



 A quick guide to

Private practice checklist

Introduction

You're contemplating entering the private practice sector, and wondering – where do I begin? Starting in private practice as a lone private practitioner can be exciting, yet also daunting – there will be a desire to create a thriving and ethical practice, and yet knowing where to start, may feel like looking for a needle in a haystack. The purpose of the BACP *Private practice toolkit* is to help guide people on their individual journeys into the world of private practice; the resources are specifically focused on the most important considerations for particularly, new private practitioners.

This guide is a quick checklist, designed to help inform the reader's knowledge on some of the important facets of setting up in practice. It places a focus on the importance of preparation (as opposed to just action), and, reflecting the material within the toolkit, highlights elements of collective knowledge, as well as areas where self-reflection, and/or self-learning are important. Although this is not necessarily an exhaustive list (and due to individual circumstances, not all considerations may be applicable), I would recommend using the checklist, which contains some of the most common themes and questions that crop up, to keep a track of what you have covered, and to also identify any areas you may need to do more research on, as part of your journey in setting up your own unique practice.

Work your way through the guide below, which is separated into relevant sections. Use the small box to tick off what has either been actioned, or reflected on, and the 'further comments' box for brief notes you may wish to make.

This guide is a checklist with occasional reflective pointers, and **does not** go into detail in specific areas. Further research and engagement with other resources are recommended.

Task/area for reflection	Further comments
The initial basics: getting ready to start in private practice	
<p>If I am a student, or newly qualified therapist planning on going into private practice, have I read the recommended BACP Private practice toolkit resource, <i>Student to private practice</i> (BACP, content ed. Binstead, C.)? Within the above recommended document, I recommend four starting points as listed below.</p> <p>NB: <i>Elements of this guide may also be useful for anyone new to private practice.</i></p>	
<p>Contemplation:</p> <p>Use the BACP Private practice toolkit, with the majority of its content free to think about what being in private practice may be like. The toolkit is split into four sections: Setting up in private practice; Managing your private practice; Developing your private practice; and Working as a private practitioner, providing an opportunity for students to begin researching and reflecting, even before qualifying (within the latter months of their training).</p>	
<p>Preparation:</p> <p>Beginning the groundwork, and preparing for how beginning private practice might look (including giving forethought to help pre-empt any potential problems that might occur).</p>	
<p>Choosing an appropriate supervisor:</p> <p>This is one of the most important decisions a private practitioner makes. Being a lone worker means exactly that – the buck stops with you. This makes supervision extremely important, and your supervisor is your ace card. Although of course any supervisor will hopefully have the ability to tackle different elements of clinical work, it is particularly beneficial to have someone who understands all the different elements that make up a private practice, which includes the business side such as practice management and marketing, and how this fits alongside the ethical clinical work.</p>	
<p>Initial practicalities:</p> <p>Before starting practice, you will need to need to put into action some practicalities to ensure you are paying attention to particularly, some vital legal, business, and ethical elements of private practice (see below).</p>	

Task/area for reflection	Further comments
Being self-employed – practicalities	
If identifying as a sole trader (a large portion of individual, lone private practitioners), register with HMRC at the earliest opportunity.*	
If setting up a limited company instead, you will probably have consulted with an accountant, and need to register with companies house.*	
Ensure you have a bank account which is for specific use for your business.	
* Have I read the BACP Private practice toolkit, <i>Understanding tax in the 21st century</i> , what you need to know (BACP, content ed. Silver-Meyer, P.).	
Registering with the ICO (Information Commissioner's Office) if applicable.	

Task/area for reflection	Further comments
Being a self-employed therapist – practicalities	
Obtaining registered member status with your aligned membership body e.g. BACP.	
Insurance – all private practitioners must be appropriately insured.	
Investing in your business – although all businesses will probably require some kind of initial financial investment and ongoing expenditure, the average private practice therapy business is likely to be relatively low cost, in comparison to larger businesses. What investments might be considered when reflecting on potential benefits they may bring to your business in the long term?	
<p>Private practice at BACP:</p> <p>A majority of the resources within the BACP Private practice toolkit are free for all members, and it provides an opportunity for self-learning and reflection for private practitioners at different stages. BACP also offers other low-cost options, which private practitioners can choose to invest in, if they so wish. These are the BACP CPD hub, which has a designated private practice section as part of the learning resource centre. This costs £25, and each CPD is accessible to members from the toolkit. The Private Practice division describes itself as: ‘the voice of private practitioners’ at BACP, and annual membership is £20. You can check out its mission, aims and benefits by clicking on the link at the bottom of this guide.</p>	
DBS (Disclosure Barring Service) check may be required if working with certain client groups.	
<p>Will I work alone, or with others?</p> <p>Private practitioners may work exclusively on their own in their practices, or they may work as part of a group practice, or consortium. Also, there is the option of signing up to EAPs (Employee Assistance Programmes), and/or private health insurance companies. You may feel strongly about working independently, but if curious, it may be worth researching the pros and cons of all these options.</p>	

