



# **Official Policy Manual**

**Veterinary Business  
Management Association**

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# **Veterinary Business Management Association Policy Manual**

(Approved August 2, 2020)

## **Purpose**

The purpose of the Veterinary Business Management Association (VBMA) Policies Manual is to provide guidance and instruction regarding the draft, maintenance, review, and distribution of policies adopted by the National Veterinary Business Management Association, Inc. and its associated chapters.

## **Definition of a Policy**

Policy is defined as “a definite course or method of action selected from among alternatives and in light of given conditions to guide and determine present and future decisions; a high-level overall plan embracing the general goals and acceptable procedures especially of a governmental body.”<sup>1</sup>

For purposes of this Policy Manual, a “Policy” is further defined as any standard procedure or practice, official position or stance, with regards to issues and events within VBMA’s operating purview. These Policies are not Bylaws amendments but nonetheless create standard operating procedures within VBMA.

## **Creation and Adoption of a Policy**

The VBMA Executive Board, National Advisors, Regional Leaders or Chapter Officers can suggest the creation of a Policy and bring a draft forward for consideration. Policies will be adopted by a simple majority vote of the VBMA National Board. If a Policy is suggested by a National VBMA Board member, the motion should include which standing committee shall maintain responsibility of the policy. If no such wording is included, then the VBMA President shall assign the policy to the most appropriate committee.

Policies and the Policy Manual shall be maintained by the VBMA National Compliance Director with assistance from the VBMA President. The VBMA Marketing Director shall be responsible for maintaining the VBMA Policies and Policy Manual online, in an appropriate and accessible location.

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<sup>1</sup> Merriam Webster

## **Communication of a Policy**

A Policy will be communicated to the VBMA National Board, Regional Leaders, VBMA Officers and membership via online methods including, but not limited to, VBMA.biz, and Officer Materials. The National Compliance Director shall be involved in determining the appropriate location for posting of these policies. The National Board and National Marketing Director shall be involved in determining if a release on the VBMA Community or Newsletter is appropriate for the policy on a case by case basis. The policy shall also be communicated as described in the original motion that enacts the VBMA policy.

## **Assignment of Committees to a Policy**

In the event that a Committee for the review of the Policy is not outlined in the original motion, the VBMA President will be responsible for assigning the policy to an appropriate Standing or Special Committee for review. The National Compliance Director will maintain the list of policies for each Committee, and assist in the Policy review process as outlined below.

## **Maintenance and Review of a Policy**

The VBMA is a highly dynamic organization that is steadily increasing in relevance within the veterinary medical community. Given the nature of VBMA, there is an inherent steady, predictable turnover rate. This benefits the organization by maintaining a continuous influx of new ideas, but also presents a unique challenge in keeping the policies supported and followed by VBMA relevant to the current concerns within veterinary medicine and veterinary medical education. VBMA Policies should be reviewed on a minimum of an annual basis, beginning the following year that the policy was enacted. A schedule for regular review of VBMA Policies and Procedures is as follows:

1. The VBMA National Compliance Director shall notify the VBMA National President of all upcoming Policies up for review at least 60 days prior to the annual Executive Board's Summer Strategic Planning.
2. The VBMA National President shall assign all policies for review to their respective VBMA National Board members before the annual AVMA conference.
3. The VBMA National Board member shall then decide upon an appropriate recommendation to make with regards to the Policy as stated above. This recommendation shall be submitted in the form of a motion to the National Executive Board for consideration at the Summer Strategic Planning.

For each Policy reviewed, one of the following recommendations should be forwarded to the National Executive Board:

1. **Rescind** – if outdated, superseded, overcome by events or implemented
2. **Revise** – with the proposed revision clearly state in the recommendation
3. **Reaffirm** – the policy will remain unchanged. The National Executive Board Member's recommendation will be brought forward to the National Executive Board to be voted upon based on the schedule outlined in this document.

VBMA recognizes that due to the dynamic nature of the organization, occasions may arise where Policies should be revised more frequently than once every year. Policies may be changed more frequently than scheduled provided that the following procedure is followed:

1. Suggested changes must be submitted to the VBMA Executive Board at least 30 days prior to the National VBMA Strategic meeting held during the Summer Strategic Planning.
2. The VBMA President must notify the respective National Board Member that was assigned responsibility at least 25 days prior to the Summer Strategic Planning.
3. The National Board Member must assign a recommendation as above with regards to the suggested change.
4. Prior to considering the VBMA Policy in question, the VBMA must make at least a quorum in order to consider the changes to the VBMA policy.

**References:**

1. Policy 2020. In Merriam-Webster.com. Retrieved July 8, 2020, from <https://www.merriam-webster.com/dictionary/policy>
2. SAVMA Policy Manual
3. AVMA Policy on Policies

# Non-Discrimination Policy

(Approved August 2, 2020)

VBMA is committed to maintaining a fair and respectful environment conducive to our mission statement and our members' roles as veterinary students. The VBMA and any Member, Officer, including National, Regional, and Chapter Officers, or Advisor shall not harass and/or discriminate against any other person or group of people because race, sex (including sexual harassment and pregnancy), sexual orientation, gender identity or expression, ethnicity or national origin, religion, age, disabled status, military service or veteran status, height, weight, physical appearance, marital status, parental status, political affiliation, or veterinary study emphasis.

No person will be adversely affected as a result of bringing complaints to the VBMA National Board. Incidents of harassment and discrimination will be met with appropriate disciplinary action, up to and including removal from the VBMA and national Business Certificate Program. This policy is applicable to individual Members, Chapters, Advisors, Regional Leaders and the national organization.

# Whistleblower Policy

(Approved August 2, 2020)

The National Veterinary Business Management Association, Inc. (VBMA) is committed to preventing reprisals against Members, Executive Board Members, Directors, Officers, or Advisors who in Good Faith report activity undertaken by VBMA members in connection with the performance of official VBMA activity that may be in violation of state or federal law pertaining to financial wrongdoing, corporate accounting practices, internal controls, or audit matters. These are collectively referred to as “Protected Disclosure”.

The VBMA, and any individual associated with the VBMA, will not:

- Take any retaliatory action against a member who has made a Protected Disclosure or who has refused to obey an illegal or unethical request, including interference with their lawful employment or livelihood; or
- Directly or indirectly use or attempt to use the official authority or influence of their position for the purpose of interfering with the right of an employee or member to make a Protected Disclosure to VBMA leadership.

## Reporting Violations

The VBMA has an open door policy and suggests that members share their questions, concerns, suggestions or complaints with someone who can address them properly. In most cases, the VBMA National Advisors are in the best position to address an area of concern.

However, individuals should always feel free to contact the VBMA’s Executive Board directly, if they so choose. The VBMA National Advisors are required to report suspected violations to VBMA’s Executive Board, who have the responsibility to investigate reported violations of state or federal law pertaining to financial wrongdoing, corporate accounting practices, internal controls, or audit matters in accordance with this policy.

## Compliance

The VBMA’s Executive Board is responsible for investigating and resolving all reported complaints and allegations concerning financial wrongdoing, corporate accounting practices, internal controls, or audit matters (Protected Disclosures), and depending on

the nature of the complaint (as set forth below), shall advise the VBMA National Advisors.

### **Accounting and Auditing Matters**

The VBMA Executive Board shall address all reported concerns or complaints concerning financial wrongdoing, corporate accounting practices, internal controls, or auditing.

