



Strategic Plan Report February 2-3, 2018 The Embassy Suites by Hilton, Richmond, VA

INTRODUCTION

The Virginia Chiropractic Association (VCA) was founded in 1929. In 2009, the VCA and the Virginia Society of Chiropractors unified and became The Unified Virginia Chiropractic Association (Unified VCA or UVCA) -- a landmark move to increase resources and strength on behalf of Virginia Doctors of Chiropractic.

Since unification, the leadership, staff and interested members have met annually to review members' needs, consider changes in chiropractic and the healthcare arena, prioritize resources and draft a strategic plan. Twenty-four experienced volunteer leaders (the UVCA Board of Directors, past presidents, committee and sub-committee chairs, legislative consultants, and other association and profession leaders) and senior staff came together on February 2nd and 3rd, 2018, to take a fresh look at the strategic plan. This strategic planning session was facilitated by Bob Harris, Certified Association Executive. Mr. Harris is an internationally recognized expert on association management and long range planning with specific insights into the needs and challenges of the chiropractic profession.

INSIGHTS

The group reviewed association data suggesting why doctors they say join the UVCA and why they drop out. It was noted that the members who dropped out appear to be primarily those who are retiring, moving out of state, or have not actively and regularly utilize association benefits. The group concluded that to truly serve members and reach a broader membership base, engagement would be critical.

Attendees suggested that while there are many vital profession needs that the organization needs to address, it also needs to more clearly communicate to members, "What am I going to get for my dues?" It was suggested the new plan be added to the website, transformed into a clear and concise brochure, and be provided to the board as wallet cards to promote value and relevance. Additionally, it was suggested that the leadership identify



key performance indicators that staff could report on at quarterly board meetings via Dashboards.

It was recognized that in many cases, the association had become a staff-driven model; benefitting from a dedicated professional staff. However, with less reliance on committees to engage members and develop future leaders, overall sustainability is at risk. Thus the group looked at governance and leadership training issues, as well as goals and initiatives.

PURPOSE OF THE STRATEGIC PLAN

It was noted that the strategic plan is vital in order to:

1. Provide the association with a roadmap for everything it does.
2. Identify successive Leaders.
3. Set focus on 3-7 goals for a 3-5 year period.
4. Clarify the answers to the question, "Why should I belong to the Unified VCA?"
5. Create committee alignment with goals and strategies.
6. Determine budget Impact.
7. Direct staff.
8. Increase member awareness.
9. Refine and improve the association.

MISSION, VISION AND VALUE STATEMENTS

The organization's Mission, Vision and Values communicate the purposes of the Association. The mission should identify the organization, who it serves

and what it offers. The vision communicates the desired outcomes. The values are the organization's guiding principles. By operating with these statements in mind, the organization and its leaders can more effectively prioritize resources and pursue the initiatives that best serve its constituents.

The **mission statement** was condensed to more clearly state the Unified VCA's purpose.

Mission: Existing

Unified in promoting the health and well-being of the public through education, advancement and protection of the practice of Chiropractic.

Mission: Proposed

Helping Doctors of Chiropractic deliver exceptional care.

The **vision statement** was updated to broaden its scope, increase emphasis on the patient, and better reflect the mission.

Vision: Existing

A state of wellness through Chiropractic care with fair and equal access for the public we serve.

Vision: Proposed

Chiropractic positioned as a highly regarded health care profession that improves and advances public health and well-being.

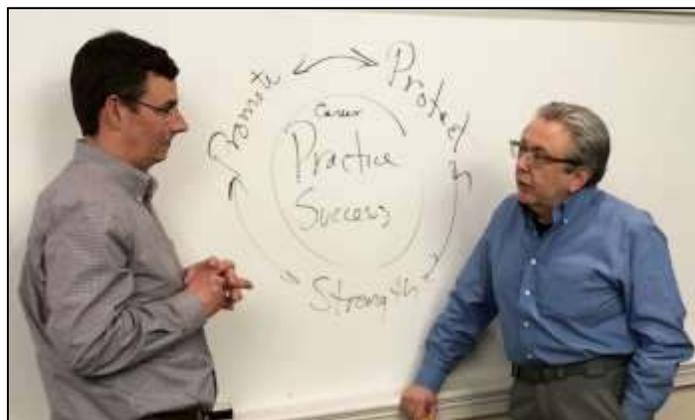
It was determined that a strike force would be appointed to develop the **core values** or principles that drive the leadership and staff. These values will include the concept of a unified association, representing all doctors of chiropractic in Virginia practicing within scope, regardless of philosophy or practice style.

