Critical Competencies: A Guide for Veterinary Practice Management Professionals
The success of a veterinary practice depends not only on the clinical skills of the professional veterinary staff but also on non-clinical skills related to organizing and managing the practice. In many veterinary practices, the non-clinical skills associated with human resource management, marketing, financial management, and service delivery are the responsibility of the practice manager. Depending on the nature of the veterinary practice, these individuals may also be called veterinary practice managers, office managers, or hospital administrators. Regardless of their title, these individuals oversee the non-clinical administrative and management tasks in the practice. In some practices an owner or senior veterinarian may be responsible for management tasks, but an increasing number of veterinary practices employ managers who have professional management training outside of the field of veterinary medicine. These individuals bring a level of management experience and expertise that surpasses that of most clinical staff, thus increasing the efficiency of the practice.

As the number of practice managers increases, however, there is a need to clarify the nature and requirements of the job of practice manager and to identify the characteristics and attributes of effective practice managers. Practice owners may not be familiar with the job requirements of a practice manager and may need guidance in hiring qualified managers. The purpose of this guide is to define the major job domains and tasks that comprise the job of veterinary practice manager and identify the worker competencies that are critical for success on the job. Competencies are defined as demonstrated behaviors, skills and abilities associated with high performance on a job. They are the personal attributes that differentiate effective from ineffective workers and should form the basis of hiring decisions.

The job requirements and competencies reported here were derived from a scientific job analysis that was conducted for the job of veterinary hospital/practice manager. The goal of a job analysis is to identify and determine in detail the particular job duties and requirements for a given job, and the relative importance of these duties. The critical requirements of a job are then linked to knowledge, skills and abilities that determine success on the job. The job analysis study identified five core job domains for the typical hospital/practice manager position: human resources, adherence to legal and ethical standards, marketing and client services, organization of the practice, and financial management. In the following sections, these job domains are described and the specific tasks that comprise each domain are listed. Then, for each domain, the critical knowledge and competencies needed for successful performance are identified. The report concludes by looking across the five job domains and identifying the most critical competencies for the job of practice manager.

The Certified Veterinary Practice Manager (CVPM)

The Veterinary Hospital Managers Association (VHMA) was formed in 1981 in order to provide individuals who are actively involved in veterinary practice management with a means of effective communication and interaction. Membership in the association is comprised of veterinarians, hospital administrators, practice managers, office managers, and consultants in the United States and Canada. Since its inception the VHMA recognized the need among veterinarians and practice administrators for a program that would qualify the knowledge, experience, and aptitude necessary to successfully manage the business of a veterinary practice. In 1989, it developed the Certified Veterinary Practice Manager (CVPM) certification. This certification signifies that a manager possesses a high level of knowledge and competency related to practice management. The CVPM certification process involves several steps: (1) completion of an application which includes documentation of training and experience in the practice management, (2) passing an examination that assesses knowledge of veterinary practice management, (3) continual education and association within the profession of veterinary practice management, and (4) adherence to VHMA profession code of ethics.

The CVPM examination is based on the job analysis results reported here. It is designed to assess knowledge and expertise in the core job domains of the practice manager. Passing the exam and obtaining the CVPM designation signifies a high level of job knowledge and competency across the five job domains discussed in this report.
Job Domain I: Human Resources

In this performance domain, the veterinary practice manager plans, directs, and coordinates the human resource management activities of the organization. Work activities include recruiting and hiring staff, providing guidance and direction to subordinates, setting performance standards and monitoring performance, and scheduling the work of others.

Tasks
Veterinary practice managers perform the following human resource tasks:
1. recruit, interview and hire new employees
2. manage personnel training and development programs (including safety training)
3. establish work schedules for staff
4. manage daily work assignments
5. conduct staff meetings
6. conduct employee performance reviews
7. mediate internal disputes between staff and office personnel
8. discipline/discharge employees
9. manage employee benefit programs
10. maintain confidential employee records
11. create, review, and update job descriptions/manuals
12. manage staff continuing education and licensure/certification

Knowledge requirements
These human resource tasks require knowledge of: (1) principles and procedures for recruitment, selection, training, and evaluation of personnel; (2) management principles involved in strategic planning, leadership, compensation, and scheduling; and (3) methods of writing job descriptions and manuals.

