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Private Practice Workshop

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Agenda

This seminar will help you create a high level business plan for your private practice, including:

1. Your hopes and your relationship to risk
2. Self-assessment-determining your starting point
3. Your clients (and the type of work you will be doing)
4. Promoting your practice
5. Your practice business model
6. Money going out—choices to be made about clinical and business practices
7. Money coming in—Fees
8. Transition plan for moving into or expanding your practice, and planning for future transitions out of private practice.
9. **Networking and building a community to help you move forward.**

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Self-assessment Hopes vs Risks

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What are your best hopes for your private practice?

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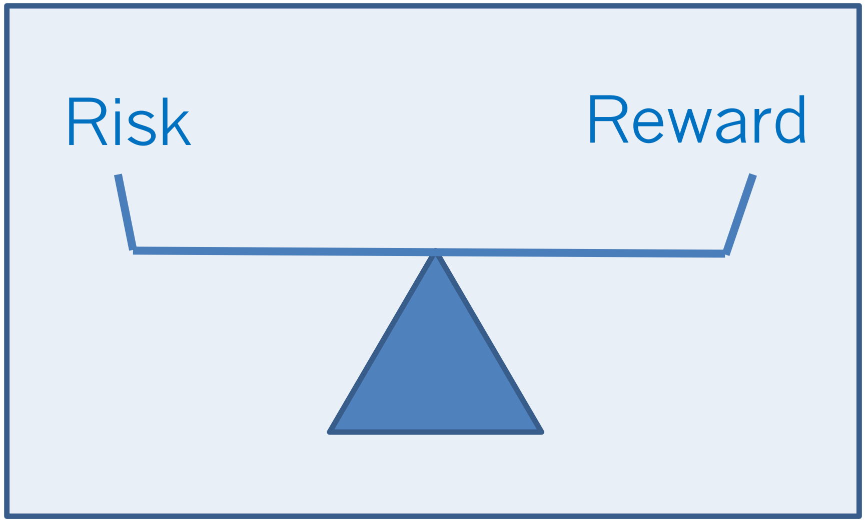
Understanding your relationship to risk



A surprising amount of time in private practice is spent managing risk (for your clients, for yourself, for your practice). Self-awareness is key to your success.

How comfortable are you with?

- Uncertainty (e.g. schedule)
- Variable income and investing without guaranteed income
- Liability and legal risk
- Clinical competencies for private practice
- Conflict and therapeutic ruptures
- Ethical decision making processes

https://www.ocswssw.org/wp-content/uploads/2015/01/PN-Look-before-you-Leap.pdf
https://www.casw-acts.ca/en/section-2-minimize-risk
https://www.casw-acts.ca/en/private-practice-all

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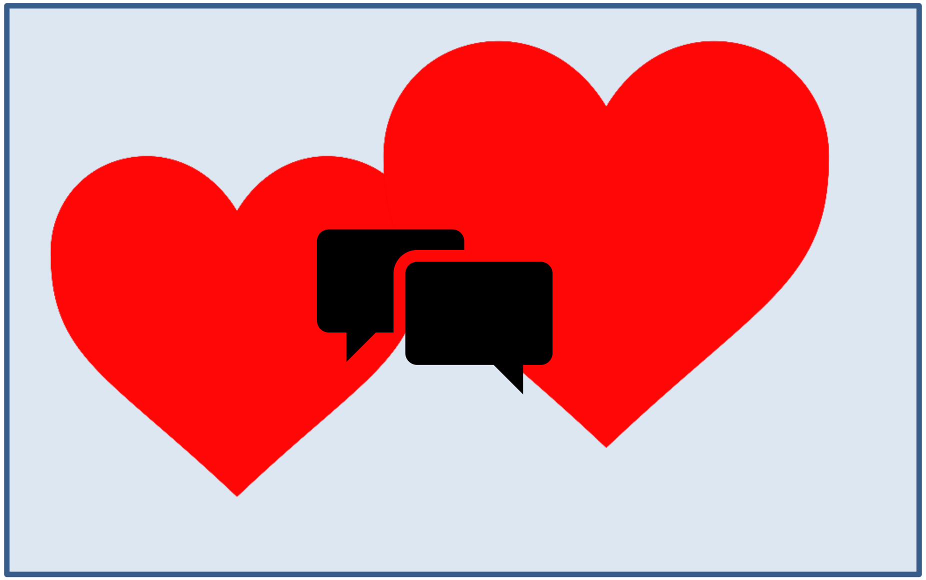
A heart to heart chat with yourself



* please complete the self-assessment provided in your package

What are your areas of strengths?
Where do you still need to learn more?

https://www.ocswssw.org/wp-content/uploads/2015/01/PN-How-Do-I-Know.pdf
https://www.crpo.ca/wp-content/uploads/2017/08/RP-Competency-Profile.pdf (excellent resource for those pursuing private practice in psychotherapy)

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Client vs competencies Keeping the balance

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Competence

The quality or state of having sufficient knowledge, judgment, skill, or strength (as for a particular duty or in a particular respect)

Merriam-Webster dictionary

Private practice is not an entry-to-practice competency. The knowledge, skills and judgement required to practise in a sound, ethical and competent manner are beyond what would be attained through completion of a social work degree or a social service work diploma alone.

