

UNIFIED VCA STRATEGIC PLAN – UPDATES FOR WEB SITE

JANUARY 2019

UPDATED 2/3/19

Goal 1: Advocacy and Influence

Goal Champion: Dr. Joe Foley

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.

1. Project: None indicated.

Alignment: Legislative Committee, Insurance Committee

January 2019: Insurance Committee has had several phone calls with MCA, MPTA, and VPTA with intention to set up a meeting with CareFirst as a result of MPPR.

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

1. 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.

Alignment: Legislative Committee, Scope of Practice Task Force

May 2018 Update: Dr. Walsh leading survey development. Has requested desired questions from all committees.

June 2018 Update:

- Sample wording for survey has been discussed. The project is still active. At the spring Board meeting the idea of breaking the survey into a number of smaller surveys was discussed, with topics in all areas of strategic interest.
- Scope of Practice Committee Report – See meeting report from 2/3/18 meeting in Richmond.

January 2019 Update: No change.

Action Item: Dr. Walsh to forward to committee chairs the questions he received from them last year with request that they take an updated look and see if they have any changes before we proceed.

- Compilation of questions sent to all.
- Waiting on responses.

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

- 1. Project: Continue to develop key contact list. Keep The Keeney Group informed of legislative contacts and issue resources.**

Alignment: Legislative Committee

July 2018 Update: Development continues.

- 2. 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.**

Alignment: Legislative Committee

July 2018 Updates:

- Dr. Dolberg attended a high level Democratic event with CPAC providing the funds. A Richmond DC has contacted the UVCA and we provided details to improve his status with the Senator. He will be attending a local event.
- The Keeneys are developing a district legislator ranking list so district directors know who in their district to invite to local event.
- The optional CPAC donation within UVCA dues has been reviewed by the UVCA accountant and this can happen with some specific procedures and oversight. The Keeneys and UVCA are working on details.

January 2019 Updates:

- The optional CPAC donation within UVCA dues has been approved and forms have been updated to reflect this addition. CPAC donations are down over the past year. Bill Ward is working on connecting with past donors. Discussing possibly publishing a donor list quarterly over DocTalk, in addition to the current practice of including it in the newsletter, on web site and at the conventions.
- The UVCA accountant provided various assistance to CPAC in 2018 as a professional courtesy.

Action Items:

- Dr. Foley -- Contact Bruce Keeney about having a legislator at Spring Convention.
- Dr. Foley or Ward - Highlight further at convention.
- Dr. Ward – Reach out to past donors to boost contributions.
- Staff – Add quarterly post of contributor list to VCA doctalk to other means of promoting donors.

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

- 1. Project: A 2018 court ruling appears to have weakened the AOB. Engage the UVCA experts to strategize as to how the AOB can be strengthened.**

Alignment: Legislative Committee, Insurance Committee (AOB Specialist)

June 2018 Update:

- The Insurance Committee has no active agenda regarding the AOB laws nor do we have an active AOB specialist that attends the meetings or provides updates.
- Legislative Committee: The Keeneys are looking into this topic and no details have been reported as of yet.

January 2019 Update: There has been no further action on this topic. Leadership has indicated this topic does not seem to be an issue for members, so it was decided not to spend the budget funds on legal consultations in 2018. The Keeneys are still aware of this topic and it may be brought back up again.

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

1. Project: Strengthen chiropractic in the Workers Compensation arena.

Alignment: Insurance Committee

July 2018 Update: Finalizing the plans to present at the Workers Comp convention in the fall about chiropractic's role in WC arena.

January 2019 Update:

- Presentation did not get accepted at their fall convention but obtained good input on how to tweak it for future acceptance. Note: The Foundation will help and very possibly even DO the presentation FOR us.
- Will post final presentation on UVCA web site for members' use.

Action Item: Insurance Committee continue work on presentation; reach out to Foundation for assistance.

2. 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”).

Alignment: Legislative Committee, Opioids Task Force

June 2018 Update: A meeting is scheduled to discuss a coordinated effort to maximize the current opioid environment with strategic UVCA resolutions, PR releases, public / professional / legislative material distributions. The goal is opening up discussions for chiropractic involvement in policy makers positions, WC and possible other legislative efforts.

