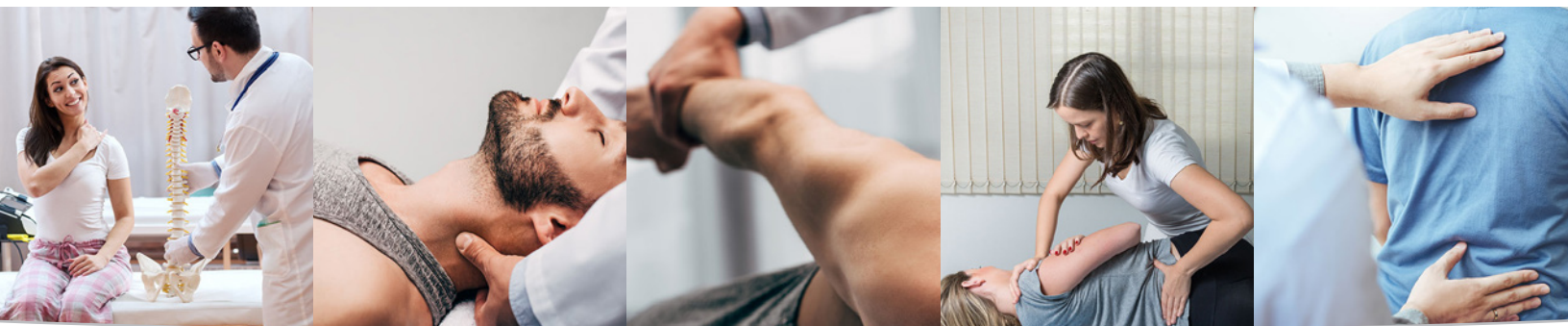




THE FUTURE OF CHIROPRACTIC STRATEGIC VISIONING AND PLANNING PROJECT

PHASE ONE REPORT

5 March 2021



The Future of Chiropractic

STRATEGIC VISIONING AND PLANNING PROJECT

PHASE ONE REPORT

This report has been produced as part of The Future of Chiropractic Strategic Visioning and Planning project and represents a summary of Phase One.

5 March 2021

Report Prepared by:

future→iQ[®]

Create Future Intelligence[®]

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1.0 INTRODUCTION

This report represents the culmination and summary of Phase One of the three-phase Future of Chiropractic Strategic Visioning Planning project. The overall project aims to produce an executable strategic plan, which will guide chiropractic priorities for the next five years. Phase One was designed to gather significant and relevant data, leading to the discovery and confirmation of widely supported priorities, for the future state of the profession. Each step of Phase One built upon the preceding steps, ultimately and objectively defining commonalities, priorities, and motivations for change. The project kicked-off on October 16, 2020, with Phase One wrapping-up on March 5, 2021.

The following provides descriptions each deliverable completed through Phase One:

- **Virtual Project Launch** – Sharity and Future IQ collaborated to provide an online overview of the project scope and launched the Future Perceptions Stakeholder Survey. The launch coincided with the first meeting of the Strategic Planning Committee.
- **Future Perceptions and Priorities Stakeholder Survey** – A collaboratively developed survey was distributed as broadly as possible, via state and national associations, to members of the chiropractic profession, and key stakeholders. The survey was made available via an online portal and was live from November 2 through December 4, 2020 and 3,415 individuals participated in the survey. A second Strategic Planning Committee report-out meeting was held on November 23, 2020.
- **Discussion Board Topics** – The project discussion board invited input and discussion on 16 key topics identified through the survey as key drivers pertaining to the chiropractic profession. The discussion board on the project portal remained open from January through the close of Phase One of the project on March 5, 2021.
- **Cohort Focus Groups** – Five specific cohort groups were identified as particularly relevant to this project. Members of each cohort were convened, through five separate focus group sessions, to explore the commonalities identified by the survey, discuss the primary mission of the chiropractic profession, and review widely embraced core values. The cohort focus groups began December 21, 2020 and concluded January 14, 2021.
- **Key Driver Workshop** – The Strategic Planning Committee was convened to explore key drivers of the chiropractic profession and to provide input on the main themes used to create the scenario matrix for the Think-Tank. The Key Driver Workshop took place on January 8, 2021.
- **Future of Chiropractic Think-Tank** – The scenario-based planning Think-Tank held on January 29, 2021, provided an important opportunity to engage chiropractic stakeholders in a critical dialogue about the future and to discuss the impacts of changing dynamics in the profession. The third virtual Strategic Planning Committee meeting took place immediately following the Think-Tank.
- **Strategic Vision Workshops and Strategic Vision Survey** – a series of five online workshops were held in February to offer additional industry input into the future scenarios. The Future of Chiropractic Vision Survey was conducted from immediately following the Think-Tank and into March to collect additional input on a preferred future of the chiropractic profession.
- **Key-Influencer Interviews:** Ten 1 to 1 key-influencer interviews were conducted between February 8 and February 23, 2021. Each elicited what makes the preferred future state critical to act on now; who must be involved to move initiatives forward with success; how getting there might be supported financially; and confirm where the starting points for strategic planning must be.

The Future of Chiropractic Phase 1 process has allowed industry stakeholders to take a 'deep-dive' into strategic visioning through a scenario-planning process.



The Phase One timeline allowed multiple opportunities for industry stakeholders to be involved and add their perspective. In total, over 3,500 industry members has significant input.

2.0 KEY STEPS – PHASE ONE

The overall goal of this project was to identify widely accepted priorities to be developed into an actionable strategic plan for accomplishing identified goals. This project involves three phases:

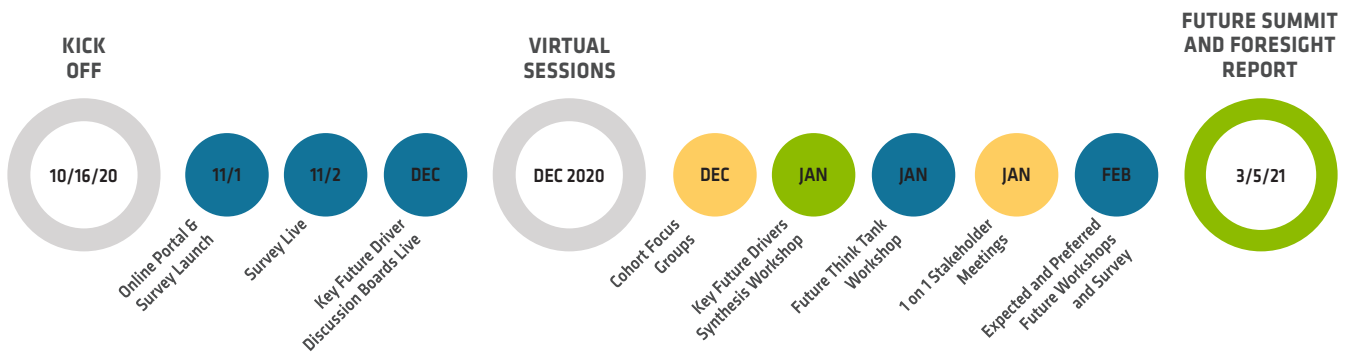
- Phase One included data gathering, visioning, and consensus building.
- Phase Two is actionable strategic planning.
- Phase Three is implementation of the plan.

The following sections detail Phase One activity of this project.

2.1 PROJECT LAUNCH

This project began with an online launch and a virtual meeting between the consultant teams of Future iQ, Sharity and the Strategic Planning Committee. At the launch, the project process plan was introduced and explained, as well as the project portal and the Future Perceptions and Priorities Stakeholder Survey. The team began the process for determining cohort groups, and a Q & A period was held. As the project unfolded, stakeholders from all facets of the profession were encouraged to participate in the strategic visioning process. Below is the outline of the visioning Phase One of this project.

Phase One Project Plan



- future*→*iQ
- SHARITY
- Future iQ and Sharity



Data collection from the survey provided a comprehensive understanding of stakeholder views about key drivers shaping the future of the industry and initial identification of priorities.

2.2 FUTURE PERCEPTIONS AND PRIORITIES STAKEHOLDER SURVEY

The first major industry engagement was the Future Perceptions and Priorities Stakeholder Survey. This was designed to explore stakeholder insights on trends and factors influencing the future of the chiropractic profession. With input from the Strategic Planning Committee, lists of critical questions and key industry drivers were created to explore in the survey. Open-ended questions were also included to capture any additional key drivers considered important by stakeholders. The survey ran from November 2 through December 4, 2020 and was distributed via national and state associations, and throughout the chiropractic professional ecosystem. The survey was also made available on the project's online lab portal.

Key data on survey responses includes:

- 3,415 stakeholders responded to the survey, representing chiropractic stakeholders from across the United States.
- The majority of respondents (81%) were chiropractors practicing 5+ years, followed by chiropractors practicing less than 5 years (9%) and students (2%).
- The majority of respondents were solo practitioners (57%), followed by group member practitioners in a single location (19%), integrated/multidisciplinary facility (10%) and multi-location practices (7%).
- Over 62% of respondents affiliated with State Associations, followed by 32% American Chiropractic Association (ACA), 15% International Chiropractic Association (ICA), 15% State Licensing Boards, and 11% International Chiropractic Pediatric Association.

Complete survey results may be found on the project portal at: <https://lab2.future-iq.com/future-of-chiropractic-strategic-visionsing-and-planning-project/data-visualization/future-perceptions-survey/>



DataInsight

DATA INSIGHT:

- The Future Perceptions and Priorities Stakeholder Survey contained 27 questions and took approximately 20 minutes to complete. That 3,415 individuals took the time to respond to this survey is a testament to the dedication of chiropractic stakeholders to this strategic planning project.
- The Future Perceptions and Priorities Stakeholder Survey probed sensitivities around 19 key driver topics, and asked respondents to identify any topics that may have been missing. Respondents identified 10 additional topic areas that were incorporated into the visioning process.



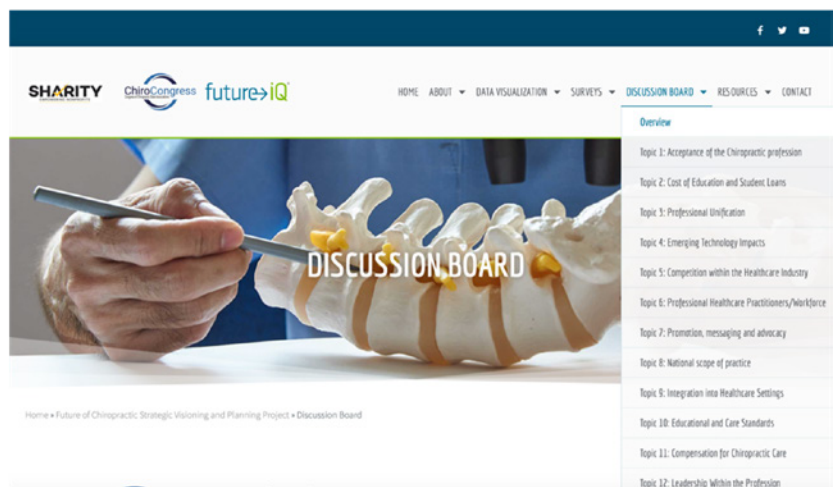
The discussion boards allowed stakeholders to contribute forward-thinking thoughts and ideas on a series of important discussion topics relevant to the future of the chiropractic profession.