OCSWSSW web site

https://www.ocswssw.org/wp-content/uploads/2015/01/PN-How-Do-I-Know.pdf
https://www.crpo.ca/wp-content/uploads/2017/08/RP-Competency-Profile.pdf

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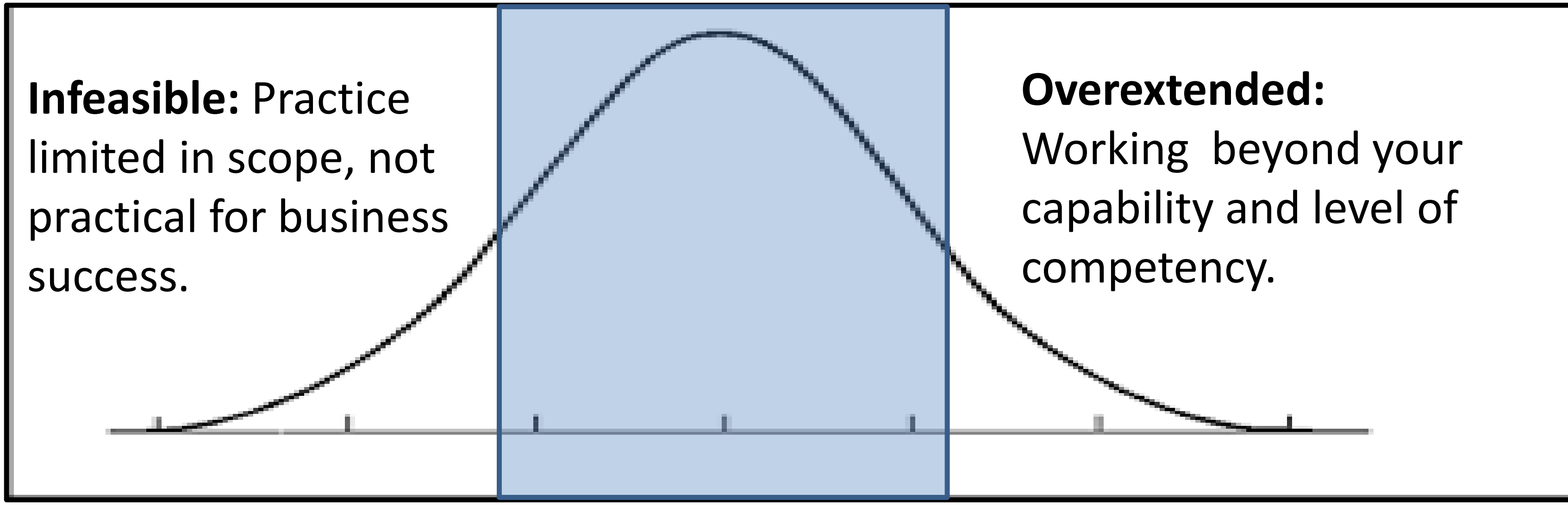
Who are you serving & what are you doing?



The Sweet Spot: A practice with access to clients and set up for professional and financial success, working within your capability and level of competency, with clinical supervision and consultation in place to support areas of weakness.

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Exercise-Who are you serving?

Exercise: The CASW has developed a “Define your practice worksheet”. I have adapted it for our use and it is available in your download package. Please use it to select your likely areas of client focus (or add your own categories).

*Many private practitioners do multiple different types of work. If you need to add additional categories to reflect the work you do, feel free to do so.

Please use the post-it notes provided. (types of work, client groups, and areas of specialization)

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Private Practice Business Models

	Model	Description
	Solo practice	This can be done as a sole proprietorship or as a professional corporation. *Do your research and get advice from an accountant and/or a financial planner as to which is best for you
	Employee	Start by working as an employee in an established private practice. Internship models are also an option here.
	Contract	Provide services for an existing private practice or with an EFAP (employee and family assistance plan) company. Solo practitioner but typically significantly less responsibility for marketing, intake, and administration as well as less money.

https://www.crpo.ca/your-practice/
https://www.ccpa-accp.ca/wp-content/uploads/2014/10/CRPOCorporations_en.pdf
https://www.ocswssw.org/wp-content/uploads/2015/01/Code-of-Ethics-Standards-of-Practice.pdf (search for term “professional corporation”)

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Private Practice Business Models

	Model	Description
	Group Models	There are multiple options for group practice: 1. <u>Co-operative model:</u> working with other practitioners for purposes of sharing costs, administration, peer support 2. <u>Sub-lease model:</u> renting out space or sub-contracting clients to contract practitioners
	Online and Telephone services	Growing area of focus, with unique liability and administrative concerns if delivering counselling services online. *The CASW and CCPA (Cdn Counselling and Psychotherapy Association) have done good work on online counselling. Should you choose to pursue online or telephone counselling, request a legal consult as part of your set-up.
	Hybrid	Many practitioners work in a hybrid model on a permanent basis, or as a way of transitioning into a new business model. Hybrid business models can reduce some risks but can also increase workload and dilute focus.

https://www.ocswssw.org/wp-content/uploads/2015/01/PN-Communication-and-Technology.pdf
https://www.casw-acts.ca/en/private-practice-all (see Virtual Counselling Link)
https://www.ccpa-accp.ca/the-use-of-technology-in-counselling-and-psychotherapy-efficacy-efficiency-and-ethics/

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Breakout Groups

Let's get into break-out groups and work on our elevator pitch.