GOALS

Goals are the core competencies for which the board is committed to allocating sufficient resources. The leadership set four goals to advance the mission. These goals should drive the UVCA through 2020 and, along with the mission, form all board and committee discussions.

1. Advocacy and Influence
2. Practice and Career Success
3. Public Awareness and Market Growth
4. Association and Membership Strength

In order for DCs to deliver exceptional care, they need to realize practice and career success. Practice and career success are impacted directly by advocacy and influence, public awareness and market growth, and the strength of both the association itself and the benefits it provides. Dr. Eric Saxton's graphic depiction of the interrelationship of these goals appears below.



Goal 1: Advocacy and Influence ⁱ

Strategies

Defending the scope of practice and advancing payment processes to benefit Chiropractic and access to health care.

Strategy 1: To ensure that Chiropractors are afforded the ability to practice and receive fair and reasonable access and reimbursement.

Strategy 2: Protect and advocate for chiropractic practices. Defend chiropractic scope.

- Project: Conduct survey by summer 2018 to solicit, measure and monitor members' satisfaction regarding available practice procedures; e.g., do DCs in Virginia feel limited by the current scope? Hope is that respondents' satisfaction level will be at least 51%, understanding that satisfied DCs may be less likely to respond to survey.

Strategy 3: Maintain and support an effective and influential lobbying team.

- Project: Continue to develop key contact list. Keep The Keeney Group informed of legislative contacts and issue resources.
- Project: Strengthen Virginia C-PAC
 - Strengthen link between the UVCA and C-PAC.
 - Include an optional C-PAC donation in membership dues/forms.
 - Increase recognition of contributors.
 - Create a challenge between member/practice contributors. Goal: Increase CPAC contributions by 33% in 2018, 50% in 2019, 70% in 2020.

Strategy 4: Improve Assignment of Benefits laws over 2018 and 2019.

Strategy 5: Position Chiropractic as a major player in addressing the opioid crisis in Virginia.

- Project: Strengthen chiropractic in the Workers Compensation arena.
- Project: Work to have a seat on the Dept. of Health Profession, General Assembly and other boards addressing the opioid crisis. (Guidestar.com – search word “opioids”).
- Project: Create relationships with pain management clinics and key corporate decision-



makers (Human Resource managers); share research, practice outcomes and advise them on the benefits of Chiropractic care.

- Establish strike force team to research, identify opportunities and conduct presentations to key parties.

Strategy 6: Improve payment systems.ⁱⁱ

- Project: Support the ECA-IPN's growth and success.
- Project: Address third party issues as they arise.
- Project: Encouraged in current drugless environment 3 years.

Strategy Summary

1. Position Chiropractic as an important player in solving the opioid crisis in Virginia.
2. Maintain a strong, powerful lobbying team.
3. Strengthen C-PAC relationship.
4. Strengthen payment systems (third party, workers' comp).
5. Solicit and monitor member input regarding the current practice act.

Committee Alignment

- Insurance
- Legislative
- Scope of Practice
- Virginia C-PAC
- Opioids Task Force
- Worker's Comp Initiative
- Medicare CAC

Goal 2: Practice and Career Success ⁱⁱ

Strategies

Providing the tools and expertise to support member success.

Strategy 1: Make resources easier for members to find and utilize.

- Project: Re-package Tools & Resources into a members-only “VCA Vault” by June 2018.

4 categories:

- Finance – What does it mean to be a successful practice?
- Quality – Research database.
- Team – How to hire and train CAs; continuing education; ACE.
- Growth -- Marketing basics.

Timeline:

- Review, cull, categorize existing content – 4 months
- Prioritize into buildable projects, delegate to task forces – 6 months
- Create awareness – 12 months
- Annual re-evaluation for updates, additions, etc.

Strategy Summary

Toolkits and Resources

1. The VCA Vault®
2. Access to Expertise (people, list-serve)
3. Conferences and Education (conventions, seminars, staff training, list-serve)
4. Sense of Community/Camaraderie/Belonging (list-serve, district meetings, signature social events)

Committee Alignment

- Practice Management
- Specialists in various techniques, practice styles, market niches



Goal 3: Public Awareness and Market Growth ⁱⁱⁱ

Strategies

Helping chiropractors deliver the best care through public awareness and marketing.

Strategy 1: Strengthen the UVCA brand and messaging in 2018. Obtain cost proposals by August 2018 in order to create 2019 budget request.

Strategy 2: Create a new website. Get cost proposals by August 2018. Evaluate proposals and develop budget recommendation for 2019.

