



GRATEFUL HEART  
HOLISTIC THERAPY CENTER

**INTERNSHIP INFORMATION AND APPLICATION**  
**Our winter application is DECEMBER 1.**

If you are interested in applying for an internship, please review this packet and then submit the following five (5) items to [admin@gratefulhearttherapy.org](mailto:admin@gratefulhearttherapy.org).

1. A resume with your professional and clinical experience
2. Two letters of recommendation from persons who can endorse your clinical work
3. A marketing plan (*Attachment 1*)
4. A statement of interest describing why you wish to join Grateful Heart
5. A business plan with information about your caseload, costs, etc. (*Attachment 2 and 3*)

**SAVE THE DATE**

DATE	WINTER 2018
Information Meeting	November 11, 11:30 AM – 1:30 PM
Application Deadline	December 1, 2017
Interviews	December 9, 2017 - 10:30 AM – 2:30 PM
Getting Started Meeting	December 16, 2017 - 10:00 AM – 1:00 PM
Additional Orientation Meeting	January 13, 2018 - 9:00 AM – 1:30 PM
Internship Start Date	January 15, 2018
Early Start Date	December 15, 2017
San Francisco Supervision Group	Noon to 2:00 PM, Thursdays
Berkeley Supervision Group	11:10 AM – 1:10 PM, Tuesdays
Alameda Supervision Group	8:00 – 10:00 AM, Fridays

**NOTE:** All meetings and events take place at the East Bay Healing Collective at 1840 Alcatraz Avenue, a few blocks from the Ashby BART Station in Berkeley or at 1549 Verdi Street in Alameda. Please email [admin@gratefulhearttherapy.org](mailto:admin@gratefulhearttherapy.org) to RSVP to our November information meeting.

We appreciate your interest in Grateful Heart and look forward to hearing from you.

Kind Regards,

Rawna Romero,  
Director of Clinical Services and Program

## INTRODUCTION

Grateful Heart is a non-profit organization that offers affordable psychotherapy to youth, adults, couples and families in San Francisco, the East Bay and Contra Costa County. We also offer a supportive internship program for pre-licensed Marriage Family Therapist clinicians that will allow you to:

- Accrue hours towards licensure
- Earn an income
- Develop the clinical and entrepreneurial skills required for success in private practice
- Create an actual practice that is yours once you are licensed
- Enter your post-licensure career with a higher income earning potential than many of your peers

As an intern, you typically have three basic options: (1) An internship that allows you to accrue hours but offers no monetary compensation, (2) an internship that offers you a nominal stipend and (3) an internship that offers you compensation, often once you have met certain thresholds.

Internships with compensation are also structured in a variety of ways. Some internships will (A) pay you a flat rate regardless of the number of clients you see or how long you've been an intern. Some offer you (B) a percentage of the client fees you generate (retaining the balance as an agency fee) and some internships (C) pay you everything you earn minus a monthly charge of typically \$680 - \$800 per month.

In addition to different fee structures, internships offer different kinds of benefits, each with their own pros and cons. Both options (B) and (C) offer opportunities for earning, with (C) offering more earning potential and fixed costs.

Like all programs, our program (categories 3 and C above) has its particular strengths and differentiators. While we are less clinically focused than some programs, we are proud to offer opportunities for private practice incubation, career and business skills development, flexibility, autonomy and earning.

In the past decade, more than 100 interns have joined Grateful Heart. Of the 48 interns currently affiliated with our organization, 22 are as employees earning average monthly incomes of \$500 to \$3,500 after expenses. The remaining 26 are volunteers, preparing for the transition to income earning.

In winter of 2018, we will select 8-10 interns to join our organization. These interns will be chosen for their aptitude and integrity as clinicians, their interest in holistic psychology and their intention to pursue a private practice as part of their career path and goals.

If you are interested in our program, please read this packet carefully. It contains detailed information about our internship and application process and will help you determine if Grateful Heart is a good fit for you.

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## SUMMARY OF BENEFITS

Our benefits include:

- Retention of your client caseload
- A competitive monthly agency fee
- The opportunity to earn an income while accruing hours for licensure
- The potential to earn more as your practice grows
- Guidance and support to launch your private practice career
- Flexibility, autonomy and support
- Assistance with business skills development
- Assistance in procuring a professional office
- Your choice of San Francisco, East Bay and Contra Costa County locations
- Clinical enrichment and support, including monthly training workshops
- A holistic philosophy
- Four months of no-cost weekly group supervision
- The freedom to choose your own supervisor/s
- Access to 40+ clinicians willing to provide reduced fee supervision
- Access to a network of 45+ fellow interns, including your own cohort
- Potential low-fee referrals
- Marketing support
- Promotion on Grateful Heart's website
- Opportunities for volunteerism and professional development
- Coordination with other agencies
- Tax-free employee reimbursement for expenses, such as the cost of psychotherapy or training
- The opportunity to continue at Grateful Heart for two years once you become licensed
- Attentive service by a dedicated staff

## DESCRIPTION OF BENEFITS

### Retention of your Caseload

Your current clients can join you at Grateful Heart after you leave your current placement site. In addition to providing continuity of care for your clients, this will allow you to begin Grateful Heart with an established caseload. It will also provide you with opportunities for longer term client retention: a benefit for both you and your clients.