An elevator pitch is a short description of your private practice explained in a way such that a prospective client or referral source can understand it in a short period of time, for example, in the length of a 30 second elevator ride. Your elevator speech should clearly indicate who your clients are, the type of work that you do with them, your unique qualifications for supporting those clients, and relevant information about your practice.

Creating an elevator pitch is harder than it sounds. Group members will need to work to support each other.

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Marketing and Promoting your Practice

Did you always imagine you would have a career in marketing?

In order to promote your practice, you are going to need the following to get started:

1. **A Brand**
   - A practice name, logo, colours, tag lines, etc. that will help others recognize you.
   - This can be basic, or fancy, and it can even evolve over time, but start with something that reflects your elevator pitch
2. **Online Presence**
   - The reality of today's world means you need some form of online presence, with options including a web site, social media sites, online registries, or some combo
3. **Printed Materials**
   - Business cards as well as other materials as required

*If you are a DIYer, there are online sites that help you create a logo, and web site builders like Wix, Weebly, Squarespace, or Wordpress that you can use to build your own web site. You might also considered hiring an independent web designer or graphic design student to assist you in building your site, and showing you how to add new content going forward.

https://www.casw-acts.ca/en/section-4-promote-services

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Marketing and Promoting your Practice

Your marketing activities might include!

1. **Being active on social media by setting up a business site (free!)**

Creating relevant posts, liking and following related local and related businesses, retweeting and sharing posts created by those businesses. In this way, you can build a professional network while also advertising your practice for free.
*it's important to keep your business social media activity separate from personal social media to avoid unnecessary dual relationship risks.

2. **Use professional directories (cost dependent on directory)**

E.g. Psychology Today, professional organization directories

3. **Present, teach, volunteer, or otherwise get your name out there**

4. **Advertise locally**

Bulletin boards, advertise to medical and allied health professional clinics, community newspapers and web sites

5. **Work on contract (e.g. EAP, other private practices)**

Pay is often quite low but it's an opportunity to build reputation and access a referral network of former clients.

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Marketing and Promotion Restrictions

Do you understand the limits on marketing and promotions?

You can market yourself by:

1. Listing your education, certifications, and qualifications, and focus
2. Providing your philosophy and approach
3. Sharing relevant and helpful content

However, you cannot do things that might seem normal when advertising other goods and services, such as:

1. Promise results that cannot necessarily be delivered (e.g. Get the job you always wanted!)
2. Use superlatives that suggest your practice is unique (e.g. The best therapy available!)
3. Appeal to a person's fears (e.g. Avoid being alone)
4. Use client testimonials (e.g. you cannot use testimonials for psychotherapy services, although you could use testimonials for training or workshop delivery)

CRPO professional practice standards manual has several sections relevant to marketing for those practicing psychotherapy. It's worth reading carefully and in detail. https://www.crpo.ca/wp-content/uploads/2017/08/Professional-Practice-Standards-For-Registered-Psychotherapists.pdf.
Section VII Advertising https://www.ocswssw.org/wp-content/uploads/2018/09/Code-of-Ethics-and-Standards-of-Practice-September-7-2018.pdf

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Prospective Clients

Every interaction is a therapeutic interaction.

1. Ethical considerations: You cannot refuse a client for discriminatory reasons (e.g. disagreement with political beliefs). Valid refusal reasons related to competency, safety, or availability, with alternative referrals provided. If you have some concerns, you can also offer a fixed number of sessions, with alternative referrals, as an option.
2. Transparency: Explain the process of therapy, risks and your therapeutic approach and make sure the client is making informed decisions about working with you.
3. Fees: Set expectations around fees early and in writing, including fees for missed appointments.
4. Short free consultation: Consider offering as a tool for establishing the therapeutic alliance or supporting alternate referrals. Having some distance from money for the initial consultation can help to set expectations around both services and fees.
5. Dual relationships: Ideally, to be avoided. See next slide for further discussion.

https://www.counseling.org/docs/default-source/ethics/ethics_ocober-2014.pdf
(this article has an interesting take on the ethics of counselling referrals)
https://www.crpo.ca/wp-content/uploads/2017/08/Professional-Practice-Standards-For-Registered-Psychotherapists.pdf.
Section VII https://www.ocswssw.org/wp-content/uploads/2018/09/Code-of-Ethics-and-Standards-of-Practice-September-7-2018.pdf

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Working in Smaller Communities

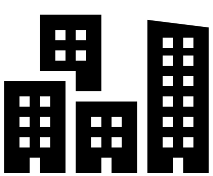
Many in private practice work in some form of smaller community, including rural/smaller cities or communities of interest/identity/culture/language, etc. Unfortunately, published professional standards of practice don't always deal with the realities of smaller communities.

Smaller communities bring a greater potential for dual relationships to exist and boundaries to be crossed, since people are more likely to know each other.

