



VIRTUAL LEADERSHIP CONFERENCE

Gain access to expert-led presentations, real-world insights, and practical strategies from top voices in the field.



LIVE VIA ZOOM

Saturday, October 11, 2025

VIRTUAL LEADERSHIP CONFERENCE

This one-day, interactive learning event designed for mid- to senior-level case management professionals, emerging leaders, and healthcare executives. This inaugural conference brings together thought leaders and experienced practitioners to explore the critical skills and strategies needed to lead effectively in today's complex healthcare environment.



Through a dynamic mix of sessions—including financial management, advocacy at the executive level, innovative acute care models, resilient leadership, virtual team management, and intentional culture-building—participants will gain actionable insights to strengthen their leadership impact. The program emphasizes both the technical and human dimensions of leadership, offering practical tools to navigate change, foster collaboration, and drive meaningful outcomes for patients, organizations, and teams.

Attendees will leave with expanded knowledge, peer connections, and evidence-based strategies to position themselves and their organizations for success in a rapidly evolving healthcare landscape—all while earning up to six continuing education credits. Registrants must complete all sessions, evaluations, and quizzes to earn the final CE certificate.

OVERALL CONFERENCE OBJECTIVES:

1. Apply advanced leadership competencies—including financial literacy, strategic influence, and operational innovation—to strengthen case management programs across diverse care settings.
2. Evaluate emerging models of care and workforce design to address evolving patient complexity, technological integration, and workforce sustainability.
3. Demonstrate resilience and adaptability in leadership practice by integrating lessons learned from real-world challenges, fostering team engagement, and sustaining personal growth as a leader.
4. Design strategies to shape organizational culture and advocate for case management's role in achieving quality, equity, and financial sustainability in healthcare delivery.

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Special Anniversary Rate 7/20 - 9/05		Standard Rate 9/6- 10/10	
Member	Non-member	Member	Non-member
\$190	\$325	\$225	\$325

Attend virtual sessions
LIVE and/or Recorded

VLC 2025 AGENDA



Saturday, October 11, 2025

Hours are displayed in Eastern Time Zone



10 - 10:05 a.m.	Welcome Remarks/Announcements	-
10:05 - 11:05 a.m.	SESSION: Developing Financial Management Skills for Case Management Leaders Mark Evans, MA, CCM, CLCP, CRC, CBIS, FCM Patricia Noonan, MBA, RN, CCM, CDP, FCM	RN, CCM, CDMS, CPHQ, CNLCP
11:15 a.m.- 12:15 p.m.	SESSION: Strategic Seat at the Table: Making the Case for Case Management Across the Care Continuum Dr. Colleen Morley, DNP, RN, CCM, CMAC, CMGT-BC, ACM-RN, IQCI, FCM, FAACM	RN, CCM, CDMS, CPHQ, CNLCP
12:25 - 1:25 p.m.	SESSION: Breaking the Unit-Based Mold: Implementing the Next Acute Care Model for Case Management Tiffany Ferguson, MSW, LMSW, CMAC, ACM	RN, SW, CCM, CDMS, CPHQ, CNLCP
1:30 - 2 p.m.	Break/Optional Networking	-
2 - 3 p.m.	PANEL: Rising Through It: What We Don't Talk About Enough in Leadership Michele O'Brien, MSW, LCSW, CCM, FCM Melanie Prince, EdD, MSS, MSN, BSN, RN, NE-BC, CCM, FCM, FAAN Lisa Simmons-Fields, DNP, MSA, RN, CCM, CPHQ, FCM Donna Todd, MSN, RN-BC, CCM	RN, CCM, CDMS, CPHQ, CNLCP
3:10 - 4:10 p.m.	SESSION: Leading a Virtual Team in Case Management Theresa Shotton, MSN, RN, CCM	RN, CCM, CDMS, CPHQ, CNLCP
4:20 - 5:20 p.m.	SESSION: Culture by Design: Building and Sustaining Company Culture in a Changing World Sarah Timm, CAE, CMP-HC	RN, CCM, CDMS, CPHQ, CNLCP

DEVELOPING FINANCIAL MANAGEMENT SKILLS FOR CASE MANAGERS

10:05 - 11:05 a.m. EASTERN

ABSTRACT

Developing financial literacy is critical for all healthcare leaders and a necessary component in today's healthcare environment. Case Management leaders, as exemplars, leverage the benefits of developing solid financial management skills, which often include key strategic planning, budgeting, and forecasting, as well as operations management. Developing financial management skills in the workplace will better position case management leaders for future success.