### A Competitive Monthly Agency Fee

Based on our research, with our low monthly agency fee, Grateful Heart offers one of the most affordable internship programs in the Bay Area. As a service to you, our monthly fee can be paid with either income from your practice or donations from family and friends. The income generated by your practice will be allocated by Grateful Heart to cover (1) the cost of financing and operating your practice and (2) your payroll once you are an employee. **All payroll disbursements made to you will include the standard governmental deductions for federal and state withholding. They will also be subject to a 12.5% payroll expense and a \$10 payroll processing fee.**

### An Opportunity to Earn an Income while Accruing Hours for Licensure

Our internship has two levels – one for volunteers (level one) and one for employees (level two). Although you will begin Grateful Heart as a volunteer, you can apply to become an employee once you have accrued \$1,000 in reserve funds, consistently average at least \$1,280 in client fees per month and have an additional Rainy Day Fund (equivalent to one month's operating expenses) saved for monetary fluctuations in your practice. Acceptance as an employee is based upon meeting these two financial thresholds as well as a review of your success in meeting the overall goals and expectations of our program. As an employee, you can request either: (A) a monthly payroll disbursement of minimum wage (\$12.25) for the hours you devote to seeing clients and your supervisor or (B) a monthly payroll disbursement of (A) above plus additional funds. Depending on their caseloads, interns can earn from \$500 to \$3,500 after expenses per month depending on their caseloads and client fees and the cost allocated to maintaining their practice. Most interns typically can transition to employee status within 4 – 8 months and earn an average of \$750 per month.

### The Potential to Earn More as Your Practice Grows

Most internships allow you to accrue hours towards licensure. Some internships also allow you to earn an income during the accrual process. The potential for earning varies widely from internship to internship, ranging from small stipends to hourly wages for interns who are retained as employees. Grateful Heart is designed to offer you much more than the compulsory minimum wage required by law. Once you qualify to become an employee, your income will increase in proportion to your practice. The more you generate in client fees, the more you can earn.

### **Guidance and Support to Launch your Private Practice Career**

Many clinicians begin their professional careers without the financial or business skills to begin and sustain a private practice. By participating in our program, you will enter your post-licensure years with the basic financial, operational and marketing skills necessary for success as a private practice clinician. You will acquire these skills experientially as well as by accessing the no or low-cost opportunities for mentoring, training and professional development we offer in our Private Practice Resource Guide.

### **Flexibility, Autonomy and Support**

We understand that managing an internship can be stressful, especially when you have other significant commitments. We also realize that after years as a student, many individuals prefer some modicum of autonomy as interns. For this reason, we've developed an internship that offers flexibility, autonomy and support. Although some major decisions must be approved by our staff, you can choose your office location, schedule, fee scale, supervisor and modality. As long as you meet our standard clinical and administrative requirements, you can also choose how actively you wish to participate in our program. The choice is yours.

### **Assistance with Business Skills Development**

In addition to the basic financial, operational and marketing experience you will acquire as an intern, we will provide you with information about The SCORE Association, Small Business Administration and The Renaissance Center, as well as other resources and opportunities for business skill development.

### **Assistance in Procuring a Professional Office**

We will assist you in identifying your short and long-term rental needs and selecting an office for your practice. Although you are responsible for locating an office compatible with your needs, we will guide you through the process and oversee the lease and monthly rent payment for the office. In addition to personalized assistance, we will provide you with information, materials and resources about evaluating, sub-leasing, renting, furnishing, equipping and maintaining a professional office for your practice.

### **Your Choice of San Francisco, the East Bay or Contra Costa County Locations**

Although it is more widely known in the East Bay, Grateful Heart has 48 offices throughout the Bay Area. As an intern, you can choose where you wish to base your practice, including whether you wish to have a practice in two locations. Our staff will help you assess which office settings are most optimal, as well as how to evaluate market opportunities as they relate to your choice of location. With prior approval by Grateful Heart, you can launch a practice in more than one county over the course of your internship, creating more opportunities for practice development in the future. At present, several interns practice in two counties.

### **Clinical Enrichment and Support, including Monthly Training Workshops**

Grateful Heart provides monthly training workshops focusing on contemporary approaches to the therapeutic process, trends in trauma, neurobiology and attachment, psychotherapy with couples and marginalized persons as well as other clinical and practice support topics of interest to our community. An annual workshop on the licensure preparation process will also be offered in 2017. Facilitated by a variety of senior or master clinicians, our trainings are intended both for clinical enrichment and skills development. In addition to training, we offer 1:1 coaching on clinical program development for interns wishing to sponsor groups, workshops or peer trainings. We also offer an extensive library of clinical articles, access to a referral directory, plus a variety of clinical tools, such as assessments and forms, to all our interns.

### **A Holistic Philosophy**

As an agency, we are committed to offering programs and services that integrate somatic, transpersonal, humanistic, psychodynamic and contemporary psychoanalytic approaches to the practice of psychotherapy. Many of our supervisors and interns work eclectically, bridging across modalities, some focusing on social justice as a particular interest. Whether informed by these focuses or others, we are joined in an important commitment to providing ethical, respectful care to both our interns and clients.

### **Four Months of No-Cost Weekly Group Supervision**

To support your transition to private practice, Grateful Heart will provide you with weekly group supervision at no cost during your first four months as an intern. If you wish to supplement the initial supervision we provide, you can choose to work with an additional individual or group supervisor, however until you are generating an average of \$800 per month in client fees, you will be required to pay for any additional supervision out-of-pocket.