Some dual relationships are abusive, and must never occur, under any circumstances (i.e. sexual relationship or other power abuse). Some dual relationships might be managed where confidentiality can be assured and mutual agreement exists with you and the client.

The path forward is the best interest of the client, as well as the potential impact on you. "Play it forward" and understand what might happen over time.

If in doubt, use the acronym SRT--stabilize, refer, and transition.



https://www.practiceofthepractice.com/small-town-therapist/
https://www.apa.org/pubs/books/4312005
Janet A. Schank, J. A., & Skovholt, T. M. (2006). *Ethical practice in small communities: Challenges and rewards for psychologists*. Washington, DC: American Psychological Association.

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Breakout Groups

Brainstorming promotion and new client acquisition/on-boarding.

Brainstorm ideas about how you will go about promoting your practice and on-boarding clients. Do this through the following exercise:

1. Brainstorm ideas for promoting your practices given your communities and focus areas.
2. What are the similarities and differences between practices and promotion strategies in your groups?
3. What is the potential, if any, for dual relationships in your work?

*Don’t include referrals in this exercise. We will get to that shortly!

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Exercise-Community Referrals

Knowing your community referrals are important for:

1. Building your own network-referrals tend to be two-way and are an important marketing tool
2. Responsible clinical care, such is when you are managing dual relationships or need to discontinue services
3. Sometimes part of the job of private practice e.g. EAP work, or when a client has limited funds available to see a private practitioner

Brainstorm community referrals using the following categories:

1. Other private practitioners
2. Private organizations/treatment centres (e.g. addictions, trauma)
3. Community resources or programs (low cost or no cost)
4. Online resources (in today's connected world, your referral community has grown!)

**How will you continue to grow and manage your referral network over time?

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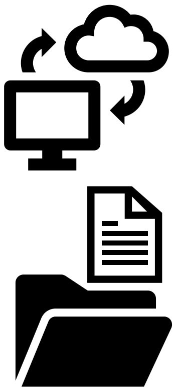
Clinical Record Keeping



Your clinical records include:

1. Case notes/clinical notes/forms
2. Appointment records
3. Records of payments.

And are governed under the rules of PHIPA (Ontario's Personal Health Information Privacy Act)

The CRPO offers very specific standards and guidelines for record keeping relevant to private practice. Even if you are not a member of the college, their record keeping standards are informative and helpful.

Section 5 Record Keeping. https://www.crpo.ca/wp-content/uploads/2017/08/Professional-Practice-Standards-For-Registered-Psychotherapists.pdf.
Principle IV https://www.ocswssw.org/wp-content/uploads/2018/09/Code-of-Ethics-and-Standards-of-Practice-September-7-2018.pdf
https://www.casw-acts.ca/en/private-practice-all
https://www.ontario.ca/laws/statute/04p03

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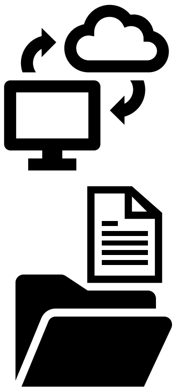
Clinical Record Keeping-Forms



You will need forms for:

1. **Client Profile (name, address, emergency contact, physician, permission to email, permission to phone, etc.).** You may also wish to assign each client a unique identifier to aid in confidentiality and security (e.g. around payment).
2. **Informed Consent:** As appropriate for the work you are doing. You may need one general informed consent form for adults, and others for teens, children, couples, or specific to online counselling if you are doing that work.
3. **Release of Information:** Occasionally, clients will ask you to share records with their physician, lawyer, or for some other purpose.

The CRPO offers very specific standards and guidelines for client profile management and for gathering informed consent. Fellow private practitioners are often willing to share forms and many publish their forms directly on their web site.

Section 5 Record Keeping. https://www.crpo.ca/wp-content/uploads/2017/08/Professional-Practice-Standards-For-Registered-Psychotherapists.pdf.

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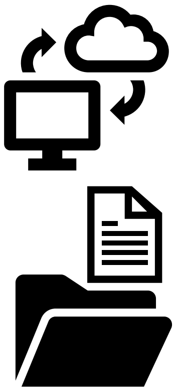
Clinical Record Keeping-Security



Records must be secure:

1. If you store records physically (e.g. in files), they still need to be both secure and accessible.
2. If you store records online, they need to be secure, accessible, and safe from being accessed or deleted by those who shouldn’t have access to them. Files must be backed up regularly.

- Owl Practice is the most common online solution in Canada ($40/month and up depending on your practice needs) https://owlpractice.ca/ If you are not tech savvy, this is a tool worth exploring
- DIYs may want to consider a secure cloud solution such as https://www.sync.com/, a Toronto based cloud provider designed for secure management of data, but it will take considerable time and effort to build your own tools and practices around this.
- If you are storing records digitally, consider purchasing cyber insurance (in case of data breach or loss—we will discuss this more later on!)