West Virginia recently passed legislation. We have asked the Keeney's to review this and offer suggestion or opportunities.

January 2019 Legislative Committee Update: A meeting has taken place to discuss a coordinated effort to maximize the current opioid environment with strategic UVCA resolutions, PR releases, public / professional / legislative material distributions. The goal is opening up discussions for chiropractic involvement in policy makers positions, WC and possible other legislative efforts. CPAC Key doctor contact with legislators prior to the session involved mentioning the opioid topic by the Doc.

January 2019 Opioids Task Force Update: See separate plan.

Specific action items in development.

- 3. 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.**

Alignment: Opioids Task Force

June 2018 Update: A meeting is scheduled to discuss a coordinated effort to maximize the current opioid environment with strategic UVCA resolutions, PR releases, public / professional / legislative material distributions. The goal is opening up discussions for chiropractic involvement in policy makers positions, WC and possible other legislative efforts.

UPDATE -June 2018

Discussed above - meeting scheduled July 11.

January 2019 Update: No change.

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

Alignment: Opioids Task Force

July 2018 Update: Have started presentation utilizing Foundation and other materials. Have promoted the Foundation presentation materials to members.

January 2019: No change.

Action Items:

- Task force to reach out to F4CP to brainstorm opportunities.
- Task force to develop mass email PCPs re: opioids. Research list options.

- **No Specific Project:**

June 2018 General Update from Opioids Task Force

Summary of initial focus:

1. Chiropractors are an essential member of the healthcare team for the benefit of the patient
2. DOT physicals are one way that chiropractors are part of the team that benefits patients
3. Chiropractors in Virginia are a cohesive group and very active in their state associations because we want to be a part of the healthcare solution for patients
4. Virginia Chiropractors are well-represented by our state leadership on the National Level

Create key messages for the following audiences:

1. Our members
2. Legislators
3. Overall public consumption (patients)

Define key platforms for communications - for example:

4. Website
5. Facebook
6. Twitter

Strategy 6: Improve payment systems.

1. Project: Support the ECA-IPN's growth and success.

Alignment: Insurance Committee, Membership Committee

June 2018 Update: Have issued a couple updates to docs.

January 2019 Update: Provided an EOY update to docs. Dr. Greenstein and Brad Cost conducted a webinar on the importance/use of data, sponsored by Infindi. Infindi is editing recording and will make it available for those who are interested.

Action Item: Staff to continue to look for or create opportunities to inform constituents of importance of IPN and elimination of barriers to join.

2. Project: Address third party issues as they arise.

Alignment: Insurance Committee

June 2018 Update: Working on a new issue with Aetna and keeping tabs on issues arising from the recent Anthem Audits. Working on an Aetna Alert regarding 97140-59 and manipulation.

January 2019 Update: Addressed issues with Aetna with relatively quick resolve. Anthem Audit Task Force has done a preliminary analysis and disseminated observations and specific tips to members and non-members.

Action Items:

- Anthem Task Force to continue audit research and analysis.
- Staff to provide audit info to 2019 coding/documentation speakers at conventions and seminars so they can incorporate.

3. Project: As health care reform continues, stress importance of chiropractic access as a drug free option in this time of opioid crisis.

Alignment: Legislative Committee

Background - Over the past two legislative session there have been multiple efforts to reduce health insurance costs by reducing benefits. Chiropractic is currently a mandated benefit. We expect this trend of trying to limit/eliminate mandated benefits to continue. We will need docs to interact with their elected officials and stress the importance of chiropractic access as a drug free option in this time of opioid crisis.

January 2019 Update: None.

Proposed New Strategies by Legislative Committee May 2018.

1. Project: Pursue the UVCA having the authority to credential CE hours.

Alignment: Legislative Committee

Background - Currently per BOM regulations CE material must be offered by the CE Dept of a CCE school. It appears several other trade organizations representing other health professions have the authority to credential CE material. This action would reduce UVCA expense and allow for more programs to be offered. Currently Optometry, Psychology, Funeral Directors, and pharmacist professional membership organizations are all able to do this and are approved providers of CE by regulation.