### **The Freedom to Choose Your Own Supervisor/s**

With the exception of the group described above, you can choose your own supervisor. We currently offer eight East Bay and San Francisco groups with varied focuses and access to more than 25+ individual supervisors willing to provide supervision on a sliding-scale basis. You may also select a supervisor that is not currently affiliated with Grateful Heart as long as they agree to participate in an annual evaluation process and meeting and offer an affordable rate.

### **Access to 25+ Clinicians Approved by Grateful Heart and Willing to Provide Reduced Fee Supervision**

As noted above, Grateful Heart actively recruits and retains a cohort of more than 25+ supervisors. Many of these supervisors serve as faculty, adjunct staff and supervisors at the California Institute of Integral Studies, JFK University and The Psychotherapy Institute and practice in a variety of contemporary modalities. These supervisors agree to offer their services at reduced rates to interns in our program.

### **Access to a Network of 45+ Fellow Interns including your own Cohort**

You will begin your orientation and supervision process as an intern with a cohort of up to 8 other interns. You can also become acquainted with the other members of our community through our List-Serve (Google Group) and our internal Facebook page. If you want to become more involved, you can join one

of the process or study groups we offer, participate in our monthly clinical training workshops or attend the community events hosted by Grateful Heart and our interns two to four times per year. As a member of our network, you can find other clinicians with similar interests, engage in collaborative learning, secure vacation coverage for your practice, exchange information about resources or find an office or suite-mate or study partner. The options are plentiful, depending on your needs.

### **Potential Low-Fee Referrals**

Grateful Heart typically receives approximately 25 client inquiries per month from individuals and couples seeking therapy in the \$30 to \$80 range, with approximately 70% of calls/emails currently from East Bay residents. Depending on factors, such as your experience, specialties and office location, you may receive inquiries from prospective clients directly through our website. While you are responsible for generating referrals for your practice, we will provide you with the guidance to establish a referral network of your own. We will also provide potential referral opportunities through our affiliation with other organizations, such as Gaylesta, CAMFT and The Psychotherapy Institute, a benefit for those interns not already affiliated with these organizations.

### **Marketing Support**

When you apply to Grateful Heart, you will be asked to develop a marketing plan that reflects your vision and goals for your practice and career. Over the course of your internship, we will support you to develop and implement your plan, providing you with:

1. A copy of “12 Months to an Ideal Private Practice” by Lynn Grodzki
2. Access to a monthly marketing support group inspired by Lynn Grodzki’s book
3. Support in creating print and digital marketing collateral that adheres to our agency’s advertising and brand guidelines
4. An annual workshop with Annie Schuessler, DBA “The Therapist’s Coach,” a renown local expert of private practice marketing
5. An annual consultation with our staff to discuss the development and refinement of your marketing plan
6. An annual training of social and digital media ethics
7. An online library of articles selected specifically to support your understanding of marketing concepts and strategies
8. The ongoing discussion of marketing and business development as a part of many of our activities and events, including our preliminary orientation and supervision group

We understand how intimidating marketing can be, especially for early-career clinicians. We also understand that there is not a “one size fits all” approach to marketing that will work equally well for everyone. We want to help you identify what will work for YOU.

### **Promotion on Grateful Heart’s Website**

We will include your practice profile and photograph on [gratefulhearttherapy.org](http://gratefulhearttherapy.org) with direct links to your website. We can also post group and/or event announcements and blogs posts on our website and Facebook page to direct traffic to your website and increase your online exposure.



### **Opportunities for Volunteerism and Professional Development**

Grateful Heart offers a variety of opportunities for volunteerism and professional development to assist you to acquire more experience and skills as a clinician. If you are interested in developing a peer presentation, study group, workshop or other clinical offering, our Clinical Directors will assist you in conceptualizing and implementing your plan. You will also be invited to participate in community forums, meetings, committees and events as a member or volunteer. These experiences can provide invaluable experience in our field and also provide opportunities for networking.

### **Coordination with Other Agencies**

Many times, interns must engage in simultaneous internships to complete the accrual of their hours. In order to help facilitate and ease this process, Grateful Heart can enter into “Third Party Agreements” with other nonprofit organizations such as schools to provide supervision for your work at these agencies, allowing you to acquire additional client hours without additional personal cost.

### **Tax-free Employee Reimbursements for Expenses, such as for the Cost of Psychotherapy and Training**

Once you become an employee, you can request reimbursement for approved expenses. The cost of psychotherapy, training and marketing are generally approved, based on the availability of funds generated by your practice.

### **The Opportunity to Continue at Grateful Heart for Two Years Once Licensed**

Our Post-Licensure Bridge Program provides newly licensed interns and alumni of Grateful Heart to continue to develop professionally, while enjoying the benefits of an affiliation with our organization for a period of two years following licensure. These benefits include opportunities for ongoing training, mentorship, facilitation of study groups, participation in program development, and continued participation in a clinical community. Our online Business Resource Library will provide you with information on accounting, business taxes, licenses, marketing, insurance panels and other vital relevant business information.

### **Attentive Service by a Dedicated Staff**

As an intern, we will treat you respectfully. We will respond to your inquiries and requests punctually. We will communicate with you clearly about our policies and procedures and provide practical assistance to support your development as a private practice clinician.