Task/area for reflection	Further comments
Finding a place to work	
Choosing a location to work	
Is there a rationale for my above choice? Have I researched the area, and do my findings fit with my expectations in terms of attracting clients?	
Choosing a room – will this be my own consulting room, a room in my house, or a shared room within an agency?	
If working within an agency, have I read my room agreement, and understood all corresponding boundaries that will affect my practice e.g. details aligned with in-house referral systems etc.	
If working in my own room, how do I create my space? What essential items do I need for my room?	
Have I read the recommended BACP Private practice toolkit resource <i>Location and place of work</i> (BACP, content ed. Binstead, C.)?	

Task/area for reflection	Further comments
Administration & practice management	
Thinking about and planning my contract – this includes in-depth reflection and decision-making on what boundaries I set within my practice.	
Drawing up a contract – have I researched, reflected on in full, discussed with my supervisor? How will I ensure clarity within my language; how/when will I share my contract; how else might I engage with the client around the contents of my contract?	
Drawing up a privacy notice	
Note-taking – have I checked-in with my supervisor on any questions I have around notes that I keep regarding my clinical work?	
GDPR in general – am I well enough informed on my responsibilities regarding this, and how I apply it to my practice? Have I given forethought to all the different considerations?	
GDPR, and ethical practice: record requests/requests for letters from clients, or outside agencies. Although any potential scenarios with clients would need to be reflected on individually (and ideally, with a supervisor), in terms of general preparation and knowledge, am I up to date on my reading in this area?	
Considerations around how I run sessions: do I offer sessions on a weekly basis; fortnightly basis; or a mixture (or other)? Am I open to re-negotiating this at any point in the work? Have I thought about how I clearly communicate my decisions around this to clients (including rationale if needed)?	
Considerations about when I see clients – what days and times do I work? Am I flexible, or do I offer set slots?	
<p>What is my general routine for new enquiries?</p> <p>NB: Although at times, for therapeutic or ethical reasons, we may need to deviate, generally speaking, having a set, consistent routine for each and every enquiry is advisable.</p>	
<p>File management – what generic paperwork will I use with all new clients?</p> <p>Is this paperwork ready and assembled (use the notes sections to create a list and tick off as done)</p>	

Task/area for reflection	Further comments
<p>What is my fee?</p> <p>Do I offer any concessions – if so, how do I manage this i.e. if I offer a student concessionary, do I ask for proof of status? Do I offer these anytime, or at particular times of the day? Do I offer unlimited concessionary rates, or have a set number of designated spots?</p>	
<p>Payment: what forms of payment will I accept? When will clients pay me?</p>	
<p>The psychology of money: Have I considered my own relationship with money, and how I feel about therapy as a business? Have I considered the potential issues that can occur when charging for therapy? If I take payment in the room, via cash, cash machine, or cheque, how does that feel for me – respectively, and in general? These could be good questions to discuss with your supervisor, peers, and if applicable, in your own therapy.</p>	
<p>Assessments, or initial sessions – what are my decisions around how I conduct these (duration, format, costs etc.)?</p>	
<p>Do I have a designated day(s)/time(s) ringfenced to carry out regular, routine admin tasks for my practice?</p>	
<p>Drawing up a clinical will</p>	

Task/area for reflection	Further comments
Marketing	
Branding: What is my brand? What do I want to convey about me and my therapy business through marketing?	
What do I want to call my practice? Have I researched and reflected on the pros and cons of using my own name vs a specifically chosen business name.	
Setting up a business website (includes setting up a basic site, buying a domain name, arranging hosting etc.)	
SEO – Search Engine Optimisation	
Copywriting for my website	
Blogging	
My branding through design: my professional photo, website layout and colour. Do I want a logo?	
Counselling directories 1 – what ones are out there, do I wish to sign up?	
Counselling directories 2 – how do I best present myself i.e. moving my content brand to assigned templates; marketing ethically e.g. ticking areas I work with in accordance with my competency level.	
Social media platforms for marketing – which ones are out there, researching how other private practitioners use them.	
Free listings	
Traditional marketing for your local area (leaflets, business cards etc.)	
Building relationships pertinent to your individual practice	
Networking within the counselling world – how do you build this up? If you are not keen on the word 'networking', can you re-frame it in a way that works for you, which considers the different aspects that relationships with other therapists, as a private practitioner, can give you, and/or your business?	

