

## Certificate in Veterinary Practice Management

### Syllabus

The CVPM covers six core management areas: General management, Personnel, Communication, Finance, Marketing, and Strategy. Candidates should tailor their learning to ensure that all six areas are covered, especially if their daily work does not include a particular aspect.

Candidates should be able to demonstrate their understanding of:

#### 1. GENERAL MANAGEMENT

Office Management	
Reconciling systems	Receipts, day sheets, income reports, cash reconciliation, bank deposits, petty cash
Credit control	Debtor management, credit control systems, debt collection, small claims court procedures
Book keeping	Book keeping procedures and terminology; cash book, purchase, sales and nominal ledgers; day to day banking transactions; VAT returns
Data storage	Filing and archiving systems for financial, personnel and general records; data security, data protection legislation, retention of records and statutory requirements
Equipment	Application and maintenance of standard office equipment
Communication systems	Communication options, their application, selection, cost and staff training requirements
Office stock	Stock control for office items
Premises	Liaising with contractors, arranging and monitoring repairs and minor alterations; utilities management

Information Technology	
Practice management systems	Terminology, essential components of standalone and network systems; application of IT systems in veterinary business and necessary software
Other practice IT	Available software for accounting, clinical, administrative and remote purposes; security requirements, data protection, digital record storage and responsibilities
Internet	Internet application and control as applied to business workplace, use at work, private use by staff including social media and email

Statutory and Ethical	
Ethics	Ethical requirements for veterinary practice, RCVS Code of Professional Conduct for Veterinary Surgeons and Veterinary Nurses, principles of informed consent and professional indemnity, VMG Code of Ethics
Statute	UK import and export procedures, role of DEFRA, relationship of veterinary surgeons working with DEFRA in an official capacity
Health and Safety	COSHH, Local Rules, radiation safety, handling and submission of laboratory samples, manual handling, electrical safety at work, fire regulations, first aid at work, RIDDOR, waste regulations; risk assessments and staff training; security arrangements for staff, patients and premises; arrangements for pregnancy and nursing
Medicines	VMD regulations, drug storage, categorisation of medicines, the cascade, dispensing, prescribing, Controlled Drugs
Legislation	Veterinary Surgeons Act 1966 and its effects

## 2. PERSONNEL

Employment Legislation	
Terms and conditions	Required components of a statement of terms and conditions of employment
Job descriptions	Importance and implementation of job descriptions
Statutory rights	Parental leave and pay, SSP, annual leave; impact on different-sized businesses
PAYE	PAYE system and application to employed, self-employed and agency workers and sub-contractors
Recruitment	Requirements for effective and non-discriminatory recruitment advertising; fair and effective assessing, interviewing and appointing
Disciplinary and grievance	Statutory disciplinary and grievance procedures

HR Management	
Performance review	Methods of assessing employee performance, principles of appraisal systems
Motivation	Influences and factors affecting staff motivation in working environments
Training	Importance of continuing training and development for all staff; business training needs analyses, identifying individual training needs and means of fulfilling these
Working patterns	Matching business needs with staff rotas, working time regulations
Part-time working	Managing and integrating part-time staff, equitable working arrangements including remuneration and employment matters
Protocols	Need and benefits of working protocols, importance of best practice, implementing and monitoring protocols
Leadership	Leadership and its application in veterinary business

### 3. FINANCE

Management Accounts	
Forecasting	Cash flow and budgeting
Prior year data	Monitoring and interpreting historical financial data
Trends	Identifying and monitoring financial and other performance data, making recommendations for improvement

Financial Accounts	
Balance sheet	Purpose and components of balance sheets, interpreting accounts, monitoring and reviewing trends, understanding impact on business
Profit and loss	Purpose and components of profit and loss statements, monitoring and reviewing trends and changes, understanding impact on business
Asset management	Maintaining asset registers for balance sheet and insurance valuation
Financial ratios	Calculating and interpreting gross profit margin, average transaction fee, debtor days, average transaction volume and creditor days; understanding impact on business

Financial Control	
Insurance	Obtaining and reviewing adequate practice insurance including public liability, professional indemnity, general business and veterinary-specific
Stock control	Importance and elements of stock control and monitoring ratios, methods of stock level monitoring including stock days and stock turnover
Stock pricing	Pricing, purchase costs and net purchase cost, calculating markups and margins
Equipment purchase	Researching and comparing purchase elements including payment methods, service contracts and return on investment
Fee setting	Fee components and effect of changes, importance of fee compliance

### 4. COMMUNICATION

Communication	
Professional	Liaising with professionals including accountants, solicitors, consultants and insurance advisors; relaying information in appropriate formats
Commercial	Liaising with companies, suppliers and their representatives
Client	Importance of standards and procedures for client complaints, suggestions and feedback; principles of good customer service
Staff	Implementing effective practice communication including written, verbal, electronic and other communication methods among staff; organising and chairing meetings and preparing minutes

## 5. MARKETING

Marketing	
Principles	Seven Ps, marketing tools including client surveys, market segmentation, target marketing; reviewing outcomes and determining effectiveness and value for money; recommending future options
Legislation	Legal categories of medicines, animal feed and merchandise; restrictions on marketing  FSA regulations and pet insurance, staff training and practice policies
Events	Planning client education meetings, open days, National Pet Week, etc
Materials	Essential content of common marketing materials including practice brochures and newsletters
Media	Different media for marketing including television, radio, press and online

## 6. STRATEGY

Planning	
Business	Producing and implementing business plans for specific projects and whole practice
Marketing	Producing and implementing marketing plans, difference and relevance of internal and external marketing
Financial	Producing and implementing financial plans
Tools	Understanding and using tools such as SWOT analysis and PEST(LE)

Monitoring	
Benchmarking	Using external performance indicators for common practice parameters, implementing monitoring systems to assess practice performance
Performance	Management accounts, performance indicators and wider non-numeric success factors
Strategic planning	Monitoring and reviewing strategic plans

Development	
Facilities	Options for financing or re-financing practice premises and equipment
Practice	Implications of partner/director retirement and changing legal identity (i.e. limited company, LLP, partnership, sole trader, joint ventures)