Section 5 Record Keeping. https://www.crpo.ca/wp-content/uploads/2017/08/Professional-Practice-Standards-For-Registered-Psychotherapists.pdf.
Principle IV https://www.ocswssw.org/wp-content/uploads/2018/09/Code-of-Ethics-and-Standards-of-Practice-September-7-2018.pdf
https://www.casw-acts.ca/en/private-practice-all

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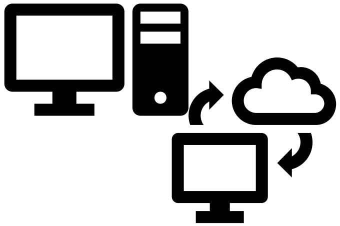
Practicing Online-Facing the Real Risks



Online interactions are often:

1. Expected by our clients and a reality of life and business…
2. Helpful for practitioners as well but also…
3. Often frightening for practitioners due to privacy and security risks

The biggest risk to clients is not necessarily "online stranger danger".

1. Example 1: A client at risk of abuse or intimate relationship.
2. Example 2: A client using their work email or office environment to interact with you.
3. Example 3: A client who is well known (in general or in their field of expertise).

So your clients records are secure, but…

1. Are you storing any client contact details, clinical details, or texts in your phone?
2. If your computer or phone is lost or stolen, do you know exactly how to remove client data from those devices remotely?
3. Is your email history somewhere in the land of Google, Microsoft, or Apple (of course it is)? Do you know what two step-verification is and is it turned on?

You MUST take reasonable precautions in the interest of your clients (as a group and individually). Take the time to reflect on the risks of online practice and act accordingly.

https://www.crpo.ca/standard-3-4-electronic-practice/
https://www.oasw.org/Public/List_of_Communities.aspx (the OASW online communities contain many practitioners working online willing to share their best practices)

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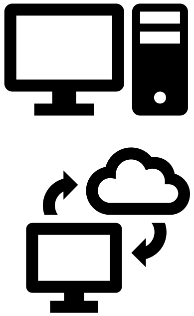
Practicing Online-Consent and Precautions



Client Consent

1. Clients must understand the risks of online interactions.
2. Clients must provide their consent and acceptance of the risks.
3. Consent doesn’t mean you are excused from intervening in client best interests.
   Example 1: You might let clients know you will not respond to an email sent from a work email or engage in a videoconference session from a computer or account owned by their employer.
   Example 2: You might discourage a client at risk of abuse or violence from using text/email to contact you if there are any confidentiality risks, however small, and to delete related call history.

What are reasonable precautions?

1. Contact Information: If anyone else ever has access to your phone, car, or computer and could accidentally call or text a client, consider not storing contact information in any device and regularly deleting text, email or call history after it’s safely stored in the client record.
2. Email: If concerned about high risk clients or want to communicate clinical information by email, consider a secure email tool like hushmail. https://www.hushmail.com/ ($5-$10 US/month). All your email accounts should use the maximum security available (strong password, dual verification)
3. Video Conferencing: Vsee is the most secure platform https://reo.mcmaster.ca/download/skype-vs-vsee but understand and assess each platform and make sure the client is fully informed, whatever you choose.

You must make sure that your liability insurance plan covers online counselling, and the tools you are using. Also consider cyber insurance to cover data loss and data breaches.

https://www.crpo.ca/standard-3-4-electronic-practice/

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Breakout Groups

Let’s get into break-out groups and share thoughts and ideas about how to approach clinical record keeping.

Private practitioners often share information, approaches, forms, or even systems (a co-operative group business model). Can you brainstorm ideas that might make sense for those in your break-out group? Can you compare notes with others attending the seminar?

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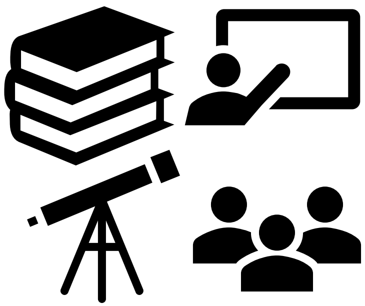
Clinical Supervision and Professional Development



Ongoing clinical supervision and professional development are both essential requirements of the colleges (OCSWSSW and CRPO) and also good ethical practice.

Supervision Options include:

1. Working with a clinical and/or administrative supervisor 1:1
2. Group supervision
3. Peer supervision

Recommendations:

1. Have a supervision plan before you see your first client in private practice (or as soon as possible). You will want it in place the first time you need it.
2. Budget time and money for professional development. It’s a requirement, and is also essential for self-care and nurturing your community.
3. If time and money are limited, “think outside of the box” for solutions.

https://www.oasw.org/OASWMbr/SocialWorkNow/A_Few_Facts_On_Social_Work_Supervision_and_Consultation.aspx
https://www.crpo.ca/supervision/
https://www.ocswssw.org/the-continuing-competence-program/ccp-documents/
https://www.crpo.ca/wp-content/uploads/2017/11/CRPO-Professional-Development-Guide.pdf

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Liability Insurance

Did you know that insurance plans are not all the same? Make sure you have the coverage you need.

Some examples:
OASW: https://www.oasw.org/Public/PROLINK.aspx
CASW: http://www.casw.bmsgroup.com/ ($50 membership requirement to access)
CCPA: https://www.ccpa-accp.ca/professional-liability-insurance-bms/ (for Certified Canadian Counsellors)

If you practice online or store data online, plans offer cyber insurance coverage (potentially at an additional cost, depending on the plan and level of coverage required), as well as coverage for out-of-country clients. Take the time to make sure your needs are being met, and if you require additional coverage, ask! It's sometimes possible to advocate for additional coverage (with some cost).

