

## Members Contribute “2020 Vision” to the Unified VCA’s Strategic Planning

President Dr. David Dolberg called the 7<sup>th</sup> annual Unified VCA strategic planning session -- aka “2020 Vision” -- to order at 10:10 a.m. on January 30<sup>th</sup>, at the Embassy Suites in Richmond. The following 51 individuals attended – slightly higher than the 49 that participated in 2015.

Mr. Randy Alexander, Chiro1Source  
Dr. Michael Amato, The Amato Clinic  
Dr. Christopher Belluzzo, South Main Chiropractic Clinic  
Dr. Chantay Bess, Family & Sports Chiropractic  
Dr. Jeff Bowers, Bowers Family Chiropractic PC  
Dr. Shannon Breeding, Ariya Family Chiropractic Center  
Dr. Jeremy Busch, Performance Sport & Spine  
Mr. Lee Carter, Sleep Essentials, Inc.  
Dr. Philip Connolly, Spine Care of Alexandria  
Ms. Julie Connolly, Unified Virginia Chiropractic Association  
Dr. Camille D’Amato, Quality Chiropractic  
Dr. David Dolberg, Family Chiropractic of Springfield  
Dr. Joseph Foley, Family Chiropractors  
Dr. Theresa Graf, Quintessential Chiropractic, LLC  
Dr. Teresa Green, Chiropractic Health & Wellness Center  
Dr. Jay Greenstein, Sport & Spine Rehab  
Dr. Nelson Gregory, Richmond Chiropractic Solutions  
Ms. Pam Grove, Unified Virginia Chiropractic Association  
Dr. Mark Gutekunst, Chesapeake Wellness Center  
Dr. Erica Heppe, Fredericksburg Wellness Center  
Dr. John Hess, Standard Process  
Mr. Bruce Keeney, The Keeney Group  
Mr. Bo Keeney, The Keeney Group  
Dr. Demetrios Kydonieus, Life Enhancing Chiropractic  
Dr. Corey Malnikof, Palmercare Chiropractic  
Dr. Matthew Marry, Tuck Chiropractic Clinic  
Dr. Lee Matthis, Tuck Chiropractic Clinic  
Dr. Katrina Mayes, Quintessential Chiropractic, LLC  
Dr. Dennis O’Hara  
Dr. Minesh Patel, Ariya Family Chiropractic Center  
Dr. Christopher Perron, Perron Chiropractic

Dr. Anne Pinto, Pinto Chiropractic & Rehabilitation  
Dr. Robert Pinto, Pinto Chiropractic & Rehabilitation  
Ms. Marilyn Porras, Chirocenters Management Corporation  
Dr. Bradley Richmond, Richmond Wellness Center  
Dr. Michelle Rose, Green Run Chiropractic  
Dr. Kevin Ruff, Family Chiropractic Center of Richmond  
Dr. Matthew Schrier, Community Chiropractic PLC  
Dr. Allison Schwartz, Premier Health Chiropractic  
Dr. Daniel Shaye, Performance Chiropractic LLC, Trusted Voice & Video  
Dr. William Sonak, Sonak Family Chiropractic & Life Wellness  
Dr. Samuel Spillman, Balanced Chiropractic & Physical Therapy  
Dr. Carly Swift, Wave of Life Chiropractic Center  
Dr. Braheem Tolbert, Divine Spine Chiropractic  
Dr. Amanda Vozar, Atwell Family Chiropractic & Wellness  
Dr. Cecil Walker, Chiro1Source  
Dr. Kevin Walsh, Walsh Family Chiropractic  
Dr. Gregory Walter, The Walter Clinic  
Ms. Becky Walter, Consultant  
Dr. Thomas Wetzen, Family & Sports Chiropractic

**“Chiropractic is not a belief system. It’s an evidence-based profession.”**  
**Dr. Jay Greenstein**

A diverse group of established doctors, new practitioners and brand new licensees representing a wide range of philosophies, geographic locations, and practice styles came from throughout the state to strengthen the discussions. Several vendor attendees also donated their time to contribute their own unique perspectives on the business of Chiropractic.