Critical competencies:
The following competencies are required and highly important for successful performance on these human resources tasks:

Oral communication and comprehension - the ability to express one’s thoughts verbally in a clear and understandable manner, and the ability to actively listen and attend to what others are saying. Good group presentation skills are also important.

Integrity - honesty, trustworthiness, and adherence to high standards of ethical conduct. Leadership - a willingness to lead and take charge, and the ability to motivate others and mobilize group effort toward common goals.

Adaptability - being open to change, flexible work methods, and the ability to adapt behavior to changing conditions or new information.

Compliance - being reliable, thorough, and conscientious in carrying out work assignments, as well as an appreciation for the importance of organizational rules and policies.

Planning and Prioritizing - the ability to effectively manage time and work load to meet deadlines; the ability to organize work, set priorities, and establish plans for achieving goals.

Decision Making - the ability to make good decisions, solve problems, and decide on important matters; the ability to gather and analyze relevant data and choose decisively between alternatives.

Relationship Building - the ability to develop constructive and cooperative working relationships with others and maintain them over time; must also be able to settle disputes, resolve grievances and conflicts, and negotiate with others.
Job Domain II: Law & Ethics

In this performance domain, the veterinary practice manager monitors the procedures and policies of the practice to determine whether events and processes comply with laws, regulations, or standards.

Tasks
Veterinary practice managers perform the following tasks related to compliance with legal, statutory, and ethical requirements:

1. Understand and ensure compliance with appropriate regulatory agencies
   a. OSHA/OSHA Right to Know, DEA, and FDA.
   b. state safety regulations
   c. state and local agencies
   d. monitor hospital violations and dangerous situations
   e. document and report accidents; file appropriate reports.

2. Understand the ethical requirements of veterinary practice, as outlined by the AVMA and CVPM code of ethics, and ensure that professional and support staff fulfill their ethical responsibilities.

3. Understand and ensure compliance of Contract Law as it pertains to
   (a) associates and staff, and
   (b) clients

4. Understand and ensure compliance with Employment/Labor Law, including: Fair Labor Standards Act
   Civil Rights Act of 1964
   Sexual Harassment
   Pregnancy Discrimination Act
   Americans with Disabilities Act
   Age Discrimination in Employment Act
   Family and Medical Leave
   Worker’s Compensation
   Federal Unemployment Tax Act
   Employment Retirement Income Security Act
   Consolidated Omnibus Budget Reconciliation Act-COBRA Health Insurance Portability and Accountability Act (HIPPA)
   Mental Health Parity Act
   Employee Polygraph Protection Act
   Required Department of Labor posters

5. Understand and ensure compliance with the legal and ethical guidelines surrounding confidentiality of:
   staff
   clients
   patients

Knowledge requirements
The tasks related to legal and ethical standards require knowledge of state/provincial and federal laws, legal codes, government regulations, professional standards, and agency rules.
Critical competencies:
The following competencies are required and highly important for successful performance on tasks related to the legal and ethical standards of the profession:

Analytical Skills - the ability to analyze information and use logic to address problems; the ability to quickly and accurately grasp complex information and concepts and to make correct inferences.

Integrity - honesty, trustworthiness, and adherence to high standards of ethical conduct.

Critical and Strategic Thinking - the ability to think critically about situations and to understand the relevance of information for different problems. Uses critical reasoning to generate and evaluate alternative courses of action or points of view relevant to an issue.

Decision Making - the ability to make good decisions, solve problems, and decide on important matters; the ability to gather and analyze relevant data and choose decisively between alternatives.

Writing and Verbal Skills - ability to comprehend written material easily and accurately; ability to express thoughts clearly and succinctly in writing.

Compliance - being reliable, thorough, and conscientious in carrying out work assignments, as well as possessing an appreciation for the importance of organizational rules and policies.

