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## THE CERTIFICATE IN VETERINARY PRACTICE MANAGEMENT

### SYLLABUS

#### General Management

|                               |   |   |
|-------------------------------|---|---|
| <b>Office Management</b>      | Understand essential components of a reconciling system | Receipts, day sheets, income reports, cash reconciliation and bank deposits, petty cash   |
|                               | Credit Control  | Debtor management, setting and enforcing effective credit control systems, debt collection process and small claims court procedure   |
|                               | Book-keeping  | Knowledge of basic book-keeping procedures and accounting terminology. Understanding cash book, purchase, sales and nominal ledgers, day to day banking transactions and the VAT return.  |
|                               | Data Storage  | Set up and maintain suitable filing and archiving systems for financial, personnel and general records and information.<br><br>Understand requirements for security, data protection legislation, retention of records in accordance with statutory requirements. |
|                               | Equipment   | Understand application and maintenance of standard office equipment.  |
|                               | Communication Systems                                   | Be aware of communication options available, their application, selection, cost and training requirements for staff.  |
|                               | Office Stock Control                                    | Understand and implement effective stock control systems.   |
|                               | Premises Maintenance                                    | Be able to liaise with contractors and arrange for and monitor repairs and minor alterations. Utilities management  |
| <b>Information Technology</b> | Practice Management Systems                             | Understand terminology and the necessary components of stand alone and network systems.   |
|                               |   | Understand the application of IT systems in veterinary business and the software necessary.   |



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|---|-----------------|--|
| <b>Information Technology<br/>Cont...</b> |                 | <p>Suitability of available software for accounting, clinical, administrative and remote purposes.</p> <p>Understand the security requirements, data protection legislation, storage of digital records and responsibilities</p>   |
|   | Internet        | <p>Understand the internet its application and controls, as applied to the business, workplace, use at work and private use by staff, including social media, email and other</p>  |
| <b>Statutory and Ethical</b>              | Ethics          | <p>Be aware of ethical requirements for a veterinary practice and the need to ensure professional and support staff fulfil their ethical responsibilities.</p> <p>To have read, understood and be able to refer to the current RCVS Code of Professional Conduct.</p> <p>Understand the importance of informed consent and its relation to professional indemnity.</p> <p>Be familiar with the VMG Code of Ethics.</p> |
|   | Statute         | <p>Appreciate implications of UK Import and Export procedures and DEFRA, and the relationship of the veterinary surgeon with DEFRA when working in an official capacity.</p>   |
|   | Health & Safety | <p>Including topics such as 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, Staff Training, arrangements for pregnant and nursing mothers and security arrangements for staff, patients, premises.</p>  |
|   | Medicines       | <p>VMD Regulations, drug storage, categorisation of medicines, knowledge of cascade, dispensing, prescribing, controlled drugs. Health and safety requirements</p>   |
|   | Legislation     | <p>Be aware of the Veterinary Surgeons Act and how it affects the profession in the UK.</p>  |

**Human Resources (HR)**

|                               |                            |   |
|-------------------------------|----------------------------|---|
| <b>Employment Legislation</b> | Terms and Conditions       | Be aware of matters which should be addressed in a Statement of Main Terms and Conditions of Employment.  |
|                               | Job Descriptions           | Be aware of the importance of job descriptions and the ways of implementing them.   |
|                               | Statutory Rights           | Be aware of current statutory rights such as maternity leave, SSP, paternity leave and pay, annual leave etc and appreciate the impact of these schemes on small and larger businesses.   |
|                               | PAYE                       | To have appropriate knowledge of the PAYE system and how it applies to employed, self-employed, agency workers and sub-contractors.   |
|                               | Recruitment                | Be aware of what is required to prepare effective and non-discriminative advertising for new staff, interviewing procedures through to appointment. Be aware of the importance of fair procedure for assessment and appointment.                |
|                               | Disciplinary and Grievance | Understand and recognise the importance of the statutory Disciplinary and Grievance Procedure.  |
| <b>HR Management</b>          | Performance Review Systems | Be aware of the methods of assessing employee performance and the basic principles of appraisal systems   |
|                               | Motivation                 | Understand influences and factors that impact on staff motivation in the working environment and be aware of main motivating factors for employees.   |
|                               | Training                   | Understand the importance of continuous training and development for all staff and owners. Be able to develop a business training needs analysis, identify individual training needs and be aware of the ways of fulfilling these requirements. |
|                               | Working Patterns           | Understand the importance of being able to match business needs with staff rotas whilst remaining compliant with working time directive   |
|                               | Part Time Working          | Understand how to manage and integrate part time staff within the working team. Be aware of equitable working arrangements including remuneration and employment matters and for staff in part time roles                                       |
|                               | Protocols                  | Appreciate the need for such documents, the benefits they give and their importance in 'best practice'. Help implement, oversee and monitor protocols.  |
|                               | Leadership                 | Understand the art of Leadership and its application within business.   |