June 2018 Update: Informal conversations with interest parties suggest this may be reasonable and possible though BOM action. A UVCA CE polices / procedures document is being updated to reflect a role as a CE credentialing organization.

January 2019 Update: This item has been achieved. The BOM voted to allow it at its October 2018 meeting. UVCA staff has developed the SOP and guidelines and a CE Review Team is being put together.

Action Items:

- Education Committee confirm CE Review Team.
- Send district directors the SOP and guidance on how this factors in to their district meetings.

2. Project: Having Doctors of Chiropractic be added to the health care professionals that utilize the Prescription Monitoring Program.

Alignment: Legislative Committee

Background - MDs and DOs can get prescription info on specific patients directly from the Pharmacy records. This is a foundational activity. It would establish that we can have information outside of our scope of practice as part of a patient's health records. In a practical application we would no longer have to ask a patient to write down their prescriptions, it could be pulled directly online. The cost would be a minimal increase in the license (@\$30-\$50 / year). This topic is related to the VHSL physical issue.

June 2018 Update: This topic is being studied further.

January 2019 Update: None.

3. Project: Have DCs added to the list of allowed healthcare providers to conduct the VHSL Physical.

Alignment: Legislative Committee

Background - Doctors or Chiropractic do not have the authority to perform sports physicals under VHSL policy. In 1985, an AG opinion stated since vaccinations are specifically excluded for Chiropractors scope of practice, reviewing medical records containing vaccine records is also outside their scope of practice.

June 2018 Update: It is being recommended that the UVCA write the VHSL and ask for a formal revisit of the VHSL policy on chiropractic and pre-participation sports physicals as new law (DOT) has recently been enacted. The goal is to get it to an actual VHSL committee for discussion.

January 2019 Update: This effort has been delayed. It may require a specific legislative effort to address this.

4. Project: Seek out opportunities for improved position of chiropractic as a drug fee alternative.

Alignment: Legislative Committee, Opioids Task Force

Background - the Opioid issue continues to in the news. West Virginia recently passed legislation.

September 2018 Update: We have asked the Keeney's to review this and offer suggestion or opportunities.

January 2019 Update: Senator Carrico introduce SB1518 non-opioid therapies – pulled by Patron.

Goal 2: Practice and Career Success

Goal Champion: Dr. Robert Pinto

Possible Committee Alignments

1. Practice Management
2. Specialists in various techniques, practice styles, market niches

Strategies

Providing the tools and expertise to support member success.

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)

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

1. **Project: Revamp the UVCA web site so more user-friendly, including re-packaging Tools & Resources into a members-only “VCA Vault”.**

Alignment: Practice Management Committee

Established four main website categories:

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

Timeline:

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

Early July 2018 Update:

- Info reviewed and the culling process has started. Due to the plethora of material we have on our website and our desire to maintain relationships with our donating Vendor Members, the info is hard to cull. A group of PMC members and staff need to review material together and decide what needs to be kept and what can be discarded or removed. Date and group to be decided by 7/6/18.
- Sent information to committees for review. Conference call to begin delegation set by 7/31/18. Task forces to be determined and task forces get after it!!!!!!
- Work with PR Committee to start branding VCAVault (™) and its content. Circulate amongst members via email blasts, DocTalk, etc.

July 31 2018 Update:

