



## 2017 Strategic Planning Meeting

January 28, 2017  
Hilton Hotel & Spa at Short Pump  
Richmond, VA



Thirty-seven individuals donated their day and their brain power to the Unified VCA's eighth annual strategic planning meeting in Richmond on Saturday, January 28<sup>th</sup>. The group of 32 DC members, 2 supporting supplier members, 2 legislative consultants and 2 UVCA Staffers ensured healthy diversity in expertise and perspective.

Eric Carlsen, DC  
Julie Connolly, FICC  
Philip Connolly, DC  
David Dolberg, DC  
Patricia Duncan, DC  
Christine Fallwell, DC  
Joseph Foley, DC  
Pam Grove  
Mark Gutekunst, DC  
James Harris, DC  
Meredith Harwell, DC  
Shawn Keegan, DC  
Bo Keeney  
Bruce Keeney  
Elizabeth Kautz Koch, DC  
Robert Leib, DC  
Lee Matthis, DC  
Bryan Miller, Anabolic Laboratories  
Bibhu Misra, DC

Lewis Pauley, DC  
Christopher Perron, DC  
Robert Pinto, DC  
Billy Ray, DC  
Brad Robinson, DC  
Michelle Rose, DC  
W J Sansfaute, DC  
Eric Saxton, DC  
Matthew Schrier, DC  
Allison Schwartz, DC  
Daniel Shaye, DC/Trusted Voice & Video  
William Sonak, DC  
Samuel Spillman, DC  
Carly Swift, DC  
Robert Walentin, DC  
Kevin Walsh, DC  
Todd Watson, DC  
Thomas Wetzen, DC



In his opening comments, UVCA President Dr. David Dolberg presented a short video on "Showing the Why" to inspire by Simon Sinek. The piece spoke to the fact that people don't buy **WHAT** you do; they buy **WHY** you do what you do.

- **WHAT** is the product,
- **HOW** is the process, and
- **WHY** is the motivation.

For example, in the context of the Unified VCA, the **WHAT** is the association and the **HOW** is member benefits (web site tools, list-serve, education, etc.) – but the **WHY** is

ensuring that everyone has the opportunity to discover and benefit from the wonders of safe, effective chiropractic care. It is those who start with the **WHY** have the ability to inspire those around them or find others who inspire them.

Drs. Will Sonak and Chris Perron briefly reviewed work from previous strategy meeting and key “guidance documents” to consider throughout the day’s work, including:

- Results of previous SWOTs in which the organization’s strengths and weaknesses (internal factors) and external opportunities and threats to the profession were considered.
- The Statement of Professional Identity that served as the cornerstone to the unification of the two previously separate chiropractic associations in Virginia.
- Mission and Vision statements.

In addition, Ms. Connolly highlighted current member trends and generational factors and Dr. Dolberg presented selected results from the 2016 Palmer/Gallup study regarding Americans’ perceptions of chiropractic.

Attendees split into five break-out groups, each corresponding with major categories emerging from previous SWOT exercises. The energy was palpable as the groups brainstormed major goals and objectives for the Association as well as projects and initiatives designed to fulfill those goals. Participants had an opportunity about half-way through, in conjunction with a lunch break, to switch to another group, if desired. Summaries follow.

## **Public Relations**

Chair: Dr. Carly Swift, Director, District V-East.

Additional Attendees: Dr. Michelle Rose, Dr. Christopher Perron, Dr. Daniel Shaye, Dr. Elizabeth Kautz Koch, and Dr. Sam Spillman.

### **Goal/Objective: Increase Positive Chiropractic View**

#### **Project/Initiative: Increase members’ sharing of UVCA Facebook posts.**

- Member campaign
- Creation of social media pillars

#### **Project/Initiative: Conduct positive community events.**

- Conduct school supply drive
  - Get offices to commit
    - create flyers
    - mid-July to mid-August
  - District directors get flyers out; find local drop-off spot



## **Membership**

Chair: Dr. Matthew Schrier, Director, District IV-West.

Additional Attendees: Dr. Mark Gutekunst, Dr. Christine Falwell, Dr. Elizabeth Kautz Koch, and Ms. Julie Connolly.