OBJECTIVES

1. Describe the current healthcare environment regarding economic trends and the impact on the financial performance of an organization.
2. Review key financial statements such as the Balance Sheet, Profit & Loss, Budget to Actual, and Statement of Cash Flows - and apply budgeting and forecasting concepts to better equip CM leaders with financial literacy within their organization.
3. Identify strategies that CM leaders can adopt to align with organizational goals to demonstrate cost efficiency and quality outcomes.

PRESENTERS

Mark Evans, MA, CCM, CRC, CLCP, CBIS, FCM

Regional Director of Operations at Hope Network

Patricia Noonan, MBA, RN, CCM, CDP, FCM

Retired Director of Care Management at Beth Israel Health Performance Network



STRATEGIC SEAT AT THE TABLE: MAKING THE CASE FOR CASE MANAGEMENT ACROSS THE CARE CONTINUUM

11:15 a.m. - 12:15 p.m. EASTERN

ABSTRACT

Case management professionals are essential to improving outcomes, reducing avoidable utilization, enhancing patient experience, and supporting value-based care. Yet, the visibility and influence of case management at the executive level often vary significantly across organizations and care settings. This session explores how case managers and case management leaders can strategically advocate for their role and demonstrate alignment with C-suite priorities—whether in acute care, managed care, community-based programs, or primary care settings.

Using real-world examples and evidence-based tactics, the session will guide attendees through the process of framing the value of case management in executive language—one focused on cost savings, quality metrics, risk mitigation, and regulatory alignment. Participants will learn how to tailor their messaging for each setting, leverage key performance indicators, and build data-driven business cases that resonate with healthcare executives.

Additionally, the session will address the cultural and structural challenges that can hinder case management's advancement and provide practical strategies to overcome resistance and position the case management function as a strategic partner. Attendees will leave with tools to lead up, influence organizational priorities, and secure a seat at the table in shaping healthcare transformation.

OBJECTIVES

1. Define the strategic value of case management across acute, managed, community, and primary care settings.
2. Identify key metrics and data points that resonate with executive leadership.
3. Apply communication and influence strategies to advocate for the integration and advancement of case management services at the organizational level.
4. Recognize setting-specific barriers and opportunities to elevate the role of case managers in strategic decision-making.
5. Construct a data-informed business case that aligns case management with organizational goals, including quality, compliance, and financial sustainability.

PRESENTER

Colleen Morley, DNP, RN, CCM, CMAC, CMGT-BC, ACM-RN, IQCI, FCM, FAACM

Associate Chief Clinical Operations Officer, Care Continuum for University of Illinois Health System



BREAKING THE UNIT-BASED MOLD: IMPLEMENTING THE NEXT ACUTE CARE MODEL FOR CASE MANAGEMENT

12:25 - 1:25 p.m. EASTERN

ABSTRACT

The traditional unit-based “triad” case management model has reached its operational limits in today’s acute care setting. Shifts in patient complexity, workforce demographics, payer behaviors, and technological capabilities have exposed cracks in the model, demanding a new approach. This presentation introduces the Adaptive Case Management Model, a data-driven, technology-enabled, and team-based framework designed to align case management with modern acute care realities. By incorporating non-licensed professionals, leveraging physician advisor partnerships, and moving beyond reactive, unit-bound assignments, the Adaptive Model emphasizes skilled communication, care progression across the full episode, and the strategic deployment of licensed clinical judgment for high-risk patients. Grounded in CMSA Standards of Practice and ethical principles, this model addresses the dual challenges of an aging workforce and increasing throughput demands, positioning case management as a central driver of quality, efficiency, and patient equity in acute care.

OBJECTIVES

1. Analyze the historical evolution of acute care case management models and identify operational limitations of the traditional unit-based triad approach in today's environment.
2. Describe the core components of the Adaptive Case Management Model, including role delineation, skill mix optimization, and integration of non-licensed professionals.
3. Apply CMSA Standards of Practice and ethical principles to staffing, workflow design, and decision-making in the Adaptive Model
4. Develop strategies to address workforce challenges, including generational differences, remote work integration, and leadership development, to ensure sustainable case management operations and model implementation.

PRESENTER

Tiffany Ferguson, MSW, LMSW, CMAC, ACM
CEO of Phoenix Medical Management, Inc.