- Created four subcommittees, each to review website for items that would fit into each "Pillar" that will become sections of the VCAVault.
- Established the following PM Committee Pillar Definitions and assignments:
Mission: The Practice Management Committee of the VCA provide tools and expertise to support member success.
The VCA Vault (™) - a VCA member benefit, is the Go-To place for all information and resources needed to grow and sustain a viable chiropractic practice in today's ever-changing healthcare climate.
Quality Pillar- (Kat and Tricia) "Resources to provide insights into best practices for sustainable financial strength in the offices of members."
 - Gather and categorize information from our website pertaining to Quality Chiropractic Measures
 - This would most likely include a Research Section with research articles, Technique information, a section listing "Gurus" that have a niche specialty (Julie is helping compile), Metrics information for qualitative measures are needed for diagnosis coding, billing coding, PI, WC info, etc.
Finance Pillar- (Bob and Robert) "Clinical or procedural best practices to maximize the patient experience with chiropractic care"
 - Review and gather information to assist in the financial health of a practice
 - Should include PnL examples, PVA and retention information, New Patient acquisition calculations, office expenditure percentages (ex of a good overhead percentage, marketing percentage, salary percentages, etc.)
 - I'm not immediately aware of this info being on our website, currently, but if it isn't, we've been asked by a few Drs for examples of good metrics for this information
Team Pillar- (Tricia and Lee) "Suggestions for building a culture of service through a solid collaborative with other community professionals."
 - What information do we have that shows how to build a good team?
 - Team member list- Lawyer, accountant, referral base for allopaths, massage therapists, etc., bank/loan officer, credit card company, billing personnel/clearing house, HR individual,
Growth Pillar- (Robert and Jeff) "Resources for Growth as an individual, a practitioner or office staff member, or as a trusted brand in the community."
 - Marketing/Branding content and ideas
 - When to look at expansion? Another Dr in house or open another location?
 - Healthcare community marketing- presentations for MDs, LMTs, Orthos, etc.

January 2019 Update:

- Staff has developed and distributed a list of experts available to members.
- Staff has downloaded the application form to apply for a trademark for "VCA Vault."

Action Items:

- PM Committee to continue culling and reorganizing.
- Staff: Expand expertise list to include gurus for other specific topics such as nutrition, sports injuries, ART, etc.
- Staff: Apply for VCAVault trademark.
- Staff: Research resources such as mobile apps, communications segmented by topic/interest area (ex: SLACK recommended by Bruce Keeney), increasing data for constituents so association can target communications more specifically, etc.

- PM Committee: Continue to search for forms and SOPs that can be shared with members. (Staff requested help from doctors at 1/26 strategy meeting.)

Goal 3: Public Awareness and Market Growth

Goal Champion: Dr. Carly Swift

Strategies

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

Strategy Summary

1. Brand strength and assessment
2. Internet presence
3. Create marketing guidelines
4. Public awareness campaigns

Strategy 1: Strengthen the UVCA brand and messaging.

1. **Project: Obtain branding project cost proposals by August 2018 in order to create 2019 budget request.**

Alignment: PR Committee

July 2018 Update: We have been working with Julie and Lee (Practice Management Committee) to move forward with this process. We have had monthly meetings to discuss progress the fourth Tuesday of every month. Julie has been in contact with Tuck Clinics to find out their branding contact.

January 2019 Updates:

- Julie has obtained rough cost estimates of \$15-35k, depending on scope. Dr. LaBarbera is exploring the branding work that Tuck recently did to see if he can provide any resources to help us do something preliminary “DIY”.
- Held 2nd annual school supplies drive in 2018.
- Holding 1st ever sneaker drive in 2019.

Action Items:

- Dr. LaBarbera – See if any resources from Tuck branding project that we can utilize (worksheets, checklists, etc.)
- Staff: In February, start to promote; implement sneaker drive.
- PR Committee and Staff: Start making plans to promote school supplies drive, including better system for identifying what offices are participating so we can promote and recognize them.

Strategy 2: Create a new website.

1. **Project: Get cost proposals by August 2018. Evaluate proposals and develop budget recommendation for 2019.**

Alignment: PR Committee, Website Committee

July 2018 Update: We have been working with Julie and Lee (Practice Management Committee) to move forward with this process.

January 2019 Update:

- Practice Management Committee working on recommendations for re-organization. Julie has obtained some rough estimates for a simple web site redesign. Public Relations Committee will not invest a great deal of time on this until the basic reorganization has been determined.
- Julie has learned that a simple redesign of the website through YM will be \$3,000-\$5,000. That excludes new features and apps not supported by the current design.

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.

1. Project: Create marketing pillars.

Alignment: PR Committee

July 2018 Update: We finalized the following marketing pillars in April 2018.

