



Practice Management Worksheet

Nan is a new Clinical Director at The Mental Health Agency. Nan has 15 years of clinical experience and is excited to start her new role. Nan has never been a Clinical Director before, but she is confident in her clinical skills and knows she can support the team. The Mental Health Agency is in a rural community and primarily works with Medicaid recipients. The Agency provides outpatient therapy for youth and families and are the only agency in the area serving this population. The team consists of 12 staff members, plus Nan. The agency is owned by David – a social worker by training. David is getting ready to retire and hired Nan to “keep things running.” He hadn’t shared his plans to retire and there was no conversation about managing the business practices. Over the next few weeks, Nan focused on the clinical side of business. When she met with David each week, they talked about how the team was doing – but nothing more. One day, David received a call from the bookkeeper. The agency is unable to make payroll. Nan learned the agency is also \$350,000.00 in debt but has over \$450,000.00 in billable services outstanding.

6 Components of Effective Practice Management:

Information Technology • Compliance • Marketing • Human Resources • Finance • Operations

Examples of “Good Habits”

- Pull financial reports
- Have regular staff meetings
- Keep avenues of communication open
- Accountability/Check in meetings
- Make reviewing the strategic plan and goals a routine process - at least twice a year. Are you on track?
- Use project management tools like a project plan or task list to manage programs, grants, projects.
- Financial Audits
- Policy submitting progress notes, etc.

Discuss as a group:

1. Of the six components of Effective Practice Management which areas does Nan need to focus on?
2. What “good habits” or practices can Nan put into place to avoid this or similar problems in the future?
3. What else is important to consider?