The COVID Conundrum: Will we be better off after the viral fog has lifted?
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Letter from the Editor

The COVID Conundrum

A small, unassuming section of a larger exhibit at the National History Museum of Los Angeles featured a collection of photographs that traced the evolution of humanoid skulls throughout time. It showcased mother nature’s evolutionary artistry and creativity – different solutions for different problems spanning hundreds of millions of years. What caught my eye wasn’t the total number of humanoid skulls (more than I could remember hearing about in school), but that their timelines overlapped. In fact, the exhibit showed that at one time, seven unique species of humans lived at once.

Then it hit me how finitely we view time. As if it was this and then, suddenly, it was that; when in fact we know that change is a lingering handshake from one era to the next.

As part of a scientific community, I find the first Law of Thermodynamics oddly appropriate and comforting for 2020. This law, also known as the Law of Conservation of Energy, states that energy cannot be created or destroyed, but rather it is simply transferred or changed. In a year with what feels like unimaginable loss, it’s comforting to think the aspects of our lives that seem to have disappeared are not actually gone and that forces that seem meant to destroy us actually cannot. These forces are agents of change, and it is our fortune to be among that lasting species of humanoid with the perspective to react and adapt. As one way of living experiences disruption – whether caused by technology, an asteroid or a pandemic – and a new one emerges, the two coexist for a period.

Bill Gates famously said, “We always overestimate the change that will occur in the next two years and underestimate the change that will occur in the next 10.” It is with that in mind that we present this latest issue of Bowman Report. With contributions from seven different experts, spanning multiple disciplines within the veterinary industry, we’ve taken a longitudinal look at the effect of COVID-19 on our professional and personal lives and how those effects will ripple out ahead of us. It is our hope that as change constantly swirls around us, these insights will help you ponder the immediate impacts so we can work through them together and chart a successful course that evolves with our unfolding future.

Ken Bowman
Bowman Report Editor
CEO KVP International
COVID. A word so significant we write it in all caps. COVID has infected and affected us, infiltrating our bodies, our businesses, our politics, our consciousness, our culture. The virus has altered nearly every aspect of our lives and almost every aspect of our profession, from animal sheltering to economics to employment.

Veterinary medicine is deemed an essential service. Early in the pandemic, people scrambled for pet care as they spent more time at home. Veterinarians and team members responded by donning personal protective equipment, endlessly sanitizing and reworking the very structure of their practices.

Pets still command an elevated status. They’re providing a much-needed connection, a lifeline to interaction in this time of oxymoronic social distancing. And their prominence in our society continues to grow. The rise in the human-animal bond is a testament to our industry, which has pushed through the initial pandemic chaos to arrive at the surreal juncture of increased demand for pet health and decreased face-to-face interaction with caregivers.

As individuals and a collective of animal health professionals, we continue to adapt, look back and adapt again. For some, COVID-19 causes a simmering unease quite literally masked by perseverance. Others crane their necks to see the positive opportunities.

The COVID conundrum:
Will we be better off after the viral fog has lifted?

CONSIDER THE FIRST DAYS OF THE PANDEMIC, WHAT’S HAPPENING NOW AND HOW YOU’LL MOVE AHEAD.

Bowman Report presents both these views and more in this longitudinal, industry-wide look at the effects of COVID-19. The experiences and perspectives shared may match your own. They may not. Regardless, take them in. Let them soak. Consider the first days of the pandemic, what’s happening now and how you’ll move ahead. Because COVID marches on. And so must we.
**The COVID Nineteen**

Key insights from leaders in the veterinary industry

1. **Growing pet care market.**
   Any business with a role in the care of pets has an opportunity to expand earnings – everyone from veterinary practices, to pharmaceutical companies that provide products and services that support animal health and well-being, to the pet care industry that supplies food and toys. Distributors also play a large part because they help the flow of goods and services. – **Matthew Salois**, PhD, Chief Economist, AVMA

2. **Care over cost.**
   The calls to our facility never really stopped. They went down a little bit at first, but it was like nobody really cared too much about how COVID might affect their finances. They just wanted their dog vaccinated or spayed or neutered. – **Michelle Rivera**, CEO, Pet Resource Center of Kansas City

3. **Me, myself and you.**
   Now more than ever veterinary hospitals must embrace individual self-care, self-worth and self-confidence. We must surround ourselves with colleagues who understand why this is valuable, so the vision of team wellness will permeate the hospital. – **Rebecca Rose**, CVT, President, CATALYST VetPC

4. **Marketable digital skills.**
   Now is a great time for veterinary professionals to increase their technology skills. Attend the technology sessions at educational conferences. Invite existing and potential technology vendors to conduct educational sessions via Zoom if they can’t physically visit your practice. – **Stacy Pursell**, CEO, The Vet Recruiter

5. **Caring for the food supply.**
   Acknowledging the veterinarians who take care of farm animals is crucial. People always have to eat. So, even in economic downturns, the importance of maintaining the health and welfare of our cattle and swine herds, poultry flocks and other farm animals never goes away. – **Matthew Salois**, PhD, Chief Economist, AVMA

