

COLLABORATIVE Practice Tips

A monthly bulletin from the CP Cal Practice Excellence Committee

The Practice Excellence Committee is pleased to offer tips to help you increase your Collaborative cases and achieve *practice excellence*.



Please send us your comments and questions! Email us at info@cpcal.com

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Billing Practices

A major part of what we do in Collaborative Practice involves family, feelings and money--a volatile mix at best. In the United States money is a taboo topic. In many other countries that is not the rule and money may be freely discussed, even loudly in public. Can you imagine this happening at our local supermarket, at a community event? In our world, families change status, either through divorce or death (the other taboo topic), and financial circumstances must be addressed in order to achieve closure. We are clear that we must have this dialogue with our clients; how do we do this with our colleagues, and should we do so? With two clients and several professionals, differing fees can become a focus for our clients. Have you had this experience?

Tip #1

Be aware of and address your own values and bias about money.

Look at your values surrounding money and how it affects your professional life. You may be confident while talking about what you do with a client, but you may transform into someone who sounds less so when letting them know about your fees.

- Does it affect how you discuss your fees with clients, and if it does, how can you address that?
- How do you decide how much to charge for your services and how do you feel about that?
- Are there services that you choose to charge for or not bill? Is that how your fee contract is written? Is it based on your profession with regard to the rest of the Collaborative Team?
- Who might you look to as a coach or mentor to tackle this subject?

Tip #2

This is a topic to discuss with your Practice Group.

Begin the discussion with your Practice Group, possibly at a monthly meeting, about whether this topic is worthy of discussion. The topics might include:

- What do you believe are the societal mores about money?
- Might this be different in your culture or family, and if so, how is it different?
- What is your personal attitude and values surrounding money?

- What did you learn from your family about money?
- How do these values affect your professional life? (For example setting fees, discussions with peers who charge less or more than you etc.)

Tip #3

This is a topic to discuss with your Professional Collaborative Team.

Have these discussions as part of your Team preparation and debriefing sessions. The Team can agree to discuss:

- Who is billing for travel and who is not doing so?
- Who in the Team will be addressing money matters when they arise?
- How will the issue of money be dealt with regarding the Parenting Plan (e.g., extracurricular activities, schooling choices)?
- How do each of you bill for emails, phone calls and text messages, etc.?
- An agreed-upon amount of time that all will bill for the meeting. (Differential intra-Team time billings without explanation can become a source of client mistrust).

Money (or possible lack thereof) can be a source of anxiety for our clients. Almost everyone has experienced the client whose fear about becoming a resident of the local highway-overpass community affects their decision-making process. The fact-based presentation by our Financial Professionals can alleviate that concern in a way that years of psychotherapy would not.

During the next month we will be sending a confidential survey to a representative sample of CP Cal's members to ask them to let us know how they deal with this issue professionally. We look forward to your replies and we will report the aggregated findings in the months to come. Please help us all to address this often-difficult issue, it will benefit us all.

