

STRATEGIC TIPS TO START AND GROW YOUR IDEAL SOCIAL WORK PRIVATE PRACTICE

Presented by:

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WHY DO YOU WANT TO START OR GROW A PRIVATE PRACTICE?

If I could create my own schedule, it would look like this:

If I could provide my services in any formats, I would include the following:

My ideal specialty is:

What would help me prevent compassion fatigue and enjoy my life while still practicing social work?

WHY DO YOU HESITATE TO START OR GROW A PRIVATE PRACTICE?

Do you feel that you need to learn more about business, if so, in what areas?

What logistical issues do you need to learn more about?

- Your prices
- How you accept payment
- Your policies and intake/consent forms
- Liability insurance
- The regulations for private practice
- Providing services for extended health benefits
- Whether to connect with insurance companies
- What to do about your own health benefits/insurance

Do you fear or struggle with keeping a steady stream of clients?

WHAT IS YOUR BIGGEST FEAR ABOUT PRIVATE PRACTICE

FEAR:

- You won't be able to replace income and may actually lose money
- You won't have guaranteed benefits or pension
- You won't be able to find or keep clients
- You will do something wrong and there will be consequences with Canada Revenue Agency or Regulatory Body
- Your family won't approve and it will cause relational stress
- FAILURE
- Something else:

SOLUTION: How can you best set yourself up for success in this/these area(s)?

WHAT BUSINESS STRUCTURE DO YOU HAVE SET UP? IS THIS THE BEST ONE FOR YOU NOW?

Sole proprietorship

- Your “company/practice” is you. Most common when starting a practice and earning less than \$75,000 per year.
- File annual personal income tax with the money you charge/earn as your income and the money you spend on your company is a deduction on your personal income tax

Corporation

- Tax advantages when growing a practice and earnings increase
- Your company becomes a separate entity from you which provides additional protection for liability
- You will file a personal income tax return and your corporation will file an annual tax return

My business structure is:

Do I need to learn more about it?

MY PROFESSIONAL LIABILITY INSURANCE

I have the following information to seek professional liability insurance:

- I know what type of business (sole prop/corporation) I have**

- I have/know where to access this. CASW members can access through BMS Group**
<http://www.casw.bmsgroup.com/>

- I need insurance as an individual practitioner or corporation**

- Do I need extra cyber security insurance?**

- Do I have/want students working in my practice?**

MY IDEAL HOURS AND LOCATION

What hours work for the people you want to work with (after school/work, weekends, early mornings)?

What hours work best for my schedule?

What location will be convenient for the people you want to work with? Downtown, near a school, near a hospital or organization. Parking?

What location works best for me?

Do I have the need/desire to rent a full office myself or do I want to sublease or work in another clinic?

MY IDEAL SCHEDULING AND INTAKE/CONSENT FORMS PROCESS

Online Platforms

Pros: can help with setting up systems so your clients can book appointments, fill out consent and intake forms, pay for sessions, receive email confirmations and reminders.

Cons: Pay for platform. Ensure meeting legislative requirements for confidentiality. Deal with any tech support or glitches. Payment may require eCommerce.

Phone and Paper

Pros: Speak with all clients before they book. Control your schedule. No additional fee. No concerns about online confidentiality requirements or tech support/glitches.

Cons: Takes times to book appointments, provide reminders, fill out forms before first appointment. Need alternative way to accept payment.

What am I currently using?

Am I happy with this or do I want to explore other options?

MY IDEAL FEES

1. **Full fee:** in Canada have seen ranges from \$90 to \$200 per session
2. **Sliding scale:** Set aside a certain percentage of sessions you will accept as sliding scale. EXAMPLE:
 - Less than \$30,000/yr = 50% discount (\$90/hr)
 - Between \$30 – 80,000 = %25 discount (\$135/hr)
 - More than \$80,000 0% discount = (\$180 hour)
3. **Rates decided** by insurance provider or programs (EAP)

My fees:

Am I happy with my fees?

Do I have a wait list and if so, do I need to increase my fees?

Am I regulated by an insurance provider/programs and if so, am I happy with this for now?

MY IDEAL LEVEL OF SUPERVISION AND PEER SUPPORT

- Does regulatory body have any supervision requirements for you?
- Are you developing an expertise in an area and would benefit from a supervisor who is advanced in that area/skill?
- Pay for clinical supervision. Do I want it to be scheduled regularly or on an “as needed” basis?
- Do I have/want different supervisors available on “as needed” base for various issues?
- Do I have/want a peer supervision group that meet regularly?
- Do I have/want to connect with other private practice social workers and begin a peer support/supervision group?

MY IDEAL CONNECTION WITH INSURANCE COMPANIES

Pros:

Be on a list of providers to gain new clients

May feel more confident if listed as an approved provider

May supplement your income from self-pay clients

May allow you to provide workplace workshops

Cons:

Controlled rates for your services

Limitations on number of sessions/type of services

Additional paper work

My current work with insurance companies is:

Do I want more or less involvement?