1. Condition-based; i.e., back pain, neck pain, chronic illness
2. Health & Wellness; i.e., nutrition, sleep, exercise
3. Research
4. Chiropractic Based post

Action Item: PR Committee – Determine how to utilize above beyond internal use for FB and other posts.

2. Project: Leverage relationships with F4CP, national and other organizations.

Alignment: PR Committee

July 2018 Update: We are promoting the F4CP monthly marketing tools to members. We surveyed members regarding awareness and found there was very little. I plan on working with the UVCA staff each quarter to go through the F4CP resources and send a selection of tools to the members with instructions on how to find these on their own. It should also help the staff become familiar with the F4CP tools.

January 2019 Update:

- We continue to promote the F4CP tools to members. We are also utilizing the Foundation’s media lists and insights to help us improve our news releases and increase pick-up by media outlets.
- Committee is considering revisiting designating a DC liaison to the Foundation so there is someone who keeps Foundation resources on his/her radar for us; ideally, someone who is already excited about the Foundation and already actively using its resources. In the meantime, UVCA staff is sitting in on monthly advisory committee conference calls by the Foundation to keep up to date.

- Dr. Tom Wetzen continues up the chairs at COCSA, providing us with a strong direct link.

Action Items:

- Consult with Foundation on how to increase member participation.
- Staff to continue to attend monthly Foundation advisory calls.
- PR Committee to revisit designating a DC liaison to the Foundation.

3. Project: Create guidelines and guardrails. Help members with their advertising, marketing and communications.

Alignment: PR Committee

January 2019 Updates:

- We have organized a calendar of PR postings and documents to be released to the public either on our Facebook page or to media outlets, with particular focus on the opioids crisis.
- AmplIFED is now posting to the UVCA Facebook page for free because of our COCSA membership and all posts are welcome to be used by the membership.
- We are going to be further organizing the calendar with the legislative committee and the opioid task force.
- There are a few things related to this on the UVCA's web site at <https://vachiro.site-ym.com/?page=34>.

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.)

1. Project: Conduct PR events.

Alignment: PR Committee

May 2018 Update: We are boosting our school supplies drive again for a positive campaign. Need some guidance re: analytics.

January 2019 Update:

- Our 2nd annual school supplies drive in 2018 raised almost 1000 lbs. for the state of Virginia. Dr. Mark Gutekunst knocked the record with over 500 pounds from his office alone. Disseminated internal and external media news releases, blast emails, newsletter article, and web site.
- In 2019 will be launching our 1st-ever "Sneaker Drive" to collect shoes to help provide people in impoverished areas with a way to earn money.
- Staff has just started tracking Find-a-Doc hits on the web site. For example, there were 64 hits to Find-A-Doc between 1/16/19 and 1/22/19, an average of 9 per day. Also in the process of expanding the links from the web site to Google analytics and how to best utilize them.
- Staff has been using guidance from the Foundation to more effectively/efficiently/consistently determine what news releases to send out, make them more effective, and update UVCA media lists with Foundation lists.

Action Items: PR Committee to conduct sneaker drive and school supplies drive. Staff to provide committee with information available through Google Analytics. Committee to discuss Dr. Yurgel's idea of a marathon and sponsor possibilities.

2. Project: Cultivate a unified message.

Alignment: PR Committee

January 2019 Update: Have been providing turn-key tools and resources to members to try and make communications easier and help create a more unified message.

Goal 4: Association and Membership Strength

Goal Champion: Dr. Chris Perron

Strategies

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

Strategy Summary

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

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

Actual at January 2019: About 700.

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

- **Build on/highlight successes.**

Alignment: Membership Committee

July 2018 Update: Member-get-a-member campaign continues.

January 2019 Update: Talking with CMC about providing grand prize for member referral program again; brainstorming how to increase participation in the program. Continued promotions to new members re: program, benefits, specific components of the strategic plan, etc.

Action Items:

- Complete and promote 2019 member referral campaign.
- Promote vcardtalk digest option (although remember digest does not allow attachments, links and pictures).
- Encourage suppliers to participate in vcardtalk (provide guidelines and rules).