6. **Simplify telemedicine.**
   Many people incorrectly define telemedicine as video, when in reality, 95 percent of telemedicine is still going to be asynchronous two-way messaging and chat. If you look at human health, they’ve been doing telemedicine a lot longer and, outside of the pandemic, video telemedicine is still not over 5 percent of use cases. – **Taylor Cavanah**, CEO, PetDesk
7 Positive policy change.
Rescue groups tend to have strict criteria for who can adopt, but the requirements are a big obstacle for some people. Many organizations relaxed their fostering criteria during the pandemic and, anecdotally, about half intend to keep those relaxed criteria. – David Meyer, CEO, Adopt-a-Pet.com

8 Zoom (and doom?) interviews.
For veterinary practices, conducting in-person interviews nets a better outcome. Candidates will be working in that environment with those people under those protocols on a daily basis. In industry jobs where there’s more flexibility and the opportunity to work from home, virtual interviews work well. – Stacy Pursell, CEO, The Vet Recruiter

9 Accelerated change.
In March, activity from our 2,200 veterinary hospitals increased in one week to a level we would expect from 3,500 hospitals. That helped us scale our systems to prepare for growth. Since then, we’ve added more than 100 hospitals, which underlines how important digital communication has become. – Taylor Cavanah, CEO, PetDesk

10 Tears of joy.
So many pet owners are so thankful for our services during this time. They cry in the parking lot during curbside appointments, saying they don’t know what they would have done without us. That’s amazing. It’s so rewarding that we are fortunate enough to continue helping those most in need, especially now. – Michelle Rivera, CEO, Pet Resource Center of Kansas City

11 Well-being resume builder.
When employers post job listings, some include that they’re looking for someone who has the capacity to bring the element of work-life balance to the team. COVID-19 may push us in the direction of more businesses valuing employees who appreciate a culture centered around work-life balance. – Rebecca Rose, CVT, President, CATALYST VetPC

12 Call pets a taxi.
The COVID-19 pet adoption boon continues. There are plenty of adoptable pets in shelters, just not in all shelters. More affluent, urban towns are experiencing a shortage of adoptable pets, while southern states, for example, are not. Our next issue to tackle is distribution of pets – getting adoptable pets out of the saturated areas into the low-availability areas. – David Meyer, CEO, Adopt-a-Pet.com
15 **Maintain practice workflow.** The implementation of more digital services is not going to change a veterinary practice’s workflow model. Practices do not need to hire a veterinarian who’s just doing video chat calls all day long, for example.
– **Taylor Cavanah**, CEO, PetDesk

16 **Collaborate for higher employment.** As more pet owners face layoffs, the veterinary profession would benefit from focusing less on competition and more on elevating the industry as a whole. This will provide better access to pet care and keep veterinary employment rates high.
– **Stacy Pursell**, CEO, The Vet Recruiter

17 **Shut down, spruce up.** We’ve been planning to remodel our surgery unit but couldn’t see how we could stop services to get it done. One silver lining of the pandemic is that we were able to use grant money to take on the remodel while services were suspended. With the revamped suite, our goal is a minimum of 70 surgeries per day.
– **Michelle Rivera**, CEO, Pet Resource Center of Kansas City

18 **Looming pet relinquishment?**
When the shutdown started, fewer people were adding pets into our Rehome program, which facilitates peer-to-peer rehoming. Meeting people for pet introductions just wasn’t safe. The Rehome numbers are back, and we expect them to continue growing.
– **David Meyer**, CEO, Adopt-a-Pet.com

13 **Pet evictions.** Rather than being concerned that more people won’t be able to afford their pet’s care, I’m more concerned with people being dislocated from their current living situation. People may be increasingly moving into smaller apartments or roommate situations where they’re not allowed to keep pets.
– **David Meyer**, CEO, Adopt-a-Pet.com

14 **Demand for veterinarians.** Even before the pandemic, practice owners would say their biggest challenge was finding the right veterinarian to fill an open position at their practice. That challenge has certainly been compounded by COVID factors, but the situation is still not what an economist would call a shortage.
– **Matthew Salois**, PhD, Chief Economist, AVMA

19 **Ready for round 2.**
The hard-hitting, fast-morphing COVID-related mandates have leveled out for veterinary practices; however, practice managers may need to anticipate that veterinary practices might be curbside for much longer than originally thought. Anticipate a marathon, not a sprint.
– **Rebecca Rose**, CVT, President, CATALYST VetPC
Global Desk:

Perspective from Brazil

As in the United States, veterinary practices in Brazil are adapting and experiencing increased demand after an initial downturn, says Cleber Fontana, a veterinarian who serves as operations manager for Pet Care, a network of 24-hour veterinary hospitals in the state of São Paulo and Rio de Janeiro. Dr. Fontana is optimistic about the future.

“I believe that veterinary medicine will adapt satisfactorily to the challenges of the moment,” Dr. Fontana said. “We deal with an essential service to society within the context of health, not only for pets but also for people. Therefore, it is necessary to reinvent processes that allow the activity to function, offering safety to the client and staff, without compromising excellence in patient medical care.”

Dr. Fontana and his team rethought the hospital’s operational flow, since the employees were reduced in alternating scales to avoid agglomerations. They implemented increased safety measures and made changes, including offering curbside appointments. This prevented hospitals from needing to reduce the services offered; however, customer relations have been impacted.

“We are a Latin people, warm and kinesthetic,” Dr. Fontana said. “The use of PPE brings out an impersonality in care that is not usual in our practice.” To maintain a close doctor-tutor relationship from an informational perspective, Dr. Fontana’s team has increased follow-up phone calls and post-appointment e-mails. Visits by animals admitted to the hospital have the option of being made via video call.