Strategy 3: Create Marketing Pillars. Leverage relationships with F4CP, national and other organizations; create “guidelines and guardrails.” Help members with their advertising, marketing and communications. Direct PR Committee to complete this by April 2018.

Strategy 4: Positive PR Campaign – B2C – for members to increase involvement. Metric: VCA website: Find-a-Doc website hits. Metric: Media imprints. (Check out Google dashboards.)

Strategy Summary

1. Brand strength and assessment
2. Internet presence

3. Create marketing guidelines
4. Public awareness campaigns

Committee Alignment

1. PR Committee



Goal 4: Association and Membership Strength ^{iv}

Strategies

Creating an engaged membership and leadership supporting a strong, dynamic association.

Strategy 1: Grow membership to 800 by 12/31/18 and 900 by 12/31/19.

Project: Increase perceived value through clearer benefits communications. Categories: Advocacy, PR/Social Media, Practice Success, Mission/Vision/Values.

- Build on/highlight successes.
- Directive to group: provide bullet points re: “what are you doing for me?” and “Why belong?”
- Appoint a strike force to develop values (to include a unified membership).
- Update web site to make more user-friendly: improve ease of navigation, use more infographics, and eliminate pull-down menus.
- Add more/new benefits (health insurance, COCSA affinity programs).
- Utilize resources through COCSA to learn and get ideas from other chiropractic associations.

Committee Alignment
Membership

Strategy 2: Create a dedicated leadership chain.

Project: Create a leadership orientation.

- Have leadership review bylaws, Articles, strategic plan, etc. and then quiz.
- Annual session to orient new leaders and remind existing – perhaps in conjunction with a strategic plan review.

Project: Create an accountability chart for the Board.

Project: Review and update Bylaws.

- Move policies from bylaws to policy manual.
- Have a task force or attorney review.

Project: Create succession plan for Executive Board.

Project: Increase leadership’s knowledge via ideas and insights from other organizations

- Utilize COCSA tool kits, lunch-and-learns, etc.
- Identify sources of non-dues income that work for other associations.
- Subscribe executive committee to COCSA list-serve.

Committee Alignment

Executive Committee

Strategy 3: Develop revenue and resources.

Project: Increase reserves to \$300,000 by the end of 2020.

Project: Research COCSA and other state associations to identify affinity programs that might be good fits for Virginia.

Project: Consider special assessment.

Committee Alignment

Finance Committee (per UVCA bylaws: President, Immediate Past President and Treasurer)

Strategy 4: Adopt a budget to be approved by Board to support Mission.

Project: Disseminate budget report to full Board monthly. Create and include a dashboard based on 5-9 key items, identified by the Board.

Project: Activate Finance Committee (President, Immediate Past President and Treasurer).

Project: Establish an audit policy.

Project: Increase investment in technology to support a growing association to roughly \$30,000 annually.

Committee Alignment

Finance Committee (per UVCA bylaws: President, Immediate Past President and Treasurer)

- Review by Officers and Staff
- Motion to Approve by Board
- Establish Performance Measures
- Member Awareness
- Alignment with Committees, Assignments
- Program of Work/Action Plan (staff)
- Ongoing Monitoring
- Annual Review
- Three Year Update

