



PROFESSIONAL BOUNDARIES FOR PANDEMIC TIMES AND BEYOND

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THANK YOU SAMHSA!



SAMHSA

Substance Abuse and Mental Health
Services Administration

COORDINATED BEHAVIORAL CARE

Coordinated Behavioral Care (CBC) is a not-for-profit organization dedicated to improving the quality of care for New Yorkers with serious mental illness, chronic health conditions and/or substance use disorders, through a Health Home, an Independent Practice Association (IPA) and other innovative programs, such as Preventative Case Management (PCM) services.

CBC seeks to create a healthcare environment where New Yorkers—especially those most impacted by social determinants of health—receive coordinated, individualized and culturally competent community-based care that is effective in preventing and managing chronic physical and behavioral health conditions.



CBC TRAINING INSTITUTE

Coordinated Behavioral Care's Training Institute provides innovative, interactive, culturally sensitive training and professional development to New York State's mental health providers. With an eye on adult learning theory, our trainings are cutting-edge, and delivered with compassion for and understanding of the complex demands on mental health professionals. It is our mission to ensure that we provide evidence-based training on a variety of topics to assist providers in supporting the service recipients on their caseload. With a love of learning ourselves, we create our trainings to be the scaffolding upon which a successful, rewarding career of service can be built.

Here are some previous trainings:

- Supporting LGBTQIA+ Clients
- HIPAA and Working from Home
- Pathway Home Model Panel Discussion
- Anti-racism Training
- Interview: This is How I Recovered From Mental Illness
- Working with Clients with Borderline Personality Disorder
- Medication Management for Non-Prescribers
- Helping Your Participants Reach Their Dreams
- Treating Seasonal Affective Disorder



PAUSE

CREATING SPACE FOR BEING HERE

- Sit upright in comfortable position with your back straight, but not tight, eyes gently closed
- Feel your bottom making contact with the chair and your feet flat on the floor
- Take 3 Slow Deep Breaths



TRAINING GOALS

- Define what we mean when we mean by “Professional Boundaries”
- Understand why maintaining professional boundaries is important
- Learn the difference between violating boundaries and crossing them for a therapeutic purpose
- Learn about how to avoid errors and make good decisions when crossing boundaries for therapeutic reasons
- Boundary considerations when doing telehealth
- Importance of self care in setting smart boundaries

POLL QUESTION

What's your job/job title?

- Care Coordinator
- Residential Case Manager
- Peer Counselor
- Case Manager
- Social Worker (Clinic, PROS, ACT)
- Vocational Counselor
- Other (type in chat box)



ONE SIZE DOES NOT FIT ALL

- There are some very clear ethical and professional guidelines that govern our interactions with clients.
- There are also a lot of situations where the boundary markings are not so clear.
- We are going to be exploring these “grey areas” where there are not always hard and fast rules, and decisions about where boundaries are set is influenced by factors like role, context, cultural considerations, diagnosis, client history.
- Be educated about agency guidelines – nothing here replaces them





BOUNDARIES ARE RELATIONAL

Boundaries exist in every relationship

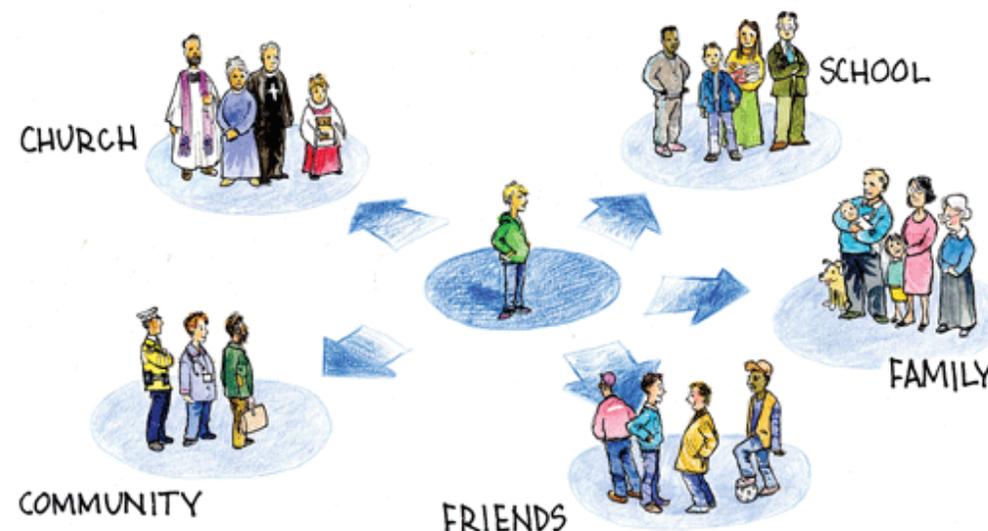
- Married/life partners
- Parents and children
- Worker and supervisor
- Co-workers
- Strangers

Boundaries are how we establish physical and emotional limits

Each person brings to relationships their own conception of what is acceptable to talk about, how to behave, how to interact.