## WHO WE ARE SEEKING

We are seeking trainees/interns who:

- Are drawn to Grateful Heart Holistic Therapy Center and its focus and approach
- Are committed to clinical excellence, integrity and learning
- Have a strong grasp of clinical practice, as verified by at least two letters of recommendation
- Have a demonstrated ability to sustain an ongoing caseload of clients for a period of a minimum of six months
- Are seriously committed to developing a private practice as part of their career path and goals
- Have a core or ancillary interest in holistic approaches to psychotherapy
- Have the equivalent of at least 2 days (10 hours) a week to dedicate to their practice
- Have a caseload of 5 – 7 established clients who agree to transfer to our agency (OR) are willing to meet the requirements of applying without a caseload
- Plan to develop a part time practice of 10-15 clients a week
- Can attend trainings once a month on the second Sunday or the month (11:00 AM – 2:00 PM)
- Will actively engage in weekly/monthly marketing and practice development
- Can attend either our San Francisco or East Bay (Berkeley or Alameda) orientation/supervision group (please see page 1 for dates and times)
- Can work individually and as part of a team

If you are a post graduate intern or post practicum trainee (about to graduate) you are welcome to apply.

## **STRUCTURE OF PROGRAM – Three Tiers with Opportunities for Advancement**

Grateful Heart offers a three-tiered program.

- **Internship Program – Level One (Volunteer)**

Level One of our program is designed to last up to one year, however under certain circumstances application and acceptance to Level Two (Employee) can be requested much sooner. Interns in Level One are volunteers. They receive all the benefits of our program and can accrue funds for future withdrawal, however are not paid until they have met the thresholds for employment and are approved to advance to Level Two.

- **Internship Program – Level Two (Employee)**

Level Two interns are considered employees. If you successfully complete our orientation, finish the practice development tasks outlined in the Task Timeline at the end of this document, have saved your \$1,000 reserve and consistently average at least \$1,280 in client fees per month, you can apply to become an employee (Level Two). Level Two offers opportunities for continued training and support as well as income generation and hour accrual.

- **Post-Licensure Bridge Program – Level Three (Associate)**

Our Bridge Program provides newly licensed interns and alumni of Grateful Heart (Associate Employees) to continue to develop professionally, while enjoying the benefits of an affiliation with our organization for a period of two years following licensure. These benefits include opportunities for ongoing training and mentorship, community service, facilitation of study groups, participation in program development, as well as potential eligibility for participation in student loan forgiveness programs for clinicians who consolidate their loans as part of the Direct Loan Program and work 30 hours or more per week (combined for client appointments, consultation and related training).

## OUR FINANCIAL STRUCTURE

Grateful Heart is financed by (1) client fees and (2) income from fundraising. These two sources of funding are considered our “agency income.” Our agency income pays for our staffing, rental and supervision costs, as well as for banking, bookkeeping, accounting and tax preparation fees, Worker’s Compensation, liability insurance and FICA taxes, marketing, professional dues and memberships, clinical training and services and other basic operating expenses. With the exception of these costs, and grants funds for program development, all of the income we receive in client fees is disbursed to our interns.

In order to determine what percentage of income is retained by Grateful Heart versus disbursed to our interns, we undergo a complex monthly accounting process. Each intern is assigned a banking account which undergoes a series of monthly credit and debit transactions. Client fees are allocated as a credit, while the five expenses itemized below are allocated as debits.

<b>DEBITS</b>						
<b>No.</b>	<b>Fixed or Variable</b>	<b>Frequency of Allocation</b>	<b>Type of Allocation</b>	<b>Amount</b>	<b>Method of Calculation</b>	<b>Pertains to</b>
1	Fixed	Monthly	Rent	<b>Varies individually</b>	Based on the cost of rent for each intern’s office	All interns
2	Variable	Monthly	Supervision	<b>Varies individually</b>	Based on the cost of supervision for each intern	All interns
3	Fixed	Monthly	Agency Fee	<b>\$350</b>	Based on a fee set by agency	All interns
4	Fixed	Each payroll disbursement	Payroll Processing Fee	<b>\$10</b>	Based on cost of processing	Employees
5	Variable	Each payroll disbursement	Payroll Expense	<b>12.5% of balance</b>	12.5% of disbursement minus expenses 1 – 4	Employees

Once the credits and debits have been transacted, the balance (minus a Reserve Fund and Rainy Day Fund described earlier in this packet) is available as a disbursement to each intern. To receive a disbursement, an intern must be approved as an employee, however transition to employee status can be deferred until an intern leaves our agency if regular disbursements are not desired.

As an employee, you can request either: (A) a monthly disbursement of \$12.25 per hour (minimum wage) for the hours you devote to seeing clients and your supervisor or (B) a monthly payroll disbursement of (A) above plus additional funds. All disbursements are subject to state and federal taxes.

**COMPARISON OF LEVEL ONE AND TWO – Basic Information**

TABLE 1

<b>Specifics</b>	<b>Level One/Volunteer</b>	<b>Level Two/Employee</b>
<b>Admission Requirement</b>	Please see “Who We Are Seeking”	Successful completion of Level One
<b>Application Process</b>	Submission of <i>Statement of Interest</i> , resume, two letters of recommendation and marketing and business plans	Submission of a <i>Request for Transfer to Level Two</i> plus a review by your supervisor and the Director of Clinical Services and Programs and Director of Business
<b>Duration</b>	Up to one year, however under certain circumstances application to the Level Two can be requested earlier. Earlier acceptance will only be considered if all criteria for advancement to Level Two are met.	Once you are accepted into Level Two, you will have an annual evaluation by your supervisor/s. If you have met the requirements for continuation in Grateful Heart, you will be invited to extend your participation for an additional year.
<b>Goals</b>	Orientation, completion of practice development tasks, commencement of practice, creation of a \$1,000 Reserve Fund and Rainy Day Fund equivalent to a month’s practice expenses, hours accrual and application to Level Two.	Income generation, private practice development, clinical training, hours accrual and preparation for licensure.