Dr. Dolberg opened the meeting with a review of anti-trust considerations and a reminder of the “Statement of Professional Identity” that facilitated the unification of the two Virginia associations in 2009<sup>1</sup>. Attendees then introduced themselves, sharing how many years they had been in business and where they practiced.

Dr. Jay Greenstein put the think-tanking in motion via a

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*Dr. Jay Greenstein presents “The 5 Dysfunctions of the Chiropractic Profession”*



Continued from page 1 thought provoking presentation on the importance of unity on an organization's functional success. Dr. Dolberg provided a summary of the results of the recent Palmer/Gallup study regarding public perception of Chiropractic<sup>2</sup>. The main focus of the nearly 50 attendees was to then apply these concepts of public perception to the forward movement of Chiropractic.

The group reviewed the Unified VCA's Mission and Vision statements and why each is important to the strategic planning process.

**The Unified VCA's Vision:**

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

**The Unified VCA's Mission:**

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

The participants reviewed the list of items that previous strategy meetings had identified as things that the Unified VCA can, does or should do to support the Mission (that is designed to fulfill the vision). The group agreed on the following list.

*(In Descending Order)*

1. Grow membership (increased resources, strength, etc.)
2. Support practice marketing
  - Metrics
  - Outside insurance environment
3. Protect chiropractic identity/adjustment
4. Improve insurance environment
  - Nurture the ECA-IPN
  - Contact/educate insurance carriers
  - Resolve Workers Comp issues
  - Increase parity of reimbursement for exams
  - Veterans' Administration
5. Explore improvements to practice scope
6. Improve perception of chiropractic
  - Public
  - Other healthcare providers
7. Study how to increase representation in the state via the existing BOM, pursuing a separate Chiropractic Board, etc.
8. Clarify advertising parameters (what can/cannot do/say)
9. Study/consider CA certification
10. Provide coding clarification resources - *Newly Added*

*Dr. Chantay Bess & Dr. Katrina Mayes*



**S.W.O.T.**

**Strengths – Weaknesses – Opportunities - Threats**

In order to ensure that the strategic planning was conducted with relevant internal and external factors in mind, results from previous "SWOT" exercises were reviewed.

The group reviewed and agreed to the following list of internal factors that are helpful to the Association.

**Unified VCA Strengths**

- Diversity
- Common goal
- Single voice
- Strong patient support
- Stable membership
- Good leadership
- Well-organized/efficient
- Talent/innovation/knowledge
- Good legal consultants
- Good legislative consultants
- Passion/desire
- Increasing member involvement
- Strong mutual respect
- Annual strategic planning, SWOT exercise
- Adaptability
- A maturing profession & membership
- Geographical location (proximity to ACA, ICA, Nation's Capital)
- Good relationships with other state & national chiropractic associations
- Watches Virginia DCs' backs
- Communications/information (VCA doctalk, Member FYI, etc.)
- Follow-through
- State scope of practice (note: both a strength and a weakness)
- Corporate sponsor support
- Momentum
- Growing more pro-active; not just re-active
- Staff
- Above average retention rate
- Increasing/improving list-serve participation
- Vendors feel welcome/part of group
- Educational programs, conventions (relevant, diverse, quality)
- Strong representative on BOM
- Growing legislative relationships (still need to be much stronger, but moving in right direction)
- Connections within insurance industry/MCOs
- Member enthusiasm
- Provides a unique product
- ECA-IPN (emerging)

*"20/20 Vision was enlightening for a multitude of reasons. Great Docs with a desire to push this profession to the next level in all fields: insurance, PR, legislative, practice management and of course membership!"*  
*Dr. Philip Connolly*

The group reviewed and agreed to the following list of internal factors that are harmful to the Association.

**Unified VCA Weaknesses**

- DCs' lack of awareness re: what association does for them
- No formal CA program
- Although improving, limited resources
- Money
- Manpower (staff, volunteers)
- Poor/varying public awareness
- Low DC self-esteem
- Apathy: low membership involvement/support
- Insufficient member use of existing UVCA tools & benefits
- Poor/inconsistent use of list-serve (but improving)
- Insufficient awareness/promotion of accomplishments
- Only about half actively practicing DCs in state are members
- Lack of collaboration with other groups (attorneys, other



healthcare providers, etc.)