### **Goal/Objective: Increase Unified VCA membership to 800 by 1/1/18.**

**Project/Initiative: Increase Premier Members to 125 by 1/1/18.**

- Increase communications of benefits
  - Show clear cost comparison
  - Create videos re: “Why I Became a Premier Member”
  - Have Premier Members talk it up at conventions
- Develop “Premier CA” identity
  - Promote to CAs the benefits of Premier DC membership to both their doctors and to them
  - “Premier CA” ribbon instead of “My DC is Premier”

**Project/Initiative: Strengthen CA involvement.**

- Develop some kind of recognition or UVCA-specific “designation” to denote extra achievement (NOT a formal certification)
  - CA attends x hours of UVCA events
  - Certificate/something to hang on wall
- Increase emphasis on encouraging doctors to bring their CAs to the conventions and help CAs to feel more connected at them; help them to feel more comfortable with mingling, asking questions



**Project/Initiative: Retain more members.**

- Study existing analytics and conduct additional research to better understand why people drop out; how to address
- Improve the VCADocTalk benefit as a key member benefit
  - Improve subject line to clarify/use keyword
- Reduce the feeling of “cliques” at conventions
  - Board member introduces self to new and non-members, gives card, invites to call with questions
  - Board member introduces him/her to at least one other person
  - Board or other member follows up with him/her after convention
  - Assign some locals to serve as a welcoming committee
  - In convention communications, highlight not just speakers but our “concierge”, staff members with photos
  - Maintain and promote a list of people who want to share rooms, are offering to provide a room at their home, etc.

**Project/Initiative: Recruit more non-members.**

- Study existing analytics and conduct additional research to better understand why people join; how to address
- Use social media
  - Target Facebook pages of non-members
  - Ensure compelling content
  - Design posts that share the value of membership (consultants, insurance)

- Experiment with advertising/boosts
- Set up personal pages for committee chairs or specific projects, so others can “friend”, so we can post to non-members’ pages, ask them to like/share on our page
- Private message
- Increase participation in Member-Get-a-Member campaign
  - Provide scripting and other tools to recruiters to address typical objections; for ex:
    - Cost
    - Associate doc and employer doc is already a member

## Insurance

Chair: Dr. Robert Pinto, Association Liaison, Workers Compensation Research Institute

Additional Attendees: Dr. Eric Carlsen, Dr. Eric Saxton, Dr. Allison Schwartz, Dr. Phil Connolly, Dr. David Dolberg and Dr. Jean Luc Sansfaute.

### **Goal/Objective 1: Establish relationships in the insurance arena.**

**Project/Initiative:  
Continue to provide support to the ECA-IPN.**

- Provide survey at Spring Convention to further identify strengths and opportunities for ECA-IPN. If not part of previous survey, poll members as to membership in ECA-IPN.
- Inform members of the importance of having access to the data that ECA-IPN affords us as opposed to having no access to data collected when participating with other MCOs.



**Project/Initiative: Continue work with WCRI, with focus on building relationships with carriers and industry leaders.**

- Continue to explore the idea of a worker’s comp training course for providers on how to effectively manage the mechanics of filing with carriers as well as the management of worker’s comp cases.

**Project/Initiative: Continue participation with Carrier Advisory Committee (CAC).**

(This is an effective tool to understand where we stand with regards to Medicare initiatives and provides a conduit for sharing information that we can act upon.)

- Aggressively promote upcoming standalone Medicare training with Susan McClelland and spring convention session by Dr. Michael Jacklitch.

- Maintain focus on documentation issues and the importance of appealing denials.

## **Goal/Objective 2: Help DCs generate revenue.**

### **Project/Initiative: Continue Insurance Tips.**

- Create new topics.
- Grow archive and make it easily accessible to members.
- Periodically update topics and rotate existing topics.

### **Project/initiative: Continue to increase Virginia DCs' participation in Veteran's Choice program.**

- Develop reimbursement guidelines.
- Promote to our members.



### **Project/Initiative: Revamp research listing on UVCA website to make it more user friendly.**

## **Goal/Objective 3: Help resolve insurance issues/problems.**

### **Project/Initiative: Streamline Insurance section of website for ease of use.**

- Develop a Flowchart for insurance issues.
- Promote audit tool.
- Consider a webinar to highlight all the features of insurance section of our website and promote its use.

### **Project/Initiative: Continue to provide assistance to members with insurance reimbursement issues.**

- Grow Attorney Network and continue to promote it with membership.
- Continue to add to Template Demand letters and promote their existence to membership.
- Continue to address issues with Aetna/Optum.
  - Research the legality of a patient waiver to allow collection of fees for services done over and above allowable of contract.
  - Develop template for members.
- Highlight to membership UVCA's relationships with our Medicare, Compliance and Insurance specialists and how to go about engaging them in the context of these relationships. Continue to promote these specialists and what an incredible resource they are.
- Improve communications and accountability between Insurance Subcommittees – Insurance Committee – Board.