For those considering practicing from a home-based office, consider checking with your home insurance company to ensure you are covered when seeing clients in your home.

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Legal Advice

By now, you are probably noticing that there are no easy answers to many questions in private practice.

Consider obtaining legal advice on informed consent, use of technology, and liability. Your liability insurance may come with a free legal help line. They typically don't provide advice in writing or a detailed review of forms, but if you read the text to them, they will comment on what they hear. The level of legal advice you need may depend on the risk levels associated with your clients.

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Business Management

Office Space:

- Rent your own office (Most flexible but most expensive)
- Share an office/rent a part-time space (Less cost and less flexibility)
- Home-based office (Low cost, flexible, with privacy and dual relationship considerations depending on where you live)

Phone number

- Decide whether you need a new phone number or can use an existing number.
- Consider type of client you are working with, and privacy and safety risks

Bank Account

- Decide whether to use an existing bank account or a new account
- Consider service fees vs. privacy (e.g. etransfers have a person’s name displayed in your bank statement)

Credit Card Solution

- Potential solutions include Square, Paypal, Quickbooks
- Consider the trade-offs between credit card fees and ease of collections (and client preferences)

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Business Management

Taxes & Accounting—
everyone's favourite topic!!

- Work with your chosen accountant (and choose an accountant) to select a bookkeeping solution for your business
- Depending on the scope of your work, solutions could range from using an Excel spreadsheet to a software package/online solution
- https://quickbooks.intuit.com/ca/ has excellent small business/accounting information and is one of many commonly used tools
- https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/keeping-records.html
- Consider identifying clients by a unique ID to ensure client confidentiality

https://www.casw-acts.ca/en/private-practice-all (sections on fees, accounting, and business management)
https://www.crpo.ca/wp-content/uploads/2017/08/Professional-Practice-Standards-For-Registered-Psychotherapists.pdf (Section 6 Business Practices)

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Breakout Groups

Let’s get into break-out groups and share thoughts and ideas about how to approach practice business management.

Business Management activities often focus on managing risk. Based on what you’ve learned, what are your thoughts about approaches to practice business management activities?

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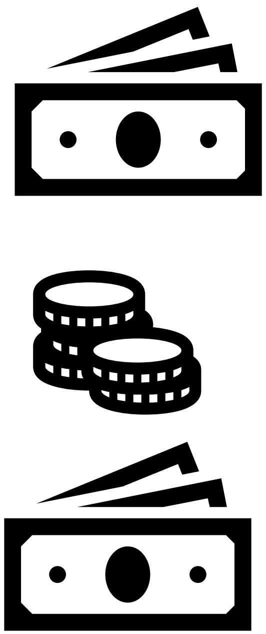
Money-Going Out



You will be spending money to start & operate your private practice:

1. Registering your business with the government (e.g. name, tax number), incorporation fees (if using a professional corporation)
2. Office Space (including furniture) and appropriate insurance
3. Phone number
4. Computer/printer, or other office supplies
5. Bank account
6. Payment solution (some have front end costs, others back-end costs only)
7. Business cards
8. Web site
9. Other marketing costs (e.g. advertising, brochures, etc.)
10. Clinical records management solution
11. Book-keeping solution
12. Professional accounting/financial planning advice
13. Professional legal advice
14. Liability insurance
15. Professional organization and college fees
16. Supervision and consultation
17. Professional development/continuing education

Do the math for your proposed business model and understand tax implications and potential tax deductions!!!

https://www.ontario.ca/page/small-business-advice-support-services-regulations
https://quickbooks.intuit.com/ca/resources/guides/diy-starting-small-business/

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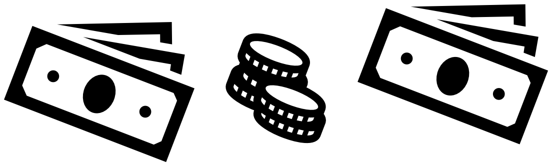
Money-Fees

Do you understand the restrictions on fees required by your college?

*Read the standards of practice carefully as some fee setting requirements can be quite nuanced.



You can

1. Set your own reasonable fees
2. Set variable fees based on a client's ability to pay
3. Inform clients about the fee schedule (and you must do so)
4. Provide free initial consultations
5. Increase your fees
6. Charge a block fee (a flat fee for a predetermined set of services)
7. Barter for alternative services (remembering that bartering still has tax implications)

You cannot

1. Offer discounts/rebates for early or prompt payment
2. Charge more when the client has insurance coverage
3. Discontinue services because a client cannot afford a fee increase
4. Immediately discontinue service for non-payment of fees, without providing alternate referrals
5. Offer fees for referrals

Section 6 Fees: CRPO professional practice standards manual has a specific section dedicated to discontinuing services. https://www.crpo.ca/wp-content/uploads/2017/08/Professional-Practice-Standards-For-Registered-Psychotherapists.pdf. https://www.ocswssw.org/wp-content/uploads/2018/09/Code-of-Ethics-and-Standards-of-Practice-September-7-2018.pdf (Principle VI-Fees)