“In Brazil, however, veterinary services cannot be done via telemedicine, as there is no regulation for it,” Dr. Fontana said. “If well regulated, telemedicine would facilitate cases in which remote monitoring would meet the need, such as in stable chronic cases. At the beginning of the pandemic, these cases stayed away from the hospital, but they presented later either with some aggravation or lack of control. Telemedicine would ease that.”
The economist’s view: Embrace the chaos

We will get through this. We will be better as a result of this. We’ve got a tremendous opportunity to reimagine what we do, to rethink every assumption and put others first.

By Matthew Salois, PhD, Chief Economist, AVMA
Opportunity to Be Better

Spring 2020: Treading

COVID-19 is the largest disruptor we’ve seen in our profession. We were already living in a time of disruption with conversations around the role of telemedicine and artificial intelligence in our industry. The demographics of our industry are changing with boomers retiring in droves and millennials joining in equally large droves every year. We’re well past the tipping point of becoming a female-dominated profession. We knew we were living in this sea of change and then COVID-19 came along and made all that change look small.

Fall 2020: Swimming

With change comes the opportunity to ask, “What can I do better?” A lot of practices continue to answer that question very successfully. COVID-19 has put veterinary practices to the test and they’ve passed with flying colors. Other industries and sectors like travel, entertainment, transportation are really struggling, and once again, veterinary medicine has shined. There are some war wounds, but by and large, we’re coming through this a more successful and brighter profession.

Consumer Spending

Spring 2020: Anticipating a fall

I’m closely watching income and unemployment, because they affect consumer spending, which comprises the bulk of our economy, including veterinary care. More than 40 million Americans and nearly one in four households have had a disruption in their financial security. We don’t yet know the long-term impact to our industry.

Fall 2020: Enjoying temporary increases

The pet and veterinary sectors are thriving, but the surge – and its primary causes – will not last. First, increased discretionary income will plateau. In the summer, a number of households found themselves with more cash from the one-time stimulus and increased unemployment benefits coupled with reduced spending on other things like entertainment and
travel. Next, pent-up demand will soon be fulfilled. Pet owners will soon be caught up on the veterinary appointments they deferred through the first four months of the pandemic. Finally, pet adoptions increased, which sent new pet owners into an initial spending mode that will level off.

Leading indicators point to challenging times ahead. Food pantry lines are getting longer. Foreclosures and evictions are increasing again. The unemployment rate is high. Back-of-the-napkin math says 65 percent of the unemployed are pet owners. If they’re not facing financial uncertainty now, they may soon be facing difficult decisions about how to put a roof over their heads and pay for food.

**Income, Labor & Efficiency**

**Spring 2020: Hurry up and wait**

Practices have made a tremendous pivot to be successful in an environment where they’re eliminating or mitigating the physical presence of clients in their practices. However, with offering curbside care, leveraging virtual medicine options and putting precautionary measure in place, practices have become less efficient, which makes them feel more busy. With practices seeing fewer patients due to quarantining measures and lower productivity, many practices are worried they need to let staff go. I advise against that unless you absolutely have to, because business will come back.

**STATS**

- Average cash shortfall for April $17,000*
- Average anticipated cash shortfall for May $23,000*

**Fall 2020: Be patient – for the most part**

Economic recovery from COVID-19 will take our industry through a series of peaks and more valleys, so now is the time to build a reserve of cash. I suggest delaying large capital investments. If you want to remodel your veterinary practice, for example, make that a future project once we get through the economic uncertainty. I also advise caution when making long-term decisions, such as staffing. When a practice hires a veterinarian or team member, that’s a long-term decision that affects the practice’s finances and ability to be nimble. If you make hiring decisions based on the volume your practice is experiencing right now, your situation could look very different in six months. Business must be set up to adapt to changing economic trends.

Don’t wait to examine your operations. Try to improve efficiency and productivity with existing resources. If your practice is still using curbside care as a band-aid, you must pivot again and optimize that workflow. Make those processes work as effectively and efficiently as possible, because they’re likely here to stay for at least a year – if not forever.

**Regional Effects**

**Spring 2020: Coasts most compromised**

The economic impact of COVID-19 correlates with where the virus is hitting. In the March to April timeframe, California, New York and northeastern
states like Connecticut and New Jersey were hit hard. That translated directly into negative impacts on veterinary practice revenue and visits. Part of it was state measures intended to protect people, but there’s also a behavioral element. People are aware of the news, so they’re less likely to go out and spend money. The other aspect is unemployment, especially in areas where entertainment and tourism are at the heart of the economy. Job loss affects people’s pocketbooks, and a lot of the unemployed are pet owners.

Fall 2020: Normalization across the U.S.

The hardest-hit areas are still limping, but they’re through the worst. New York, in particular, has stayed the course with a slow and steady recovery. California on the other hand has been dealing with virus flare-ups then the fires came along. We don’t yet know how those two aspects will affect the veterinary sector. For some states, like Arizona, we have a solid picture of the COVID-19 impact on the veterinary sector. By the time the virus started impacting Arizona, the situation was more known. People were less afraid and even somewhat desensitized.

The Future

Digital practice

E-commerce and automation are here to stay. We’re going to see an increased value placed on physical distance, because the virus isn’t going to magically disappear. Even when we have a COVID-19 vaccine and more efficacious treatment options, there will be struggles with distribution and people will remain concerned and cautious.