### **Confidentiality**

Protected Disclosures may be submitted on a confidential basis by the complainant or may be submitted anonymously. Reports of violations or suspected violations will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.

### **Handling of Reported Violations**

The VBMA National Advisors will promptly notify the sender and acknowledge receipt of a Protected Disclosure (unless such report was submitted anonymously). All reports will be investigated promptly and appropriate corrective action will be taken (if warranted by the investigation). Reports and copies of Protected Disclosures shall be retained by the VBMA in accordance with applicable record retention policies.

### **References:**

1. Adopted from the Policy Manual of the Student American Veterinary Medical Association

# Record Retention Policy

(Approved August 2, 2020)

## 1. Policy and Purposes

This Policy represents the policy of National Veterinary Business Management Association, Inc (the “VBMA”) with respect to the retention and destruction of documents and other records, both in hard copy and electronic media (which may merely be referred to as “documents” in this Policy). Purposes of the Policy include (a) retention and maintenance of documents necessary for the proper functioning of the VBMA as well as to comply with applicable legal requirements; (b) destruction of documents which no longer need to be retained; and (c) guidance for the Board of Directors, officers, staff and other constituencies with respect to their responsibilities concerning document retention and destruction. Notwithstanding the foregoing, the VBMA reserves the right to revise or revoke this Policy at any time.

## 2. Administration

**Responsibilities of the Administrator.** The National VBMA President shall be the administrator (“Administrator”) in charge of the administration of this Policy. The Administrator’s responsibilities shall include supervising and coordinating the retention and destruction of documents pursuant to this Policy and particularly the Document Retention Schedule included below. The Administrator shall also be responsible for documenting the actions taken to maintain and/or destroy VBMA documents and retaining such documentation. The Administrator may also modify the Document Retention Schedule from time to time as necessary to comply with law and/or to include additional or revised document categories as may be appropriate to reflect organizational policies and procedures. The Administrator is also authorized to periodically review this Policy and Policy compliance with legal counsel and to report to the Executive Board as to compliance. The Administrator may also appoint one or more assistants to assist in carrying out the Administrator’s responsibilities, with the Administrator, however, retaining ultimate responsibility for administration of this Policy.

**Responsibilities of Constituencies.** This Policy also relates to the responsibilities of Executive board members, staff, volunteers and outsiders with respect to maintaining

and documenting the storage and destruction of the VBMA's documents. The Administrator shall report to the Executive Board (the board members acting as a body),

which maintains the ultimate direction of management. The VBMA's staff and volunteers shall be familiar with this Policy, shall act in accordance therewith, and shall assist the Administrator, as requested, in implementing it. The responsibility of volunteers and members with respect to this Policy shall be to produce specifically identified documents upon request of management, if the volunteer still retains such documents. In that regard, after each project in which a volunteer has been involved, or each term which the volunteer has served, it shall be the responsibility of the Administrator to confirm whatever types of documents the volunteer retained and to request any such documents which the Administrator feels will be necessary for retention by the VBMA (not by the volunteer). Outsiders may include vendors or other service providers. Depending upon the sensitivity of the documents involved with the particular outsider relationship, the VBMA, through the Administrator, shall share this Policy with the outsider, requesting compliance. In particular instances, the Administrator may require that the contract with the outsider specify the particular responsibilities of the outsider with respect to this Policy.

### **3. Suspension of Document Destruction; Compliance.**

The VBMA becomes subject to a duty to preserve (or halt the destruction of) documents once litigation, an audit or a government investigation is reasonably anticipated. Further, federal law imposes criminal liability (with fines and/or imprisonment for not more than 20 years) upon whomever "knowingly alters, destroys, mutilates, conceals, covers up, falsifies, or makes a false entry in any record, document, or tangible object with the intent to impede, obstruct, or influence the investigation or proper administration of any matter within the jurisdiction of any department or agency of the United States ... or in relation to or contemplation of any such matter or case." Therefore, if the Administrator becomes aware that litigation, a governmental audit or a government investigation has been instituted, or is reasonably anticipated or contemplated, the Administrator shall immediately order a halt to all document destruction under this Policy, communicating the order to all affected constituencies in writing. The Administrator may thereafter amend or rescind the order only after conferring with legal counsel. If any board member or staff member becomes aware that litigation, a governmental audit or a government investigation has been instituted, or is reasonably anticipated or contemplated, with respect to the VBMA, and they are

not sure whether the Administrator is aware of it, they shall make the Administrator aware of it. Failure to comply with this Policy, including, particularly, disobeying any destruction halt order, could result in possible civil or criminal sanctions. In addition, for staff, it could lead to disciplinary action including possible termination.

#### **4. Electronic Documents; Document Integrity.**

Documents in electronic format shall be maintained just as hard copy or paper documents are, in accordance with the Document Retention Schedule. Due to the fact that the integrity of electronic documents, whether with respect to the ease of alteration or deletion, or otherwise, may come into question, the Administrator shall attempt to establish standards for document integrity, including guidelines for handling electronic files, backup procedures, archiving of documents, and regular checkups of the reliability of the system; provided, that such standards shall only be implemented to the extent that they are reasonably attainable considering the resources and other priorities of the VBMA.

#### **5. Privacy.**

It shall be the responsibility of the Administrator, after consultation with counsel, to determine how privacy laws will apply to the VBMA's documents from and with respect to employees and other constituencies; to establish reasonable procedures for compliance with such privacy laws; and to allow for their audit and review on a regular basis.

#### **6. Emergency Planning.**

Documents shall be stored in a safe and accessible manner. Documents which are necessary for the continued operation of the VBMA in the case of an emergency shall be regularly duplicated or backed up and maintained in an off-site location. The Administrator shall develop reasonable procedures for document retention in the case of an emergency.

#### **7. Document Creation and Generation.**

The Administrator shall discuss with staff the ways in which documents are created or generated. With respect to each volunteer or organizational function, the Administrator shall attempt to determine whether documents are created which can be easily

segregated from others, so that, when it comes time to destroy (or retain) those documents, they can be easily culled from the others for disposition.

## **8. Document Retention Schedule.**

<b><u>Document Type</u></b>	<b><u>Retention Period</u></b>
<b>Accounting and Finance</b>	
Accounts Payable	7 years
Accounts Receivable	7 years
Annual Financial Statements and Audit Reports	Permanent
Bank Statements, Reconciliations & Deposit Slips	7 years
Canceled Checks – routine	7 years
Canceled Checks – special, such as loan repayment	Permanent
Credit Card Receipts	3 years
Employee/Business Expense Reports/Documents	7 years
General Ledger	Permanent
Interim Financial Statements	7 years
<b>Contributions/Gifts/Grants</b>	
Contribution Records	Permanent
Documents Evidencing Terms of Gifts	Permanent
<b>Corporate and Exemption</b>	
Articles of Incorporation and Amendments	Permanent
Bylaws and Amendments	Permanent
Minute Books, including Board & Committee Minutes	Permanent
Annual Reports to Attorney General & Secretary of State	Permanent
Other Corporate Filings	Permanent
IRS Exemption Application (Form 1023 or 1024)	Permanent
IRS Exemption Determination Letter	Permanent
State Exemption Application (if applicable)	Permanent
State Exemption Determination Letter (if applicable)	Permanent
Licenses and Permits	Permanent
Employer Identification (EIN) Designation	Permanent
<b>Correspondence and Internal Memoranda</b>	

Hard copy correspondence and internal memoranda relating to a particular document otherwise addressed in this Schedule should be retained for the same period as the document to which they relate.