- Inefficient inter-profession cooperation
- Insufficient marketing/branding
- Not pro-actively involved in research
- Incomplete key legislative contact network
- Inconsistent communications with non-members
- Lack of district awareness
- Insufficient communication of support for new docs
- Little presence at chiropractic colleges
- Lack of understanding about healthcare reform issues
- Low committee participation
- Lack of doctors' awareness/understanding about compliance, documentation
- Low Virginia C-PAC Contributions
- Low member participation in legislative activities
- State scope of practice (both a strength and a weakness)
- No specific timelines affixed to goals and initiatives

Certified compliance specialist Becky Walter stressed the dangers of doctors' lack of compliance and documentation expertise and the importance of working to resolve the issue.

The group reviewed and agreed to the following list of external opportunities that are helpful to the Association.

### Opportunities for the Unified VCA

- Patient support/advocacy
- Membership support/advocacy
- Increased value/awareness that UVCA offers something for everyone
- Increased legislative strength
- Technology/communications
- Improve public awareness of chiropractic benefits (lifestyle care, wellness model, etc.)
- Learn from other states
- Increase alliances with national & state associations, other groups
- Increase outreach to students, new grads, & new licensees
- Virginia C-PAC
- Social networking
- Endowment program
- Sports physicals
- Increased representation
- Workers Comp
- IPN (note: in process of moving from an "opportunity" to a "strength")
- Increased media coverage/awareness of Chiropractic
- Improved profession self-esteem
- Economic value of Chiropractic
- Insights from probe review
- Vendor involvement
- Healthcare reform (provider specific)
- Unique product
- Referrals by other healthcare providers
- Baby boomers have the most disposable income, represent good prospects for cash &/or wellness

*Drs. Lee Matthis, Tess Graf, Allison Schwartz, Kevin Ruff, Braheem Tolbert, Anne Pinto*

- based practices with less dependence on insurance
- VA (with national associations taking the lead)
- F4CP tools and resources
- Growing body of research supporting Chiropractic
- DOT physicals (if legislative is changed) – *Newly Added*

Participants suggested that in addition to learning from other states, we can teach other states about unifying.

The group reviewed and agreed to the following list of external threats that are harmful to the Association.

### Threats to the Unified VCA

- External apathy
- Economy
- Dwindling insurance coverage, protections... TPAs (note: not as big a threat as more patients move to cash and/or wellness models)
- Government interference
- Insufficient legislative clout
- Lack of integration into public healthcare system
- Negative PR
- Losing our identity (to PTs, DOs)
- Healthcare reform
- Lack of inter-professional trust
- Cultural authority perceptions
- Audit/recoupment process
- Lack of national vision
- Other chiropractic organizations interfering with Virginia scope, regs, etc.
- Medicare: Probe Review, OIG

"Interns' lack of ability to adjust" was removed.

It was noted that most of the items above relate back to issues of perception; awareness; public relations. Dr. Jay Greenstein also observed that, "One of the more interesting points that was brought up was the issue of belief." Dr. Greenstein explained, "When a patient goes to a chiropractor and has a bad experience, the patient then says I don't "believe" in chiropractic. However when they have a bad experience with their local plumber, I'm sure they don't say "I don't believe in plumbing!" We had some great discussion around the fact that Chiropractic is not a belief system, it's an evidence-based profession. And we need to let the public know that. We have one of the best PR committees in any state association. I know we can make that happen."

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Thanks to five generous suppliers, the following door prizes added to the fun throughout the day.

- Online Audio Course and Implementation Materials on “How to Hire, Train, and Keep GREAT CAs,” contributed by **Assistants for Chiropractic Excellence (ACE)**
- Box of Standard Bars contributed by **Standard Process**
- AVG Antivirus 2016 Software License contributed by **CT Business Solutions**
- 6 Month Subscription to ChiroTV Network contributed by **Health Visions**
- Case of headrest paper from **HF Hill & Associates**

## BREAK-OUTS

Attendees broke into five groups to review previously established initiatives, progress, and updates. Participants and the updated key initiatives they outlined appear below.