What does that mean for veterinary practices? You must adapt to consumer behavior. If you don’t have an e-commerce option, you must implement one. Without it, a more equipped entity will come along and take your clients. If you think curbside care will stop in six months, think again. A portion of your clientele will always want it as an option. If they can’t get it from you, they’ll get it from somebody else.

Matthew Salois, PhD, is chief economist and head of the Veterinary Economics Division for the American Veterinary Medical Association (AVMA). He worked in private industry, government and academia before joining the AVMA in 2018.

*AVMA COVID-19 Veterinary Survey, April 2020.*
The technology entrepreneur’s view: Keep pushing forward

COVID-19 has accelerated telemedicine and that will be a huge boon to the veterinary industry in 2021.

By Taylor Cavanah, CEO, PetDesk

Digital client service

Spring 2020: Spike in pushing out info

Historically, the veterinary industry has been slow to adopt technology. Most veterinary practices have implemented a few digital services but haven’t felt the need to be cutting edge. During COVID-19, clinics are realizing how much technology can help, especially during these tough times.

They’re coming to understand that the focus is not only on improving their technology, but also focusing on how that technology enables better connection with clients. For example, instead of only sending transactional, one-way messages, practices must consider how to
engage in full conversations and
to complete full medical triage or
diagnoses through technology.

**STATS —**

3x more PetDesk practices using two-way messaging the first two months after COVID

122 two-way messages sent per clinic per week in June compared to 50 per clinic per week pre COVID

8x more mass messages sent by PetDesk practices in March than February

33% more messages opened by clients

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Fall 2020: Avoiding a backslide

When COVID-19 first hit, practices were scrambling to service clients in a world of decreased in-person interaction. Understandably, they didn’t spend a lot of time thinking about how to best use digital tools and integrate them into the workflow. The danger now is that practices will go back to working the way they did before. Consumers expect digital service. If a veterinary practice goes back to pre-pandemic technology levels, clients will go elsewhere.
Rather than focus on the future state of telemedicine, each practice should focus on implementing basic proven use cases for individual services. Curbside is a great place to start. Think through every step of the process and how you can remove barriers for your team and your clients in each step, such as using two-way messaging instead of phone calls. The average curbside appointment requires more than five phone calls. That’s a lot of time for practice team members to be devoted to talking on the phone. With two-way messaging, clients don’t get put on hold, team members can communicate with multiple clients at once, and time per individual conversation decreases. Once your practice has optimized your curbside process, move to the next scenario, expanding technology use as you go to continue adapting to the new normal.

**STATS** —

51% of customers prefer text-based messaging because they can multitask.

73% of customers report being satisfied with service handled via chat, versus 61% for email and 44% for phone.

Of the hospitals trying PetDesk two-way messaging for free, 84% opted into continued service.

**Video Telehealth**

**Spring 2020: Meeting an urgent need**

PetDesk worked around the clock to expedite the launch of our video chat feature. About one month in, usage is following the 80/20 rule where 80 percent of clinics are using it sparingly and 20 percent are using it more often. Anecdotal feedback about the lower use is that practices are opening back up and think they don’t need it anymore or that the absence of payment integration makes it more difficult to use.

**Fall 2020: Momentary decrease**

Use of video chat is trending down and will continue to go down throughout 2020, but that will be a head fake. It will go up in 2021. To better serve veterinary practices, PetDesk and companies like us will expand their offerings to be an all-encompassing communication platform. Our video chat feature is about an additional $70 a month. On the other hand, some companies only offering video chat have fees over $250 a month or they charge for every transaction. Video chat volume isn’t high enough for that model to work. As such, companies will begin adapting to practices by offering video chat as one feature of telemedicine and a digital communications platform. That means practices can streamline their vendors and choose based less on features and more on customer service. Companies offering the best service will work directly with the practice
to customize the communications and telemedicine experience for their workflows and client needs.

The Future

Digital communications get catty

Cats will emerge as one of the use cases for successfully implementing digital communications. We’re looking at how to build our PetDesk platform to focus more on cats, not necessarily in terms of features but in terms of workflow and proven use cases. Step one is optimizing digital information and communications.

For example, a veterinarian wouldn’t necessarily use video chat differently for a dog than a cat, but a lot of practices don’t know their dog-owning clients also own cats. With the PetDesk app, most pet owners enter all their pets. If a dog owner enters a cat into the app, we can share that information with the practice. On the flip side, if the practice knows the client owns a cat but there’s no feline health activity recorded in the app, we can flag that. Then the practice can reach out with health reminders for the cat.

These basic measures could add 20 or 30 percent to a practice’s appointment volume. With that, the next step would be for the practice and communications company to work together to look into how incorporating more digital features into the workflow could continue to grow services with cat owners.

The Future

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Taylor Cavanah founded PetDesk in 2013, building it to become the leading client communication software for veterinary practices. He serves on the Veterinary Virtual Care Association Advisory Board and has worked as a technology entrepreneur for 15 years.


The recruiter’s view: Job seekers win

Now is a good time to open yourself to new opportunities. Companies, including veterinary practices, are hiring and many will be at their best, because innovation takes place when there’s a need for something different.