Hard copy correspondence and internal memoranda relating to routine matters with no lasting significance Two years

Correspondence and internal memoranda important to the VBMA or having lasting significance Permanent

### **Electronic Mail (E-mail) to or from the VBMA**

Electronic mail (e-mails) relating to a particular document otherwise addressed in this Schedule should be retained for the same period as the document to which they relate, but may be retained in hard copy form with the document to which they relate.

E-mails considered important to the VBMA or of lasting significance should be printed and stored in a central repository . Permanent  
E-mails not included in either of the above categories 12 months

### **Electronically Stored Documents**

Electronically stored documents (e.g., in pdf, text or other electronic format) comprising or relating to a particular document otherwise addressed in this Schedule should be retained for the same period as the document which they comprise or to which they relate, but may be retained in hard copy form (unless the electronic aspect is of significance).

Electronically stored documents considered important to the VBMA or of lasting significance should be printed and stored in a central repository (unless the electronic aspect is of significance). Permanent

Electronically stored documents not included in either of the above categories Two years

## **Employment, Personnel and Pension**

Personnel Records	10 yrs after termination
Employee contracts	10 yrs after termination
Retirement and pension records	Permanent

## **Insurance**

Property, D&O, Workers' Compensation and General Liability Insurance Policies	Permanent
Insurance Claims Records	Permanent

## **Legal and Contracts**

Contracts, related correspondence and other supporting documentation	10 yrs after termination
Legal correspondence	Permanent

## **Management and Miscellaneous**

Strategic Plans	7 years after expiration
Disaster Recovery Plan	7 years after replacement
Policies and Procedures Manual revision history	Current version with

## **Property – Real, Personal and Intellectual**

Property deeds and purchase/sale agreements	Permanent
Property Tax	Permanent
Real Property Leases	Permanent
Personal Property Leases	10 years after termination
Trademarks, Copyrights and Patents	Permanent

## **Tax**

Tax exemption documents & correspondence	Permanent
IRS Rulings	Permanent
Annual information returns – federal & state	Permanent
Tax returns	Permanent

# Likeness, Imagery, and Trademark Policy

(Approved August 2, 2020)

In order to protect the reputation of our brand as a leader in Veterinary Business Management education, the National Veterinary Business Management Association, (“VBMA”) has specific guidelines regarding the use of its Brand Elements and trademarks. This policy establishes when VBMA Brand Elements may be used, for what purposes, and restrictions that may apply to such use. **Brand Elements should only be used when VBMA explicitly gives written permission, and that usage is restricted to the guidelines outlined in this policy.**

## Brand Elements

A Brand Element is a word, name, symbol, or device (or any combination thereof) that identifies the goods or services of a person or company and distinguishes them from the goods and services of others. For VBMA, this includes but is not limited to, trademarks such as our name (“VBMA”), current logos and credentials, including but not limited to, Business Certificate Program (“BCP”), intellectual property, and future logos, credentials and intellectual property.

## Policy Details

### 1. Chapters in Good Standing, may:

- a. Create a link from their website to our website’s homepages (<https://vbma.biz> and [myvbma.biz](https://myvbma.biz))
- b. Use the name, official logos, likeness, and artwork of the VBMA on digital and printed communications.
- c. Print or otherwise replicate the name, official logos, likeness, and artwork of the VBMA on digital and print materials, including banners, posters, business cards, letterhead and other marketing materials.
- d. Use the name, official logos, likeness, and artwork of the VBMA on social media platform and websites.

### 2. Chapters, regardless of Good Standing status, Board Members, Sponsors, Advisors or Members may not:

- a. Register top-level or create second-level domain names with VBMA Brand Elements.
- b. Use VBMA Brand Elements in any manner that implies a relationship or affiliation with, sponsorship, or endorsement by VBMA, or that can be reasonably interpreted to suggest content has been authorized by, or represents the views or opinions of VBMA personnel, when these endorsements, affiliation or sponsorships do not exist.
- c. Copy or imitate the look and feel of VBMA publications, design properties, the website, products’ trade dress, or VBMA brand packaging, distinctive color

combinations, typography, graphic designs, product icons, or imagery associated with VBMA products or Brand Elements.

- d.** Display a VBMA Brand Element in a manner that is in VBMA 's sole opinion misleading, unfair, defamatory, infringing, libelous, disparaging, obscene, or otherwise objectionable to the VBMA.
- e.** Adopt marks, logos, slogans, or designs that are confusingly similar to VBMA Brand Elements.
- f.** Display a VBMA Brand Element on any website that contains or displays adult content, promotes gambling, involves the sale of tobacco or alcohol, or otherwise violates applicable law.
- g.** Display a VBMA Brand Element on a site that violates any law or regulation.
- h.** Use VBMA Brand Elements in a way that suggests a common, descriptive, or generic meaning.

# Privacy and Confidentiality Policy

(Approved August 2, 2020)

National Board Members, National Advisors, Regional Leaders, Consultants, Chapter Officers and Members may be exposed to non-public information regarding sponsors, donors, universities, other members and organizations, referred to as “Confidential Information”. Confidential information includes, but is not limited to, information about our donors, supporters, contractors, marketing processes, as well as our financial information, which includes current and future business plans, our computer and software systems and processes, personnel information, and associated documents.

It is the policy of the National Veterinary Business Management Association, Inc. (“VBMA”) that National Board Members, Officers and Members, Consultants and Independent Contractors of the VBMA will not disclose confidential information belonging to, or obtained through their affiliation with VBMA to any person, including their relatives, friends, and business and professional associates, unless the VBMA has authorized disclosure. This policy is not intended to prevent disclosure where disclosure is required by law. Board members, volunteers and employees are cautioned to demonstrate professionalism, good judgment, and care to avoid unauthorized or inadvertent disclosures of confidential information and should, for example, refrain from leaving confidential information contained in documents or on computer screens in plain view. Upon separation of services and at the end of a Board Member’s term, he or she shall return all documents, papers, and other materials that may contain Confidential Information. Failure to adhere to this policy will result in discipline, up to and including separation of service with the VBMA.

I \_\_\_\_\_ (print name) have read the VBMA’s policy on confidentiality as presented above. I agree to abide by the requirements of the policy and inform the National President immediately if I believe any violation (unintentional or otherwise) of the policy has occurred. I understand that violation of this policy will lead to disciplinary action, up to and including termination of my service with the VBMA

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_

# Conflict of Interest Policy

(Approved August 2, 2020)

## 1. Purpose

This conflict of interest policy is designed to foster public confidence in the integrity of The National Veterinary Business Management Association, Inc. (the “VBMA”) and to protect the VBMA’s interest when it is contemplating entering a transaction (defined below) that might benefit the private interest of a Executive Board Member, Advisor, Regional Leader, Alumni Board Member, Consultant or any individual with proprietary knowledge about the VBMA.

