for 2020.
- To continue to develop corporate links for the development of the industry as a whole.

- To offer research and professional development grants to the membership.

Committee Updates

Membership & Links Committee

2018 Strategy aims:

- Complete a *Benefits of Membership* review for individual members and look at increasing its offering to include discounts, perks and a welcome pack for new members
- Consider a Membership Month where all new applications get an additional 10% off normal membership price
- Continue to review renewing members against current criteria of membership and address any issues raised
- Review the current eligibility criteria flow chart to fully represent the pathway for psychologist case managers
- Consider setting up a nurse revalidation link up service
- Commence reviewing Corporate and Company memberships including their use of logos and how they present corporate profiles of case managers etc
- Encourage the upgrade of Company memberships to Corporate Memberships

Membership & Links Committee Members: Sue Ford (Bridge Case Management) Chair, Andrew Pepler (HCML), Phil Perry (ILS), Niccola Irwin, Wendy Loosley (CMSUK), Heather Roberts (CMSUK)

The Membership Group has been delighted with the impact of the more user-friendly application process which has seen a steady increase both in the speed of applications going through, and in the numbers of members.

With regard to membership figures, as of 13th November 2018 the individual membership numbers are as follows:

- Active – 632
- Pending Approved – 19
- Pending Unapproved – 37
- Active & Pending combined – 688
- Lapsed – 31



22nd November 2018

The Committee spent some time this year working through the areas highlighted as needing further clarity as part of last year's work on membership criteria. That previous work had identified groups of members, particularly those who do not have an overarching professional regulatory body such as NMC or HCPC, for whom establishing the appropriate membership criteria had been somewhat confusing. Discussions have taken place with members affected by this as we worked through the criteria, to help CMSUK develop a robust mechanism that is both clear for prospective members, and to those using the Member Check facility to find an appropriate case manager.

The Committee also took time to review the "Benefits of Membership" for individual members. The evolution of the events run by CMSUK to include more webinars and the Awards Ceremony is now reflected in the list of benefits. Access to the new grants for research and practice development is also now a benefit to members and one which we expect to see grow in popularity in coming years. There are some new possible benefits in developments, including a "membership month" being planned for introduction in 2019 with additional savings for new members.

Work has started on reviewing our Corporate Memberships, and the benefits and levels appropriate for those organisations who support us in this way. This will be a major part of the work for next year, but we have already started considering how we might connect more meaningfully with our Corporate members.

We are always looking for fresh ideas on how we might improve our connections with members, both on an individual and corporate level. If you or members of your organisation would like to share your ideas, please get in touch.

Events Committee

2018 Strategy aims:

- Webinars: increase lunch & learn training sessions to 8 over the course of 2018
- Study days: Repeat the Introduction to Case Management Study Day in Spring 2018
- To plan and implement a 2 day Conference with dedicated Expo and Dinner Dance in November 2018
- To plan and implement a Celebration & Awards Lunch in September 2018
- To populate the Member Resource Library with webinar recordings
- To present to NHS trusts whenever possible

Committee Members: Victoria Collins (Chroma) Joint Chair, Karen Elsmore (Head in the Right Direction) Joint Chair, Jo Evans (Unite Professionals), Teresa Shaw (Teresa Shaw Associates), Carole Chantler (Carole Chantler Ltd), Rachel Roebuck (Innovate HMG), Helen Ovans (ILS), Amy Kelly (Innovate HMG) Tracey Buchanan (Proclaim Care), Heather Roberts (CMSUK Admin), Wendy Loosley (CMSUK Admin)

2018 has been another busy year for the Events Committee. As always, our aim is to deliver high quality events for our members, offering learning, development and networking opportunities, as well as forums to celebrate the fantastic work that is being done in our industry. This is all possible thanks to the hard work and dedication of our administrative staff and volunteer committee members.

A summary of our main achievements is below:

Intro to Case Management Study Day

The 2018 Intro to Case Management Study Day was run on 11 April 2018 by Carole Chandler and Jo Evans who both sit on the Board of Directors of CMSUK. This annual event is aimed at newcomers to the case management world and covers essential topics such as the case management process, codes of conduct and best practice, the Rehabilitation Code, expectations of a case manager and information about the litigation process.

22nd November 2018

Webinars

This year the Events Committee set-up a separate sub-committee dedicated to the delivery of CMSUK's popular webinar programme. This sub-committee, headed by Events Committee members, Rachael Roebuck and Amy Kelly has, to date, delivered a programme of high quality and informative webinars on topical issues such as GDPR, Benefits and NMC revalidation. Other subjects have included Functional Restoration Programmes, Neurologic Music Therapy and the Assessment and Management of Self-Harm.

The webinars are advertised to CMSUK members and non-members. The non-members attendance at webinars in 2018 has increased by 80%. Furthermore, the attendees who respond to our feedback after the webinar has increased. This feedback allows us to monitor the success of our webinars and ensure we are meeting the needs of the audience. We saw an increase in overall attendance at webinars of 20% in 2018 and will be looking to achieve a further increase beyond this in 2019.