## FINANCIAL BASICS FOR LEVEL ONE

If you wish to have a sustainable practice, and progress to Level Two of our internship program (as an employee) we recommend you strive to generate a minimum of \$1,280 per month in client fees by your sixth month as an intern. These earnings could be generated with an average of 8 client hours per week with a fee of \$40/session as noted in TABLE 1. In actuality, you are likely to have clients with a range of fees, but in general, fee levels and client caseload increase over time, resulting in a commensurate increase in income. If you begin with 6 clients, you might consider pursuing the following increase over 6 months:

TABLE 2

<b>CASELOAD and FEE PROGRESSION – Level One</b>					
	A	B	C	D	E
Size of caseload	6	7	<b>8</b>	<b>10</b>	<b>12</b>
Average hourly fee	\$25	\$30	<b>\$40</b>	<b>\$40</b>	<b>\$50</b>
Average monthly income	\$600	\$840	<b>\$1,280</b>	<b>\$1,600</b>	<b>\$2,400</b>

**Once you are in the C, D or E range (grey above) on a consistent basis of more than 3 months, have your \$1,000 reserve and the equivalent of a month’s expense as a “Rainy Day Fund,” you will be eligible to apply to Level Two.**

If you find that you are struggling to progress in meeting the minimum goals, please discuss your concerns with your supervisor, the Director of Clinical Services and Programs and Director of Business Operations. If you do not meet the minimum expectations for more than eight months you will be invited to a review meeting. Together we will work to develop a plan of action to support you in growing your practice.

Everyone builds their practice in their own way, depending on their goals, referral network, dedication to marketing and outreach and availability. *Although you will receive support throughout your internship, you are ultimately responsible for determining how successful you will be. The more you focus on your practice’s growth, the more it will blossom.*

## CRITERIA FOR ADVANCEMENT TO LEVEL TWO (EMPLOYEE)

1. Demonstrated ability to engage and sustain an active client caseload of 7 – 8 clients, averaging approximately 32 client hours per month
2. Consistent attendance at weekly supervision group and orientation in months 1 – 4 of your internship
3. Endorsement of your group supervisor and/or the Director of Clinical Services and Programs for admission to employee-status
4. Punctual completion of all weekly and monthly organizational responsibilities including weekly deposits to your designated Grateful Heart account, monthly submission of a tracking report and careful management of other document records
5. Accrual of \$1,000 reserve fund from client fees and an additional Rainy Day Fund of approximately one month's operational expenses to assist with fluctuations in client income
6. Consistent earning of over \$1,280 per month for a period of three months
7. Completion of *Request for Transfer* with self-evaluation

## EARNING POTENTIAL AS AN EMPLOYEE (LEVEL TWO)

Level Two (employee) interns will receive a monthly disbursement based on a variety of financial factors, also described on page 13. Typically, these factors include a clinician’s (1) caseload, (2) average client fee, (3) total client receipts, (4) supervision costs, (5) rental costs and (6) Reserve Fund and Rainy Day Fund status. The table below offers several scenarios for the earning potential offered by our internship.

TABLE 3

<b>Possible Income Scenarios</b>					
	A	B	C	D	E
Size of caseload	8	12	16	20	24
Average hourly fee	\$40	\$50	\$50	\$60	\$60
Average monthly client fee	\$1,280	\$2,400	\$3,200	\$4,800	\$5,760
Allocation for participation in group supervision – once weekly	\$225	\$225	\$225	\$225	\$225
Allocation for participation in individual supervision ( <i>once first unit of supervision has been met</i> )		\$400	\$480	\$480	\$520
Allocation for office overhead: 4-6 clients/day	\$300	\$300	\$450	\$525	\$800
Agency Fee (2016 rate)	\$350	\$350	\$350	\$350	\$350
Payroll Processing Fee	\$10	\$10	\$10	\$10	\$10
<b>SUB-TOTAL</b>	\$465	\$1,182	\$1,752	\$3,277	\$3,922
Minus 12.5% Payroll Expense	-\$58.12	-\$147.75	-\$219	-\$409	-\$490
<b>GROSS INCOME</b>	\$406.88	\$1,034.25	\$1,534	\$2,868	\$3,432
% of income to average monthly client fees	31%	43%	47%	59%	59%
State and Federal Income Taxes (25%)	-\$101.72	-\$258.56	-\$383.50	-\$717	-\$858
<b>NET INCOME</b>	<b>\$305.16</b>	<b>\$775.69</b>	<b>\$1,150.50</b>	<b>\$2,151</b>	<b>\$2,574</b>

### NOTE:

- This table assumes that a \$1,000 Reserve Fund and a Rainy-Day Fund (equivalent to one month’s expense) has been established. It does NOT account for the \$31 to \$57 increase in agency fee planned for all new cohort members.
- Please note that an intern must be averaging \$1,280 (“A” above) for at least three consecutive months to be considered for graduation to Level Two as an employee.
- Submission of reimbursement requests for pre-tax payment of allowable expenses (such as psychotherapy and training) can reduce the amount you pay in our agency payroll expense and state and federal taxes.