2.3 ONLINE DISCUSSION BOARD

Discussion board topics were added to the online project portal to encourage further discussion around important issues impacting the chiropractic profession. Participants were able to contribute their thoughts and ideas, and also comment on other participant posts. This dialogue was encouraged to allow individuals to have thoughtful discussion among themselves as the project progressed. The combined key drivers identified from the Future Perceptions and Priorities Stakeholder Survey were developed into 16 key topic areas for discussion:

Discussion Board Topics:

- | | |
|---|---|
| Topic #1: Acceptance of the Chiropractic Profession | Topic #10: Educational and Care Standards |
| Topic #2: Cost of Education and Student Loans | Topic #11: Compensation for Chiropractic Care |
| Topic #3: Professional Unification | Topic #12: Leadership Within the Profession |
| Topic #4: Emerging Technology Impacts | Topic #13: High Costs of Eldercare |
| Topic #5: Competition Within the Healthcare Industry | Topic #14: Impacts of an Aging Population |
| Topic #6: Professional Healthcare practitioners Workforce | Topic #15: Broader Access to Healthcare |
| Topic #7: Promotion, Messaging and Advocacy | Topic #16: Growing Health and Wellness Movement |
| Topic #8: National Scope of Practice | |
| Topic #9: Integration into Healthcare Settings | |



DataInsight

DATA INSIGHTS:

- Comments were contributed by stakeholders to the discussion board in January and February 2021.
- The discussion topic most commented on was the topic of 'Acceptance of the Chiropractic Profession.'



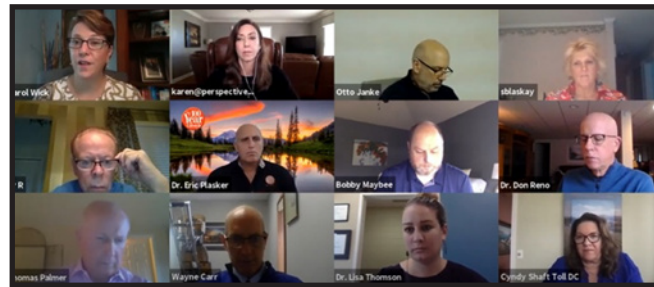
The intent of each focus group was to gain deeper perspective and find consensus, where possible, with potential priorities, unifying language, high-level mission and shared core values.

2.4 COHORT FOCUS GROUPS

Five Cohort Groups were identified through a collaborative effort with the Strategic Planning Committee, combined with demographic results from the survey. The cohorts were then populated through outreach and sign-up efforts. Each cohort participated in a 2-hour facilitated session, wherein survey results and commonalities were explored. Cohort focus group sessions started December 21, 2020 and concluded January 14, 2021.

Cohort Groups Included:

- Chiropractors practicing less than 5 years
- Chiropractors practicing greater than 5 years
- Chiropractic students
- Regulators and researchers
- Chiropractic College Leadership and Faculty



Each focus group was presented with the same prompts, derived from the survey results as a whole, and supported by their specific cohort group results. Robust discussion around each topic took place, which was enhanced by the diverse backgrounds and perspectives of individual participants.

It should be noted, discussion topics were narrowly defined by the results of the survey and identified in advance as areas most likely to garnish robust discussion and demonstrate high-level agreement, already supported within the profession according to the survey data. Each group expressed appreciation for the opportunity to engage in professional discussions with their peers – particularly those with whom they had not imagined they would find agreement so swiftly.

“Our strongest unifying point is keeping the best interest of our patients at the forefront of all we do and all we discuss”

- From College Leadership/Faculty



DataInsight

DATA INSIGHTS:

- A total of 37 professionals participated in the five 2-hour focus group sessions. Each session deepened the understanding of the complexities and long-standing issues existing within the profession.
- The groups also confirmed the priorities gleaned from the survey, and demonstrated the common desires across the professional spectrum, regardless of philosophy, specialty, preference and beliefs.



Drivers are events, trends, developments, catalysts or forces that actively influence and cause change. The key drivers identified are likely to shape the future of the chiropractic profession looking out to 2030.

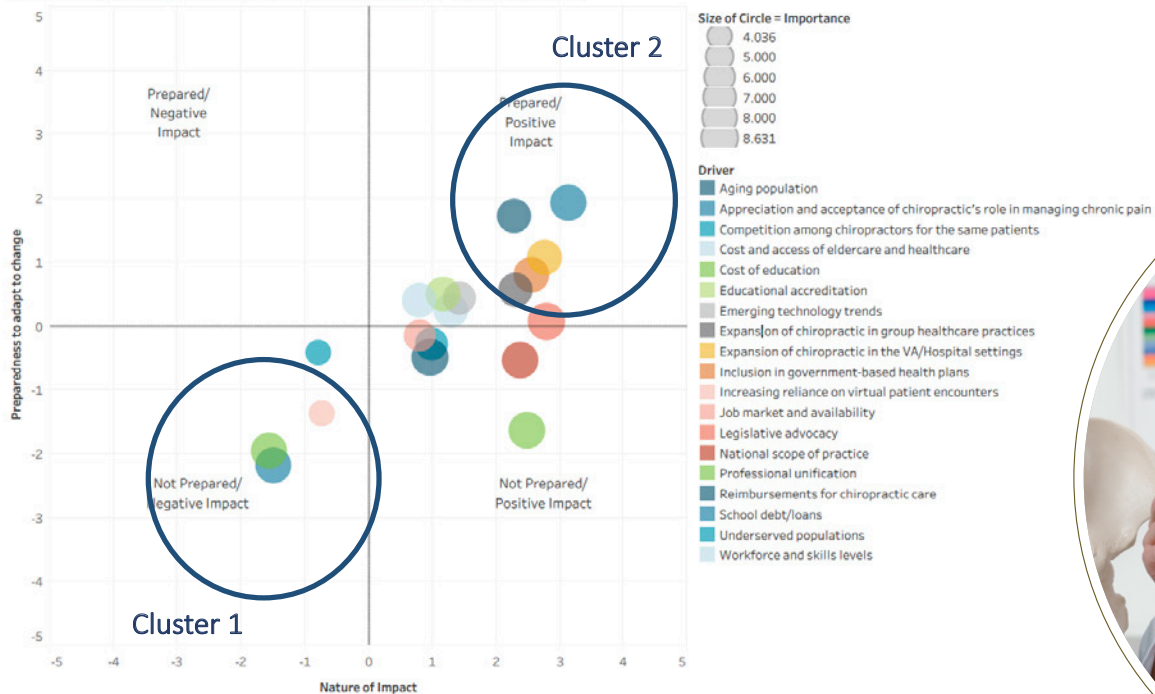
2.5 KEY DRIVER WORKSHOP

After the Future Perceptions and Priorities Stakeholder Survey and cohort focus group sessions were complete, the Strategic Planning Committee participated in a Key Driver Workshop. At this workshop, participants discussed and analyzed the survey results and emerging information of 'future-splitting' drivers and topics. The graph below explores the 19 key drivers in the survey as they relate to the nature of impact of the driver, preparedness to adopt to change, and the importance of the driver.

The purpose of this workshop was to identify critical clusters of drivers, that could be used to create the future scenario matrix, used in scenario development at the following Think-Tank.

Key Drivers of Change - Average Data

X-axis - Nature of Impact (SCALE: -5 = Very Negative; +5 = Very Positive)
 Y-axis - Preparedness to adapt to change (SCALE: -5 = Not at all prepared; +5 = Very well prepared)
 Size of Circle - Importance of Driver (SCALE: 1 = Not at all important; 10 = Critically important)



DataInsight

DATA INSIGHTS:

- Cluster 1 indicates the drivers of the industry saw as having potential negative impact and which the industry was not well prepared to address. There were grouped into a theme about 'Professional Pipeline Development'. It includes driver about the cost of education and school debt/loans impacts.
- Cluster 2 indicates the drivers with the highest positive impact, importance and preparedness. There were grouped into a theme about 'Appreciation and acceptance' of chiropractic's role within the health industry.



The scenario planning process allowed chiropractic stakeholders to examine the implications of choices about future direction, and to explore preferred future direction.

3.0 SCENARIO-BASED THINK-TANK

The Future of Chiropractic scenario-based Think-Tank was conducted on January 29, 2021 and included chiropractic stakeholders from across the United States. Approximately 53 stakeholders attended this two-hour session. The session was intended to help identify the shared vision for the industry and begin to identify high level strategic direction.

The scenario planning approach provides a method to explore and consider the implications of various future scenarios. The Think-Tank workshop aimed to:

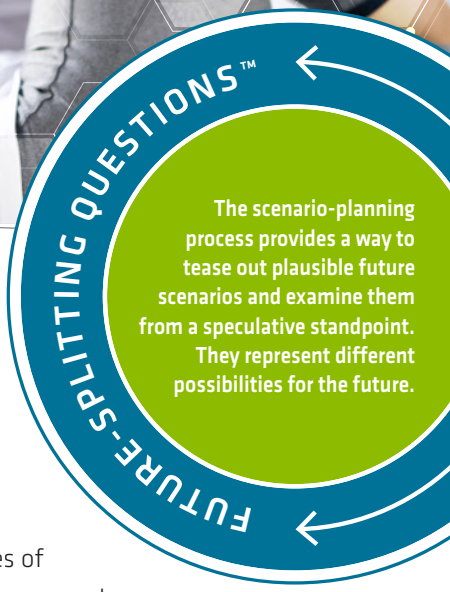
- Identify and understand the key influences, trends, and dynamics that will shape the chiropractic profession looking out to 2030.
- Create and describe four plausible long-term scenarios for the chiropractic profession.
- Begin exploring alignment around a shared future vision.