By Stacy Pursell, CEO, The Vet Recruiter
**Hiring**

Spring 2020: Robust job market

Even before COVID-19 hit, the veterinary profession was in a tight labor market, tighter than the overall employment job market. Veterinary practices are still dealing with a talent shortage, so it’s still a healthy job market. I’m still placing candidates in veterinary practices and in animal health companies, with about 80 percent of interviews being virtual via Zoom, Google Meetings, or other platforms. Practices are getting creative. Those hiring in veterinary practices are creating videos of their practices to share with candidates, and one practice even interviewed a candidate through a drive-through window. Other practices have put hiring on hold until they’re able to hold in-person, working interviews.

Fall 2020: Even more robust job market

Veterinary practices are busier than ever, and so am I as a recruiter. The talent shortage is even more prominent now. Veterinary practices have told me they’ve turned away new clients or fired existing ones because, without more doctors, they can’t keep up with increased demand for services.

When hiring candidates, veterinary practices are returning to face-to-face interviews. On the industry side, Zoom interviews are still the norm because so many companies are still asking employees to work remotely. In-person interviews are more important for veterinary practices because the employee will be working in the practice environment.

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**STATS —**

18% expected job growth in the veterinary industry between 2018 and 2028*

Before COVID:

4% National Unemployment Rate

0.5% to 1.5% veterinary profession unemployment rate

— Source: Bureau of Labor Statistics
Practices have strong COVID-19 measures in place, so candidates are comfortable following those protocols and visiting the practice.

October 2020:
7.9% National Unemployment Rate (nearly twice the rate before COVID)
1.0% to 3.0% veterinary profession unemployment rate*
— Source: Bureau of Labor Statistics

Telemedicine

Spring 2020: Remote veterinary positions

More candidates have expressed an interest in working from home, and telemedicine could afford that opportunity. I just received the first request to help place a veterinarian to practice telemedicine from home, and I expect to see more jobs like that become available. While the majority of clinical practice veterinary positions will still require doctors to work in the practice to see patients, the telemedicine option is attractive to some. One candidate I recently spoke with has young children at home and was interested in a work-from-home position so she could spend less time commuting and more time with her family.

Fall 2020: Requirement for top talent

I placed a veterinarian in the telemedicine position that was open this summer, and the practice is planning to hire additional telemedicine positions once they’ve determined how to make the platform best work for them. However, the vast majority of veterinary positions are still traditional roles. The telehealth technology will come first. As veterinary practices adopt the technology, the telehealth positions may start to increase.

From a recruiting perspective, veterinary practices will start losing talent if they’re not open to using more technology and digital tools. Top veterinary talent will be deterred from working at practices that don’t evolve. Instead, they’ll choose to work at a practice that not only has the technology in place but is also implementing it into workflows and improving the practitioner’s work experience.

Professional Decorum

Fall 2020: Bad times don’t excuse bad behavior

These are difficult times and we need to give people grace, compassion and flexibility. We’re all in this together and things will go wrong for each of us – clients will need to reschedule, children will interrupt Zoom calls, technology will fail and the list goes on. Needing some forgiveness for the unexpected and unavoidable, however, is different from using the pandemic as an excuse to behave poorly and unprofessionally.

Veterinary practices tell me clients’ rude behavior has increased during the pandemic. Clients are demanding to get appointments immediately, even though the practice is at full capacity. They’re hurling insults at maxed out veterinarians and staff, which causes even more stress for the practice team. This is unacceptable.

In remote working situations, I’ve witnessed first-hand people who aren’t presenting themselves professionally. They’re taking calls in a loud environment or while
laying in bed, they’re obviously multitasking or they haven’t brushed their hair. Even when working from home, people need to consider how they’ll be perceived and whether their interactions will be effective

The Future

Lower-cost care

The industry is already creating new models focused on providing low-cost services, and there’s value in continuing that innovation. I also encourage veterinarians to be open to working in low-cost clinics, because my biggest concern for the veterinary profession right now is layoffs in other industries. If people aren’t getting paychecks, this will further fuel demand for low-cost veterinary care.

There is a market for all types of practices serving all types of pet owners. Some pet owners will pay for concierge service and the most advanced, highest level of care, while others will be interested in foundational, high-quality, low-cost care. A large percentage of pet owners don’t go to the veterinarian at all, so we should continue to elevate the industry to reach all types of pet owners. Practices in each type of model will need to hire talent, so there will be jobs for veterinarians and staff in all of the models.

Some veterinarians are not attracted to the lower cost model, and I’m trying to better understand why. Low-cost practices deliver high-quality medicine and usually offer compensation similar to other veterinary practices. Lower cost clinics are sometimes wellness only, so some veterinarians may miss the opportunity to perform surgery, for example. But there’s certainly a need and a demand for this type of care, so there will be plenty of job opportunities for veterinarians at low-cost clinics.

*Based on the doubling of the National Unemployment Rate during the same time period. Although there are no concrete unemployment numbers in the veterinary profession on a month-to-month basis, a doubling of the unemployment rate could be considered a worst-case scenario.

Stacy Pursell founded The VET Recruiter in 2004. Today, The VET Recruiter is the leading U.S. search firm in the animal health and veterinary industry. Stacy is the only Certified Personnel Consultant and Certified Employee Retention Specialist in the animal health and veterinary industry, and she has personally placed more people in the industry than any other U.S. recruiter.
The low-cost clinic’s view: Maxed out but maintaining

If we can get through what we’ve gone through so far, we can get through anything. COVID-19 has forced us to think faster, become more responsive and accept change quickly.