### Legislative

#### Participants:

- Joe Foley, DC – Facilitator
- Mike Amato, DC
- Erica Heppe, DC
- Demetrios Kydonieus, DC
- Camille D’Amato, DC
- Dennis O’Hara, DC
- Sam Spillman, DC
- Kevin Walsh, DC
- Tom Wetzen, DC

#### Key Initiatives:

1. Grow our legislative clout – continue/ongoing.
2. Protect the chiropractic profession’s identity/adjustments - continue/ongoing.
3. Protect/clarify physician status - continue/ongoing.
4. Increase BOM representation vs. establish an independent chiropractic board - continue discussion to gain a consensus.
5. *Added* - Encourage attendance at the National Chiropractic Leadership Conference (2016: February 25th).
6. *Added* - Explore having a DC at the Virginia capitol during session.
7. *Added* – Work with PTs and other health professions to increase communications and cooperation on common issues.
8. *Added* - Scope of practice change/clarification - continue discussion to gain a consensus.

*Removed/COMPLETED:* Restructuring of UVCA legislative committee to increase efficiency.

### Membership

#### Participants:

1. Matthew, Schrier, DC – Facilitator
2. Mark Gutekunst, DC
3. Corey Malnikof, DC
4. Amanda Vozar, DC
5. Julie Connolly, Staff
6. Pam Grove, Staff

*Dr. Cecil Walker &  
Mr. Randy Alexander,  
Chiro1Source; Drs.  
Teresa Green &  
Shannon Breeding*

#### Key Initiatives:

Recruitment: Reviewed why people join the UVCA.

- Nearly half new members come from referral by an existing member. Explored what the member sponsors are presenting that persuades prospective members to join. The docs have an edge due to their natural insights into their colleagues’ needs, enabling/causing them to

automatically talk about membership within the context of the non-member docs’ specific needs.

- Develop a member-get-a-member campaign again, like we’ve done the last couple years.
- Once a month, send ALL members a list of non-members in their area and ask them to invite them to join. If members notice that a colleague is on the non-member list, they might be more apt to bring the topic up.
- Incorporate videos by leadership into recruitment emails; target specific areas with videos by the directors for those specific districts.
- Add to the member-get-a-member tools available to potential sponsors.
  - Webinar explaining benefits
  - PowerPoint explaining benefits
- Next most frequent reason members join is in order to attend conventions with member discounts. Continue strong convention promotion, including district director focus on personally inviting docs to attend.
- Idea - Valentine’s Day promotion: A dramatic special offer to non-members for a very limited time – just Valentine’s Day or just that week – with the message, “UVCA Loves You” or “Because the UVCA Loves You...” Incentive could be a short-term deep discount, or perhaps a supplier will contribute a discount to an upcoming seminar.

Retention: Reviewed why people drop out of the Unified VCA.

- “I’m just not using the benefits.” In most cases they ARE using and/or benefitting from the benefits; they just don’t realize it. Need to increase awareness. Develop talking points for staff and district directors to help uncover which benefits and communicate them.
- “Financial issues.” Usually translates to not utilizing (or aware that they are utilizing) benefits.
  - Work to increase awareness/recognize value of benefits they are using.
  - If they are having practice difficulties, see if we can put them in touch with practice management committee members, specialists in various areas of practice, etc.
  - Continue inviting members to submit requests for partially reduced dues as needed.
- “Just haven’t gotten ‘round to it.” Incentivize those on annual renewal to switch to EZ-Pay.

EZ-Pay: EZ-Pay enrollment is a “win-win” -- adds value to membership and increases retention.

- Continue to tie recruitment incentives into EZ-Pay enrollment or make it the only payment option for new members.
- Revisit employing a financial incentive to get existing members to switch from annual renewal to EZ-Pay. A more dramatic





one-time discount than we have offered in the past might pay off in the long run.

- Recognize those who ARE on EZ-Pay. (Pin or button: "I'm EZ; are you?")