## FINANCIAL MANAGEMENT OF LEVELS ONE AND TWO

TABLE 4 – Will be discussed in detail at our upcoming information meeting

Specifics	Level One/Volunteer	Level Two/Employee
<b>Cost</b>	\$350 (current) plus one-time \$10 payroll processing fee and 12.5% payroll expense upon separation if transition to employee status has not occurred	\$350 (current) plus monthly \$10 payroll processing fee and 12.5% payroll expense
<b>Banking</b>	Client fees are deposited into an agency bank account designated for your use.	Same as Level One
<b>Lease Deposit</b>	Grateful Heart will cover your lease deposit as a short-term loan. Once you are accruing funds from client fees, your loan debt will be automatically repaid to Grateful Heart.	Same as Level One
<b>Payment of Rent, Agency Fee and Supervision (Practice Expenses)</b>	Your rent and agency fee of (ENTER) will be paid by Grateful Heart using the client fees generated by your practice. Supervision will be paid for by the agency once you have reached the necessary thresholds. Until then, you will pay for supervision costs out of pocket.	Grateful Heart will pay your deposit, rent and supervision and withdraw a monthly agency fee (currently \$350) from the client fees generated by your practice.
<b>Reserve Fund</b>	If income generated from your monthly client fees exceeds your expenses, the difference will be held until a \$1,000 Reserve Fund has been established.	\$1,000 must be continually sustained in your Reserve Fund.
<b>Rainy Day Fund</b>	You will be required to save the cost of one month's expenses as a Rainy-Day Fund.	You will be required to sustain or replenish your Rainy-Day Fund.
<b>Funds Accrual</b>	Any (after-expense) income generated from your monthly client fees will accrue as a balance in your account.	Same as Level One
<b>Payment</b>	If you do not advance from Volunteer to Employee status, you will be issued a one-time payment at the conclusion of your internship. This payment will include all of the client fees you collected during your internship, minus any expense that are owed and due. A \$10 and 12.5% payroll expense will be deducted from your earnings after expenses and pre-tax reimbursement payments are deducted.	Once your expenses have been debited, you can request either: (A) a monthly payroll disbursement of minimum wage for the hours you devote to seeing clients and your supervisor or (B) a monthly payroll disbursement of (A) plus additional funds. If your Reserve Fund and/or Rainy Day Fund become depleted, it must be at least partially replenished before funds above minimum wage are paid.
<b>Expense Reimbursement</b>	This benefit is available only to employees.	If you have the funds, you can request pre-tax reimbursement for some expenses.

## GROUP SUPERVISION AND ORIENTATION

### Supervision

During your internship you will meet with at least one supervisor each week. Your supervisor will offer you both clinical guidance and practical support to assist you with the development of your practice. As an intern with our organization, you will be required to participate in our no-cost group supervision as your first unit of supervision for four months at the beginning of your internship. We offer East Bay groups on Tuesdays from 11:10 AM until 1:10 PM at the East Bay Healing Collective at 1840 Alcatraz in Berkeley and on Fridays from 8:00 – 10:00 AM at 1549 Verdi Street and a San Francisco group from noon to 2:00 PM on Thursday at 1939 Divisadero Street. If you are an intern, group supervision will cover you for up to 10 client hours per week. If you are a trainee, group supervision covers you for up to 5 client hours. The dates for the summer and fall groups are as follows:

WHAT	WINTER
<b>San Francisco Supervision Group</b> 1939 Divisadero Street Code: 46790*	Noon to 2:00 PM – Thursdays
<b>East Bay (Berkeley) Supervision Group</b> 1840 Alcatraz Please ring bell	11:10 AM – 1:10 PM - Tuesdays
<b>East Bay (Alameda) Supervision Group</b> 1549 Verdi Street	11:10 AM – 1:10 PM – Fridays

### Orientation Meetings

We will hold a Getting Started meeting for the winter cohort on December 16, 2017 from 10:00 AM – 1:00 PM at the East Bay Healing Collective at 1840 Alcatraz Avenue in Berkeley. An additional orientation meeting will be held on Saturday, January 13, from 9:00 AM to 1:30 PM at 1549 Verdi Street. These meetings are mandatory and will provide you with the opportunity to become better acquainted with both our agency and your cohort. Our preliminary orientation topics will include:

WHAT	WINTER
<b>Getting Started Meeting</b> 1840 Alcatraz, Berkeley Please ring bell	December 16, 2017, 10:00 AM – 1:00 PM
<b>Additional Orientation Meeting</b> 1549 Verdi Street, Alameda Please ring bell	January 13, 2016, 9:00 AM – 1:30 PM

## **GETTINGS STARTED TOPICS**

- Terms of Internship Agreement
- Establishing your Banking Account
- Our Financial Process
- Procedures for Renting an Office
- Establishing Email and Voicemail
- Agency Record-Keeping Protocols
- Establishing Client Fees/Increases
- Managing Client Transitions
- Your First Month

## **ORIENTATION TOPICS**

- Our Organization
- The Financial and Logistical Nuts and Bolts of Practice Management
- Forms and Record-Keeping
- Envisioning your Practice and Clinical Identity
- Developing an Entrepreneurial Mindset
- Client Fees
- Marketing your Practice – First Steps

**TIMELINE – FIRST THREE MONTHS**

This is a sample checklist itemizing the tasks you will be asked to complete your first three months as an intern at Grateful Heart.