## 2. Definitions

**Insider** means

- a. Each member of the National Executive Board, including Regional Leaders but excluding Chapter Officers,
- b. The President, Vice President, Treasurer, Marketing Director, Compliance Director, and Business Certificate Director, or any person with the responsibilities of any of these positions (whether or not the person is an officer of the VBMA under the VBMA’s Bylaws), or
- c. Any individual appointed as an Advisor to the National Board or any person who (a) has responsibilities or influence over the VBMA similar to that of officers, directors, advisors, or trustees; or (b) manages a program that represents 10% or more of the activities, assets, income, or expenses of the VBMA; or (c) has or shares authority to control 10% or more of the VBMA’s capital expenditures, operating budget, or compensation for employees.

**Interest** means any commitment, investment, relationship, obligation, or involvement, financial or otherwise, direct or indirect, that may influence a person’s judgment, including receipt of compensation from the VBMA, sponsorship of the VBMA, or exchange of transactions with the VBMA.

A **Conflict of Interest** is present when, in the judgment of the National Executive Board, Regional Leaders, Advisors, or any individual with an Insider’s stake in the

VBMA, is such that it reduces the likelihood that an Insider's influence can be exercised impartially in the best interests of the VBMA.

**Transaction** means any transaction, agreement, or arrangement between an Insider and the VBMA, or between the VBMA and any third party where an Insider has an interest in the transaction or any party to it.

### 3. Procedures

- a. **Duty to Disclose.** Each Insider shall disclose to the Board all material facts regarding his or her interest in the transaction, promptly upon learning of the proposed transaction.
- b. **Determining Whether a Conflict of Interest Exists.** With regard to an Insider, the Executive Board shall determine if a Conflict of Interest exists. The insider(s) and any other interested person(s) involved with the transaction shall not be present during the Board's discussion or determination of whether a Conflict of Interest exists, except as provided in Article IV below.
- c. **Procedures for Addressing a Conflict of Interest.** The Board shall follow the procedures set forth in Article IV in order to decide what measures are needed to protect the VBMA's interests in light of the nature and seriousness of the conflict, to decide whether to enter into the transaction and, if so, to ensure that the terms of the transaction are appropriate.

### 4. Review by the Board

The Executive Board may ask questions of and receive presentation(s) from the Insider(s) and any other interested person(s), but shall deliberate and vote on the transaction in their absence. The Executive Board shall ascertain that all material facts regarding the transaction and the insider's conflict of interest have been disclosed to the Board and shall compile appropriate data, such as comparability studies, to determine fair market value for the transaction.

After exercising due diligence, which may include investigating alternatives that present no conflict, the Board shall determine whether the transaction is in the VBMA's best interest, for its own benefit, and whether it is fair and reasonable to the VBMA; the majority of disinterested members of the Executive Board then in office may approve the Transaction.

## **5. Records of Proceedings**

The minutes of any meeting of the Executive Board pursuant to this policy shall contain the name of each Insider who disclosed or was otherwise determined to have an interest in a transaction; the nature of the interest and whether it was determined to constitute a Conflict of Interest; any alternative transactions considered; the members of the Board who were present during the deliberations on the transaction, those who voted on it, and to what extent interested persons were excluded from the deliberations; any comparability data or other information obtained and relied upon by the Executive Board and how the information was obtained; and the result of the vote, including, if applicable, the terms of the transaction that was approved and the date it was approved.

## **6. Annual Disclosure and Compliance Statements**

Each Executive Board Member, Advisor, Regional Leader, any individual who works directly with the VBMA or has strong business affiliations with a sponsor, shall annually sign a statement on the form attached, that:

- a. affirms that the person has received a copy of this Conflict of Interest policy, has read and understood the policy, and has agreed to comply with the policy; and
- b. discloses the person's financial interests and professional relationships that could give rise to Conflicts of Interest.

## **7. Violations**

If the Board has reasonable cause to believe that an insider of the VBMA has failed to disclose actual or possible Conflicts of Interest, including those arising from a transaction with a related interested person, it shall inform such Insider of the basis for this belief and afford the insider an opportunity to explain the alleged failure to disclose. If, after hearing the insider's response and making further investigation as warranted by the circumstances, the Executive Board determines that the insider has failed to disclose an actual or possible Conflict of Interest, the Executive Board shall take appropriate disciplinary and corrective action.

## **8. Annual Reviews**

To ensure the VBMA operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic

reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the VBMA's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

The review may be written or oral. The review shall consider the level of compliance with the policy, the continuing suitability of the policy, and whether the policy should be modified and improved.

## **9. Annual Statements**

Each Executive Board member, Regional Leader, Alumni Board Member, Advisor or Consultant shall annually sign a statement which affirms such person:

- a. Has received a copy of the Conflicts of Interest policy,
- b. Has read and understands the Policy,
- c. Has agreed to comply with the Policy, and
- d. Understands the VBMA is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

## **10. Use of Outside Experts**

When conducting the annual reviews as provided for in Article VIII, the VBMA may, but need not, use outside Consultants. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

**The Veterinary Business Management Association  
Conflict of Interest Policy:  
Acknowledgement and Financial Interest Disclosure Statement**

The National Veterinary Business Management Association, Inc. (the “VBMA”) follows a Conflict of Interest policy designed to foster public confidence in our integrity and to protect our interest when we are contemplating entering a transaction or arrangement that might benefit the private interest of a Executive Board Member, Advisor, Regional Leader, or any of our key sponsors who work directly with members or the VBMA.

**Part I. Acknowledgment of Receipt**

I hereby acknowledge that I have received a copy of the Conflict of Interest policy of the Veterinary Business Management Association, Inc., have read and understood it, and agree to comply with its terms.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

## Part II. Disclosure of Financial Interests

The National Veterinary Business Management Association, Inc. (VBMA) is required to file a Form 990 annually with the Internal Revenue Service, and the form we file is available to the public. To complete Form 990 fully and accurately, we require each Officer and Advisor to disclose the information requested in this Part II.

A “Conflict of Interest,” for purposes of Form 990, arises when a person in a position of authority over an organization, such as an Executive Board Member, Officer, Director, or Advisor, may benefit financially from a decision he or she could make in such capacity, including indirect benefits such as to family members, businesses, or other non-profits with which the person is closely associated.

Please check ONE of the following boxes:

My interests and relationships have not changed since my last disclosure of interests. [Proceed to signature block below. Do not complete the tables.]

OR

I hereby disclose or update my interests and relationships that could give rise to a conflict of interest: [Complete the table below. Use additional pages as needed.]

Types of Personal Interest	Description of interest or potential to a conflict of interest
Transactions or arrangements with the VBMA	
Transactions or affiliations with other nonprofit organizations	
Substantial business or investment holdings	
Transactions or affiliations with sponsors or businesses not listed above	
Family relationships (include names)	

I am not aware of any financial interest involving me or a family member that could present a Conflict of Interest that I have not disclosed either above or in a previous disclosure statement.

\_\_\_\_\_

Printed Name

\_\_\_\_\_

Signature Date

# VBMA Leadership Duties and Responsibilities Policy<sup>2</sup>

(Approved August 2, 2020)

As an Officer of the National Veterinary Business Management Association, Inc.

(“VBMA”), I \_\_\_\_\_ (print name) agree to the following terms.

I abide by the Veterinarian’s Oath.