By Michelle Rivera, CEO, Pet Resource Center of Kansas City

Staffing

Spring 2020: Rehiring

On March 14, we decided to cancel appointments and suspend all services. We laid off 18 people that day, because we didn’t know what support we would receive. My FEMA disaster certification kicked in, and I went into disaster mode. We saw ourselves as a disaster center for pet owners, providing food, acting as a referral center and just being there for our community.

At the same time, we started applying for grants and trying to obtain as much money as possible. I really thought
we would be forced to close our doors forever. But the lights kept coming back on, so to speak. Now with the Paycheck Protection Program loan, we’ve brought back staff, all of who were eager to return, and have planned ways to do business without jeopardizing safety.

Fall 2020: Seeking veterinarians, stat

We need more veterinarians to meet demand. We’re desperately trying to hire doctors, but we’re unable to fill the positions. Low staffing is crippling our ability to provide the needed care and cope with the necessary logistical changes of curbside appointments. We’re facing a financial situation that does not meet the budget, per se, we’ve operated on in the past, because we can’t generate enough business with the number of veterinarians currently on staff.

**Appointment Volume**

**Spring 2020: At capacity**

Our wellness clinic reopened in May. Now we’re seeing 65 wellness patients a day and we’re booked out two weeks. We’re building up surgery numbers to pre-COVID levels, but we have over 3,000 pets on a waiting list. Our staff is revamping everything to try to institute a self-serve process for clients to book their own wellness and spay/neuter surgery appointments to take pressure off our call center.

**STATS —**

- Pre-COVID: Pet Resource Center averaged 250 appointment request calls per day
- During COVID: averaging between 350 to 400 appointment requests per day

**Fall 2020: Over capacity**

More than 4,000 pets are on a waitlist for spay/neuter surgeries and we estimate about 14,000 pets are overdue for vaccinations because of the backlog of appointments after we suspended services. Our call center cannot contact 4,000 people while also handling new calls, so we’ve implemented a texting service.

We’ve texted everyone on the wait list to let them know they’ll be put on the schedule in the order of when they initially called our organization. We’re texting about 400 of these pet owners every Monday to let them know the week ahead is their opportunity to schedule their pet’s appointment. We explain that if they don’t call this week for an appointment, we’ll move them to the end of the waiting list. If we’re lucky, we’ll get back to everyone by
have time to deal with the no-show rate, which is about 10 percent every day. A few pet owners have said they don’t have the money right now, and we ask them to call back when they do. That’s difficult, but we’re trying it for a couple of weeks so we can better handle the masses of people who need services. With unemployment on the rise, some pet parents may start to be more financially affected, and that may impact our surgery appointments.

Fall 2020: Slow and steady
Pet owners continue to seek wellness care and spay/neuter surgeries at record numbers. We’re maintaining our pre-pay requirements, which the vast majority of pet owners understand and respect. The majority of our clients wouldn’t be able to afford care at a traditional veterinary practice. They love their pets, but for many, a sick pet would mean they’d need to surrender that pet to a shelter because they can’t afford the needed care. That’s why our goal is to continue growing our partnership with for-profit veterinary clinics.

Estimates are that we refer about 50 sick or injured pets a month to local private practices. Our organization pays the private practice for those referred services through a special program. We also encourage our wellness clients to establish a relationship with a full-service clinic, letting them know that vaccinations are a great start, but they’re only a part of pet care. The hope is that a percentage of our wellness clients do go to a private practice but, again, we’re serving the clientele who can barely afford base care.

The Future
Care that comes to you
Before COVID-19, we held off-site clinics in the lowest income neighborhoods. Now we’ve switched to offering mobile services curbside outside people’s
homes. We equipped one of our vehicles with a surgical table and light and all the equipment the veterinary team needs to complete vaccinations and spay/neuters. We target those pet owners who lack transportation, who aren’t physical able or who aren’t able to pay. Our mobile services are subsidized by company sponsorships, so we offer those services at an even lower price than in our clinic.

One positive aspect about the mobile clinics versus our previous off-site clinics is that we’re able to see the pet’s situation and immediately provide the pet owner with additional resources if needed. We might find that there are other pets in the home that need service or that the pet owner needs additional education about caring for their pets.

We’re already running mobile clinics two or three days a week, and we’re preparing to increase them to six days a week Monday through Saturday. We’re also reinstating our off-site vaccination clinics so we can safely vaccinate between 100 and 150 pets in just a couple hours. We’re hoping to start offering pop-up clinics where we announce same day that we’ll be in a neighborhood for a few hours.

Michelle Rivera has been in the animal welfare field for more than 20 years, founding Pet Resource Center of Kansas City (formerly Spay and Neuter KC) in 2002. Today, Pet Resource Center is Kansas City’s largest targeted spay and neuter program, with the mission of addressing all variables of pet homelessness.
The adoption advocate’s view: Cautiously optimistic

Demand for adoptable pets is very strong and we haven’t yet seen mass relinquishment, so it’s fair to say that COVID-19 hasn’t been too bad for homeless pets.

By David Meyer, CEO, Adopt-a-Pet.com
Pet Foster Care

Spring 2020: From shelter to foster home

We help thousands of shelters and rescues find homes for the pets in their care, and the March stay-at-home orders led most shelters and rescues across the country to make a big push to place their pets in foster homes. They knew that they’d have to limit shelter operations and that people wouldn’t be able to come in to adopt, so their goal was to get the pets into home situations. Overall, about three quarters of all pets in shelters were suddenly moved into foster homes, and we think a lot of them are going to stay there until they are adopted.