As Think-Tank participants were guided through a scenario planning process, they created a narrative of each future scenario world. In describing the future, they considered impacts and future industry characteristics in areas such as:

- Scope of Services
- Role in the Healthcare Industry
- Professional Cohesion / Unification
- Utilization and Economics
- Political and Regulatory Power
- Public Perception

The scenarios developed during this planning process and outlined in this report are important to provide a framework to discuss future possible outcomes and implications for the chiropractic profession. In addition, the Think-Tank deliberations assist in identifying key strategies and actions and explore how various groups might collaborate to best contribute to future decision and policymaking.

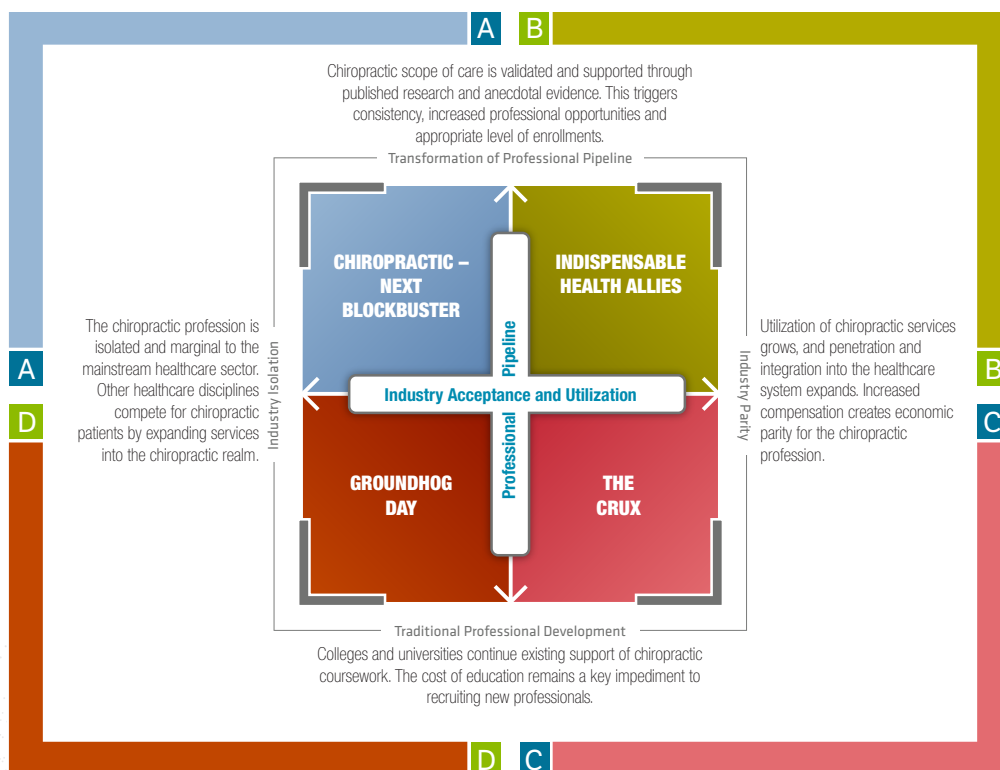




4.0 CREATING THE FUTURE SCENARIOS

Data was collected through the Future Perceptions and Priorities Stakeholder Survey, cohort focus group discussions, and from the Strategic Planning Committee. This helped identify themes that became the two main axes on the scenario matrix. The two axes identified were Industry Acceptance and Utilization and Professional Pipeline.

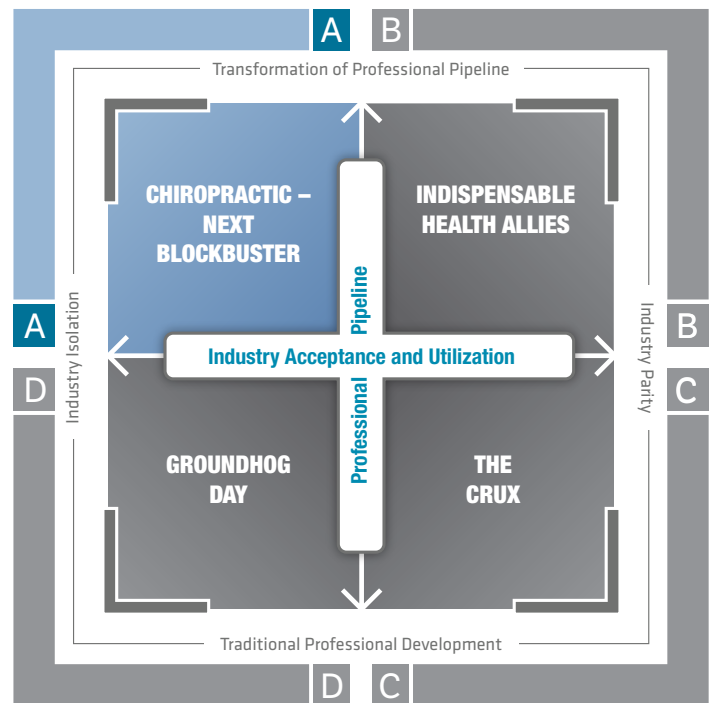
Think-Tank participants were presented with the scenario matrix, defined by the two major axes of 'Industry Acceptance and Utilization' and 'Professional Pipeline' (see diagram). Brief descriptions were also attached to the end points of each axis. Participants were randomly divided into four groups to develop a narrative for each scenario. Each group was asked to describe the characteristics of the chiropractic profession in 2030 under the conditions of the scenario quadrant that they had been given. After the characteristics were established, Think-Tank participants were asked to devise major events or headlines of how the scenario occurred using the years 2022, 2025, and 2030, and to give their scenario a descriptive name. Narratives and descriptions of each scenario, as developed by the workshop participants, are included in the following sections.



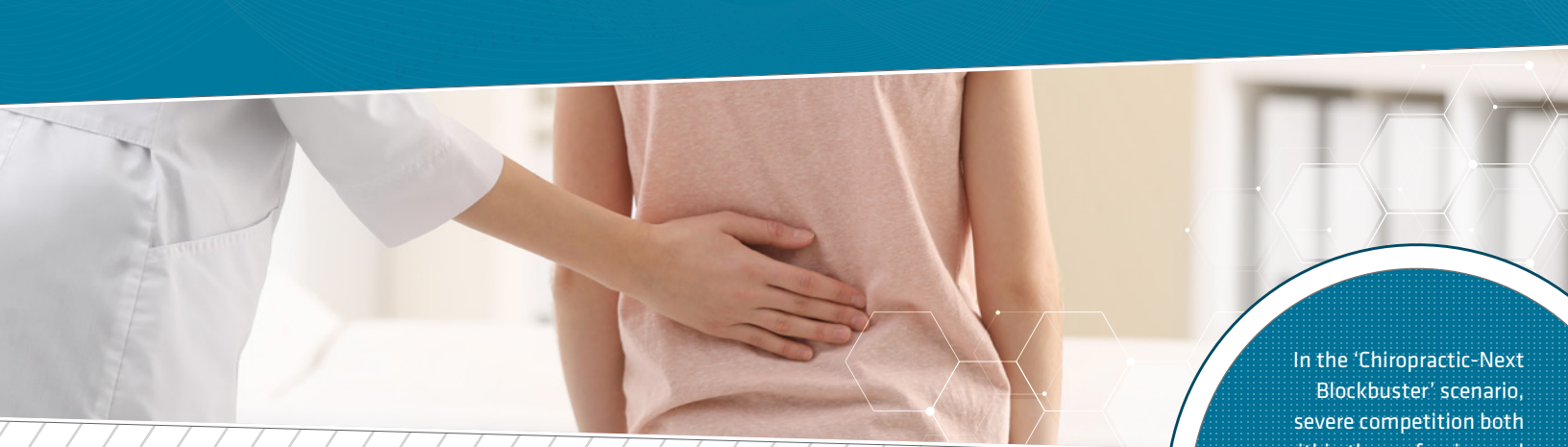


4.1 SCENARIO A: CHIROPRACTIC – NEXT BLOCKBUSTER

This scenario forecasts a future where industry acceptance and utilization of the chiropractic services gradually dwindle. The chiropractic profession holds firm to focusing its services outside of the mainstream healthcare system. Some specialization occurs as additional research is published, but growth is limited when the profession fails to scale up and gaps occur between what the public wants and what is offered. Public misunderstanding of chiropractic grows and the gaps in services are filled by other healthcare disciplines. There is a slow infiltration of other professions in the chiropractic space and competition for patients both within and outside the profession is fierce. Reimbursements increase for those professions inside the healthcare system as they take on chiropractic skillsets and chiropractors are marginalized. There is a risk of extinction for the chiropractic profession as time goes on.



This scenario paints a future where investment in research in chiropractic services initially supports a pipeline of new enrollments. However, refusal to integrate into the mainstream healthcare system leads to a profession that is isolated, marginalized and risks extinction.



In the 'Chiropractic-Next Blockbuster' scenario, severe competition both within the profession and with outside healthcare professions intensifies. Quality of care is reduced, and the chiropractic profession loses its sense of identity as it struggles to survive.

SCENARIO A CHARACTERISTICS: CHIROPRACTIC - NEXT BLOCKBUSTER

The characteristics of this scenario paint a future where a lack of coherent messaging around the chiropractic profession causes public confusion and allows for other healthcare professions to take over the chiropractic space. A lack of standards makes it difficult to maintain a unified voice and chiropractors are squeezed out of any legislative power they once had. Enrollments decrease over time and there is a sense of a 'race to the bottom' for the profession.



Scope of Services

Chiropractic services increase in the form of specializations within existing services, yet there is limited growth of the profession overall. Practices become more fragmented and marginal.



Role in the Healthcare Industry

Without standardization, there is failure to scale up. There are more cash practices yet limits on services creates frustration among chiropractors.



Professional Cohesion/Unification

An expansion of what is happening now in the profession creates more divisions and disunity. Enrollments in chiropractic schools decrease.



Utilization and Economics

Decreased reimbursements increase competition among chiropractors and with other healthcare professions. Practitioners are pushed to the edge providing lower quality care and there is a sense of a 'race to the bottom'.



Political and Regulatory Power

Political and regulatory power becomes difficult to leverage and chiropractors are marginalized and left out of the system. Legislation is difficult to progress and there is potential extinction of the chiropractic profession.



Public Perception

A lack of coherent messaging around what chiropractors do continues to cause misunderstanding and confusion with the public. The loss of professional identity causes a decline in care coordination.

2022 HEADLINE NEWS:

"Chiropractic practice adopts national identity."