Do I want to learn more about these options?

MY IDEAL SET UP FOR DIRECT BILLING OR EXTENDED HEALTH BENEFITS

Direct Billing:

- There are some organizations that will allow you to provide services and direct bill them, so that clients don't have to pay up front and be reimbursed.
- Non-insurance health benefits provider – [Mental Health Counselling](#)
- [Medavie Blue Cross](#)
- [Homewood Health](#)
- [Lifeworks](#)

Receipts for Extended Health Benefits:

- Client pays you. You provide receipt for Social Work Services (no taxes) and they submit to their insurance company for reimbursement.

My current status as a direct billing provider is:

Do I want to change that and if so, how?

- I have my receipts set up for self-pay clients who want to submit receipts for their extended health benefits.**

**BARRIER #1 TO PRIVATE
PRACTICE BLISS:
YOU DON'T HAVE AN ONLINE
PRESENCE WHERE PEOPLE CAN
LEARN ABOUT YOU AND HOW TO
CONTACT YOU FOR SERVICES.**

Create a format to share information about yourself and how you can help people

- Profile on marketing platform such as [Theravive](#) or [Psychology Today](#)
- Website - Purchase a domain, choose a hosting company, build a website
- Professional email address with your domain can be purchased through [Gmail for business](#)

- I have an online presence where potential clients or referral sources can learn more about me and my services.**
- I have described my services in a way that people who need my services will truly understand why it's beneficial for them to see me.**
- I have a profile on a marketing platform with specialties listed that my ideal client would be seeking**
- My professional contact information is available in these formats (business cards, brochures, website, marketing platforms, member registry):**

**BARRIER #2 TO PRIVATE
PRACTICE BLISS:
YOU HAVE AN ONLINE PRESENCE,
BUT IT DOESN'T GET A LOT OF
TRAFFIC SO PEOPLE DON'T
KNOW HOW YOU CAN HELP**

- FREE: Write articles or guest posts for platforms that have the readers you want to connect with.
 - FREE: Be a guest on podcasts that your audience listens to
 - FREE: Write blogs and post on social media
 - PAID: Google ads or Facebook ads. Search Engine Optimization (SEO) services. Therapist marketing platforms. Ads to organizations that have your audience.
- I will write articles or be a guest on the following platforms or podcasts where my ideal clients will see them:**
- I will write blog posts about the following topics that my ideal clients are interested in:**
- I will post my blog posts on the following social media platforms where my ideal clients will see them:**
- I will pay for ads in the following locations:**

**BARRIER #3 TO PRIVATE
PRACTICE BLISS:
YOU WANT TO IMPROVE YOUR
ONLINE PRESENCE BUT IT'S
TAKING TOO MUCH TIME
AND/OR MONEY**

Branding includes: website, fonts, colours, logos, business cards, brochures, email templates, newsletter templates

- Prove your market and service before investing big \$\$\$ into branding.
- Keep your brandings as straightforward as possible.
- DIY is your friend in the early days ([Canva](#), [VistaPrint](#))

I will not make huge investments into my online presence before I have proven there is a market for my services.

My company name is:

When I tell my company name to people they immediately understand what I do.

I use the following low cost DIY resources to create basic marketing materials:

**BARRIER #4 TO PRIVATE
PRACTICE BLISS:
YOU DON'T LIKE WORKING IN
THE PRACTICE YOU'VE CREATED.**

Reflect on what logistical details will help make your life easier.

- I want to increase the number of self-pay clients so you can let go of insurance?**

- Can I reduce my expenses? What expenses should I research?**

- Can I modify my location/hours to better suite my needs?**

- Can I change my branding so I attract the type of clients I want to work with?**

- Can I diversify my revenue streams so I'm not only receiving fee-for-service?**

- Can I specialize in an area and charge a premium for it?**

FINAL TIPS FOR ACHIEVING PRIVATE PRACTICE BLISS

- What kind of practice will allow me to live my life in alignment with my values?**

- What am I willing to give my practice in the short-term (time, money, resources)?**

- What am I willing to let go of for my practice in the short-term (activities, hobbies, free time)?**

- What is an acceptable level of risk that I am willing to tolerate and for how long (income, benefits, pension)?**

RESOURCES FOR ACHIEVING PRIVATE PRACTICE BLISS

- ✓ **Schedule, payment, intake forms:** Acuity Scheduling
- ✓ **eCommerce:** Stripe. PayPal.
- ✓ **Email:** Gmail for Business
- ✓ **Websites:** Wordpress, Weebly, SquareSpace
- ✓ **Website Hosting:** WPEngine (for Wordpress)
- ✓ **Video meetings:** Zoom
- ✓ **Webinars:** WebinarJam
- ✓ **Bookkeeping:** Quickbooks or Sage
- ✓ **Social Media Management:** Hootsuite or Buffer

Which ones do I want to explore first?

QUESTIONS/CONTACT

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www.PrivatePracticeBliss.com

Resources:

<https://privatepracticebliss.com/webinarresources/>