Owing to the popularity of our webinar programme, CMSUK have recently invested further in our webinar software in order to increase the number of attendees we can cater for, as well as being able to include live video streaming and offline webinar creation. We have also updated the functionality of our website so that - subject to the presenter's agreement - we can post recordings of our webinars in case you missed them live, as well as upload other useful resources. We are in the process of populating these resources within the Members area of the website, so keep an eye out.

Awards Ceremony

This was the second year we hosted our CMSUK Awards Ceremony. Held at the Radisson Blu Edwardian Hotel, London on 28 September 2018, the Awards Ceremony featured an inspirational talk by 7/7 survivor, Martine Wright. We were also proud to launch our new, expanded awards programme; showcasing the fantastic work done by our case manager members as well as the other valued people and organisations which are critical to the success of our industry. The winners of each of the eight categories were as follows:

- Catastrophic Case Manager of the Year – Rebecca Hey (The Rehabilitation Partnership)
- Clinical Case Manager of the Year – Wendy Hopps (Proclaim Care)
- Vocational Case Manager of the Year – Raaziyah Mahmood (Innovate Healthcare)
- Case Manager Supporter of the Year – Michaela Nisbet (Proclaim Care)
- Therapeutic Service Provider of the Year – Krysalis Consulting
- Case Management Company of the Year – Innovate Healthcare
- Partnership Case of the Year- Rebecca Hey (The Rehabilitation Partnership)
- Rehabilitation Innovation of the Year – Overland Health

Conference 2018

The CMSUK 2018 conference is taking place in Bristol from 22 to 23 November 2018 at the Mercure Grand Hotel in Bristol. Entitled "Innovation & Evidence Based Practice", this year's conference aims are to:

- Increase case managers' knowledge relating to the latest evidence-based approaches, interventions and technologies for use in rehabilitation [CMSUK Standard of Practice no8 - Professional Development and Lifelong Learning].
- Support case managers to maintain resilience in their own practice and work together with other stakeholders for the benefit of their clients [CMSUK Standard of Practice no14 – The Case Manager as a Practitioner].
- Assist case managers to ensure their practice is up to date, cost effective and of the highest quality [CMSUK Standard of Practice no7 – Service Quality and Governance].

The conference programme includes three streams of outstanding speakers in the areas of Psychological/Vocational Rehabilitation, Physical Rehabilitation and Brain Injury Rehabilitation. The conference will also feature a large exhibition space with 26 exhibitors and lots of networking opportunities.

22nd November 2018

Working with NHS Trauma Centres

Over the past few years, CMSUK have been working to establish connections with NHS Major Trauma Centres to raise the profile of case management and CMSUK, as well as to educate staff regarding the role of case managers in the private sector and discuss how we can best work together with statutory services.

In September, Jo Evans, CMSUK Board of Directors and Events Committee member attended a long-awaited meeting with the Major Trauma Operations Manager of Aintree University Hospital NHS Foundation Trust and the Cheshire and Merseyside Rehabilitation Network. Jo reports that, "There was consensus that the role of the case manager was poorly understood and that a further meeting or presentation by CMSUK may be helpful to the trauma and rehabilitation staff. The aim of this meeting would be to help staff understand how they can work with case managers to assist in signposting patients who are being repatriated from regional Trauma Centres; advocate or provide equipment and services; and/or follow up on the recommendations of rehabilitation prescriptions to ensure patient care is progressed and followed up appropriately".

Jo continues: "We suggested various options including a webinar, CMSUK running one of our conferences in Liverpool and working jointly with the local trauma teams and community rehabilitation services to share best practice. They were interested in understanding how the case management model could be considered when understanding the larger cohort of patients who utilise the trauma services and are not pursuing a claim; the idea to explore advocacy, individual ownership and responsibility. There are plans to follow up in the New Year with an invitation to present at a trauma team meeting".

To conclude, we are always looking for volunteers to join our committee so if you would like to get involved in organising events for your fellow case managers, or if you have any suggestions for future events, topics or speakers, please contact Heather Roberts or Wendy Loosely at the CMSUK office. We would love to hear from you.

Research Committee

2018 Strategy aims:

- Publish Grant documentation on Website
- Disseminate full details of the application process for the Grants to members and publish on the website
- Liaise with Events regarding impact on Conference in November
- Process applications received for grants throughout the year and make recommendations to board for approval.

Research Committee Members:

Devdeep Ahuja, Chair (RTW Ltd), Sue Ford (Bridge Case Management), Dr Dee Burrows (Consultant Nurse).

2018 has been an exciting year for the CMSUK research committee. As a committee our remit has been to promote research activity within the case management community. To this end, we have undertaken the following activities:

1. CMSUK Research Committee put out a call for applications for the first CMSUK Research Grant 2018 and we have received two high quality submissions from case management members for a grant of **up to** £10,000. We are completing the initial committee review phase of the applications and the applications will be sent out to external reviewers by 1st December 2018. We anticipate the review process to be completed by end of December and the award will be announced in January 2019.
2. Call for CMSUK members to attend the CMSA conference in Chicago. On behalf of the CMSUK Board, Chris Bartlett attended the conference and was able to learn about the case management practice both in the US and internationally as there was representation from other countries as well.
3. Devdeep Ahuja submitted an article highlighting the steps in implementing evidence-based practice in case management in the inaugural issue of Inside Case Management magazine.
4. Devdeep Ahuja will be presenting at the CMSUK Conference on the topic: Building Evidence for Case Management: Current State, Barriers and Opportunities.