*“Being admitted to the profession of veterinary medicine, I solemnly swear to use my scientific knowledge and skills for the benefit of society through the protection of animal health and welfare, the prevention and relief of animal suffering, the conservation of animal resources, the promotion of public health, and the advancement of medical knowledge.*

*I will practice my profession conscientiously, with dignity, and in keeping with the principles of veterinary medical ethics.*

*I accept as a lifelong obligation the continual improvement of my professional knowledge and competence.”*

## *Veterinarian’s Oath*

1. Additionally, as an Officer of the VBMA I agree to: At all times, I will act with integrity, honesty, and respect that aligns with our mission statement and prioritizes the organization's members and legacy over any personal agendas.
2. I will trust other board members to perform their responsibilities as outlined in the VBMA Operations Manual without impinging on anyone’s duties.
3. I will ask for help when I need it.
4. I will respectfully listen and carefully consider others ideas and opinions. In doing so, I will practice a growth mindset, approach disagreements with an open mind, assume positive intent and promote collaboration.
5. I will focus on meaningful, timely and respectful communication through appropriate communication channels.

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<sup>2</sup> Adopted from University of Minnesota VBMA Chapter

6. I understand that my first priorities are to my academic responsibilities. If for any reason I cannot fulfill my duties as a VBMA Leader, temporarily or permanently, due to other obligations, commitments, or personal health, I must notify the National VBMA President or a National VBMA Advisor.

### **Intellectual property:**

I agree that all intellectual property relating to the VBMA that has been developed prior to my acceptance of this office and/or is developed by me or other VBMA leaders and advisors during my tenure as a VBMA leader belongs to the VBMA. The VBMA grants a non-exclusive, revocable license to VBMA owned materials to use as non-publicly available samples for purposes of soliciting work, employment, or career development.

### **Role violations:**

Further, I agree that another member, or myself is reasonably suspected of violating this Leadership Duties and Responsibilities Policy, I will file a complaint with the President and / or a National Advisor, via email, and the following actions may be enlisted in this order. All conversations will include formal documentation and be subjected to auditing.

1. **Feedback:** In order to foster a culture of open, meaningful feedback, prior to a complaint being submitted to the President and or a National Advisor, the identifier must first address the violation with the individual directly. This can be done verbally or through written communication. This is intentionally not formalized to cater to different communication styles.
2. **Mediation:** Once the feedback has been provided, the formal complaint can be submitted to the President and should include the date in which the violation feedback (#1) was discussed between the two parties. The President or National Advisor will set up a one-on-one meeting with the individual. At the meeting, the violation and expectation of appropriate behavior in accordance with the oath will be reviewed. The President or National Advisor will document and maintain a record of the meeting.
3. **Review:** A secondary meeting with the President or National Advisor and individual in question. This meeting will take place at 30 days after the initial

Mediation meeting to review the individual's progress. The President or National Advisor should be prepared to make a final recommendation of the individual's violation of this Policy within 2 weeks.

4. **Recommendation:** Within 2 weeks of the Review as stated in 3 above, the President or National Advisor will make a recommendation for moving forward to the National Executive Board. At this time the President or National Advisor will present the National Executive Board with the original Feedback, discussion of Mediation, Review of progress and final recommendations. The National Board will make a final decision to resolve the complaint: termination of term or continuation with term.
5. **Termination:** Follow the instructions in the by-laws for termination of a National VBMA Leadership Team member.

In case of failure to fulfill duty or meet the stipulations in the policy:

1. If I am unable to fulfill the duties of the full term of my position, I will notify the President or Vice President of my resignation within thirty (30) days of this decision;
2. That I will return any personal property, including digital Passwords, that belongs to the National VBMA within 15 days of my withdrawal from any of the above positions at my expense; and
3. That I will include only the actual dates of the term of the office I held in any and all of my résumés, CVs and/or cover letters.
4. the National VBMA may notify the dean of your school at their discretion.

Further, the parties agree that no employment relationship exists arising from this agreement or any other agreement, whether oral or written. The parties also agree to indemnify and hold each other harmless from any claims arising from this agreement or affiliation with the VBMA.

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Printed Name

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Signature / Date

## Financial Section

# Financial and Tax Policy

(Approved August 2, 2020)

**1. Philosophy** The purpose of financial management in the operation of all VBMA activities is to fulfill the organization's mission in the most effective and efficient manner and to remain accountable to stakeholders, including clients, partners, funders, employees, and the veterinary community. In order to accomplish this, VBMA commits to providing accurate and complete financial data for internal and external use by the National Executive Board.

## **2. Authority**

- a. The Executive Board is ultimately responsible for the financial management of all activities.
- b. The National Treasurer is authorized to act on the Board's behalf on financial matters when action is required in advance of a meeting of the Executive Board. The National Treasurer is responsible for the day-to-day financial management of the organization.
- c. The Executive Board authorizes the National President and National Treasurer to hire and supervise staff and independent consultants, pay bills, receive funds, and maintain bank accounts.
- d. The National Treasurer is authorized to manage expenses within the parameters of the overall approved budget, reporting to the Finance Committee on variances and the reason for these variances.
- e. The Board of Directors must approve any use of the board designated cash reserve fund.

## **3. Responsibilities**

- a. The National Treasurer shall:
  - i. Account for donor restricted and board designated funds separately from general operating funds, and clearly define the restrictions applicable to these funds.
  - ii. Report the financial results of VBMA operations according to the schedule established by the Executive Board at least annually.
  - iii. Pay all obligations and file required reports in a timely manner.

- iv. Make no contractual commitment for bank loans, corporate credit cards, or for real estate leases or purchases without specific approval of the Board.
- v. Record fixed assets with purchase prices greater than \$500 as capital assets in accounting records.
- vi. Depreciation of capital assets will not exceed five years for furniture and equipment or three years for computer and other technology equipment.
- vii. Limit vendor credit accounts to prudent and necessary levels.
- b. Obtain competitive bids for items or services costing in excess of \$5,000 per unit. Selection will be based on cost, service, and other elements of the contract. The VBMA may award the bid to any provider and is not required to accept the lowest cost proposal.
- c. The Executive Board shall:
  - i. Review financial reports at each board meeting.
  - ii. Provide adequate training to members to enable each member to fulfill his or her financial oversight role.

#### **4. Financial Transactions with Insiders**

- a. No advances of funds to employees, officers, or directors are authorized. Direct and necessary expenses including travel for meetings and other activities related to carrying out responsibilities shall be reimbursed.
- b. In no case shall VBMA borrow funds from any employee, officer, or director of the VBMA without specific authorization from the Executive Board.

#### **5. Budget**

- a. In order to ensure that planned activities minimize the risk of financial jeopardy and are consistent with board-approved priorities, long-range VBMA goals, and specific one-year and five-year objectives, the National President and National Treasurer shall:
  - i. Submit operating and capital budgets to the Executive Board in time for reasonable approval by the Board prior to each fiscal year.
  - ii. Use responsible assumptions and projections as background, with the general goal of an unrestricted surplus.

#### **6. Gift Acceptance**

- a. VBMA will not accept stock or other negotiable instruments as a vehicle for donors to transfer assets to the organization.

- b. VBMA shall accept contributions of goods or services other than cash that are related to the programs and operations of VBMA. Any other contributions of non-cash items must be reviewed and approved by the Executive Board before acceptance.