- **Develop bullet points re: “what are you doing for me?” and “Why belong?”**

Alignment: Membership Committee (Originally an on-site directive to Strategy Meeting attendees)

July 2018 Update: Julie sent out request to 2018 strategy meeting participants and membership committee members for responses to the following questions, as source material to help develop more effective membership marketing messages:

- What successes do you feel are important to highlight in marketing materials?
- What are some bullet points to address “what are you doing for me?”
- What are some bullet points to address “Why belong?”

Very low response.

January 2019 Update: No change.

Action Items: Staff to try again to get input from leadership on the key questions, plus supplement with generational and career stage insights.

- **Appoint a strike force to develop values (to include a unified membership).**

Alignment: Values Strike Force

March 2018 Updated: Completed.

Unity - Strength through Diversity

Vision – Leadership, Innovation, Growth

Community – Serving the Public, Supporting our Members

Advocacy - Promote, Advance, Educate

- **Update web site to make more user-friendly: improve ease of navigation, use more infographics, and eliminate pull-down menus.**

Alignment: Practice Management Committee, Website Committee

January 2019 Update: Work continues.

- 2. Project: Add more/new benefits (health insurance, COCSA affinity programs). Monitor COCSA for possible opportunities and to get ideas from other chiropractic associations. Forward to appropriate committee to evaluate.**

Alignment: All Committees, through COCSA Board and Staff participants

July 2018 Update:

- Health Insurance Plans for members only was launched in May 2018 just before Spring Convention and was introduced at convention. I don't believe it was highlighted enough and it should be a real focus at the Fall Convention. We will also already have members utilizing the insurance by then which should assist from a testimonial standpoint. This is THE biggest member benefit that we have to date that also generates revenue. It should be given that focus and weight. I know that there have been many inquiries and quotes to date but too new to have results as of yet. I recommend we get some real numbers prior to the Board retreat with regard to how many enrolled as well as feedback from Mark Ritchie (the agent) on what the common questions and concerns from doctors are so we can tailor our message to speak to those points.
- Exploring affinity program through ChiroIC.

January 2019 Update:

- Medova health insurance up to 21 participants. Marketing and closing continues. Will utilize testimonials with spring convention promos.
- ChiroIC program (including KT) on hold due to organizational changes at that company.
- Exploring new affinity program with Quartermaster Tax.
- Exploring expansion of Michigan credit union.
- Obtained a # of affinity program ideas at November 2018 COCSA convention to consider and pursue as merited.

Action Items: Ongoing by staff and leadership.

- 3. Add? Project: Increase ability to target and customize communications to constituents in order to increase impact. Expand database fields and obtain more demographic information so can target by generational group, career stage, specialization/techniques, alma mater, and more.**

Alignment: Membership Committee

January 2019 Update: Staff working on list of desired data, what we already have, how to obtain additional information. Calculated generational groups based on year of licensure and small amount of DOB data.

Action Items:

- UVCA staff to reach out to Dr. David Brown, ED of the Virginia DHP, to see if the demographics study they have been working on will provide data we need.
- UVCA staff to compile list of data we want and show leadership what we already are collecting.
- Staff and leadership to develop a plan to gather more data through surveys at conventions and elsewhere, district directors visiting and calling constituents, staff telemarketing, membership and registration forms, etc.

January 2019 Overall Updates

Membership Numbers: Net loss of 13 members/2%.

2018	2017	2016	2015
712	725	724	727

Strategy 2: Create a dedicated leadership chain.

The nature of leadership volunteerism from UVCA membership remains haphazard. Messaging and cultivating leadership interest has been a goal of President David Dolberg, DC. However, interest remains low. Additionally, the personal and practice circumstances of current leaders has an impact on decision making to continue and move up. Nonetheless, as structure and procedure of the UVCA continues to strengthen by guidance of the Strategic Plan, the logic of establishing a procedural succession plan will increase.

- 1. Project: Create a leadership orientation.**

Alignment: Executive Committee

May 2018 Update: The board training scheduled for August 5, 2018 is being developed as an ongoing training tool. Additionally, a booklet of useful UVCA documents is being compiled as a quick reference guide for all board members.