2025 HEADLINE NEWS:

"Insurance compensation expands reimbursements to other professions"



2030 HEADLINE NEWS:

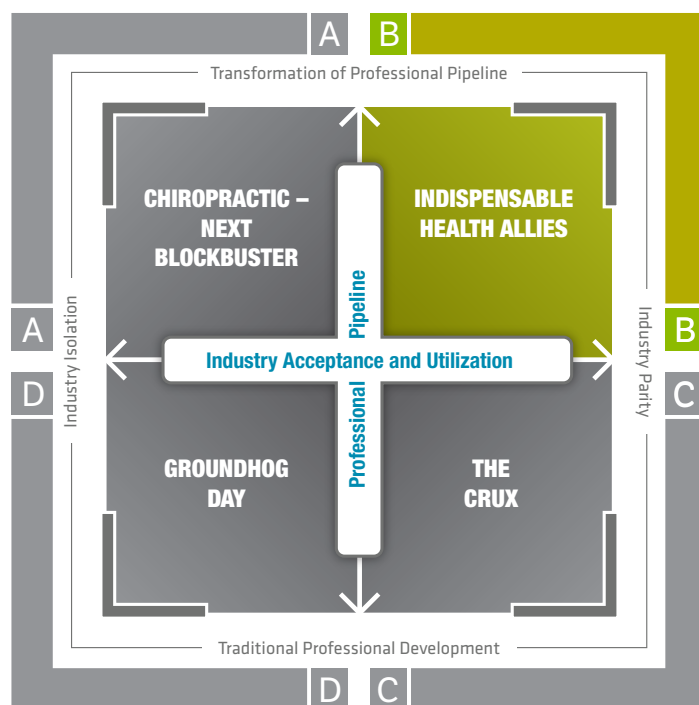
"Is it too late?"





4.2 SCENARIO B: INDISPENSABLE HEALTH ALLIES

This scenario forecasts a future where acceptance and utilization of the chiropractic profession soars as the public understands the unique strengths of the profession and seeks out chiropractic services. Universal respect across the profession exists and divisions are diminished. The demand for chiropractic services transforms the professional pipeline and funding for research and schools is readily available. The demand for chiropractic services is so high, the government actually pays people to become chiropractors and chiropractors become first in line for health and wellness in healthcare. Healthcare costs are reduced as the public becomes healthier. New chiropractors are diverse, and the demographics of the profession's leadership change dramatically. Reimbursements reach parity with other healthcare professions and chiropractic services are respected equally across professions. Natural collaborations occur among the healthcare professions and teams of interdisciplinary practices address public healthcare needs in a cradle-to-grave approach. Full acceptance translates into political and regulatory power and the chiropractic profession flourishes.



The 'Indispensable Health Allies' scenario paints a future where the chiropractic profession is fully accepted, utilized, integrated and funded. Current divisions within the profession are diminished and universal respect exists across the profession.



In the 'Indispensable Health Allies' scenario, chiropractic care becomes the 'new normal' for cradle-to-grave healthcare. The profession's flood gates open and chiropractic services penetrate all areas of healthcare to meet growing demand.

SCENARIO B CHARACTERISTICS: INDISPENSABLE HEALTH ALLIES

The characteristics of this scenario paint a future where the profession is transformed and achieves parity with other healthcare professions. Big Pharma is no longer a key driver in healthcare, and chiropractic services emerge as key to healthy lifestyles. The public understands, accepts, and seeks out chiropractic care as a first step in their journey of lifelong wellbeing.



Scope of Services

Chiropractic services expand as chiropractors become the primary source of healthcare drivers, motivators, and coaches. Tiers of care are created and DCs refer patients to other DC specialists.



Role in the Healthcare Industry

Chiropractors become the first line of health and wellness. Natural collaborations and respect occur across healthcare professions. Integrated, diverse 'teams' of healthcare are created.



Professional Cohesion/Unification

School entrance requirements remain rigorous and residencies produce high quality students. Universal respect exists across the profession and easy referrals occur.



Utilization and Economics

Chiropractic becomes a \$50 billion industry. The profession becomes much more diverse and the demographics of chiropractic leadership change dramatically. The demand for chiropractic services is high. All research is funded.



Political and Regulatory Power

Documentation is streamlined and easy. Chiropractors are free to practice where they choose and where need exists. State Associations are strong with immense purchasing power (resources, healthcare, legislative agendas).



Public Perception

The chiropractic profession is viewed as 'whole health' and marketing focuses on cradle-to-grave services. Perception of chiropractic services are now mainstream; offerings and benefits are understood and accepted.

2022 HEADLINE NEWS:

"Chiropractors viewed as health and wellbeing drivers, motivators, and coaches."



2025 HEADLINE NEWS:

"Chiropractic becomes \$50 billion industry!"



2030 HEADLINE NEWS:

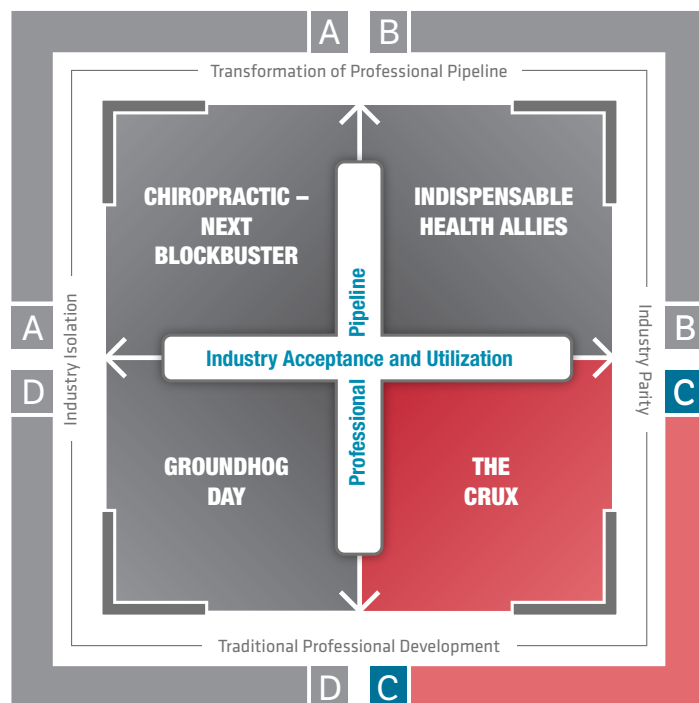
"Government mandates chiropractic care for all Americans!"





4.3 SCENARIO C: THE CRUX

This scenario forecasts a future where industry acceptance and utilization is achieved for only some chiropractors and the profession remains deeply divided. Public perception of chiropractic services improves as they are integrated into the healthcare system, however those who refuse integration continue to cause confusion and distrust. The professional pipeline becomes more restricted as schools promote traditional educational offerings, and the high costs of education and student debt discourage new student enrollments. For those chiropractors who become more integrated into the healthcare system, increased compensation creates economic parity for that portion of the profession. The chiropractic profession splits and speaks with two distinct voices. Legislative clout for the profession is weakened and ability to obtain funding to support schools and educational programming declines.



The 'The Crux' scenario paints a future where the chiropractic profession is poised to split. Integration into the healthcare system helps to bring about acceptance and parity but leaves behind those who cannot accept unification without uniformity.



In the 'The Crux' scenario, the chiropractic profession becomes 'stuck' in its ways. The profession struggles to maintain the gains made by integration and acceptance as the loud voices of discord create a lack of confidence in the profession over time.

SCENARIO C CHARACTERISTICS: THE CRUX

The characteristics of this scenario paint a future where schools continue to support existing chiropractic coursework orientation, and this limits industry growth and parity. Acceptance and utilization of chiropractic services increase where services are integrated into the healthcare system. A lack of consensus on internal divisions continues to plague the profession and political clout is lost over time.

Scope of Services

There is a trend towards a narrowing of scope as the educational system does not evolve with changing demand. Lack of scholarship and grant funding limits program expansion. Specializations are delineated within the profession.

Role in the Healthcare Industry

Industry growth is limited due to lack of research initiatives and educational program expansion. Chiropractic skillsets are integrated into other healthcare professions and competition for patients and quality students is fierce.

Professional Cohesion/Unification

Chiropractic schools double down on producing students adhering to different philosophical practice orientations. The trend towards integration and parity for some requires schools to meet demand and some chiropractors are highly successful.

Utilization and Economics

Use of chiropractic services increases as acceptance increases. Utilization expansion is limited by restricted course offerings and lack of funding to support the high costs of education and student loan debt.

Political and Regulatory Power

With no consensus and divisions within the profession, legislative clout is lost. Leadership fails to bring together internal warring factions to speak with one voice, and efforts to seek outside financing to fund schools fail.

Public Perception

Greater integration into the healthcare system helps to improve public perception of the chiropractic profession. Continuing divisions within the profession cause confusion and prevent complete acceptance over time. The public turns to PT for greater reliability.

2020 HEADLINE NEWS:
"Stuck in the middle."



2025 HEADLINE NEWS:
"Some private colleges hanging on by a thread."



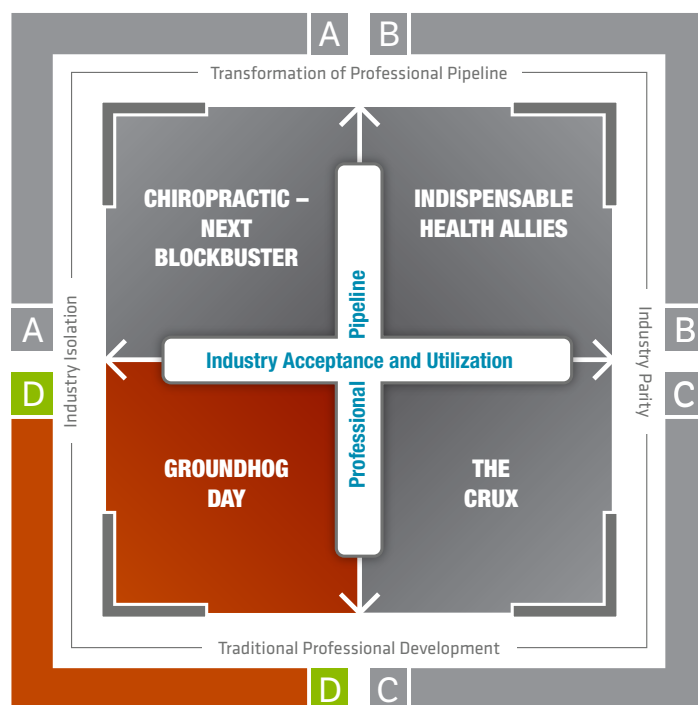
2030 HEADLINE NEWS:
"Living on the fault line."