More pets living in foster homes is a great scenario. It’s definitely better for the pet because it decreases risk of disease and behavioral issues, plus the foster home is able to provide more insightful information to potential adopters, such as whether a dog likes to ride in the car or whether a cat is good with children.

Fall 2020: From foster to forever home

The good news for pets during COVID-19 is how many communities across the country stepped up to foster. Many pets are being adopted by their fosters. What’s more, this crisis is making people more aware of the need for pet fostering in general, so I think we’re going to see a more community-oriented approach to animal homelessness. Fostering ties people to the shelter and gives them personal responsibility. So, rather than animal homelessness being a shelter’s problem to solve, it becomes a community’s responsibility. The trend toward more pets in homes – foster or forever – is positive.

STATS —

<table>
<thead>
<tr>
<th>Cats in foster care</th>
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<tr>
<td>2019: 30%</td>
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<td>2020: 36%</td>
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<th>Dogs in foster care</th>
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<tr>
<td>2019: 20%</td>
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<td>2020: 28%</td>
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— Source: Pethealth Inc. animal management software data

Adoption Interest

Spring 2020: Skyrocketing demand

In April, a majority of adoptable pets are in foster homes. Shelters are limiting their operations, which means they aren’t trying to bring in more pets. If you need to relinquish a pet, you have to make an appointment. If you want to adopt, you either can’t
or need an appointment. Basically, shelters went dark for many of their public-facing activities. At that exact moment, Adopt-a-Pet.com website traffic almost doubles.

What’s the reason behind the spike? Is it bored people stuck at home searching the internet? Is it people who would’ve visited a shelter in person now searching for a pet online? Is it people who were planning to adopt a pet in a month or two who are now wanting to adopt sooner since they’re working from home? Or is it people who weren’t looking for pets at all now suddenly looking?

Our best guess is that the answer is a bit of “all of the above,” but based on the actions people are taking on Adopt-a-Pet.com, there’s a real increased interest in pet adoption. People are not only visiting our website more often, but they’re also giving us their email, signing up for new pet alerts, favoriting a pet and inquiring with shelters. That’s absolutely real adoption-related traffic.

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<th>STATS</th>
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<td><strong>April 2020:</strong></td>
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<tr>
<td>Total Adopt-a-Pet.com users: more than 90% increase to almost 3.2 million users per week</td>
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<tr>
<td>Users signing up for New Pet Alert emails: more than 166% increase to almost 110,000 signups per week</td>
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<tr>
<td>Users sending New Pet Inquiry messages to shelters: more than 190% increase to about 47,000 messages per week</td>
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Fall 2020: Up for good

Our website traffic has leveled off at about 50 percent higher than it was before the pandemic. Anecdotal evidence shows COVID-19 has driven offline behavior online. In other words, more people who would’ve walked into their local shelter are visiting our site first. I do believe there are also legitimately more people wanting pets than in the past; although, I have no reason to think that increased interest is in pet adoption specifically rather than in pet acquisition from any source.

Fundraising & Revenue

Spring 2020: Waiting for a fall

Adopt-a-Pet.com is a non-profit organization, and we have not seen a drop in donations. We posted a donation request for emergency funds we could distribute to shelters. After a couple of months, we started using donations to support our infrastructure, because our operating expenses went way up with the spike in use of our site. We’re grateful that we also get significant funding from corporate sponsorship from Nestle Purina, Chewy.com and Elanco Animal Health. Pet food and animal health companies also support shelters, so it’s my understanding that, overall, shelter funding is not taking a strong dip. I do think shelters and rescues are worried about the future and the effects of a possible economic downturn. Lack of revenue is perhaps the biggest concern. With shelters
limiting in-person visits, they’re not collecting as many adoption fees and pet owners aren’t making purchases in their brick-and-mortar retail shops.

Fall 2020: Social distancing downer

There has been a reduction in shelter revenue. We don’t have any data to quantify the extent of the reduction, but shelter veterinary clinics and retail shops have taken a hit. Shelters tell us their fundraising is either decreasing or they’re concerned it will be down overall by year’s end. One of the main challenges with fundraising is the inability to host an in-person event. Many larger shelters organize annual 5K runs or auction events with dinner, and the current COVID-related regulations aren’t allowing for those events to take place.

STATS —

More than 50% of Adopt-a-Pet.com-member organizations surveyed report major limitations in fundraising

The Future

“Virtual” adoptions

Technology is always moving ahead, and COVID-19 has fast-forwarded the progress. In terms of pet adoption, we’re considering whether it’s possible to limit an adopter’s time in a physical shelter by digitizing even more of the adoption process. We were looking into such a system before the pandemic, and now it’s looking like more “virtual” adoptions could be even more useful.

As the pandemic has continued, shelters have noticed that the combination of fewer pets and people in the shelter has cut down on the incidence of disease. It’s no surprise that fewer animals living together in kennels decreases the spread of diseases like parvovirus and distemper. What’s interesting is that shelters have learned that fewer people walking through the shelter and petting multiple animals also reduces disease spread. The thought is that connecting adoptable pets with people outside the shelter could result in both short-term and long-term benefits.
The wellness expert’s view: There’s always hope

I like to believe COVID-19 has pushed the momentum for well-being. I want veterinary medicine to be a more sustainable, healthy career for everyone on the team, and I hope the pandemic pushes the inclusion of wellness as a core value.