Premier Membership: Revive efforts to upgrade "regular" members to Premier.

- Step-up promotions of Premier benefits.
- Offer a one-time discount or additional perk to existing members to upgrade.

## Public Relations

### Participants:

- Carly Swift, DC – Facilitator
- Lee Carter, Sleep Essentials
- Tess Graf, DC
- Lee Matthis, DC
- Anne Pinto, DC
- Michelle Rose, DC
- Kevin Ruff, DC
- Allison Schwartz, DC
- Daniel Shaye, DC
- Braheem Tolbert, DC

### Key Initiatives:

Continue focus on Social Media.

- Increase member awareness and utilization of available social media tools.
  - Distribute Celebrate Wellness! information to the membership on a regular, weekly basis.
  - Augment UVCA-produced materials with affinity partnerships.
- Push for Unity in order to realize collective power
  - Work with organizations like the F4CP and COCSA to produce unified messages to the public to help increase public utilization of chiropractic from 12% to 20%.
  - Petition the national organizations to unify. (PR effectiveness might be the impetus here, but obviously unity is also vital to increasing clout in the legislative, insurance and other arenas.)

## Insurance

### Participants:

- Jeremy Busch, DC – Facilitator
- Christopher Belluzzo, DC
- Minesh Patel, DC
- Bob Pinto, DC
- Greg Walters, DC
- Phil Connolly, DC

### Key Initiatives:

1. Establish Relationships
  - Continue building relationships with key executives of all managed care carriers.
  - Continue WCRI initiatives (Dr. Bob Pinto).
  - Maintain working relationship with ECA-IPN to assist with key contact facilitation.
2. Help DCs Generate Revenue
  - Establish database of appeal letters.
  - Build Corporate Wellness relationships.
  - Create new/stepped-up coding training strategies.
3. Resolve Problems
  - Increase documentation training on a district basis.
  - Monitor Optum/UHC.
  - Monitor 97140/Aetna.
  - Improve Audit Tool usage.



*Drs. Sam Spillman  
& Jeremy Busch,  
Ms. Becky Walter,  
Dr. Greg Walter*

## Practice Management

### Participants:

- Jeff Bowers, DC – Facilitator
- Nelson Gregory, DC
- Becky Walter, MCS-P
- Shannon Breeding, DC
- Teresa Green, DC
- Randy Alexander, ChiroOneSource
- Cecil Walker, ChiroOneSource
- Kat Mayes, DC
- Chantay Bess, DC

### Key Initiatives:

1. Create a Regional Practice Success Meeting. Develop a practice success program that can be taken to each district to eliminate travel and accommodation expenses.
2. Monthly Business Tips via email.
3. Create a work sheet/spreadsheet to help doctors better understand the cost of doing business and how to be profitable.
4. Emergency To-Do List. Create a check list of things that need to be done in case the doctor will be absent from the practice for an extended amount of time.
5. Create a list of community networking groups to help practitioners network in their communities.

A valuable byproduct of the meeting was that several doctors decided to join a Unified VCA committee in order to continue their involvement in the initiatives discussed. After the break-outs, the group facilitators briefed the crowd on their brainstorming, ideas and initiatives and opened the floor to questions. The ensuing full-group discussion provided helpful feedback and buy-in to move the ideas forward. The meeting adjourned at 4:00 p.m. DC attendees earned six Type 2 CEUs.

Dr. Dolberg deemed the meeting a "great example of the assemblage of dedicated people working collaboratively on the mission of this association: unified in promoting the health and well-being of the public through education, advancement and protection of the practice of Chiropractic." The Board is now working with the corresponding committees to prioritize initiatives, allocate resources, establish timetables and delegate responsibilities to ensure that the work continues to move forward. Regular updates will be forthcoming.

<sup>1</sup> *The UVCA Statement of Professional Identity:* <http://www.viriniachiropractic.org/?68>.

<sup>2</sup> *The Gallup-Palmer report on perceptions:* <http://www.palmer.edu/uploadedfiles/pages/alumni/gallop-report-palmer-college.pdf>.