22nd November 2018

In the November committee meeting, it was decided to invite two more members to the research committee to enable wider representation. The call will be sent out through the usual CMSUK channels post the CMSUK conference.

Communications Committee

2018 Strategy Aims:

- To improve the set up and presence of CMSUK social media
- To complete training in Digital Marketing Media
- To improve Digital Marketing on the website
- To review the aesthetic look of CMSUK communications generally including presentations and email signatures etc.
- To liaise with other CMSUK committees for content inclusion within the Resource library for members on the website.
- To continue to update and improve the website content generally
- To review Microsoft 365 facilities from a Board perspective
- To review current webinar facility and consider upgrading it to allow video content

Committee Members: Chris Bartlett - Chair, (Overland Health), Katya Halsall, (Voc-Rehab UK), Liz Haunch, (Bridge Case Management), Michael Davis, (Corpore), Anthony Savage, (Advent Welfare), Heather Roberts (CMSUK), Wendy Loosley (CMSUK).

Update:

The communications committee have been working hard to increase the social media and communication to our membership over the past 12 months. Updates to our website have assisted in this strategy. Developments including 'back-end' functionality to assist with the administration process of new memberships, a home page scrolling banner for key messages, resource library for documentation for the membership and new corporate banner recognition on the home page are just a few of the developments made to the website in 2018. We have also trialed digital marketing advertising through a 3rd party which we believe is having a positive impact on the growth of membership.

The development of the INSIDE Case Management e-magazine has also enabled an innovative way for CMSUK to communicate to its membership key news and interesting topics. Its first issue in early November has received very positive feedback.

The webinar facility introduced in the past couple of years has also been updated due to the number of attendees wishing to access the webinar series (from 100, to 500) and enables pre-recorded webinars. The website now has the functionality for members to view past webinars.

We have successfully increased our international communication and recognition, with board presence at the CMSA conference in Chicago in June, attendance from board members of CMASA (South Africa) at our November conference and ongoing dialogue with CMSA (Australia) we are looking at ways to improve our international alliances with similar organisations. If you have contacts at similar organisations throughout the world, please let us know.

If there are any ways in which you feel we could further improve the communication as an organisation to our membership, please do make contact with chris.bartlett@cmsuk.org.

Joint Educational Pathway Group

2018 Strategy Aims:

- Continue to support combined working with VRA and BABICM to progress the professional pathways for Case Management
- Create a skeleton outline organisation ('Institute of CM' – or something similar) to provide a mechanism to certify case managers to PSA standards that will:
 - Provide structure and governance
 - Be cost effective
 - Add value and quality professional development
 - Keep options open for future development of business potential
 - Gain financial written commitment from all parties both in terms of start-up fund and ongoing funding.
 - Engage legal and financial services to provide advice and costings on the set up of the new organisation
 - Begin more active engagement of industry stakeholders
 - Ensure that feedback to the CMSUK board is continued regularly

CMSUK Board Group Members:

Carole Chantler (Carol Chantler Ltd) Chair, Adam Shelverton (QBE), Karen Burgin (Karen Burgin Ltd)

The process of certification and accreditation as been continuing.

We have worked collaboratively with BABICM and the VRA to create a new joint Code of Ethics which is now in circulation.

We have obtained financial and legal advice from Grant Thornton and the legal report from Shakespeare Martineau, as how best to proceed should it be decided to set-up a separate organisation to manage the certification of case managers. The recommendation was to create a company limited by guarantee. This would be a company separate from all the organisations and run independently from them to manage the accreditation/certification of Case Managers with the PSA (Professional Standards Authority). The PSA is answerable to the Government. This would provide a route to address poor professional practice of case management, as CMSUK, BABICM and VRA are currently purely membership organisations with no authority in respect to disciplining members for poor practice.

Further discussion took place with individual boards as well as the committee to review the reports and recommendations and a further meeting with Grant Thornton was held in order to address further questions.

We are currently at the stage of meeting with the Personal Injury and Employers Liability Industry insurers, Claimant and Defendant bodies to determine if this is still what the market wants in order to ensure consistently high standards across the case management industry.

We have had a meeting with the International Underwriting Association (IUA) rehab working party in November, a committee that has members from all areas of the industry, both Claimant and Defendant representatives, to explain what the process will involve.

We will survey the market, both Claimant and Defendant, to gauge the level of support for this strategy. We need to ensure the costs of the process (both financial and in terms of time spent for our members) are warranted.

One might ask why are we not approaching our members first? We have previously approached the membership and established that we have members' agreement to develop a professional pathway for case management. However, we are now at a stage where a significant amount of money is going to need to be invested, and case managers will incur costs in order to register. If the market is not going to support this initiative, which anecdotally they have said they do, then there would be no point in continuing with the process. If, as we anticipate, there is support for this process to proceed, we will carry on and update all memberships once we have further information.