By Rebecca Rose, CVT, President, CATALYST VetPC

Regulations and Process

Spring 2020: Stress for practice managers

Practice managers are more common in veterinary hospitals than ever before, and right now they’re handling more change than ever before. They’re implementing fluctuating local, state and federal mandates. They’re figuring out how to apply for the Paycheck Protection Program. They’re looking for ways to keep the practice afloat financially, such as ramping up telemedicine, which comes with its own set of regulations and implementation challenges.

Employee attendance is more complicated now, too. Practice managers are organizing the re-entry of team members amid health and discrimination concerns, which comes with a higher likelihood of employee lawsuits. I recommend veterinary practice managers evaluate and update their employee handbook, focusing on understanding what’s in new state and federal regulations and how they move forward within the law.
Fall 2020: Stress for team members

Practice managers must consider how high unemployment and changing household situations are affecting their team. Unemployment can hit veterinary team members heavily because a large majority are not the main bread winners. Many team members are managing children at home who need extra educational support.

Thinking people can remove personal life from work is ridiculous. If there’s an ill child at home or bills that aren’t getting paid, these things impact performance. That’s why employee assistance programs (EAPs) exist. All veterinary practice managers need to build up their EAPs and remind team members on a monthly basis that EAP benefits are in place and available to be used.

**Business Values**

Spring 2020: Changing our focus

For practice managers, the pandemic will provide an opportunity to revisit the foundation of our teams. We can go forward to the basics in our values, vision and mission. I recommend this regardless of whether the team is a corporate or private entity.

The pandemic will certainly shift your team’s values. A person’s health and well-being are first and foremost. They’re wondering whether they can go to work, whether they have to go to work, whether they’re getting exposed. They’re worrying about the health and social impacts on their children. What are team members valuing as families and what are we valuing as veterinary teams?

Fall 2020: Healthier client interactions

Resilience and empathy are rising to the top of teams’ values. Practice managers are reaching out asking how to help their teams manage clients’ anger. Just like team members, clients are experiencing anxiety in their lives, which can lead to anger.

Role playing is the perfect training for these situations. People roll their eyes at it, but role playing equips teams with the emotional intelligence to handle situations they will definitely encounter. Practice finding a point of
empathy with angry clients, such as you’re both here for the pet. Conflict-resolution training is also important, so team members understand it’s ok to set boundaries while acknowledging that a client may be coming from a place of anxiety and uncertainty.

**Importance of Well-Being**

**Spring 2020: On the backburner**

Well-being is not foremost in most practice managers’ minds. They’re thinking about maintaining caseloads and how to figure out policies and protocols.

Placing personal well-being first is difficult, but being selfish in this sense is perfectly fine. Our veterinary teams are very much caretakers and caregivers in our core, and we have to put special emphasis on saying, “Yes, I’m filling my cup in order for me to be able to overflow it to others.”

**Fall 2020: Economic and mental value**

The American Veterinary Medical Association Chief Economist, Dr. Matt Salois, is writing about the pandemic impacting our teams’ well-being. (See more of his thoughts on page 14 of *Bowman Report.*) We’ve always felt in our guts that if our teams are healthy, our hospitals are healthier.

Our veterinary teams are in dire need of sustainability in terms of health and career longevity. I pray COVID-19 will result in a valid, actionable well-being conversation and that at this time next year we will be able to say that our teams are healthier.

**STATS —**

Companies using employee well-being programs saw an average of:

- 4.5% yearly productivity growth in the two years following launch of the program, compared to 0.1% growth in the two years preceding implementation of the program


**The Future**

**Well-being KPI**

Companies track key performance indicators (KPIs) like customer retention and website traffic in order to measure whether their business is healthy. But businesses won’t be healthy without healthy employees. That’s why I recommend each business, including veterinary practices, set a KPI in team well-being. Well-being is not intangible. On the contrary, it is measurable through tangible KPIs, such as hours of sleep, physical activity level, water intake, healthy diet and so on.

This topic ignites me and I’m on a mission to get companies and veterinary practices ignited about it too. Of the 40,000 veterinary hospitals across the U.S. and Canada, very few track well-being. Some track employee turnover and absenteeism because they understand how high numbers in these areas affect the bottom line. Similarly, the industry must help practice managers understand the tangible business benefits of wellness and how they relate to practice profitability and client satisfaction.

One place to start is a partnership between industry and private practice. Key account managers (KAM) at an animal health company could choose a few top veterinary practice accounts to partner with.
The industry partner could present 10 options for well-being KPIs, asking the practice team to choose five.

After six months of tracking the well-being KPIs, the KAM and team could evaluate success and any changes that might need to be made. After a year of tracking, the KAM and practice manager will have collected hard evidence of how well-being impacts the team and the business. I have no doubt the results will be positive for team members’ happiness and the practice’s bottom line.

Rebecca Rose, CVT, founded CATALYST Veterinary Professionals in 2014. She is a certified career coach, worked in private practice as a veterinary technician and practice manager for over 20 years, has sat on industry councils, and served as President of the National Association of Veterinary Technicians in America in 2016.

Resource Library

Visit catalystvetpc.com/bowman-report-veterinary-wellbeing for free tools to help veterinary practice managers improve well-being for their business and their teams. You’ll find information on:

- Creating effective Employee Assistance Programs
- Establishing a wellness key performance indicator
- Coaching teams in professionalism, efficiency and efficacy
- Designing and delivering interactive, informative team workshops
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