January 2019 Update: The leadership orientation plan was created from a Power Point provided by Bob Harris. It was adapted and modified to fit UVCA structure. It was first used at leadership training at the summer retreat in Virginia Beach in August 2018. The power point can be used for future training and adapted to evolving changes as needed. All Board Members will be shown power point early in their term. Need to systemize new board member orientation further.

Action Item: Executive Committee to see if any updates to PP, other orientation strategies are needed.

2. 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.

Alignment: Executive Committee

May 2018 Updates:

- Leadership will be provided easy access to all useful documents. All board members are encouraged to develop a working knowledge.
- The usual time of the “Strategic Planning Meeting” around February 1 will be developed into an opportunity to orient and review.

January 2019 Updates:

- All Board Members received a binder of “key documents” at their leadership orientation. While every document is available electronically, it was felt a quick access reference binder with UVCA documents would be convenient. Documents include: Mission & Vision; Articles of Incorporation; Bylaws; Policies (7 documents and room for more); Strategic Plan, brochure and report, with updates to be added; Board “Job Descriptions; and Board Materials on UVCA Website. Again, the objective is an organized ‘quick reach’ reference source for all UVCA documents. As previously stated, “All board members are encouraged to develop a working knowledge.”
- The 2019 Strategic Planning Session is designed for focus and refinement of the existing Strategic Plan. All Board Members participate in multiple roles and develop evolving knowledge of the association history and future.

Action Item: Exec Committee and staff to review binder and identify updates and additions.

3. Project: Create an accountability chart for the Board.

Alignment: Executive Committee

May 2018 Update: This is in a review stage and is to be developed in conjunction with a “Board member Commitment Form” which will be finalized at the board training and established as a guideline by which members are “held accountable.”

January 2019 Update: Board Members completed and signed an “accountability form” at the summer 2018 Board Training. An ongoing chart/matrix was discussed but not further developed. Staff provided some samples to leadership for consideration. It will become part of the Key Documents binder and reviewed periodically, typically around the time of preparation for conventions.

Action Item: Executive Committee to review sample forms and finalize UVCA version; introduce at 2019 training session.

4. Project: Review and update Bylaws.

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

Alignment: Executive Committee or Establish Bylaws Committee or Strike Force

May 2018 Update: The bylaws were reviewed by Bob Harris and the president and executive director have discussed the comments. Further action is deferred for membership approval by the 2019 Spring Convention. Development of a policy manual and appropriate review will be part of the process.

January 2019 Update: No change. Expected activity between January strategy meeting and Spring Convention.

Action Item: Executive Committee to determine who will conduct this review and timeline.

5. Project: Create succession plan for Executive Board.

Alignment: Executive Committee

May 2018 Update: The nature of leadership volunteerism from UVCA membership remains haphazard. Messaging and cultivating leadership interest has been a goal of this President (David Dolberg, DC). However, interest remains low. Additionally, the personal and practice circumstances of current leaders has an impact of decision making to continue and move up. Nonetheless, as structure and procedure of the UVCA continues to strengthen by guidance of the Strategic Plan, the logic of establishing a procedural succession plan will increase.

January 2019 Update: No change.

Action Item: Executive Committee to schedule a conference call to discuss.

6. 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.

Alignment: Board of Directors

May 2018 Updates:

- All Executive Committee members have been subscribed to the COCSA list-serve. Pertaining to this and access to all kinds of resources, it is up to the individuals of leadership to avail themselves with accessible information. We are fortunate that UVCA Immediate Past President, Dr. Tom Wetzen, is currently the District 3 Director to COCSA. His inside knowledge of COCSA direction and resources is an asset to the UVCA
- Along with opportunities that may develop from COCSA, Dr. Wetzen has informed us that a kinesiotape affinity program is developing. UVCA recently began a member health insurance program that it learned about via COCSA, which is operating. Staff is working with Amplified on a possible affinity program. It is thoroughly recognized that non-dues income is important and awareness of opportunities is keenly maintained.