Culture and family history are among the factors that influence the boundaries we set

Boundaries are how we protect our privacy and establish our individuality



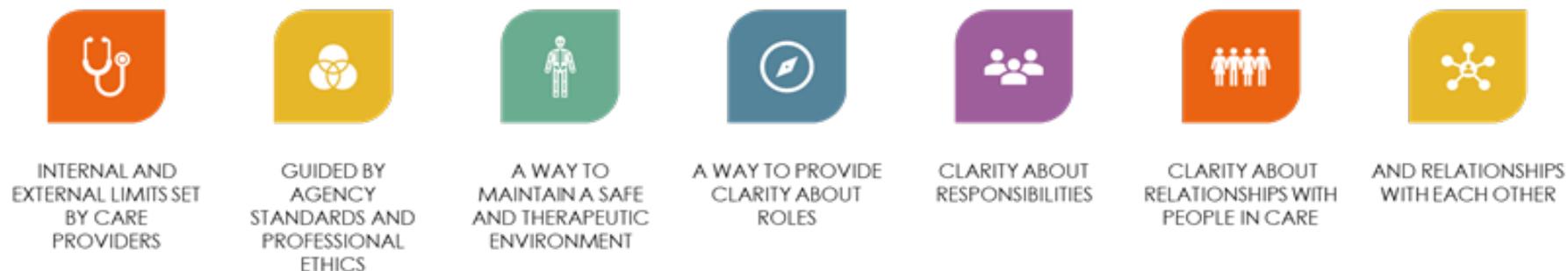


PROFESSIONAL BOUNDARIES

An interpersonal dividing line that creates a physically and emotionally safe environment for a client receiving services.

Distinguishes the helping relationship from social, sexual, family or business relationships.

It is a framework whose purpose is to primarily benefit one of the people in the relationship – the client





WHY ARE BOUNDARIES IMPORTANT?



Maintain safety of clients and staff



Maintain a therapeutic environment that supports growth and development



Consistent boundaries provide a corrective experience



Boundaries limit potential for retraumatizing clients



Clear boundaries promote job satisfaction, career development and safety for all



STEPPING BEYOND BOUNDARIES

- Boundary Violations
- Boundary Extensions/Crossings

BOUNDARY VIOLATIONS

- A crossing of a personal or professional boundary that is not in the service of helping the client. In fact, it is harmful. It violates professional ethics, regulations, guidelines or the law.
- It is often, but not always, unwelcome and perceived by the client as harmful.

EXAMPLES OF BOUNDARY VIOLATIONS

Sexual and Romantic

- Sexual relationships with clients (Justice Center provides an exemption for staff who are also recipients of services)
- Sharing of sexually explicit photographs
- Romantic relationships

Substance Use

Financial

- Lending and Borrowing money
- Taking money from a client for the services a staff is providing that is part of their job
- Hiring a client to do personal work, e.g. cleaning a worker's house or car, babysitting

Confidentiality

- Sharing a client's personal information with others



BOUNDARY EXTENSIONS/CROSSING S

- A thoughtful, purposeful crossing of a personal or professional boundary in keeping with achieving the client's goals. There is no violation of professional ethics, regulations, guidelines or the law.
- The client does not experience the crossing as abusive, unwelcome or harmful.
- Caution - Just because a worker believes that a boundary extension is intended to be helpful, justified, or not-harmful doesn't necessarily make it so.





DUAL RELATIONSHIPS

Relationships with clients outside the work environment or helping relationship

- Happens frequently when a worker lives in the same community as a client
- 12-Step groups
- Happens sometimes in residential environments
- Social networking/media

Roles imposed by law, regulation, or agency

- Mandated reporter
- Rent collection



EXAMPLES OF BOUNDARY EXTENSIONS



Self-disclosure

Accepting gifts

Attending life cycle events

Contact via social media



SELF-DISCLOSURE

- A conscious, intentional technique in which a worker shares information about their lives outside the work relationship with a client.
- What would be an acceptable reason to disclose information about yourself to a client?
- Understand your motive
- Understand your own context – life events
- Role of experience, seek supervision – transparency, we all blow it sometimes