4.4 SCENARIO D: GROUNDHOG DAY

This scenario forecasts a future where acceptance and utilization of chiropractic services is on a diminishing trajectory. The chiropractic profession is isolated and marginalized from mainstream healthcare and standards of care are non-existent. Silos of care are reinforced by the educational system which continues to provide existing chiropractic coursework and remains blind to new needs and demands in healthcare. The incorporation of chiropractic services into other healthcare professions becomes a consistent reality and students gravitate to healthcare professions that can provide livable compensation and economic parity. Marginalized voices of the minority become the loudest heard by the public and potential new patients turn away seeking evidence-based healthcare for treatment. Over time, chiropractic services are gradually incorporated into the medical education system and chiropractic schools cease to exist except for a few fringe schools.



The 'Groundhog Day' scenario paints a future where the chiropractic profession risks losing itself. Industry isolation and refusal to speak with one voice threatens to render the profession powerless and unviable.



In the 'Groundhog Day' scenario, the chiropractic profession implodes over time. Other healthcare professions incorporate chiropractic skillsets, and the profession ceases to exist except for fringe elements.

SCENARIO D CHARACTERISTICS: GROUNDHOG DAY

The characteristics of this scenario paint a future where the chiropractic profession cannot get its act together. Lack of cohesion in the profession perpetuates disarray and any hope for political power or funding for education is lost as infighting continues. Utilization of chiropractic services diminish as the public loses confidence in the legitimacy a profession that eschews research and standards.



Scope of Services

Cash only practices increase as chiropractic service growth decreases. Direct competition from other healthcare professions increases, and the chiropractic profession loses visibility.



Role in the Healthcare Industry

Industry acceptance and utilization decreases, and the chiropractic profession becomes marginalized. The profession stands alone outside of the healthcare system.



Professional Cohesion/Unification

Professional cohesion and unification proves too daunting a task. The chiropractic profession remains divided and unwilling to work together for the greater good.



Utilization and Economics

Utilization of chiropractic services decrease as other professions move into the chiropractic space. Lack of funding for schools make the profession difficult for students from underserved populations to access. There is no economic parity, and the profession is left behind.



Political and Regulatory Power

The lack of cohesion in the profession leads to zero legislative clout for State and National Associations. Professional silos are maintained, and no one will play together in the sandbox.



Public Perception

The public does not understand the chiropractic profession and vocal minorities within the profession cause confusion. Lower utilization ensues and the lack of demand for chiropractic services causes the profession to die out.

2020 HEADLINE NEWS:

"The chiropractic profession struggles along"



2025 HEADLINE NEWS:

"Chiropractic care – a dying breed of healthcare"



2030 HEADLINE NEWS:

"What is a chiropractor?"





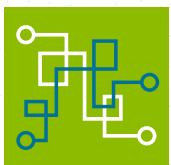
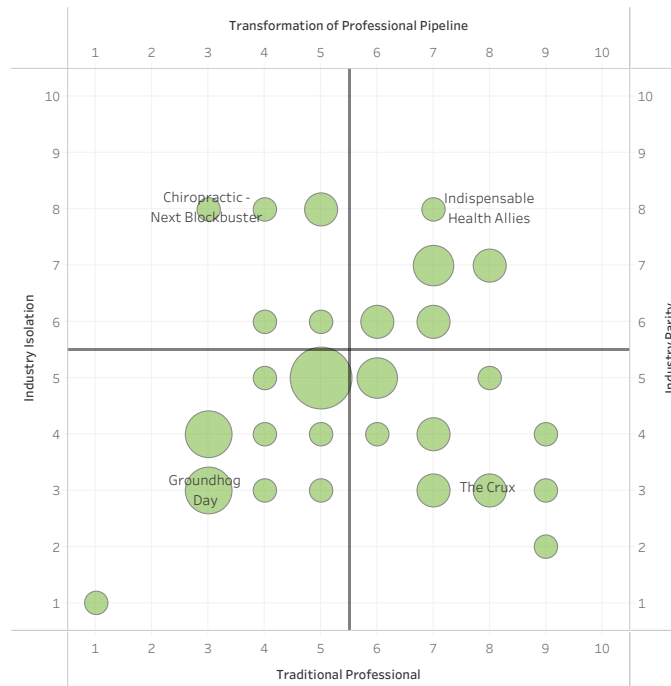
The Expected Future represents the future that is most judged to be likely to happen if nothing changes, or if the profession does not change direction.

5.0 EXPECTED AND PREFERRED FUTURES

After the Think-Tank, participants were asked to take a Future of Chiropractic Strategic Vision Survey that included a question that established Expected and Preferred Futures. This was done by overlaying the scenario matrix with a 10 x 10 grid. As the axes are presented as continuums, this creates 100 different versions of the future, building on the four main scenarios. Survey respondents were asked to identify the 'cell' in the matrix that represented their estimate of the expected and the preferred future.

5.1 EXPECTED FUTURE

The expected future is one deemed most likely to happen if there is no change in the current trajectory of the chiropractic profession. Workshop participants indicated on average that the expected future was close to the center of the scenario matrix.



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FUTURE INSIGHTS:

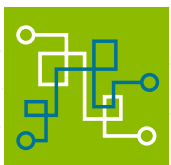
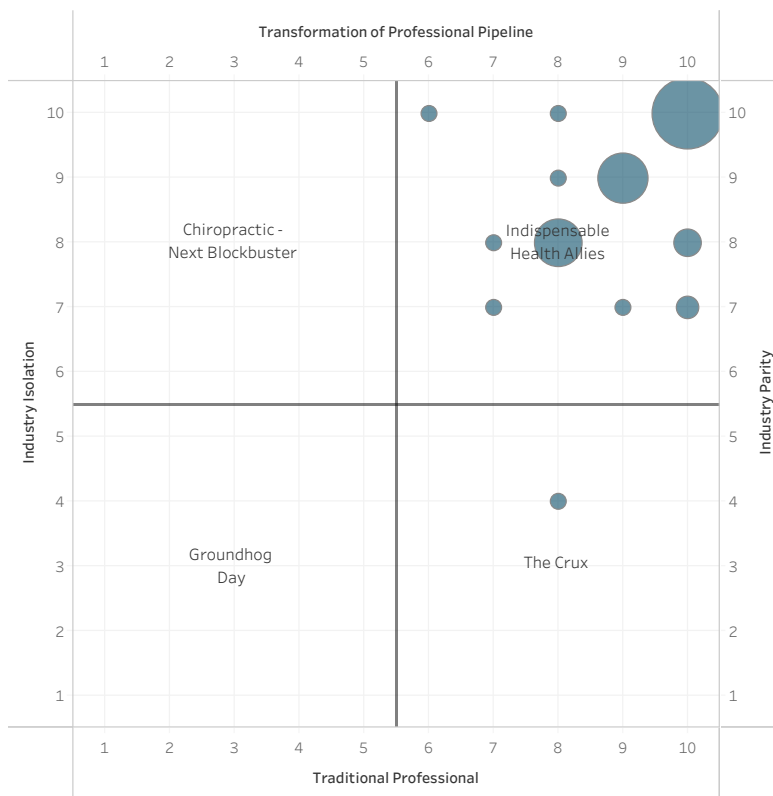
- The results reflected the underlying concern that the industry is drifting towards 'Groundhog Day' scenario.
- The results from the Future Perceptions and Priorities Survey revealed internal divisions and reimbursement parity as the two biggest threats facing the chiropractic profession.



A clear preference for the preferred future gives a significant mandate to industry leadership to implement bold actions that support that vision for the future.

5.2 PREFERRED FUTURE

While each of the scenarios were generally viewed as plausible, Think-Tank participants expressed a clear preference for one of the presented outcomes, Scenario B, “Indispensable Health Allies”. The Preferred Future heatmap shows a strong concentration of responses in the upper right corner of the scenario matrix, reflecting a desire for maximum change. Think-Tank participants viewed Scenario B as both ideal and attainable with the right adjustments to the current trajectory of the profession.



FutureInsight

FUTURE INSIGHTS:

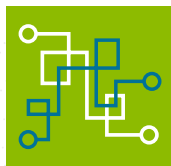
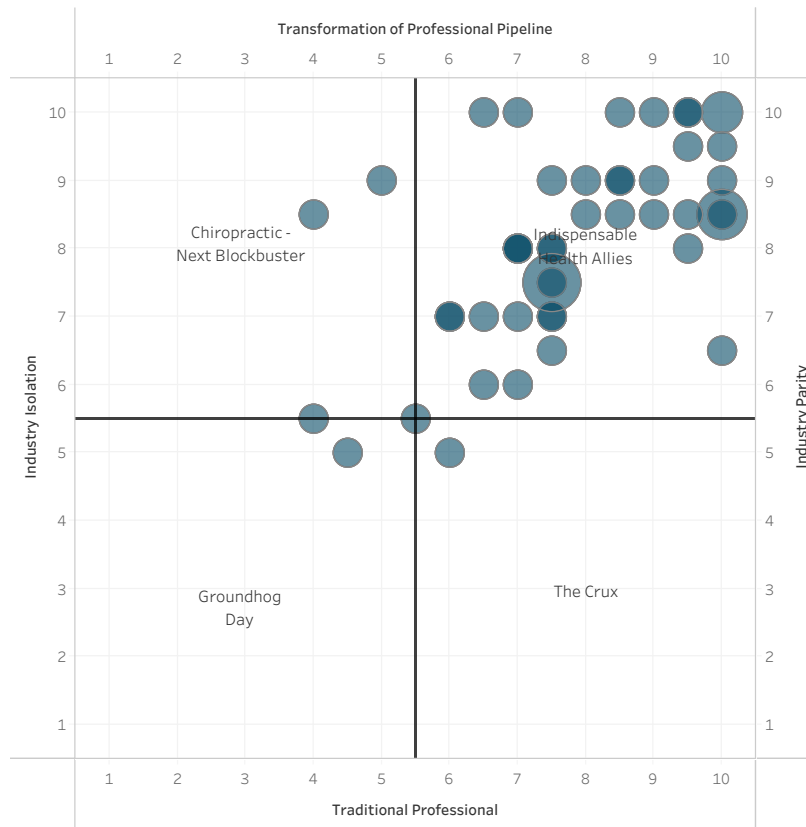
- The tight concentration of color in Scenario B, ‘Indispensable Health Allies’ indicates a close alignment of thinking among chiropractic stakeholders.
- This response was reflected in surveys from the subsequent Strategic Vision Workshops.



The scenario validation matrix highlights the concentration of responses from the survey and validates the perceived desire for change. These results suggest a strong mandate for purposeful change within the chiropractic profession.

5.3 SCENARIO VALIDATION MATRIX

This 'Scenario Matrix Validation Chart' is created by building a preferred future from the answers to the 'Important Themes' questions. These 'Important Themes' questions are subsets of the scenario axes, and by recombining each person's answers we create a unique X, Y average. This approach generates a notional Preferred Future, but one based on likely response to issues and expected behavior in real-life. This provides a validation of the Preferred Future response based on the heat map diagram.