**Table Abbreviations:**

AC: Administrative Coordinator, DCSP: Director of Clinical Services and Programs, GH: Grateful Heart, IC: Intake Coordinator and MM: Marketing Manager

	<b>TASK – MONTH BEFORE</b>	<b>WHEN</b>
	Read the “Getting Started” document	<i>Month before</i>
	Set your schedule	<i>Month before</i>
	Sub-lease or rent an office space. If you need assistance in this process, please refer to our information sheet titled <i>Renting an Office Space</i> .	<i>Month before</i>
	If you need more than two hours of group supervision during your first four months as an intern, please speak to the Director of Clinical Services and review our supervision directories of groups and supervisors offered through GH.	<i>Month before</i>
	Prepare your existing clients for the transition to a new setting and your new status as an intern if relevant. Talk with your current supervisor about potential clinical themes/issues that may emerge during the process.	<i>Month before</i>
	In discussion with your supervisor and/or the DCSP, establish your fee structure and range.	<i>Month before</i>
	Review our sample forms and either copy or use to create your own forms. Before completing the forms, ask your supervisor to review them. Useful forms might include those that are used for HIPAA, informed consent, client contact information, confidentiality exchange of information, income and attendance tracking, etc.	<i>Month before</i>
	Refine your practice “vision” to help you prepare to further develop your marketing plan. Consider your ideal client, how large a caseload you would like to have, the kinds of clients you would most like to focus on seeing, etc. Information from this exercise will assist you in refining your business plan.	<i>Month before</i>
	If you plan to have an individual supervisor in addition to the group supervision we provide in October – January, please ask that supervisor to establish a Supervision Agreement with you. We will provide samples.	<i>Month before</i>
	Develop procedures for your office	<i>Month before</i>
	Review the agency’s policies and procedures	<i>Month before</i>
	Establish your cancellation and payment policies	<i>Month before</i>

	<b>TASK – MONTH 1</b>	<b>WHEN</b>
	If relevant, send the DCSP and FC an email with the name of your supplemental individual supervisor, your start date and the fee you will be charged monthly.	Month 1
	Inform your clients about your supervisor and their name and license number. If you are participating the agency’s introductory 4-month group supervision <i>Rawna Romero, LMFT, 41466</i> will be your supervisor.	Month 1
	Discuss the clinical implications of your change in status/setting with your transfer clients, consulting with your supervisor about the process.	Month 1
	Create a locked filing system for your new practice.	Month 1
	Set-up your practice phone and voicemail. We recommend Google Voice (free) or BayLink (minimal cost).	Month 1
	Begin considering how you will answer questions from prospective clients about your practice/orientation. If needed, please speak with your supervisor about this process.	Month 1
	Create a Wells Fargo account – Contact details will be provided.	Month 1
	Consider your networking strategies and goals. Develop an outreach list (personal and professional) of persons who could serve as possible referral sources ( <i>professors, colleagues, current and former supervisors, fellow students and interns, your co-workers, community members, family members and friends</i> )	Month 1
	Develop a practice announcement letter for distribution electronically and via postal mail. Samples will be sent to you.	Month 1 (or earlier)
	Research and decide which professional organizations you wish to including which offer list-serves which may be useful in promoting your practice. GH is a member of <i>CAMFT, Association of Northern California Family Therapists, The Psychotherapy Institute and Gaylesta</i> and will routinely send you information from these agencies but you may also wish to join yourself.	Month 1
	Submit a photograph and profile for the GH website.	Month 1
	Re-review our agency policies and procedures.	Month 1
	Begin attending group supervision and orientation.	Month 1
	Send an announcement to our agency List-Serve (Google Group) describing your practice and clinical interests.	Month 1
	Discuss your supervisor’s policies regarding emergencies and “red flags.”	Month 1
	Discuss your financial policies with your supervisor, including any difficulties you might experience as it relates to fee collection.	Month 1
	Develop copy for your business card and send to our MM for approval.	Month 1

	<b>TASK – MONTH 1 – 2</b>	<b>WHEN</b>
	Call/email the FC to schedule a preliminary meeting.	<i>Month 1</i>
	Begin making weekly deposits into your Wells Fargo account, including the first week of work.	<i>Month 1</i>
	Call/email your “buddy” (a current intern who has volunteered to help support you through the first months of your internship).	<i>Month 1</i>
	Submit your business card, office signage and any marketing or promotional collateral, including for groups or workshops you wish to offer, via email to our AC for approval. Please pre-approve clinical program concepts with the DCSP.	<i>Month 1/2</i>
	Attend monthly training/s.	<i>Month 1 on</i>
	After approval, order your business cards.	<i>Month 2</i>
	Meet with the DCSP.	<i>Month 2</i>
	Meet one time with your buddy.	<i>Month 2</i>
	Meet with your buddy a second time.	<i>Month 2</i>



GRATEFUL HEART  
HOLISTIC THERAPY CENTER

**APPLICATION FOR INTERNSHIP**

If you are interested in applying for an internship, please review this packet and then submit the following five (5) items to [admin@gratefulhearttherapy.org](mailto:admin@gratefulhearttherapy.org) by **DECEMBER 1, 2017**.

1. A resume with your professional and clinical experience
2. Two letters of recommendation from persons who can endorse your clinical work
3. A marketing plan (Attachment 1)
4. A statement of interest describing why you wish to join Grateful Heart
5. A business plan with information about your caseload, costs, etc. (Attachment 2 and 3)

**Application – Attachment 1**  
**MARKETING PLAN – Please Use this Format**

(Please refer to pages 68 – 78 of Lynn Grodzki’s “12 Months to Your Ideal Private Practice” for assistance in answering questions 1 – 6. If you do not have access to the book, we will provide copies of these pages via email).