Strategy Summary

1. Membership Value
2. Leadership Strength
3. Financial Sustainability
4. Technology Investment

OVERVIEW

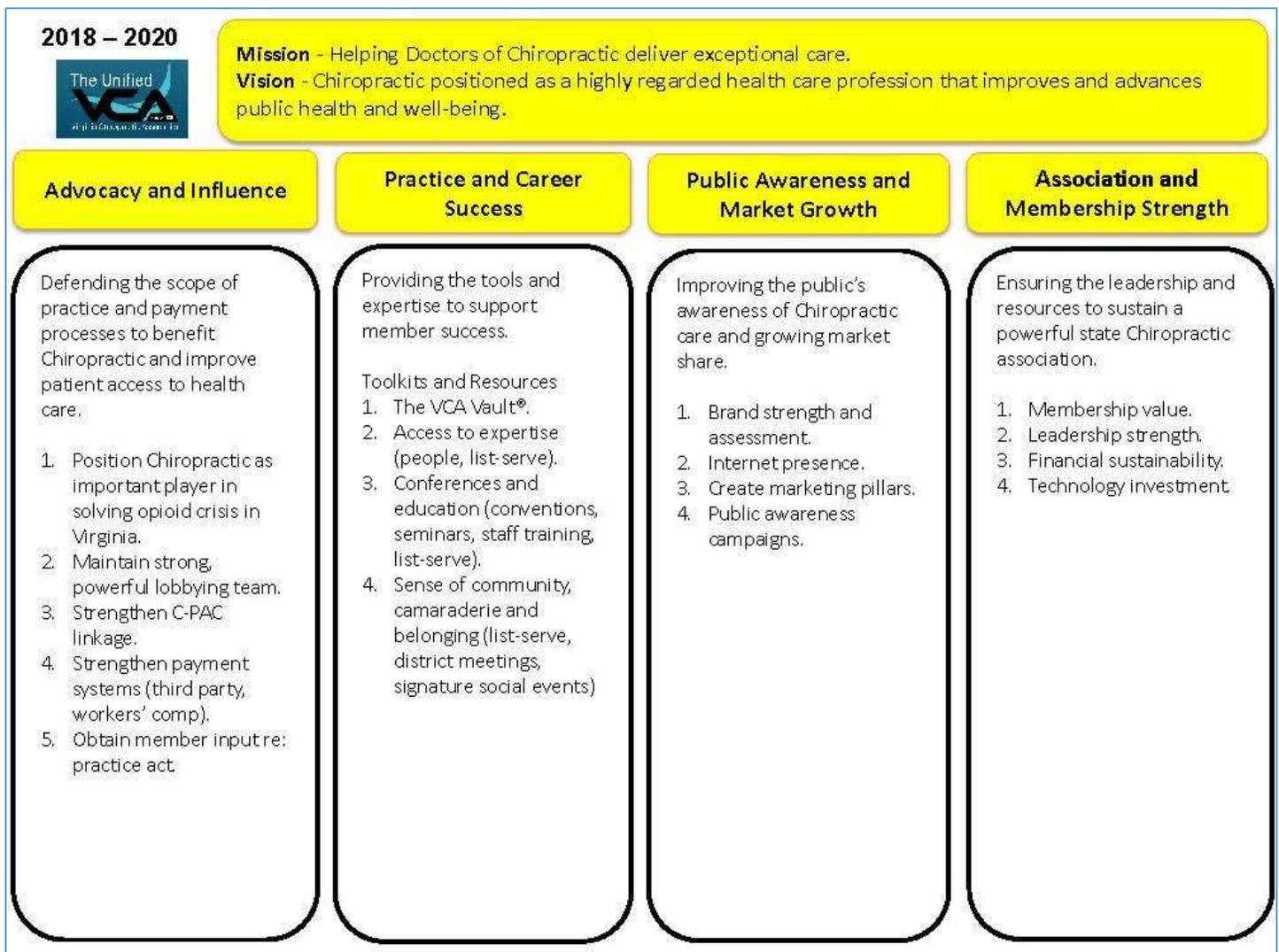
A chart providing an overview of the strategic plan appears below.

NEXT STEPS

The leadership and staff will proceed with the implementation of the strategic plan as follows.

The membership will receive regular updates and opportunities to provide input so that they “own” the strategic plan. It was felt that it was critical to the plan’s success that the members are aware and have buy-in into the goals; that they recognize that the plan is a living, breathing document yielding real progress on their behalf.

Dr. Michelle Rose, Unified VCA Secretary, was appointed the plan’s “Champion” to help ensure adherence to the association’s mission, vision, values and goals; leadership accountability; and member awareness.



ⁱ **Advocacy and Influence Break-out Group Participants:** Dr. Joe Foley – Co-Leader, Dr. Bill Ward – Co-Leader, Dr. Eric Saxton, Dr. Bibhu Misra, Dr. Kevin Walsh, Dr. Eric Carlsen, Mr. Bruce Keeney, Mr. Bo Keeney

ⁱⁱ **Practice and Career Success Break-out Group Participants:** Dr. Lee Matthis – Co-Leader, Dr. Bob Pinto – Co-Leader, Dr. Jeff Bowers,

ⁱⁱⁱ **Public Awareness and Market Growth Break-out Group Participants:** Dr. Carly Swift – Co-Leader, Dr. Ray Tuck – Co-Leader, Dr. Jennifer Rathmann, Dr. Brad Robinson, Dr. Sam Spillman, Dr. AJ LaBarbera, Dr. Rebecca Wilder

^{iv} **Association and Membership Strength Break-out Group Participants:** Dr. Chris Perron – Co-Leader, Dr. Matthew Schrier – Co-Leader, Dr. Tom Wetzen, Dr. Michelle Rose, Ms. Julie Connolly