FUTURE INSIGHTS:

- The tight correlation of the preferred future responses, and scenario validation matrix, gives significant validation to the process. It suggests that issue by issue decision making will support the aspiration preferred future.
- Overall, the results indicate a desire for bold change, and an appetite for 'pushing the boundary'. The clustering of responses at the extremity of the axes and scenario matrix indicates deep desire for maximum change. This was also reflected in the survey responses and within the focus group discussions.

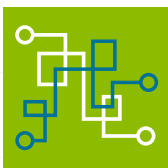
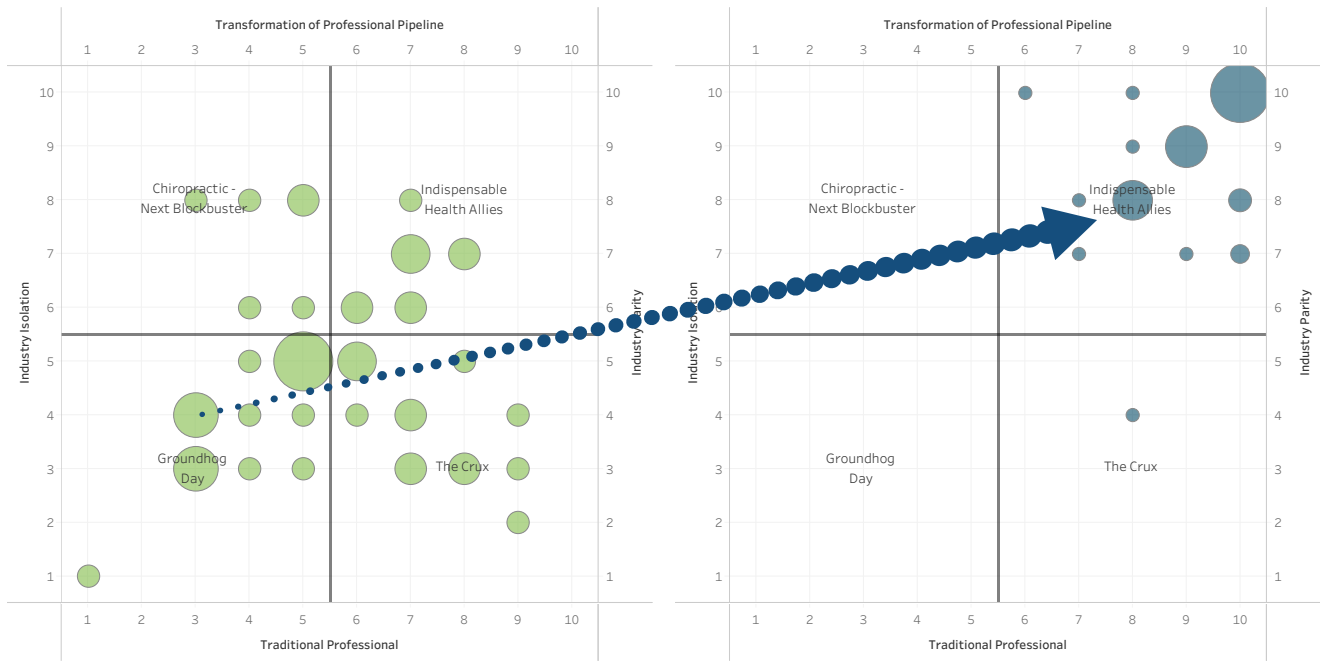
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Because of the long-term nature of the Scenario Planning methodology, stakeholders often see the 'distant future vision (2030)' as unattainable and unrealistic. However, this underestimates the progress that can be made during the intervening years, and the cumulative positive impacts of change.

5.4 GETTING FROM THE EXPECTED FUTURE TO THE PREFERRED FUTURE

Think-Tank participants discussed the ramifications and implications of failing to achieve the preferred future. It was noted that the gap between the expected and the preferred is significant. While this illustrates outsized support for bold change, it is appreciated that this will require significant effort and collaboration across the chiropractic profession. It was determined that clear communications would be required to support the desired changes in the profession, as well as practical steps and initial wins. It was noted that the profession has perceived divisions that need to be overcome in order to be able to move ahead as one voice.



FUTURE INSIGHTS:

- Survey respondents considered acceptance of the chiropractic profession as both a threat and an opportunity for profession. How much change occurs resulting from the Strategic Plan will determine the future-splitting nature of this issue.
- Getting from the expected to the preferred future will require strategy, focus, collaboration and commitment by the majority of chiropractic stakeholders.

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This project's visioning process has resulted in clear evidence of support for the preferred future of the chiropractic profession, which articulates the shared vision.

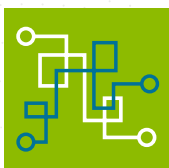
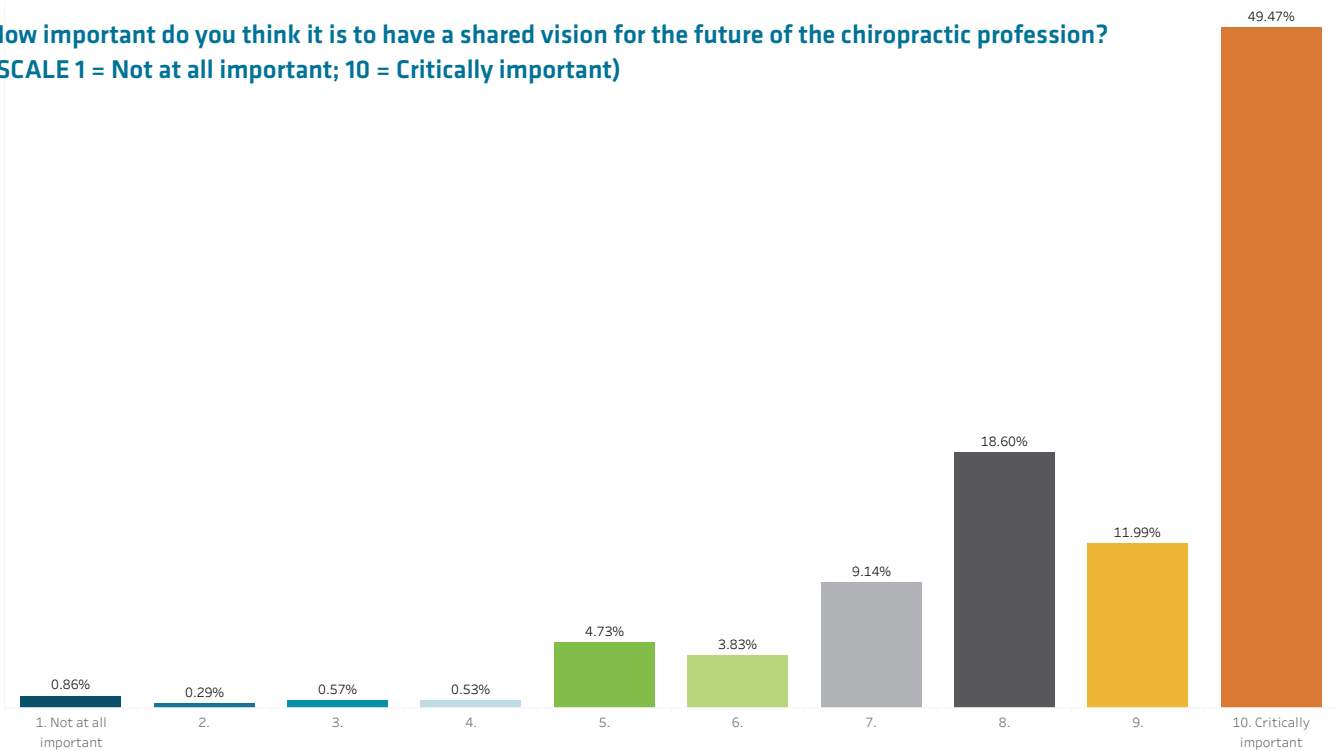
6.0 SHARED VISION

One of the key outcomes of the Phase One work, is to identify shared vision, mission and strategic priorities. The scenario planning process has helped identify a potent preferred future, that encapsulates and articulates the shared vision.

6.1 IMPORTANCE OF SHARED VISION

One of the questions asked in the initial industry-wide Future Perceptions and Priorities Stakeholder Survey, was the perceived importance of having a shared vision. This question was also asked in the post Think-Tank survey and produced similar results.

How important do you think it is to have a shared vision for the future of the chiropractic profession? (SCALE 1 = Not at all important; 10 = Critically important)



FutureInsight

FUTURE INSIGHTS:

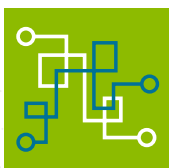
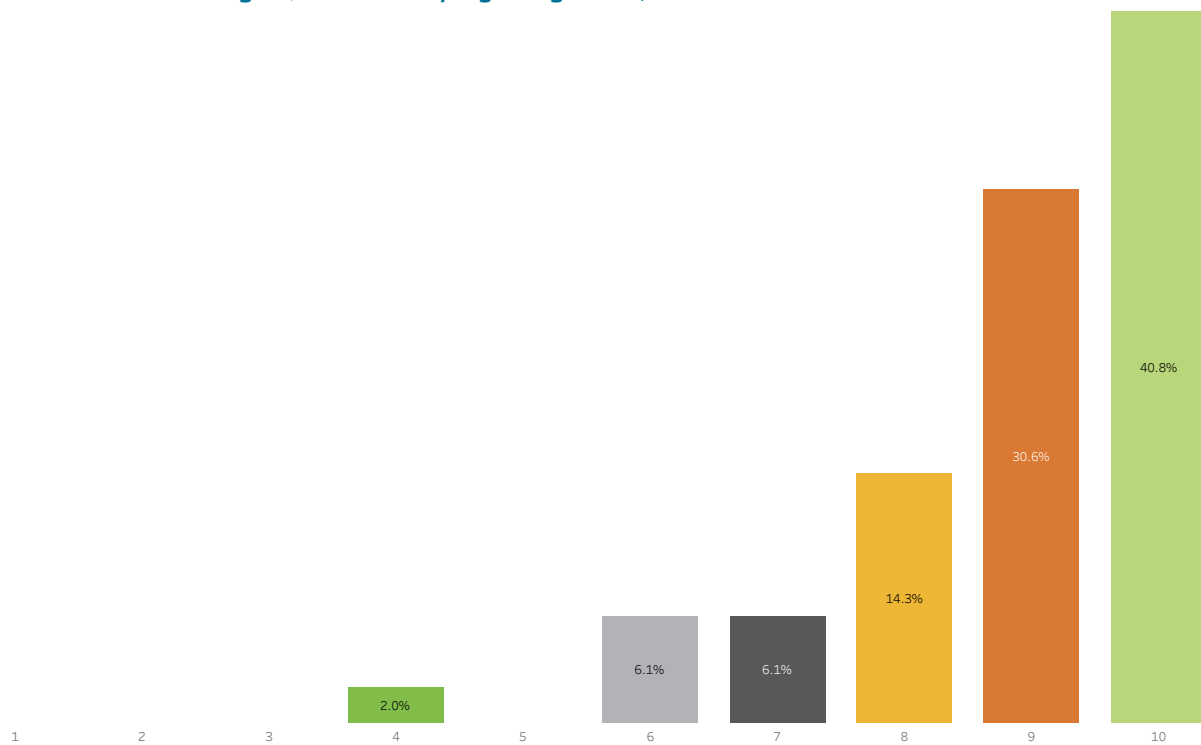
- On a scale of 1-10, 93% of survey respondents rated the importance of having a shared vision for the future of chiropractic in the 6-10 scoring range (important to Critically important).
- This data reflects a very strong recognition of the importance of a shared vision. This was reflected in all focus group discussions, and other key engagement points in the Phase One process.