**1. Background**

Is there anything more you would like to share with us that you have not included in your resume?

**2. Strengths**

Please list some of your strengths as a psychotherapist. As you describe them, please keep the following questions in mind: *What is special about you as a therapist? What makes you most happy in your work?*

**3. Integrity and Values**

Please tell us what gives your work as a psychotherapist the most meaning? What principles and values inspire and guide you?

**4. Vision**

In 1-3 sentences, please tell us about your long-term vision for your practice.

**5. Purpose**

In 1-3 sentences, please describe the steps you will need to take to fulfill your long-term vision of your practice.

**6. Mission**

In 1-3 sentences, please tell us what immediate steps you will take to begin to pursue your vision of your practice in the near future.

**7. Goals**

Please describe your one, two and five year goals for yourself as a clinician.

**8. Practice Summary and Service Description**

Please write a description that explains what services you will be providing and to whom, essentially addressing the “*who, what, where and how*” of your practice. Some specific questions you might answer include: What services will you offer and to whom. As you write, consider what you might include in the home or services page of your website.

**9. Your Market**

Please describe your markets (*the categories of people you wish to serve*) or what Annie Schuessler, The Therapist’s Business Coach” calls your “Right-Fit Client?” These are the clients with histories,



issues, concerns or needs you feel drawn to work with. What do you know about them? Where and how do they generally seek psychotherapy? How do you anticipate making yourself and your services accessible to them?

**10. Your Brand**

In one sentence (a “tagline” in marketing), say something about yourself and your work that exemplifies who you are and what you offer as a therapist. It is an opportunity to articulate your basic message. As an example, you might say: Jane Jones, *Helping Couples in Conflict Restore Peace to their Lives*.

**11. Your Competitive Edge**

List five of your most valuable qualities or expertise as a therapist. Review the websites of other therapists also promoting themselves to your target markets. How will you distinguish yourself to ensure you are considered by your market/s?

**12. Marketing Strategies**

Please tell us about your marketing approach. What marketing strategies will you employ? For instance, will you create a website, list your practice in Psychology Today or other online sites, develop and circulate your business cards, participate in social marketing, create flyers or postcards promoting your practice, send letters or electronic emails to your contacts, advertise in local media, arrange 1:1 meetings with potential referral sources, network with colleagues and peers, attend and mingle with co-attendees at conferences related to your areas of specialty, hold special workshops, write educational articles for local newspapers or blogs to place yourself in the public eye, speak at public events, etc. If you need additional help to execute your marketing strategies, how or where will you seek it?

**Application – Attachment 2  
BUSINESS PLAN**

*Please answer all of the following questions in your business plan.*

**COSTS**

How much money will you need to start your business? Please consider this the costs of the first three months as well as ongoing costs. How much will it cost to operate your business on a yearly basis? What is your goal for your personal annual income after business expenses? How much will you need to charge, based on the number of clients you will ideally see, in order to meet these goals. *(Please see the Financial Worksheet to help ascertain this.)*

<b>INCOME to CLIENT RATIO</b>		
	<b>SAMPLE</b>	<b>YOU</b>
How much do you wish to earn each month before expenses?	<b>\$5,000</b>	
After calculating your business expenses (average \$800), how much do you wish to earn?	<b>\$4,200</b>	
What is your average client fee?	<b>\$80</b>	
How many <i>monthly</i> client hours will you need to achieve this income goal?	<b>62.5</b>	
How many <i>weekly</i> client hours will you need to achieve this income goal? <i>(Monthly hours divided by 4)</i>	<b>15</b>	
How many client hours do you currently log each week?	<b>9</b>	
How many more clients do you need to meet this weekly goal?	<b>6</b>	

<b>PROPOSED FEES</b>	
My proposed hourly rate for individual will be:	\$
My proposed hourly rate for couples will be:	\$
My rate for an extended (90 minute) session will be:	\$
My scale range will be (low fee to high fee):	\$ - \$
My lowest fee will be:	\$
My group rate (if relevant) will be:	\$



<b>ESTIMATED OVERHEAD DURING LEVEL ONE</b>					
<b>This is for purposes of calculation only</b>					
<b>EXPENSE</b> <i>Estimate High</i>	<b>AMOUNT</b>	<b>Start-Up</b>	<b>Monthly</b>	<b>Annually</b>	<b>NOTE</b>
Rent					
Deposit					
Agency Fee	\$350				
Supervision					48 sessions per year estimated with absences
Voicemail Fee					
<b>SUB-TOTAL</b>					
Training					Approval required
Psychotherapy					Approval required
Marketing					Approval required
Transportation to trainings					Approval required
<b>SUB-TOTAL</b>					
Payroll Processing Fee	\$10				
Payroll Expense (of balance to be paid to you as payroll)	12.5%				
<b>TOTAL COSTS</b>					

<b>INCOME PROJECTIONS – Employee/Level Two - This is for purposes of calculation only</b>					
<b>SOURCE/COST</b>	<b>SAMPLE – High</b>	<b>SAMPLE - Low</b>	<b>Monthly</b>	<b>Annually</b>	<b>NOTE</b>
Desired Income	\$5,000	\$1,000			
Add \$10 Payroll Processing Fee	\$10	\$10			
Add Payroll Expense (12.5%)	\$625	\$125			
Add taxes (13% avg.)	\$650	\$130			
Average Expense for Level One	\$791	\$791			
<b>NEEDED as GROSS INCOME</b>	<b>\$7,076</b>	<b>\$2,056</b>			