## **7. Asset Protection**

- a. In order to ensure that the assets of VBMA are adequately protected and maintained, the National President shall:
  - i. Insure against theft and casualty losses to the VBMA and against liability losses to Board members, staff, or the VBMA itself to levels indicated in consultation with suitable professional resources.
  - ii. Plan and carry out suitable protection and maintenance of property and equipment.
  - iii. Avoid actions that would expose the VBMA, its board, or its staff to claims of liability.
  - iv. Protect intellectual property, information, and files from unauthorized access, tampering, loss, or significant damage.
  - v. Receive, process, and disburse funds under controls that are sufficient to maintain basic segregation of duties to protect bank accounts, income receipts, and payments.

## **8. GAAP Compliance**

- a. The VBMA's financial statements shall be prepared in accordance with Generally Accepted Accounting Principles (GAAP). The presentation of the Financial Statements shall follow the recommendation of the Financial Accounting Standards Board (FASB) No. 117, "Financial Statements of Not-For-Profit Organizations." Under GAAP, revenues are classified based on the existence or absence of donor-imposed restrictions. Accordingly, the net assets of the VBMA are classified as unrestricted, temporarily restricted and permanently restricted.

## **9. Use of a Certified Public Accountant**

- a. The VBMA shall contract with and utilize the services of a Certified Public Accountant (CPA) for recordkeeping, tax preparation, tax filing and representation.
  
- b. All Executive Board Members, National Advisors Consultants, Chapter Officers and Members shall comply with all requests in response to audits

by the Internal Revenue Service (IRS) or record request by any governmental authority.

**10. Umbrella Organization.** The National VBMA shall act as a “Umbrella Organization” for purposes of IRS non-for-profit status. As such, the National VBMA shall be responsible for maintenance of not-for-profit status, tax filing and reporting and chapter shall not file for not-for-profit status, report taxes or otherwise represent non-for-profit status.

- a. **Chapter Reporting to National VBMA.** In order to facilitate not-for-profit status, Chapters shall report financial activity to the National Treasurer as requested, no less than annually on the form set forth by the Executive Board.

# National VBMA Reimbursement Policy

(Approved August 2, 2020)

## Failure to comply may result in a delayed or incomplete reimbursement

It is the goal of the VBMA is to foster and maintain the ability of each chapter to Equip, Empower, and Educate its members. Under this responsibility, we must all work together to maximize our ability to effectively work nationwide, while allocating all additional resources to the local chapters.

1. These Policies are effective for any person seeking reimbursement from either the National VBMA account, including but not limited to: Executive Board Members, Alumni, Regional Leaders, National Advisors,.
  - a. All reimbursements must be submitted within 7 days of the last day of the event.
2. The Treasurer will email the Standard Reimbursement Form before the event.
  - a. All reimbursements must be submitted utilizing this Form.
  - b. The first page should include calculations. Each item and description must be listed, with a grand total at the bottom.
  - c. The second page should contain all itemized receipts.
    - i. An itemized receipt including date and time must be present for all reimbursements of flights, gas, meals, parking, hotel rooms, or any other charges paid for by the national accounts.
3. Properly formatted reimbursements will be processed within 2 weeks of submission.
  - a. The Treasurer will notify all individuals if additional time is needed.
  - b. If expedited reimbursements are essential, please email the Treasurer before the event.
  - c. Exceptions may be granted for extenuating circumstances. Please email the Treasurer for consideration at [Treasurer@vbma.biz](mailto:Treasurer@vbma.biz)
4. Meals: Detailed receipts from both personal and business meals incurred during travel days. Receipts must clearly show date, time, itemized food items, and names/number of people in attendance.
  - a. Lunch and breakfast: Meals and Tip may not exceed \$25 dollars per person per meal.
  - b. Dinner and Tip: May not exceed \$35 per meal.
  - c. Travel days: Maximum of \$85 for meals within the above standards.
  - d. One alcoholic beverage per person per day may be expensed.
  - e. Tips: You may tip more than these guidelines, but reimbursement will be capped at:
    - i. Take-out: 10%, Dine-in: 20%
5. Flights:
  - a. Must be purchased by the deadline as provided by the Treasurer.
  - b. Maximum reimbursement: \$450, with exceptions must be pre-approved by the Treasurer.
  - c. All upgrades for flights will come at the expense of the individual purchasing the ticket. Please notify the Treasurer in the reimbursement email regarding upgrades.
6. The least expensive, yet safest option should be selected for all ground transportation

- a. Transportation to and from Airport, Parking, rideshares, rentable cars, etc.
- b. A print out of Google Maps with a 'To' and 'From' mileage for transportation to the airport is essential.
- c. Mileage will be reimbursed at the current IRS Standard Mileage Rate (\$0.575 in 2020).

*Alumni have a distinct budget and can draft independent reimbursement guidelines that must be approved by the current national board. Unless this process is completed, this document governs all stated parties.*

# Expense Policy

(Approved August 2, 2020)

1. All expenses must comply with current reimbursement policy . Including but not limited to: Itemized receipts, excel documents, and spending limits below or equal to that outlined in said guideline.
2. The VBMA Debit Card shall be used for all expenses when applicable. Travel expenses not able to be placed on the VBMA Debit Card may be spent on individual cards and can be reimbursed by following the reimbursement guidelines.
  - a. Purchases of over \$1,000, other than properly approved travel expenses, must be placed on the VBMA corporate card.
3. The National Treasurer solely has access to the VBMA Debit card under their individual name.
  - a. Individuals seeking reimbursement of expenses shall submit the Expense Reimbursement Form to the National Treasurer in accordance to the Reimbursement Policy he treasurer shall record the Expense and Reimbursement must be written in a master log
  - b. Including: a clear log of all money sent from the master account broken up into individual transactions.
  - c. Detailed copies of all receipts, invoices, all reimbursement sheets, and other incurred expenses. will be be stored in shared Google drive

## Sponsor Section

# Sponsor Terms of Agreement

For Sponsors of the National Veterinary Business Management Association, Inc.

(Approved August 2, 2020)

The National Veterinary Business Management Association, Inc. (VBMA) is a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code and further, is a student-driven organization, dedicated to advancing the profession of veterinary medicine through increasing business knowledge, creating networking opportunities, and empowering students to achieve their personal and professional goals. The VBMA is committed to educating, empowering and protecting its Members, Officers, Organization and legacy.

\_\_\_\_\_ (“Sponsor”) desires to become a Sponsor of VBMA and to provide financial support and to increase awareness of Sponsor’s mission, on the basis set forth in this agreement.

As used in this agreement, **Sponsorship** means the financial support paid directly to the National VBMA organization to support its chapters, members, programs, and business. **Charitable donorship** is defined as a person, company, or organization which donates products, services, or other in-kind benefits to the National VBMA.

1. **Sponsorship Payment.** To support the VMBA’s charitable activities, Sponsor agrees to pay the VBMA the sum listed in Attachment A and payable to the VBMA on or before December 1st, 2020 unless otherwise agreed upon with the VBMA National President. Sponsorship and Charitable donorships are each valid for one year and must be renewed as a mutual agreement with the National VBMA Executive Board.
2. **Term and Termination.** This Agreement and Sponsorship shall become effective on January 1st, 2021 and shall terminate December 31st, 2021. The VBMA may terminate this agreement with 14 days written notice to the other party, for violation of this agreement or any policy of the National VMBA with refund to the Sponsor on a pro-rata.
3. **Use of Student and Member Information.** For purposes of this Agreement, Student Information includes but is not limited to name, likeness, email address, mailing address, school of attendance, or graduation date. Any Student Information that a Sponsor may gain access to in being a Sponsor of the National VBMA or a local Chapter VBMA, cannot be collected, sold, distributed or stored for future use.

