



DIVERSITY, EQUITY,
INCLUSION, AND
BELONGING

ROADMAP



Workforce Development Pillar Guidelines

Introduction to the Roadmap

Intentional efforts in workforce development are crucial for healthcare organizations to create inclusive workplaces. This roadmap for Diversity, Equity, Inclusion, and Belonging (DEIB) in the workforce outlines actionable strategies across four key pillars: **Talent Acquisition, Workforce Composition, Career Development, and Learning and Development**. These pillars provide a comprehensive framework to embed DEIB principles throughout the employee lifecycle—from recruitment and onboarding to retention, career progression, and continued professional growth.

By implementing standardized processes, promoting transparency, and fostering an inclusive culture, organizations that hire and/or contract with individuals within the case management workforce can create environments where all employees thrive and contribute to sustainable success. **This roadmap serves as a resource for integrating DEIB practices into the core of workforce management, driving both individual and organizational excellence.**

Please note that this roadmap should be used in conjunction with regular reference to relevant federal, state, and local regulations, as well as professional codes of conduct and standards of practice, to guide your work effectively. Keep in mind that these guidelines are meant to support—not replace—your employer’s policies and procedures, which should always take precedence when applicable. In all instances, medical and legal professionals should be consulted prior to the implementation of any case or care management plan; the information contained in this DEIB Roadmap shall not constitute medial or legal advice. In no event shall the Case Management Society of America (CMSA) be held liable for damages of any kind in connection with the material, methods, information, techniques, opinions or procedures expressed, presented, or illustrated in the DEIB Roadmap even if the CMSA has been informed of the possibility of such liability.

Talent Acquisition Strategies

These Talent Acquisition strategies will help build the groundwork for an inclusive workplace.

1. Evaluate recruitment tactics from the beginning of the hiring process
 - Promote diversity of talent acquisitions/recruitment units within health systems
 - Develop/implement a standardized set of requirements per job that a candidate & recruiter must meet, inclusive of diversity representation
 - Standardize questions and interview strategies at all levels of the screening process
 - Monitor the recruiter/API initial screening process
2. Implement ongoing monitoring of metrics to ensure successful outcomes
 - Highlight & educate on job metrics specific to case management
 - Leverage successful onboarding matches that align CM skillset to job description
 - Demonstrate successful measures in training competency during onboarding
 - Exhibit positive workforce retention at defined intervals (e.g., six months, annually)
 - Incorporate assessment of CM Unit benchmarks within the more extensive system

Workforce Composition Strategies

These Workforce Composition Strategies focus on maintaining a sustainable workforce.

1. Develop actionable strategies to achieve and sustain an inclusive workforce by incorporating Specific, Measurable, Achievable, Relevant, and Time-bound (“SMART”) goals that reflect the following:
 - Encourage leadership collaboration with HR to ensure employee benefits reflect inclusive workforce needs (e.g., child care or caregiving, reproductive health, gender-affirming care, cultural/religious holidays & celebrations)
 - Assure flexibility with scheduling to accommodate those needs
 - Develop and sustain hiring practices to ensure diverse workforce composition:
 - Span the cultural nuances of ableism, age, gender, ethnicity, geographic distribution, familial choice, neurodiversity, race, sexual orientation, and other marginalized and minoritized groups
 - Encompass all professional disciplines and requirements addressed by CMSA’s Qualification Standard (A) and incorporate all levels of professional case management practice
 - Use tools that promote objectivity, such as rating scales that account for both hard competencies and soft competencies, as well as objective Likert scales.
 - Partner with academic institutions for preceptor and practicum opportunities within healthcare organizations for students across all qualifying disciplines
 - Develop and sustain mentoring and sponsorship initiatives

Career Advancement Strategies

The following Career Advancement Strategies will encourage advancement through promotions and ascending the corporate ladder.

1. Promote the advancement of diverse talent into executive, management, technical, and board roles.
2. Encourage staff engagement in available learning opportunities to further their career development, knowledge acquisition, and other professional growth.
3. Enhance the visibility of fair and transparent criteria for promotions and pay processes through the use of analytics tools.



Learning & Development Strategies

The Learning & Development Strategies focus on broadening understanding and should be infused throughout the first three strategies.

1. Utilize formal industry resources to advance knowledge acquisition and career development across the case management workforce:
 - Use of professional case management's Established Resources of Guidance (Fink-Samnicks, 2023) to align departmental knowledge acquisition (e.g., continuing education, organizational and department trainings) with dedicated, industry-vetted guidelines and frameworks for practice excellence, including:
 - Organizational accreditation and credentialing requirements for case management (e.g., ANCC Magnet status, NCQA, URAC)
 - Individual credentialing board-certification professional codes of conduct and ethical codes (e.g., CCM, CDMS, CRC) and CEU-renewal requirements (e.g., ANCC's CMGT-BC, CCM). Any board certifications used must be evidence-based, industry-vetted, and with formal external credentialing (e.g., American Board for Specialty Nursing Certification (ABSNC), NCCA for the Institute of Credentialing Excellence (ICE))
 - Standards of Practice for Case Management (CMSA, 2022)
 - CMSA Position Statement on Diversity, Equity, Inclusion, and Belonging (2024) to ensure consistent use and understanding of standard terms and definitions by all case managers
2. Implement a learning & development (L&D) program.
 - Develop technology and cybersecurity training for CMs.
 - Endorse Informatics training consistent with CM functions such as care integration, compliance, and reporting.
 - Encourage external training, seminars, and conferences.
 - Advocate for paid membership in professional associations not only to develop CMs but also to promote broader inclusivity
 - Provide recommendations on L&D modules for multiple management tiers or levels as well.
 - Establish a rotation among staff for training, conference attendance, career development, specialty development, and other opportunities to promote equity and inclusion for all.

REFERENCES

CMSA (2024). Position statement on diversity, equity, inclusion, and belonging; DEIB Core Committee: Author; Brentwood, TN

CMSA (2022). Standards of practice for case management: Author; Brentwood, TN

Fink-Samnicks, E. (2023). The ethical case manager: tools and tactics; Blue Bayou Press

NASW (2023) Standards and Indicators for Cultural Competence in Social Work Practice.

McKinsey & Company (2020) Diversity Wins: How inclusion matters.