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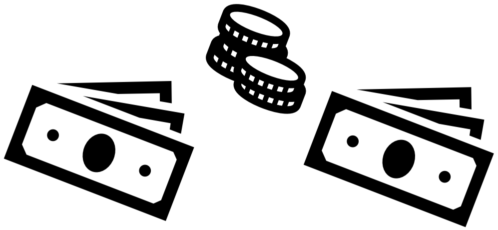
Money-Working With Third Parties



The landscape around third party work (including EAPs, and extended health insurance coverage) is changing quickly and not always for the best

EAPs: Canadian providers are consolidating quickly (acquisitions by Sheppell FHI, with lower rates for affiliate counsellors and fewer sessions offered)

Third Party Insurance Coverage (Extended Health Care): This landscape is also changing quickly, with the introduction of the controlled act of psychotherapy (Registered Psychotherapists gaining in recognition, Psychologists not longer able to supervise other disciplines as of end of year).

**Private practitioners should register with the Provider Connect registery https://www.providerconnect.ca/AccessMgmt/Public/SignOn.aspx so that you can be easily found by clients who hold benefits with member insurance companies (be easy to work with)

**Private practioners should sign up for the OASW private practice listserv to receive current information

https://www.oasw.org/OASWMbr/Library_of_Articles/Private_Practice_Publications.aspx

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Money-Cash Flow

1. What fees might you charge, based on going rate in your community/focus area?
2. How many clients/week do you think you would realistically be able to see?
3. Are you planning alternative income sources in addition to private practice?
4. Are you able to estimate monthly cash flows in and expenses out for a year in the life of your private practice? If you aren’t ready to do this, ask your accountant or financial planner for assistance.

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Discontinuing Services

You must act in the best interests of the client at all time and you cannot end the relationship due to discriminatory reasons. There are several legitimate reasons for discontinuing services to clients, including:

- You lack the competence required to work with this client
- You believe the client will not benefit from continued therapy (or the client feels they are
- Your safety is at risk (e.g. physical threats)
- You are closing your practice
- You had a prior agreement for fixed number of sessions, which have been used
- The client has not met their obligation to pay fees

In all these cases In all cases you need to make reasonable efforts to inform the client of the reason for discontinuing services, and provide alternative referrals. Document the reason for discontinuing services in your case notes.

CRPO professional practice standards manual has a specific section dedicated to discontinuing services. https://www.crpo.ca/wp-content/uploads/2017/08/Professional-Practice-Standards-For-Registered-Psychotherapists.pdf.

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Emergency/Contingency Planning

Private practitioners are expected to have a plan in place for planned and unplanned interruptions to their practice. This might include:

- Temporary coverage (e.g. maternity leave, family illness)
- Transfer or referrals of clients and client records
- Shutting down a practice

Please read the standards of practice for details. Both the CASW and the CRPO have put detailed standards/guidelines in place for emergency/contingency planning or closing a practice.

CRPO professional practice standards manual has a specific section dedicated to closing, selling, and relocating. https://www.crpo.ca/wp-content/uploads/2017/08/Professional-Practice-Standards-For-Registered-Psychotherapists.pdf.
Section 9 Close Your Practice https://www.casw-acts.ca/en/private-practice-all