January 2019 Update:

- This was begun by having Treasurer, Dr. Chris Perron, and Secretary, Dr. Michelle Rose attend the ChiroCongress national convention in November 2018. Other resources and reading materials such as Race for Relevance/by Coerver, and Never Lose a Customer Again/by Coleman are examples of reading materials recommended. Short presentations from these books were prepared for the 2019 Strategy Meeting.
- Dr. Wetzen is now the 2nd VP of ChiroCongress and UVCA will continue to benefit from his passing along of developing information.

- Dr. Dolberg attended the ChiroCongress round table meeting in Washington, DC in conjunction with NCLC, in January 2019. I was made aware of the ChiroCongress mission to continue to develop resources relevant to the needs of state associations. Much like the benefit of UVCA membership utilizing our website for numerous resources, it is up to leadership to likewise take advantage of a broad array of tools and guidance on the ChiroCongress website.

Action Item: Staff and Exec Committee to continue to utilize resources and explore programs that have worked for other associations.

Strategy 3: Develop revenue and resources.

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

Alignment: Finance Committee

July 2018 Update: Medova Health Insurance Program has been launched as described above and needs to be marketed continuously to establish it as a staple benefit. ChiroHealth USA is an ongoing affinity program since 2010 and we have received over \$2800 through June this year. I believe the KT tape affinity program that Dr. Wetzen has informed us about has not rolled out yet. (Pun not intended but should have been. 😊)

A separate line item in our bookkeeping was/is to be established as the depository for these additional revenue streams for the purpose of saving towards the initial goal of \$300,000.

January 2019 Update: We currently have about \$103,000 that we can consider reserves. Consulted with our accountant on how to best handle reserves in QB and reports.

Action Items: Staff and Finance Committee -- In consultation with accountant, handle the accounting side of things differently in 2019 than having a specific line item in the budget like we did in 2018. Will create budget to have a net increase commensurate with the amount we want to allocate to reserves. Hope is that increased revenue from affinity programs will allow us to budget for more.

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

Alignment: Relevant to all Committees; which to spearhead?

July 2018 Update: We continue to look into additional revenue sources, particularly through COCSA.

January 2019: Ongoing. Exploring several.

Action Items:

- Staff to reach out to Michigan credit union and find out status of their expansion of that program into additional states.
- Mark Ritchie from Medova to send us new marketing materials for health insurance program so staff can get some fresh promotions out.
- Conference call with Quartermaster Tax on January 30th.
- Infinedi to forward proposal.

3. Project: Consider special assessment.

Alignment: Finance Committee, Membership Committee

January 2019: No change.

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

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

Alignment: Finance Committee

July 2018 Update: Staff is working on template for report using the resources from Strategic Plan facilitator.

January 2019 Update: Committee and task force chairs with income and expense were sent 2018 budget reports. Staff working on EOY reports for full board.

Action Items:

- Staff to finish EOY reports for board and committees (P&L, Budget vs. Actual, Balance Sheet).
- Draft 2019 budget.

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

Alignment: Finance Committee

July 2018 Update: Completed.

3. Project: Establish an audit policy.

Alignment: Finance Committee

July 2018 Update: Audit system with regard to all funds being spent based on the merits of how the expense supports our Mission has been fully implemented. Audit from a bookkeeping perspective has not been implemented and I could use assistance is figuring this system out.

January 2019 Update: No change.

Action Items: Treasurer, ED and/or bookkeeper to consult with accountant re: auditing policy best practices and recommendations.

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

Alignment: Finance Committee

July 2018 Update: Staff provided a proposal as to what would be of benefit in terms of upgrading software and/or hardware for greater efficiency. Immediate needs are minimal and more in the way of sit/stand desk tops, larger screens, etc.

January 2019 Update: Staff has initiated moving network on the cloud to provide better sharing of information between staff members and increase staffing flexibility and opportunities. Is also installing Voice IP for similar reasons. Funds for technology will be needed in 2019 for possible texting services, mobile apps, online project management tools, etc. Staff researching options through existing association management software and other sources.

Action Items by Staff:

- Expand implementation of OneDrive.
- Implement Voice IP.
- Research and develop recommendations and fiscal impact re: new technology to improve communications, benefits delivery, strategic plan and other project management, etc.