Resourcefulness - the ability to understand what it takes to complete the job. Applies knowledge, skills and expertise to perform tasks quickly and efficiently.

Job Domain III: Marketing & Client Relations

In this performance domain, the veterinary practice manager plans and coordinates marketing, public relations, and client service programs. In terms of marketing, the manager develops internal and external marketing plans and monitors results of marketing efforts. In terms of client relations, the manager establishes protocols for client communications and monitors client services to facilitate client retention and satisfaction.

Tasks
Veterinary practice managers perform the following tasks related to marketing and client relations:

A. Internal/External Marketing and Public Relations
   1. manage practice promotional items (brochures, etc.)
   2. develop and manage advertising
   3. website management
   4. manage social media
   5. manage community outreach

B. Client Services
   1. monitor client retention
   2. develop and manage new client programs
   3. handle client complaints
   4. obtain/report client feedback on service
   5. respond to client questions
   6. develop and manage client reminder system

C. Client Education
   1. manage client education
Job Domain III: (continued)

Knowledge requirements
The tasks related to marketing require knowledge of the principles of target marketing, market research, pricing, and product promotion. The tasks related to client services and education require knowledge of the principles and processes for providing customer and personal services; including customer needs assessment and methods for evaluating customer satisfaction.

Critical competencies:
The following competencies are required and highly important for successful performance on the marketing and client relation’s tasks:

Relationship Building - the ability to develop constructive and cooperative working relationships with others and maintain them over time; must also be able to settle disputes, resolve grievances and conflicts, and negotiate with others.

Creativity - the ability to think creatively about situations, to see things in new and different ways; use imagination and creativity to develop innovative solutions to problems.

Planning and Prioritizing - the ability to effectively manage time and work load to meet deadlines; the ability to organize work, set priorities, and establish plans for achieving goals.

Persuasion - the ability to change the attitudes and opinions of others and to persuade them to accept recommendations and change behavior.

Writing and Verbal Skills - the ability to comprehend written material easily and accurately; the ability to express thoughts clearly and succinctly in writing.

Critical and Strategic Thinking - the ability to think critically about situations and to understand the relevance of information for different problems. Uses critical reasoning to generate and evaluate alternative courses of action or points of view relevant to an issue.

Decision Making - the ability to make good decisions, solve problems, and decide on important matters; the ability to gather and analyze relevant data and choose decisively between alternatives.

Resilience - the ability to cope effectively with pressure and setbacks, to handle crisis situations effectively and not be deterred by obstacles or failure.

Job Domain IV:
Organization of the Practice

In this performance domain, the veterinary practice manager is responsible for general practice management, including maintaining appropriate inventory and medical records systems, establishing protocol for hospital policies and procedures, and coordinating equipment acquisition and maintenance. The manager is also responsible for establishing data monitoring systems related to veterinary practice (e.g., controlled drugs, radiography exposure, laboratory and surgical procedures).

Tasks
Veterinary practice managers perform the following tasks related to organization of the practice:

A. Inventory
   1. maintain appropriate inventory system including controlled substance ordering, tracking, security, destruction
   2. place and track purchase orders for drugs, uniforms, equipment

B. Equipment & Maintenance
Job Domain IV: (continued)

1. assure insurance coverage of hospital and equipment
2. contract for repair/maintenance of equipment, building, grounds
3. protocols for daily facility maintenance

C. Medical Record Standards and Compliance
   1. maintain appropriate medical record system that complies with legal standards

D. Technology Systems and Policies
   1. establish policies for use of technology in the practice, including computer networks

E. Liaison to Professional Services
   1. act as a liaison between the practice and professional advisors (e.g., accountants, insurance agents, consultants)

F. Hospital policies/procedures/Risk Management
   1. maintain protocols for hospital procedures and risk management plans

Knowledge requirements

The tasks in this domain require a working knowledge of veterinary medical terminology, the requirements for common veterinary practice procedures (e.g., anesthesia, radiography, I/V injections, lab work), and preventative health and risk management protocols. Tasks in this domain also require knowledge of inventory systems and methods; standards for maintaining medical records; and protocols for equipment maintenance and insurance.