## Legislative

Chair: Dr. Joe Foley, Chair, UVCA Legislative Committee

Additional Attendees: Dr. Sam Spillman, Dr. Brad Robinson, Dr. Tom Wetzen, Dr. Bibhu Misra, Mr. Bruce Keeney, Mr. Bo Keeney, Dr. David Dolberg and Dr. Kevin Walsh.



### **Goal/Objective 1: Raise our legislative clout.**

#### **Project/Initiative: Organize key doctor contact lists.**

- Have district directors help coordinate with CPAC key contact doctors, plan training for key docs.
- Encourage docs to show support of legislators through social media, host an educational meeting with legislators in the doc's office.
- Have CPAC send out a request for donations to ALL DCs after legislative success.
- Discuss building CPAC donation into UVCA dues.
- Support legislative events/lunches with local DCs and state elected legislators.

#### **Project/Initiative: Increase DC presence at the Virginia capital during session.**

- Lobbyists? suggest a DC doing blood pressure or other physical exam screening.

#### **Project/Initiative: Encourage Virginia DC attendance at the National Chiropractic Leadership Conference.**

### **Goal/Objective 2: Monitor legislation to protect chiropractic in Virginia.**

#### **Project/Initiative: Clarify physician status of the Doctor of Chiropractic in Virginia.**

- Oppose any reductions of physician status.
- Support any appropriate advancements regarding physician status.

#### **Project/Initiative: Protect chiropractic identity/adjustment.**

- Oppose any threats to chiropractic identity/adjustment.
- Support any appropriate advancements to the chiropractic identity/adjustment.

**Project/Initiative: Seek consensus within UVCA membership on keeping chiropractic scope as is or making a legislative change. (Lobbyist recommends no change unless there is a threat or challenge.)**

### **Goal/Objective 3: Increase representation on the Virginia Board of Medicine.**

**Project/Initiative: Seek consensus within UVCA membership on keeping chiropractic's regulatory body as is, increasing the number of DCs on the Board to two, or creating a separate Board of Chiropractic.**

## **Goal/Objective 4: Increase communications and cooperation on common issues with PTs and other health professions.**

### **Project/Initiative: Establish DC liaisons to various professions.**

- Dr. Sam Spillman will serve as liaison to physical therapists.

## **Practice Management**

Chair: Dr. Lee Matthis, Chair, UVCA Philosophy & Ethics Committee

Additional Attendees: Dr. Bob Leib, Dr. Robert Walentin, Dr. Patricia Duncan, Dr. Lewis Pauley, Dr. Todd Watson, Dr. Billy Ray, Dr. James Harris, Dr. Meredith Harwell, and Dr. Shawn Keegan.

## **Goal/Objective 1: Increase committee effectiveness.**

### **Project/Initiative: Revisit the committee membership.**

- Identify those who wish to participate actively, those who wish to drop off the committee, and additional new members who would like to join on.
- Identify and communicate expectations for committee membership.

## **Goal/Objective 2: Provide resources to help DCs succeed in practice.**

### **Project/Initiative: Build a reference list for member use.**

- Ideas for inclusion: personal development, books, audio, YouTube, evidence-based articles, a “who to ask” list, vendor member list.
- Some material will be new, some will be pulled from other areas of the web site (for example, existing supplier list accessible from home page).



**Project/Initiative: Develop tools to help members successfully handle a range of practice matters.**

- Develop an Office Overhead form: an idea of the general percentages of each category a successful practitioner should have (for example, for illustration purposes: 18% on rent, 25% on staff wages, 149% for doctor's salary.....but with real numbers).
- Format an Emergency to-do list with instructions on how to implement it should the need arise. For example, when a spouse is dealing with a doctor who has passed, or a doctor is suddenly incapacitated.
- Create an Associateship check-list to help ensure that both parties' interests and goals are factored in to the equation.
  - For Owner Doctors looking to add an associate.
  - For Doctors looking to enter into an associateship.

Once the break-outs concluded, representative(s) from each reported on their work to the full group. The return to a general session gave attendees an opportunity to observe and comment on emerging trends or themes across groups, They also debriefed the format of this year's meeting and how to make it even more productive, inspiring and fun next year.

Watch for updates on strategic planning progress at conventions and throughout the year. If there is a particular area or initiative you would like to contribute your own passion (and a little time) to, please contact your Unified VCA committees, district directors, or the association office. A convenient list of their names and email addresses follows!





## Get Involved!

### *A Little Bit of Sharing Can Make a BIG Difference*

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