RISING THROUGH IT: WHAT WE DON'T TALK ABOUT ENOUGH IN LEADERSHIP

2 - 3 p.m. EASTERN

ABSTRACT

Leadership is often portrayed as confident, decisive, and forward-moving, but the reality is more complicated. Even the most experienced leaders face moments of uncertainty, self-doubt, and failure—times when expectations are high, and the next step feels anything but clear. In this session, a panel of accomplished leaders will share candid stories about some of their toughest leadership challenges. These are not the polished, picture-perfect examples of success, but the behind-the-scenes moments where real growth happened.

Through personal stories and lessons learned, panelists will offer insight into how they moved forward during times of difficulty. Whether it involved rethinking a decision, having a difficult conversation, or sitting with the discomfort of not having an immediate solution, their experiences offer valuable guidance for others navigating similar challenges. Attendees will leave with practical tools, fresh perspective, and a reminder that resilient leadership is built in the hard moments—not in their absence.

OBJECTIVES

1. Identify common leadership pitfalls and emotional hurdles that arise in high-pressure situations.
2. Apply practical strategies shared by panelists to navigate setbacks, decision fatigue, and moments of uncertainty.
3. Review personal leadership growth areas and normalize the experience of struggle as part of effective leadership development.

PRESENTERS

Michele O'Brien, MSW, LCSW, CCM, FCM

Director of Case Management/Network Hospital Operations at Kaiser Permanente Washington

Melanie Prince, EdD, MSS, MSN, BSN, RN, NE-BC, CCM, FCM, FAAN

CEO of BioGals; Care Associate Consulting; and MAPYourWAY, LLC

Lisa Simmons-Fields, DNP, MSA, RN, CCM, CPHQ, FCM

Director, System Population Health/Care Management at Trinity Health System

Donna Todd, MSN, RN-BC, CCM

Sr. Director, Clinical Operations at American Health Holdings, Inc.



LEADING A VIRTUAL TEAM IN CASE MANAGEMENT

3:10 – 4:10 p.m. EASTERN

ABSTRACT

This presentation explores best practices for leading virtual teams of nurse case managers, focusing on fostering engagement, achieving organizational metrics, and supporting team well-being in a remote healthcare environment. It addresses the unique challenges and opportunities of virtual leadership, including setting clear expectations, empowering nurse case managers as leaders, driving engagement and retention, monitoring metrics for continuous improvement, and cultivating a positive, inclusive culture where open communication and psychological safety are prioritized. Leadership principles, such as influence over authority, active listening, and the power of appreciation, are emphasized to build trust and motivation. Practical examples, actionable talking points, and real-world scenarios equip leaders to inspire high performance, resilience, and exceptional patient care across virtual teams.

OBJECTIVES

1. Describe best practices for leading virtual case management teams to drive engagement, accountability, and well-being.
2. Define clear expectations for team performance, patient outcomes, and collaboration with provider partners.
3. Apply strategies to monitor key metrics, deliver data-driven feedback, and coach for continuous improvement.
4. Create a positive, inclusive team culture prioritizing open communication, psychological safety, and appreciation.
5. Integrate practical leadership principles—including influence, active listening, and appreciation—to motivate and retain high-performing virtual teams.

PRESENTER

Theresa Shotton, MSN, RN, CCM

Sr. Manager, Clinical Health Services at American Health Holdings, Inc.



CULTURE BY DESIGN: BUILDING AND SUSTAINING COMPANY CULTURE IN A CHANGING WORLD

4:20 - 5:20 p.m. EASTERN

ABSTRACT

In today's fast-evolving workplace—shaped by remote work, generational shifts, and rapid technological change—company culture can't be left to chance. This 60-minute session explores how leaders can intentionally build and maintain a strong, inclusive, and adaptive culture that supports performance and employee well-being. Participants will learn actionable strategies to align their values with behavior, foster engagement across distributed teams, and respond to cultural challenges in real-time. Whether your culture is in tip-top shape or needs an overhaul, this session will equip you with ideas and tools to lead with purpose in today's dynamic environment.

OBJECTIVES

1. Define the core components of an inclusive and resilient organizational culture and explain their relevance in today's healthcare environment.
2. Analyze strategies for aligning leadership behaviors with organizational values to promote ethical practice and team cohesion.
3. Demonstrate methods to enhance engagement and well-being among remote and interdisciplinary teams.
4. Evaluate real-time approaches for identifying and addressing cultural challenges that impact care delivery, staff morale, and organizational outcomes.

PRESENTER

Sarah Timm, CAE, CMP-HC
CEO & President of Parthenon Management Group