Critical competencies:

The following competencies are required and highly important for successful performance in this broad job domain:

Decision Making - the ability to make good decisions, solve problems, and decide on important matters; the ability to gather and analyze relevant data and choose decisively between alternatives.

Writing and Verbal Skills - ability to comprehend written material easily and accurately; ability to express thoughts clearly and succinctly in writing.

Integrity - honesty, trustworthiness, and adherence to high standards of ethical conduct.

Resourcefulness - the ability to understand what it takes to complete the job; the ability to apply knowledge, skills and expertise to perform tasks quickly and efficiently.

Planning and Prioritizing - the ability to effectively manage time and work load to meet deadlines; the ability to organize work, set priorities, and establish plans for achieving goals.

Compliance - being reliable, thorough, and conscientious in carrying out work assignments, as well as an appreciation for the importance of organizational rules and policies.

Continuous Learning - a curiosity for learning; actively seeks out new information, technologies, and methods. Keep skills updated and applies new knowledge to the job.

Resilience - the ability to cope effectively with pressure and setbacks, to handle crisis situations effectively and not be deterred by obstacles or failure.
Job Domain V: Financial Management

In this performance domain, the veterinary practice manager analyzes financial reports for the practice, maintains practice financial accounts, oversees banking procedures, establishes client credit policies and conducts fee analyses, and manages the practices’ payroll. In consultation with practice owner, the manager also monitors financial trends and projections and prepares budgets.

Tasks

Veterinary practice managers perform the following tasks related to financial management:

1. analyze practice and financial reports
2. manage payroll
3. manage A/R and A/P
4. prepare budgets and long-range fiscal plans
5. establish and enforce client credit policies
6. conduct fee analysis, and monitor and update fee schedules
7. oversee daily and monthly banking procedures
8. maintain chart of accounts
9. maintain imprest petty cash account

Knowledge requirements

This domain requires knowledge of basic principles of financial accounting and forecasting. The manager must understand components of a balance sheet, profit/loss accounts, and financial ratios. Knowledge of current taxation law is also needed.

Critical competencies:

The following competencies are required and highly important for successful performance on the marketing and client relation’s tasks:

Analytical Skills - the ability to analyze information and use logic to address problems; the ability to quickly and accurately grasp complex information and concepts and to make correct inferences.

Decision Making - the ability to make good decisions, solve problems, and decide on important matters; the ability to gather and analyze relevant data and choose decisively between alternatives.

Writing and Verbal Skills - the ability to comprehend written material easily and accurately; ability to express thoughts clearly and succinctly in writing.

Integrity - honesty, trustworthiness, and adherence to high standards of ethical conduct. Planning and Prioritizing - the ability to effectively manage time and work load to meet deadlines; the ability to organize work, set priorities, and establish plans for achieving goals.

Compliance - being reliable, thorough, and conscientious in carrying out work assignments, as well as an appreciation for the importance of organizational rules and policies.

Continuous Learning - a curiosity for learning; actively seeks out new information, technologies, and methods. Keep skills updated and applies new knowledge to the job.

Writing and Verbal Skills - ability to comprehend written material easily and accurately; ability to express thoughts clearly and succinctly in writing.

Critical and Strategic Thinking - the ability to think critically about situations and to understand the relevance of information for different problems. Uses critical reasoning to generate and evaluate alternative courses of action or points of view relevant to an issue.
Resourcefulness - the ability to understand what it takes to complete the job. Applies knowledge, skills and expertise to perform tasks quickly and efficiently.

Resilience - the ability to cope effectively with pressure and setbacks, to handle crisis situations effectively and not be deterred by obstacles or failure.