## Financial Management

|                            |                        |  |
|----------------------------|------------------------|--|
| <b>Management Accounts</b> | Forecasting            | Recognise the importance of cash flow and budgeting  |
|                            | Prior Year Data        | Understand the importance of monitoring historical financial data and their interpretation   |
|                            | Trends                 | Be able to identify and monitor financial and other performance data and make recommendations for improvement if necessary.  |
| <b>Financial Accounts</b>  | Balance Sheet          | Understand the purpose and components of the balance sheet. Be able to effectively interpret a set of accounts, monitor and review trends and changes and understand how these impact on the business.   |
|                            | Profit and Loss        | Understand the purpose and components of the Profit and Loss Statement. Be able to effectively monitor and review trends and changes and understands how these impact on the business.   |
|                            | Asset Management       | Be able to maintain asset registers for balance sheet and insurance valuation  |
|                            | Financial Ratios       | Be able to calculate important financial ratios applicable to veterinary practice including such indices as gross profit margin, average transaction fee, debtor days, average transaction volume, creditor days. Be able to contribute effectively to a discussion on how these impact on and affect the business |
| <b>Financial Control</b>   | Insurances             | Understand the need for obtaining and reviewing adequate practice insurances including public liability, professional indemnity insurance, general business insurances and specific insurance for veterinary businesses.   |
|                            | Stock Control          | Understand the importance and elements of stock control and monitoring ratios. Be able to identify methods of monitoring stock such as stock days, stock turnover and what influences these ratios.  |
|                            | Stock Pricing Policies | Understand pricing, purchase costs and net purchase cost, mark up and margin, how to calculate margins and mark ups.   |
|                            | Equipment Purchase     | Be able to research and compare elements of a purchase such as payment methods, service contracts and return on investment.  |
|                            | Fee Setting            | Understand the components of a fee and the effect of fee changes on the business and the importance of fee compliance.   |

## Communication

|                     |   |   |
|---------------------|---|---|
| <b>Professional</b> | Be able to liaise with professionals such as accountants, solicitors, consultants and insurance advisors. | Be able to relay pertinent information from discussions with professionals to practice owners in an appropriate format.   |
| <b>Commercial</b>   | Be able to liaise with companies, suppliers and their representatives.                                    | Where necessary, be able to act upon information received within the practice.  |
| <b>Client</b>       | Be able to communicate effectively with clients   | Understand the importance of standards and procedures for client complaints, client suggestions, feedback and good customer service.  |
| <b>Staff</b>        | Understand effective communication methods and their importance.  | Implementing effective practice communication to include written, verbal electronic and other communication methods with and between staff.<br>Organising, chairing meetings and preparing minutes. |

## Marketing

|                                |   |   |
|--------------------------------|---|---|
| <b>Principles</b>              | Understand the basic principles of marketing            | The 7 'P's and other marketing tools e.g. client surveys.<br>Market segmentation and target marketing   |
| <b>Legislation</b>             | Products  | Legal categories of medicines, animal feed, and merchandise and any restrictions on their marketing.  |
|                                | Pet Insurance   | Understand the impact of FSA regulations on the marketing of pet insurance. Staff training and practice policy.   |
| <b>Promotion and Marketing</b> | Events  | Understand the planning required for client education meetings, open days, National Pet Week etc  |
|                                | Material  | Be aware of the essential content of common marketing materials used in veterinary practice such as brochures, newsletters and target marketing.  |
|                                | Media   | Understand the different media for marketing such as television, radio, press and the internet and websites.  |
|                                | Review outcomes and success of marketing and promotions | Review outcomes with regard to the aims and objectives and determine effectiveness of any marketing, cost effectiveness and value for money and future recommendations and options if repeated. |

**Strategic Management**

|                    |                 |   |
|--------------------|-----------------|---|
| <b>Planning</b>    | Business        | Understand the importance of a business plan. Be able to contribute effectively to its production and implementation.<br><br>Be able to produce a simple business plan for a specific project, for example, acquiring an ultrasound scanner and setting up a new scanning service in the surgery. |
|                    | Marketing       | Understand the importance of a marketing plan. Be able to contribute effectively to its production and implementation. Understand the difference and relevance of internal and external marketing.  |
|                    | Financial       | Understand the importance of a financial plan. Be able to contribute effectively to its production and implementation.  |
|                    | Tools           | Understand the use of tools such as SWOT analysis and PEST [PESTLE] and their application in planning.  |
| <b>Monitoring</b>  | Benchmarking    | Be aware of external performance indicators for common parameters in the profession and be able to set up appropriate systems in a practice and be able to measure your own practice in context.  |
|                    | Performance     | Be aware of management accounts, performance indicators and other wider non-numeric success factors   |
|                    | Strategic Plans | Be able to effectively monitor and review strategic plans.  |
| <b>Development</b> | Facilities      | Be aware of the options available for financing or re-financing practice premises and equipment.  |
|                    | Practice        | Understand the implications on the business of Partner/Director retirement, change of legal identity, ie limited company, LLP, Partnership, sole trader, joint ventures.  |