The sense of urgency supports the focus on creating a short term (1-5 year) strategic action plan and delivering quick wins to the industry and profession.

6.2 URGENCY TO IMPLEMENT VISION

The Future of Chiropractic Vision Survey explored the perceived sense of urgency to implement the shared vision. The results indicate a strong desire to move with critical urgency. This reflects a sentiment seen in the survey results, and industry discussion, of an underlying sense of frustration. The frustration was that the Chiropractic profession was not moving forward in a cohesive manner and was potentially missing opportunities to build industry vitality and success.

How quickly do you think leaders in the chiropractic profession need to adopt and pursue the preferred vision? (SCALE: 1 = Not at all urgent; 10 = Critically urgent right now)



FutureInsight

FUTURE INSIGHTS:

- On a scale of 1-10, 92% of survey respondents rated the urgency adopting and pursuing the vision in the 7-10 scoring range (Urgent to Critically Urgent).
- This data reflects a very strong desire to move quickly. This was also reflected in all focus group discussions, and other key engagement points in the Phase One process, as well as the initial survey.



Common Mission was explored in surveys and focus groups, where groups identified key words and the overall concept of a profession-wide mission statement.

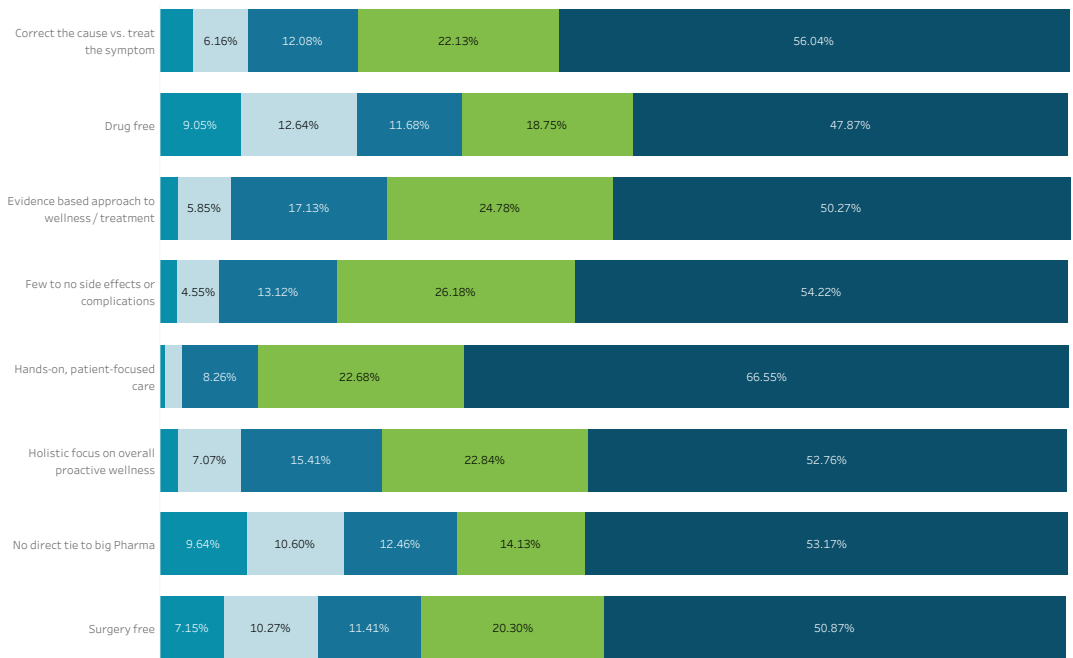
7.0 MISSION AND CORE VALUES

Exploring mission and core values was a one of the goals for Phase One. To achieve this, work focused on gathering qualitative and quantitative data to identify central components of the profession and explore specific central commonalities. This included a broad external-facing understanding of why the profession exists as well as the profession's core values.

7.1 COMMON MISSION

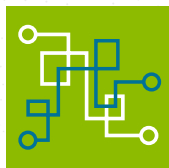
The crafting of a mission statement has been attempted many times in the history of the profession. During the survey portion of Phase One, and in cohort groups, participants were asked to give their thoughts on key differentiators for the Chiropractic Industry.

The list below contains differentiators between the chiropractic profession and other health care professions. Please rate the importance of each differentiator on a scale of 1-5. (1=not important at all, 5=extremely important)



While there were varying ideas about how it might be phrased, the following areas of consensus were found:

- Hands-on
- Compassionate
- Patient-centered care
- Drug-free
- Non-invasive
- Whole body wellness



FutureInsight

FUTURE INSIGHTS:

- There are clear and unique core differentiators that define the Chiropractic Industry, and these appear to be well understood and widely supported by industry stakeholders.
- During Phase Two, more work will be done to create a mission framework, which is externally facing and clearly defines why the chiropractic profession must exist.



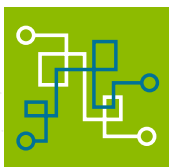
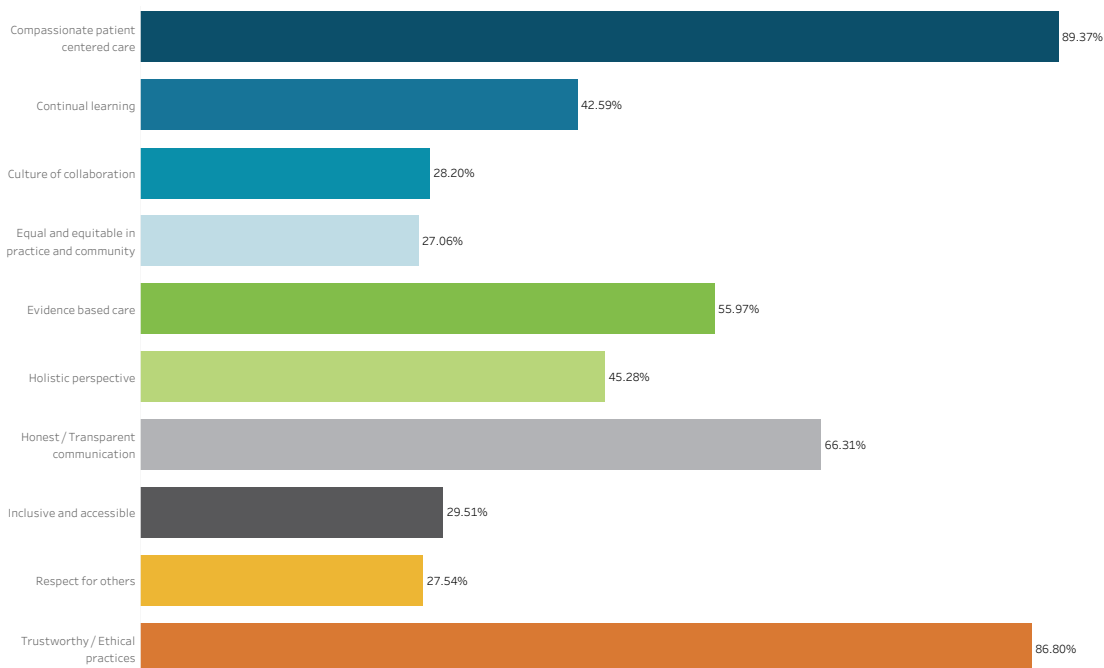
7.2 CORE VALUES

Core values inform thoughts, decisions, and actions and serve to unify the profession, as they point to the most important attributes of a chiropractor. They are the essential foundation in defining the purpose of the profession because they remind us – and others – who chiropractors truly are. During the initial survey, participants were asked to rank core values.

Core values were also analyzed by practice philosophy as well as cohort group. Core values identified by the survey as having the greatest consensus were presented to, and discussed by, the cohort focus groups. The final core values identified were:

- Compassionate patient-centered care: 89% top choice
- Trustworthy ethical behavior: 87% top choice
- Honest, transparent communication: 66% top choice

From the list below, please select the top 5 core values you believe should represent the greater chiropractic profession. (Core values being behavioral pillars in conducting your work.)



FutureInsight

FUTURE INSIGHTS:

- The Phase One survey work, and in subsequent focus group discussions, has identified clear agreement about Core values for the profession.
- These Core values will be explored further in the Phase Two strategic planning work and help create a strong shared foundation of future industry dialogue.



Key influencers were an important stage in testing and validating emerging strategic priorities. Having widespread support from industry leadership will be critical to implementing future strategic steps.

8.0 CREATING STRATEGIC PRIORITIES

The development of the strategic action plan for the next 5 years is the primary focus of Phase Two. However, during the Phase One engagement, issues around strategic priorities were explored, through both the survey and discussion sessions.

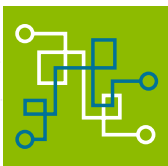
8.1 KEY INFLUENCER INTERVIEWS

A key step in validating the emerging strategic priorities was discussions with key influencers. These influencers were identified through the recommendations of survey participants, as well as in consultation with state and national chiropractic association leaders. As a result, ten confidential, one-hour, one-on-one interviews were conducted with key influencers within the chiropractic profession. Each participant was provided a list of potential strategic priorities, which were identified through the Phase One process.