Task/area for reflection	Further comments
Preservation of the therapist	
Factoring self-care into your business plan: as a new private practitioner, how will I self-care? How will I pay attention to myself, in order to make changes when needed, and maintain self-care throughout my private practice career?	
Availability – being self-employed, I set my own workload, but am I paying proper attention to my limits, as a therapist and person? Note: Deciding on the number of clients you will see each week on average, from both your own reflections, and discussions with a supervisor; ongoing as you develop, and subject to personal circumstances, are paramount for ethical practice, and self-care.	
Have I researched, or spoken to fellow colleagues, about common pitfalls in private practice?	
Knowing myself as a person, are there any potential personal pitfalls e.g. self-sabotage; perfectionistic mind-set etc?	
Who is part of my support system?	
Consideration of personal therapy: what are my views/immediate thoughts on entering/re-entering therapy throughout the course of my professional life as a private practitioner? Have you reflected on this open question with your supervisor?	
Burn-out 'it's a real thing'. How will I spot if I am on my way towards it?	
Use of supervision check-in: am I using my space as I need to? How am I feeling in the space and within the supervisory relationship? In my responsibilities as supervisee and therapist running a lone private practice, do I need to reflect on any aspect of supervision with my supervisor, or change anything?	
Personal safety in lone working – have I read up on and considered this seriously?	

Task/area for reflection	Further comments
Maintaining momentum	
<p>If you don't receive an enquiry for a couple of weeks – try not to panic!</p> <p>In my experience working with new private practitioners, premature anxiety can be very common, and can have an effect on a practitioner's confidence in their therapy business. Remember, there will be quieter times even for the most successful practices. I recommend staying calm and consistent with how you run your practice. You may need to change things if it's a continual issue (and then maybe start by speaking to colleagues, and/or your supervisor for feedback/support).</p>	
<p>Re-visiting and revising professional links as you grow your practice.</p>	
<p>Developing your skills, and underpinning your private practice through ongoing CPD and further training.</p>	
<p>As you develop your practice, and grow in your experience as a therapist, periodically revisit your website and directories, to refresh your content keeping it relevant and up to date.</p>	
<p>Life is not all work! Make sure you balance your time, and invest in engaging in other things in life, which will help keep you connected to yourself. This in turn will help keep you refreshed and motivated in your work.</p>	

Further information

BACP Private practice toolkit

www.bacp.co.uk/pptoolkit

BACP Ethical Framework for the Counselling Professions

www.bacp.co.uk/ethical-framework

Private Practice divisional information:

Full membership subscription £20 a year; free for journal access.

www.bacp.co.uk/privatepractice

Related resources:



Please note, there are a plethora of useful resources available throughout the BACP *Private practice toolkit*. Listed here are just some of the most recent, or relevant guides.

BACP (2021) *Student to private practice*. BACP Private practice toolkit. BACP student conference streaming, and BACP Private practice toolkit (recorded workshop) (Content Ed. Binstead, C.).

Binstead, C. (2020) Tools of the trade. *Private Practice*, September, BACP (journal).

Counselling Tutor Podcast 157 – BACP Special: *Starting a private practice in counselling*. (audio podcast). <https://counsellingtutor.com/starting-a-private-practice-in-counselling/>

BACP (2021) *The buck stops with you!* BACP Private practice toolkit divisional – members' resource (website) NB *Access only via divisional membership (£20 a year).

BACP (2021) *Understanding tax in the 21st century, what you need to know*. BACP Private practice toolkit.

BACP (2021) *Location and place of work*. BACP Private practice toolkit. BACP (2021)

BACP (2021) *Growing your own practice – blogging and website basics*. BACP Private practice toolkit.

BACP (2021) *Growing your practice - The uniqueness of you*. BACP Private practice toolkit. NB *Access only via divisional membership (£20 a year).

BACP (2021) *Contract discussions. Private practitioner's contract template*. BACP Private practice toolkit.

BACP (2021) *Negotiation of the business with ethical, therapeutic practice*. BACP Private practice toolkit. NB *Access only via divisional membership (£20 a year).

BACP (2021) *Privacy notice guide*. BACP Ethics hub/Private practice toolkit.

BACP (2021) Video interview between working private practitioner Caz Binstead, and Data Protection Lead at BACP, Dan Gibson. BACP Private practice toolkit. <https://learningcentre.bacp.co.uk/#/catalogue/landingpage/item/e65fb54c-9391-4f5f-8771-aae5a713c464/>

Continued >

BACP (2021) *Brief guide - notes to accompany the GDPR video discussion*. BACP Private practice toolkit.

BACP, GPiA 105 Fact Sheet: *The United Kingdom General Data Protection Regulation (UK-GDPR) legal principles and practice notes for the counselling professions*. (Content Ed. Mitchels, B.).
Lutterworth: BACP.

BACP GPiA 044 Fact Sheet: *Ethical decision making in the context of the counselling professions*. Lutterworth: BACP.

BACP GPiA 110 Fact Sheet: *Boundaries within the counselling professions*. Lutterworth: BACP.

BACP GPiA 004 CAQ: *Working in private practice within the counselling professions*. Lutterworth: BACP.

All GPiA resources are available at: www.bacp.co.uk/gpia.