4. **Spam and Solicitation.** Solicitation is defined as to approach with a request or plea<sup>3</sup>. A student can willingly provide a Sponsor with their information but a Sponsor is not allowed to Solicit for student information either at National or local Chapter VBMA events or through any National or local Chapter VBMA social media platform. It is the VBMA National Board's sole discretion to determine when such a violation of this Sponsor policy has occurred.
5. **Giveaways and Contests.** The Sponsor agrees to adhere to the applicable University's Vendor Policy Regulations regarding Giveaways or contests with monetary, sponsorship, or product rewards put forth by a Sponsor, either at the National Level or Chapter Level. The local VBMA chapter agrees to provide Sponsor with a copy of the Vendor-Policy Rules and provide information on any guidelines. The University's Vendor-Policy Rules may extend to any branded items that can be handed out to students.
6. **Meetings and Information Shared.** Any meetings or information shared with students at a University Campus must comply with the policies in the the VBMA Terms of Agreement (this document) and University policies, that include but are not limited to a Vendor Policy.
7. **Sponsor Presentations.** The Sponsor agrees to adhere to the **BCP Presentation for Credit Guide**, which includes an prior approval of the presentation from the Business Certificate Director. Only presentations that have been pre-approved can be presented to students. This document is posted in our Policy Handbook and can be sent by request by emailing [businesscertificate@vbma.biz](mailto:businesscertificate@vbma.biz). A speaker that presents on behalf of Sponsor to a VBMA chapter must also comply with the applicable University's Vendor-Policy Rules.
  - a. **Sponsor Logos:** Only logos of official Sponsors of the National VBMA can be displayed on presentations for VBMA. If a speaker has been invited to speak on behalf of a sponsor, only the logo of the Sponsor may be displayed on the Speaker's presentation materials. The logo of the National VBMA is only allowed to be used in presentations by official Sponsors with prior approval from a member of the National Executive Board. National Advisors of the VBMA are allowed to use the VBMA logo in presentations without prior approval.
8. **Social Media.** The Sponsor agrees to submit Social Media posts to the National VBMA to qualify as a Sponsor post. Sponsor Posts must adhere to the **Social Media Style Guide**. This document is posted in our Policy Handbook and can be sent by request by emailing [marketing@vbma.biz](mailto:marketing@vbma.biz).
  - a. The Sponsor agrees to the use of Sponsor logos and VBMA logos on VBMA Social Media platforms at the discretion of VBMA according to the Social Media

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<sup>3</sup> "Solicit." *Merriam-Webster.com Dictionary*, Merriam-Webster, <https://www.merriam-webster.com/dictionary/solicit>. Accessed 1 Aug. 2020.

Style Guide and the Likeness or Image and Trademark Policy. Any posts by Sponsors on a Sponsor's own Social Media platforms involving or mentioning the VBMA must be submitted to the National President or National Marketing Director for approval.

**Agreement:**

By agreeing to the terms listed above, the VBMA agrees to offer the benefits as outlined in the 2021 Partnership Opportunities packet.

**FOR THE VBMA:**

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
Sarah Montoya

Title: VBMA National President

**FOR THE SPONSOR:**

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

# Media Marketing Guide for Sponsors Policy

(Approved August 2,2020)

## VBMA SOCIAL MEDIA STYLE GUIDE FOR SPONSORS

### MISSION

The Veterinary Business Management Association is a student-driven organization dedicated to advancing the profession through increasing business knowledge, creating networking opportunities, and empowering students to achieve their personal and professional goals.

The VBMA maintains accounts on:

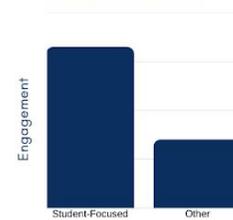


If you require a specific posting time, please provide materials at least 72 hours in advance of that date and time.

When referring to our organization, please use:



Posts that are student-focused do twice as well as posts that are not student-focused.



Personal and Professional Development



Practice Buy-in and Ownership



Debt Management and Financial Stability

### INSTAGRAM

Preferred image aspect ratio is 1:1 but may be anywhere from 1.91:1 to 4:5

Keep captions short

Include any hashtags for the post, 3-5 are recommended

Hyperlinks in captions are not clickable

Provide Instagram accounts that should be tagged, if applicable

Contests posted on the VBMA Instagram must follow Instagram's rules\*

### FACEBOOK

Image aspect ratio may be 1.91:1 to 9:16

Captions may be longer

Hashtags are not recommended

Hyperlinks are clickable

Provide Facebook accounts that should be tagged, if applicable

Any contests posted on the VBMA Facebook must follow Facebook's rules\*

\*Rules supplied upon request

# Sponsor Presentation Guide Policy

(Approved August 2, 2020)

These Sponsor Presentation Guidelines are meant to aid the Veterinary Business Management Association (VBMA) Sponsors and Speakers in creating presentations that will be presented to local VBMA Chapters for Business Certificate Program (BCP) credit. Only presentations that have been pre-approved by the Business Certificate Director can be presented to students.

Presentations approved for Business Certificate Program (BCP) credit shall:

- a. Focus on a topic within the BCP Curriculum, as attached, to ensure business education for students.
- b. A minimum of 95% of the time spent on the presentation should be focused on the broad subject matter within the BCP curriculum, and not speaking toward commercial offerings.
  - i. Presentations with greater than 5% non educational, commercially oriented material will not be approved for BCP credit.
- c. Provide 50 minutes of educational content, which coincides with 1 BCP credit of the certain category the topic fits into.
  - i. Synchronous webinars will be approved for BCP credit on a case by case basis.
  - ii. Workshops do NOT count for BCP credit.
  - iii. Networking events and etiquette dinners do NOT count for BCP credit.
  - iv. Presentations about externship opportunities do NOT count for BCP credit.

Each University has a different Vendor-Policy Rules creating additional rules for presentations and speakers to students. Any speaker that speaks through a VBMA chapter must also comply with the guidelines written in the University's Vendor-Policy Rules. The University's Vendor-Policy Rules may extend to any branded items that can be handed out to students. The local VBMA chapter will be able to provide you with a copy of the Vendor-Policy Rules and let you know of any guidelines.

If you have any questions or concerns regarding a Speaker Presentation, please do not hesitate to reach out to the National Business Certificate Director at [businesscertificate@vbma.biz](mailto:businesscertificate@vbma.biz).

# National VBMA Business Certificate Program Curriculum Outline

## Business Finances

This category spans both business finances and start-up or acquisition financing.

### CATEGORY 1

- ❖ Business finance
- ❖ Financial statements
- ❖ Revenue and expense streams
- ❖ Startup financing
- ❖ Bookkeeping
- ❖ Business and payroll taxes
- ❖ Accounting software and other relevant computer programs

## Business Operations, Management, and Ownership

This category focuses on the daily operations, law, and ethics of veterinary businesses for associates and owners.

### CATEGORY 2

- ❖ Evaluating a practice
- ❖ Practice acquisition
- ❖ Startups
- ❖ Business plan
- ❖ Exit strategy
- ❖ Business and employment law
- ❖ Telemedicine/Virtual Medicine
- ❖ Pet insurance
- ❖ Insurance needs as a veterinarian and/or practice owner
- ❖ Practice management software
- ❖ Marketing (including social media)
- ❖ Media relations
- ❖ Fraud and embezzlement
- ❖ Business continuity

## Business Leadership Skills

This category focuses on developing and leading an effective team through collaboration and communication skills.