A series of questions were also provided in advance, as follows:

1. The data collected thus far has identified 4 priorities as the most agreed-upon priorities for the profession. From your unique perspective, we would like to know:
 - Why are these initiatives important now?
 - What needs to happen to move them forward?
 - Who must be the table for planning and implementation?
 - What will the barriers be in moving these initiatives forward?
 - What are the benefits of following through with time-bound action?
 - Where would you begin?
2. In March 2021, we will begin working with groups to set-up measurable priorities and objectives and create a tactical plan that can be implemented for each of these. How do you see yourself being involved as these initiatives move forward?
3. This project will need funding to succeed. What do you think some sources could be?

"I dream of the beauty of one chiropractic profession; with understood and accepted unique and diverse specialties."
- Interview Participant



FutureInsight

FUTURE INSIGHTS:

- These confidential interviews further confirmed and validated the key areas of agreement that have been revealed and repeatedly confirmed throughout Phase One of this project.
- Given the history and reach of each influencer, their unique insights were valuable in determining where to begin, who to include, and how to proceed with Phase Two.



The Chiropractic profession has successfully identified widely supported vision, mission, values and strategic priorities. This creates a solid foundation to move into Phase Two.

8.2 EMERGING HIGH-LEVEL STRATEGIC PRIORITIES

Throughout the Phase One process, the focus has been on creating shared vision, mission and values, with the specific purpose of identifying key high-level strategic priorities. During the Think-Tank and the subsequent survey, participants were asked to score high-level strategic areas.

The topics were:

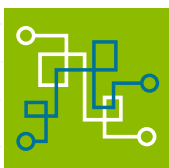
- Future Place and Role in the Healthcare Industry and System
- Professional Utilization Levels
- Chiropractic Industry Research Focus
- Future Professional Recruitment
- Professional Cohesion / Unification
- Political and Regulatory Power

All of these topics were considered critical, and survey responses indicated a desire for bold action in each of these areas. These results, coupled with focus groups and one-on-one interviews, have helped whittle the focus down to four initial high level strategic priorities. These are the priorities that are considered to be most appropriate to start work on, and where there are quick wins.

The following high-level priorities emerged with the survey results, and carried through the focus groups, key drivers' sessions, Think-Tank, and key influencer interviews. These high-level strategic priorities represent an agreed upon framework, for the development of an operational industry-wide strategic plan.

Initial High-Level Strategic Priorities:

1. Profession Identify
2. Legislation
3. Utilization
4. Research



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FUTURE INSIGHTS:

- Phase One was designed to explore future vision, mission, core values, and initial strategic priorities. The intention was to create an inclusive and transparent planning process, that elicited wide industry input and was data driven.
- Nearly 4,000 people have participated across surveys, discussion boards, focus groups and workshops.



This report represents the end of Phase One, and the commencement of Phase Two work.

8.3 NEXT STEPS - PHASE TWO

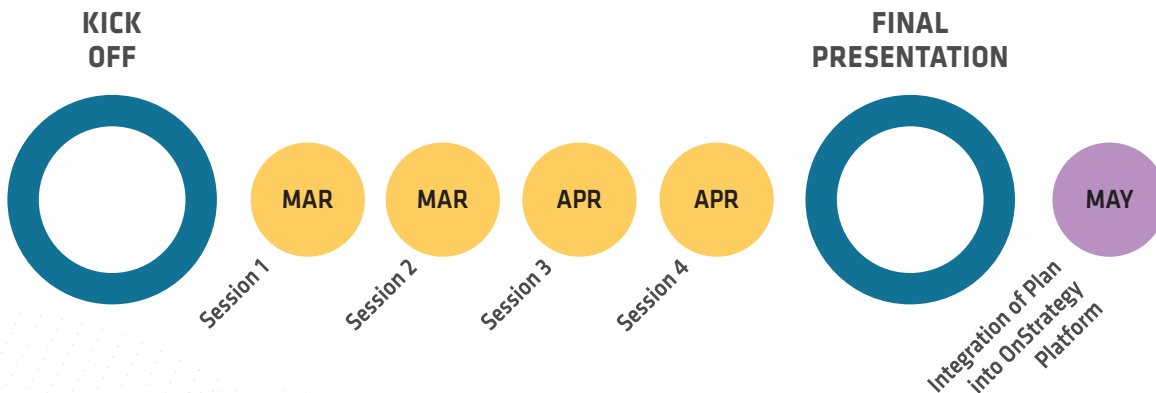
Perhaps the most significant differentiator of this project (and a mandate from the strategic planning committee from the onset) was for Sharity and Future iQ to combine skills and expertise to establish an inclusive and transparent process, which would derive a statistically driven, defensible, widely accepted, professional plan. The expectation was for the process to deliver a future vision, mission, values, and priorities. With the conclusion of phase one, that directive has been accomplished, and now the work of phase two begins.

Phase Two will focus on translating Phase One outcomes into a strategic action plan. The workplan for Phase Two includes:

- Four workgroups, each aligned with an identified strategic priority, will be formed.
- These workgroups will:
 - Establish specific goals for their priority
 - Create tactical action plans for each goal
 - Define measures of success
 - Assign accountability and timelines for completing action items

As phase two progresses, interim results will be shared between the workgroups. This will help avoid duplication and will build synergy between the group's efforts. The results from each workgroup will form the foundation of the final deliverable: A clearly defined, executable strategic action plan.

Phase Two





The dedication, professionalism and collaboration of the Strategic Planning Committee was an invaluable support to this phase of the strategic planning project.

9.0 ACKNOWLEDGEMENTS

In addition to the Strategic Planning Committee Members, Think-Tank, Cohort Focus Group and Key Influencer interview participants, our special thanks to Lizz Klein, Dr. Brenda Holland, and Dr. Dan Spencer for weekly project calls, advice, and support during the strategic visioning process.

Strategic Planning Committee Members

This dedicated group of individuals agreed to serve on this committee for the duration of this strategic visioning and planning initiative. The group has attended numerous scheduled meetings and has served as overall advisors for the project. Our sincere thanks to them all for the time and dedication they have committed to the strategic visioning process.

Elizabeth (Lizz) Klein (OR)

Dr. Brenda Holland (WI)

Dr. Thomas Wetzen (VA)

Dr. Brian Stenzler (CA)

Dr. Dan Spencer (MI)

Dr. Julie Bird (IL)

Dr. Rachel Wendt (CO)

Kristine Dowell (MI)

Dr. Gerald Stevens (NY)

Marc Abila (IL)

Tiffany Stevens (TN)

Dr. Chad Carpenter (TX)

Dr. Garry Baldwin (WA)

Dr. Ray Foxworth (MS)

John Murray (WI)

Dr. Don Cross (FL)

Barbara Contessa (NY)



We would like to acknowledge the contribution made to the Steering Committee by Dr. Tom Klapp (MI), who passed away during this Phase One work.

ChiroCongress generously took on the obligations related to coordinating this project, including hosting and convening workshop sessions. However it is acknowledged the results and outcomes of the Phase One of the Strategic Visioning and Planning project reflects the voice and needs of the Chiropractic profession; and not those of ChiroCongress.



10.0 CONTACT DETAILS

For more information about The Future of Chiropractic Strategic Visioning and Planning Project, please contact:

Elizabeth Klein, *Executive Director*

Congress of Chiropractic State Associations

Phone: (503) 922-2933

Email: lizz@chirocongress.org

For more details and access to additional information about The Future of Chiropractic Strategic Visioning and Planning project, please visit <https://lab2.future-iq.com/future-of-chiropractic-strategic-visioning-and-planning-project/>.

"We are, at our core, trustworthy compassionate providers who spend more time, hands on, to educate our patients."

- Cohort Group Participant

"There is an enormous group of patients and like-minded professionals that can and should be utilized to promote the profession and the strategic plan. Another very significant thing will be the need to position ourselves to create legislative changes. Lastly, what I would truly hope for would be, if not a fully unified profession, at least one that can work symbiotically to insure greater public awareness and utilization of Chiropractic."

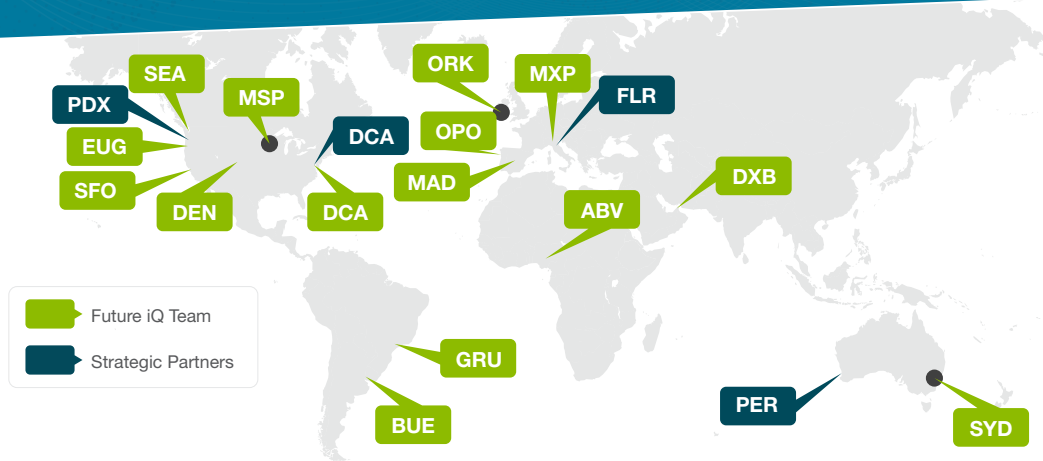
- The Future of Chiropractic Strategic Vision Survey Respondent

"Our profession has so many brilliant minds and hearts. Engage them, encourage cooperation, dangle that brilliant future possibility, compare it to the "Groundhog Day", unleash their creative power to come up with good realistic strategies and the sky is the limit."

- The Future of Chiropractic Strategic Vision Survey Respondent

"We need to teach people outside the profession how to think about the benefits of chiropractic. We've been so focused on ourselves. We know what we know, but the fact is, the general population doesn't see through our lenses."

- Cohort Group - Chiropractors practicing greater than five years



11.0 CONSULTING TEAM - PHASE ONE

The Phase One consulting team was led by Sharity, with key methodological, survey and workshop components designed and delivered by Future iQ.



Future iQ specializes in applying innovative tools and approaches to assist municipalities, organizations, regions and industries shape their economic and community futures. With nearly two decades of experience, the company has a global clientele spanning three continents.

To learn more about Future iQ, and recent projects visit www.future-iq.com or by email at info@future-iq.com.



Sharity ensures philanthropists can trust the nonprofits they invest in by knowing what they're looking for, and nonprofits can empirically show how their work is making a difference. Sharity's customized plans help clients engage donors and communicate exactly how they will achieve their mission.

To learn more about Sharity and recent work, visit www.SharityGlobal.com or by email at admin@sharityglobal.com

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Expert

