

# **Delegation and Empowerment- The Nuts and Bolts of the Manager's Job and the Owner's Role**

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I have created 4 interactive and unique workshop-like presentations discussing how to optimize the Owner / Manager relationship. Whether or not you are attending with or without your owner and/or manager you will be engaged, energized, and motivated to going back to your own clinic and taking the next step to moving forward. Our 4 Categories of discussion include:

1. Creating and Understanding the Roles of the Owner & Manager
2. Creating a Cohesive Team with each other and in our practices
3. Directing the team's efforts to Profitability
4. Strategic Planning: Preparing for Success

I am often asked by practice owners around the country, "What is it the practice managers do?" or "What is it they are supposed to be doing?" Great questions. First let me start by saying the title of practice manager is the most over and under-utilized title in veterinary medicine in my opinion. While I could quote Webster's definition or even management books from our own industry; it can be simply put: As the owner, the role of the manager is whatever you dictate it to be. With that said, we are lucky to have many pioneers and many wonderful organizations that have added a bit more structure to it. But even with all that organization and definition, it is still up the owner(s) on who, what, where, when, and how management/leadership tasks will get accomplished. Owners, you will find this process much easier if you sit down and have discussions with your current or perspective manager. This should be a discussion of what are the needs and wants of the owner, the practice, the staff, and ultimately the clients and pets the clinic serves.

Once a manager or management team is put together it is vital each know their roles and responsibilities. In addition, the ability to prioritize projects, tasks, and responsibilities becomes an ongoing mission that needs to be discussed together regularly. In our first segment, we will evaluate how to create cohesive lines of responsibility, how to communicate effectively with each other to maximize efficiency and productivity. We will learn how and when owners need to delegate and what to do when the staff attempts to go over the manager's head.

We discuss the weekly meetings I have with my owners. We will create agendas and learn to hold each other accountable. I have attached the Certified Veterinary Practice Manager's Task List. This has been created by the Veterinary Hospitals Managers Association. This form and much more information may be found at [www.vhma.org](http://www.vhma.org).

## **CVPM Task Analysis Outline**

### **Human resources**

- Recruit, interview and hire
- Manage training and development (including safety training)
- Scheduling
- Manage daily work assignments
- Conduct staff meetings
- Conduct employee performance reviews
- Mediate internal disputes
- Discipline/discharge employees
- Manage employee benefit programs
- Maintaining confidential employee records
- Create/update job descriptions/manuals

### **Law & ethics**

- Regulatory Agencies
  - OSHA/ OSHA Right To Know
  - DEA
  - FDA
  - Familiarity with state, local agencies
  - Monitor hospital violations/dangerous situations
  - Familiarity of state safety regulations
  - Document/report accidents, file appropriate reports

- Ethics
  - AVMA code of ethics
  - CVPM code of ethics
- Contract Law
  - associate / staff
  - client
- Employment/Labor Law
  - Fair Labor Standards Act
  - Civil Rights Act of 1964
    - Sexual Harassment
    - Pregnancy Discrimination Act
    - Americans with Disabilities Act
    - Age Discrimination in Employment Act
  - Family and Medical Leave
  - Worker's Compensation
  - Federal Unemployment Tax Act
  - Employment Retirement Income Security Act
  - Consolidated Omnibus Budget Reconciliation Act-COBRA
  - Health Insurance Portability and Accountability Act (HIPPA)
  - Mental Health Parity Act
  - Employee Polygraph Protection Act
  - Required Department of Labor posters
- Confidentiality
  - Staff
  - Vlient
- Patient

### **Marketing**

- Internal/External Marketing and Public Relations
  - manage brochure production / distribution
  - place ads in publications
  - website management
- Client Services
  - monitor client retention
  - set up/ maintain new client program
  - handle client complaints
  - obtain/report client feedback on service
  - respond to client questions
  - manage vaccine/check up reminder routine
- Client Education

### **Organization of Practice**

- Inventory
  - maintain appropriate inventory system including controlled substance ordering, tracking, security, destruction
  - place and track purchase orders for drugs, uniforms, equipment
- Equipment & Maintenance
  - assure insurance coverage of hospital and equipment
  - contract for repair/maintenance of equipment, building, grounds
  - protocols for daily facility maintenance
  - other
- Medical Record Standards and Compliance
- Technology Systems and Policies
- Liaison to Professional Services
- Hospital policies/procedures/Risk Management

**Financial**

- Analyze practice and financial reports
- Manage payroll
- A/r and a/p
- Budgeting and long-range planning
- Establish and enforce client credit policies
- Fee analysis
- Oversee daily and monthly banking procedures
- Maintain chart of accounts
- Maintain imprest petty cash account