### CATEGORY 3

- ❖ Recruitment, hiring, and termination
- ❖ Presentation skills
- ❖ Listening skills
- ❖ Communication (with coworkers and clients)
- ❖ Delegation
- ❖ Responsibility and accountability
- ❖ Creating and leading an inclusive culture
- ❖ Leadership
- ❖ Managing change
- ❖ Teamwork
- ❖ Conflict resolution
- ❖ Motivation
- ❖ Exam room skills

## Career and Personal Development

This category focuses on preparing students to manage their career and personal finances.

### CATEGORY 4

- ❖ Resumes and the CV
- ❖ Interviewing
- ❖ Networking how-to's
- ❖ Internship and mentorship
- ❖ Career search and employment opportunities
- ❖ Wellness & Wellbeing Initiatives
- ❖ Continuing education
- ❖ Personal finance
- ❖ Personal investments
- ❖ Student debt
- ❖ Credit score
- ❖ Personal taxes
- ❖ Personal budgeting
- ❖ Communication skills and open dialogue around diversity and inclusion

## Completion Requirements

### **Business Certificate Program**

*Previously the Silver Certificate*

16 hours (4 hours minimum in each Category)

### **Business Certificate Program with Honors**

*Previously the Gold Certificate*

32 hours (8 hours minimum in each Category)

Completed Honors Portfolio

# National VBMA Business Certificate Program Honors Portfolio

## Career and Employment Preparation

- ❖ Resume and/or CV
- ❖ Interview questions
- ❖ Practice qualities of Interest
- ❖ Providing value to your employer
- ❖ Questions for employers
- ❖ Follow-up protocol
- ❖ Employment contract

## Professionalism and Value Proposition

- ❖ LinkedIn profile
- ❖ Professional email address
- ❖ Professional headshot
- ❖ Professional liability insurance
- ❖ Practice profitability

## Finance

- ❖ Personal Budget
- ❖ Profit and Loss Statement Analysis
- ❖ Practice Ownership Loans

*All components require a passing score by veterinary professional evaluators for the Business Certificate with Honors to be awarded. Any components that fail to pass evaluation may be modified and re-submitted..*

# Waivers

# Agreement for Assumption of Risk, Indemnification, Release, and Consent for Emergency Treatment

(Previously Adopted, Incorporated by Reference)

NATIONAL VETERINARY BUSINESS MANAGEMENT ASSOCIATION, INC  
January, 200

IN CONSIDERATION OF MY VOLUNTARY PARTICIPATION IN THE NATIONAL VETERINARY BUSINESS MANAGEMENT ASSOCIATION, INC, (VBMA) ITS CHAPTERS AND AFFILIATES, I UNDERSTAND THAT I AM BEING ASKED TO CAREFULLY READ EACH OF THE FOLLOWING PARAGRAPHS. I UNDERSTAND THAT IF I WISH TO DISCUSS ANY OF THE TERMS CONTAINED IN THIS AGREEMENT, I MAY DISCUSS WITH THE VBMA.

## **Assumption of Risks:**

I understand that physical activity by its very nature includes certain inherent risks that cannot be eliminated regardless of the care taken to avoid injuries. Some of these include serious physical injury or death. The specific risks vary, but range from: 1) minor injuries such as concussions, bruises, and lacerations to 2) major injuries such as fractures, loss of vision or paralysis 3) catastrophic injuries including death. **I understand and appreciate the risks that are inherent in the VBMA's programs and activities. I hereby assert that my participation is voluntary and that I knowingly assume all such risks. I further understand that I am ultimately responsible for my own safety.**

## **Hold Harmless, Indemnity and Release:**

In consideration of permission to participate in the VBMA I agree, for myself, my heirs, personal representatives or assigns, to defend, hold harmless, indemnify and release, the VBMA, its officers, employees, agents, advisors and sponsors from and against any and all claims, demands, actions, or causes of action of any sort on account of damage to personal property, or personal injury, or death which may result from my participation in the VBMA's activities. This release includes claims based on the negligence of the VBMA and its officers, employees, agents, advisors, sponsors and volunteers, but expressly does not include claims based on their intentional misconduct or gross negligence. **I understand that by agreeing to this clause I am releasing claims and giving up substantial rights, including my right to sue.**

## **Consent for Emergency Treatment:**

I authorize the VBMA, and its designated representatives to consent, on my behalf, to any emergency medical/hospital care or treatment to be rendered upon the advice of any licensed physician. I agree to be responsible for all necessary charges incurred by any hospitalization or

treatment rendered pursuant to this authorization. I understand that this coverage is not provided to me by the VBMA.

**BY SIGNING BELOW, I ASSUME THE ABOVE NAMED RISKS, INDEMNIFY THE VBMA AND ITS AFFILIATES, AND GIVE CONSENT FOR EMERGENCY TREATMENT. I CERTIFY THAT I AM OF 18 YEARS OF AGE AND HAVE LEGAL CAPACITY AND ACTING UNDER MY OWN FREE WILL.**

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

# 2020 Photo Release Form

(previously adopted, incorporated by reference)

I hereby authorize Veterinary Business Management Association (herein after “VBMA”) and those acting pursuant to its authority to: (i) record my likeness and/or voice on a video, audio, photographic, digital, electronic or any other medium; (ii) use my name and biographical material in connection with such recordings; and (iii) use, reproduce, exhibit and/or distribute my name, biographical material and such recordings in any medium (e.g. print publications, video, internet, etc.) for promotional, advertising, educational and/or other lawful purposes. I release and waive any claims or rights of compensation or ownership regarding such uses and understand that all such recordings shall remain the property of the VBMA.

By signing my name below, I certify that I am 18 years of age or older and that I agree to the above statement.

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

# 2020 Travel Waiver

(previously adopted, incorporated by reference)

I understand that physical activity and travel by its very nature includes certain inherent risks that cannot be eliminated regardless of the care taken to avoid injuries. Some of these include serious physical injury or death. The specific risks vary, but range from: 1) minor injuries such as concussions, bruises, and lacerations to 2) major injuries such as fractures, loss of vision or paralysis 3) catastrophic injuries including death. **I understand and appreciate the risks that are inherent in the travel, programs and activities. I hereby assert that my participation is voluntary and that I knowingly assume all such risks. I further understand that I am ultimately responsible for my own safety.**

## Hold Harmless, Indemnity and Release:

In consideration of permission to participate in the VBMA I agree, for myself, my heirs, personal representatives or assigns, to defend, hold harmless, indemnify and release, the VBMA, its officers, employees, agents, advisors and sponsors from and against any and all claims, demands, actions, or causes of action of any sort on account of damage to personal property, or personal injury, or death which may result from my participation in the VBMA's activities, including the travel to and from events. This release includes claims based on the negligence of the VBMA and its officers, employees, agents, advisors, sponsors and volunteers, but expressly does not include claims based on their intentional misconduct or gross negligence. **I understand that by agreeing to this clause I am releasing claims and giving up substantial rights, including my right to sue.**

By signing my name below, I certify that I am 18 years of age or older and that I agree to the above statement.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_