Summary: Essential Competencies

The job of veterinary practice manager is multi-faceted and, as outlined above, requires many different behavioral competencies for success. Summarizing across the five job domains, thirteen competencies emerge as essential and highly important for the job of veterinary practice manager:

Decision Making. The ability to make good decisions, solve problems, and decide on important matters is a critical competency for all five job domains. Practice managers must be able to gather and analyze relevant data on different issues and choose decisively between alternatives. They must also be able to effectively implement their decisions and initiate action. Whether the decision pertains to personnel matters, financial options, marketing strategy, inventory programs, or hospital protocols, practice managers must be able to efficiently analyze information and evaluate results to choose the best solution or course of action.

Integrity. Practice managers must act with integrity and uphold high standards of ethical conduct. A large portion of the job of practice manager involves ensuring compliance with laws, regulations, and standards. Managers are also responsible for financial accounts and oversight of day-to-day banking. In addition, human resource management tasks often involve confidential and sensitive personnel issues. As a result of these job responsibilities, managers must adhere to ethical principles and values, and be seen as sincere and trustworthy.

Critical and Strategic Thinking. Strategic thinking and planning are an essential part of financial forecasting, marketing plans, and long-term plans for growth of the practice. Managers must have the ability to identify questions, problems, and arguments relevant to these issues and to use logic and critical reasoning to identify the strengths and weaknesses of alternative solutions or approaches to problems.

Planning and Prioritizing. The practice manager has many different job responsibilities, several of which relate to compliance with professional and legal standards and regulations. As a result, practice managers must be able to organize their work efficiently, set priorities, and establish plans or timetables for achieving goals. They must effectively manage time and workload to meet deadlines.

Oral Communication and Comprehension. Practice managers must have the ability to express their thoughts verbally in a clear and understandable manner, and the ability to actively listen and attend to what others are saying. Practice managers must also possess good presentation skills and be comfortable making group presentations. These skills are necessary and essential for interacting and communicating effectively with clients and coworkers, and provide the foundation for effective personnel training and performance management programs.

Writing and Verbal Skills. Veterinary practice managers are responsible for writing and updating protocols, manuals, and handbooks. They must also understand complex technical information related to different aspects of their job (e.g., contracts, state and federal regulations, insurance policies, financial statements). Managers must be able to comprehend written material easily and accurately and be able to express their thoughts clearly and succinctly in writing.
Analytical Skills. Many of the tasks in the financial, personnel and marketing job domains require quantitative reasoning and analytical skills. Veterinary hospital managers must have the ability to analyze information quickly and efficiently. They must accurately grasp complex information and concepts and make correct inferences from their analysis of data.

Compliance. Managers are responsible for office management and compliance with federal, state, and professional regulations. Accordingly, they need to be thorough and conscientious in their approach to work; they must be dependable and show appropriate concern for detail. Effective managers demonstrate appreciation for the importance of organizational rules and policies.

Resourcefulness. The multi-faceted nature of the job requires veterinary practice managers to be resourceful, to take initiative and figure out how to get a job done. Effective managers possess the ability to understand what it takes to complete the job. They apply knowledge, skills and expertise to perform tasks quickly and efficiently. They make effective use of resources and technology.

Continuous Learning. Best practices in management are constantly evolving. In addition, the legal environment related to personnel, client interactions, health and safety in workplace is constantly shifting. Practice managers must keep up with these changes. The effective manager demonstrates curiosity for learning and actively seeks out new information, technologies, and methods. They also seek feedback and other opportunities for self-development.

Resilience. Veterinary hospitals can be stressful workplaces and thus practice managers must have the ability to cope effectively with pressure and setbacks; obstacles or failure should not deter them. Effective managers handle crisis situations effectively and maintain their composure under stress.

Adaptability. Veterinary hospitals can also be characterized by a fair amount of uncertainty and unpredictability. Thus, practice managers must have the ability to adapt their work behavior in response to changing conditions or new information. They need to be open to change and not bothered by ambiguity.

Leadership. Leadership is essential for the human resource management tasks involved in the job of veterinary practice manager. Effective managers influence and motivate others in the workplace. They take initiative in organizing and coordinating the activities of group members and are successful at mobilizing group effort toward a common goal.