Breakout Groups

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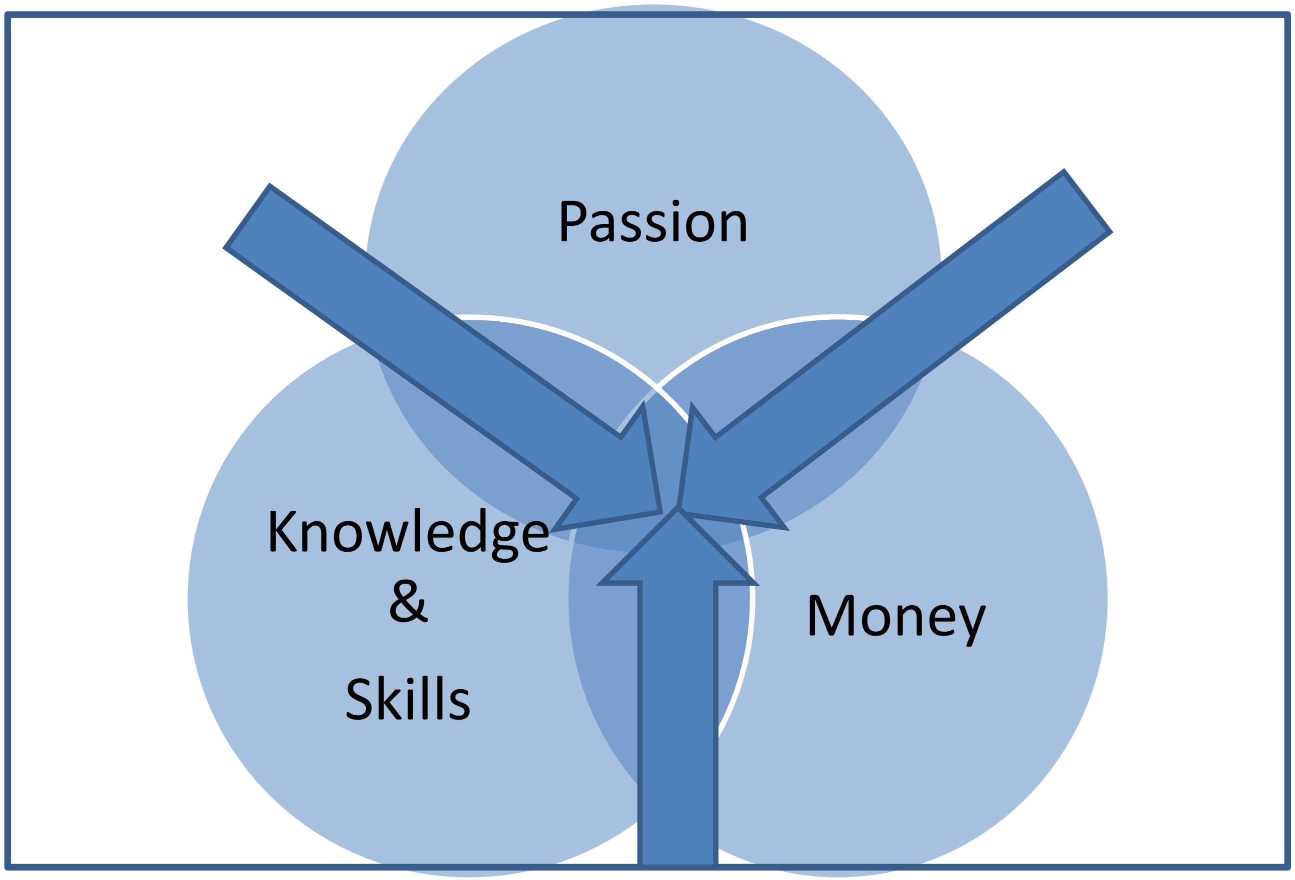
What is your transition plan into private practice?

There's a lot of information here, but you don't need to do everything at once. What might your transition plan into private practice look like? Keep in mind:

1. The best interests of your prospective clients.
2. Self-care
3. Income requirements
4. Level of comfort with risk
5. Hopes and dreams

At the Center of It All



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April 5, 2019

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Resources-Colleges and Professional Organizations

Resource	Comments
Ontario Association of Social Workers https://www.oasw.org/Public/Private_Practice_Resources.aspx	The OASW has a web page with many helpful private practice resources. The online communities options are a nice way of connecting with other social workers doing similar work, although the private practice community often have a heavy urban/Toronto emphasis.
Canadian Counselling and Psychotherapy Association https://www.ccpa-accp.ca/	The CCPA is an excellent organization for those practicing counselling and psychotherapy, particularly if you are involved in telecounselling and/or online counselling outside of Ontario.
Canadian Association of Social Workers Private Practice Portal	The Canadian Association of Social Workers has a private practice portal that contains very useful, albeit sometimes a bit dated, information. If offers an excellent liability insurance plan for those planning to practice telephone or online counselling outside of Ontario.
College of Registered Psychotherapists of Ontario https://www.crpo.ca/	Even if you are not a registered member of the college, the CRPO's web site hold a wealth of resources for private practitioners in counselling and psychotherapy.
Ontario College of Social Workers and Social Service Workers https://www.ocswssw.org/professional-practice/private-practice/	OCSWSSW offers some limited information specific to private practice.

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Resources-Web Sites and Companies

Resource	Comments
The Business of Helping https://www.thebusinessofhelping.com/	This is a Vancouver based commercial web site, filled with really useful information about starting a private practice.
Owl Practice https://owlpractice.ca/	Owl Practice is the Canadian leader in practice management solutions specific to the needs of a social work/psychotherapy private practice. Their web site is commercial, but the blog does offer helpful information.
Practice Of The Practice Web site/blog/podcast https://www.practiceofthepractice.com/	This is a commercial web site targeted at the American market but contains some useful ideas and a popular podcast.
Selling the Couch https://sellingthecouch.com/podcast/	This is a very popular podcast that talks about the realities of private practice. This is also targeted at the American market but contains useful information relevant to Canadian private practitioners.
Private Practice Startup https://www.privatepracticestartup.com/	This is a commercial web site targeted at the American market but contains some useful ideas and a popular podcast specifically focused on starting a private practice.

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Resources-Business Management

Resource	Comments
Province of Ontario Small Business Advice https://www.ontario.ca/page/small-business-advice-support-services-regulations	You should consult an accountant, financial planner, and/or legal advisor as part of the process of starting a small business.
Quickbooks Canada https://quickbooks.intuit.com/ca/resources/starting-business/how-to-start-a-small-business-in-ontario/	Quickbooks Canada has great information in general about the accounting side of your small business and may be helpful in preparing to meet with your chosen accountant.
Legal Advice https://oasw.org/Public/Law_Assist.aspx https://www.oasw.org/Public/PROLINK.aspx	The OASW offers a low cost legal service (Law Assist). Your liability insurance may also offer access to a free legal helpline. Check your policy!