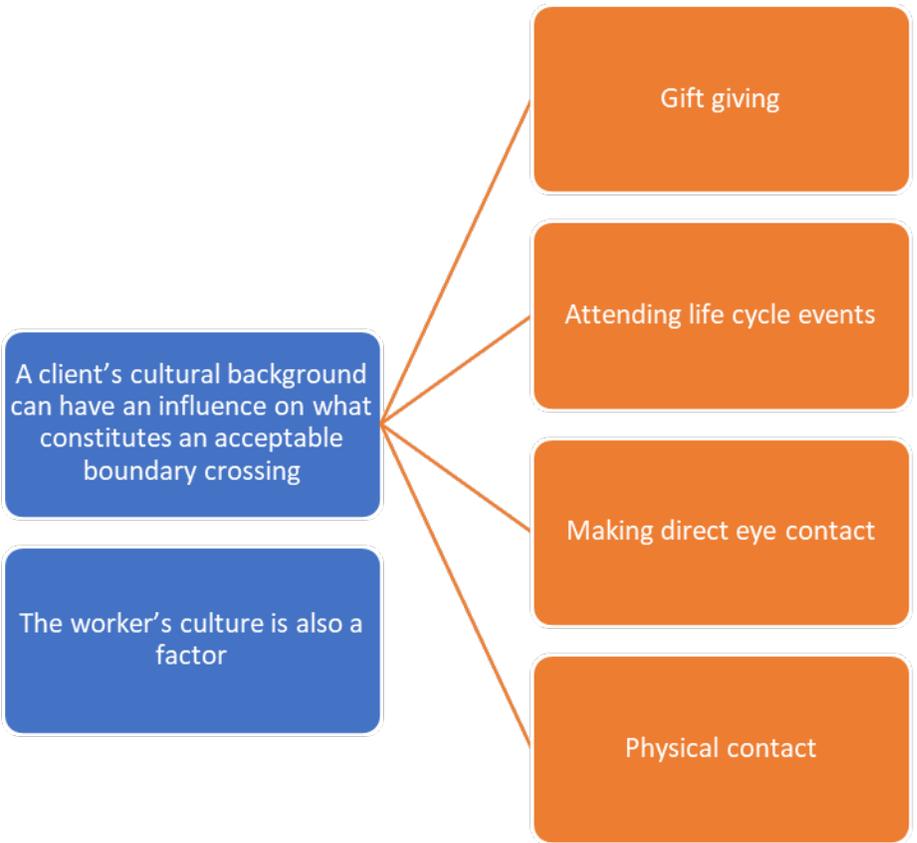
CONSIDERATIONS ON ACCEPTING GIFTS AND ATTENDING LIFE CYCLE EVENTS

- Would accepting the gift cause the client harm?
- Context/variables
 - Cost/value?
 - When in the course of the relationship – e.g. termination?
 - Cultural context – what does the gift symbolize?
- Religious ceremonies
- Graduations





CULTURE AND PROFESSIONAL BOUNDARIES



CULTURE AND PROFESSIONAL BOUNDARIES: WHAT TO DO?



Educate yourself - cultural literacy



Seek consultation

Supervisor
Colleague
Someone else in the client's community



Adopt a stance of humility – find out from the client what is meaningful.

Be curious
Be open to admitting a mistake.



SOCIAL MEDIA

Social Media presents inherent ethical risks and boundary issues

- Privacy and confidentiality for both you and your client
- Inappropriate self-disclosure
- Dual Relationships



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SOCIAL MEDIA

Don't assume

Don't assume that anything you put out on social media or content sharing platforms won't be seen by clients

Don't accept

Don't accept 'friend' requests from clients on platforms like Facebook and LinkedIn

Set

Set privacy settings to limit access to your personal social media to only those you approve

Respect

Respect client's privacy rights by not accessing social media unless there is a clinical reason to do so – consult with your supervisor first



RISKS OF UNPROFESSIONAL BOUNDARIES

- Abuse, neglect and/or mistreatment of people in care
- Damage to the therapeutic relationship
- Re-traumatizing clients and causing relapse
- Removing an opportunity for the client to learn and develop healthy boundaries with others
- Role confusion – personal vs. professional
- Legal consequences for staff



WHEN CLIENTS INITIATE OR INVITE A BOUNDARY CROSSING/EXTENSION

Clients may be unclear about what appropriate boundaries are in the helping relationship

- Clients who have been abused may be confused about boundaries
- Clients may come from settings where boundaries and rules are very different
- Psychiatric symptoms may interfere with understanding and respecting boundaries
- Pressures to gain immediate gratification of needs
- Cultural values and beliefs may influence perception of the relationship

BE SELF REFLECTIVE

QUESTIONS TO ASK YOURSELF

Does this boundary enhance or threaten the client's sense of safety in our relationship?

Is setting this boundary meeting my needs or the needs of my client?

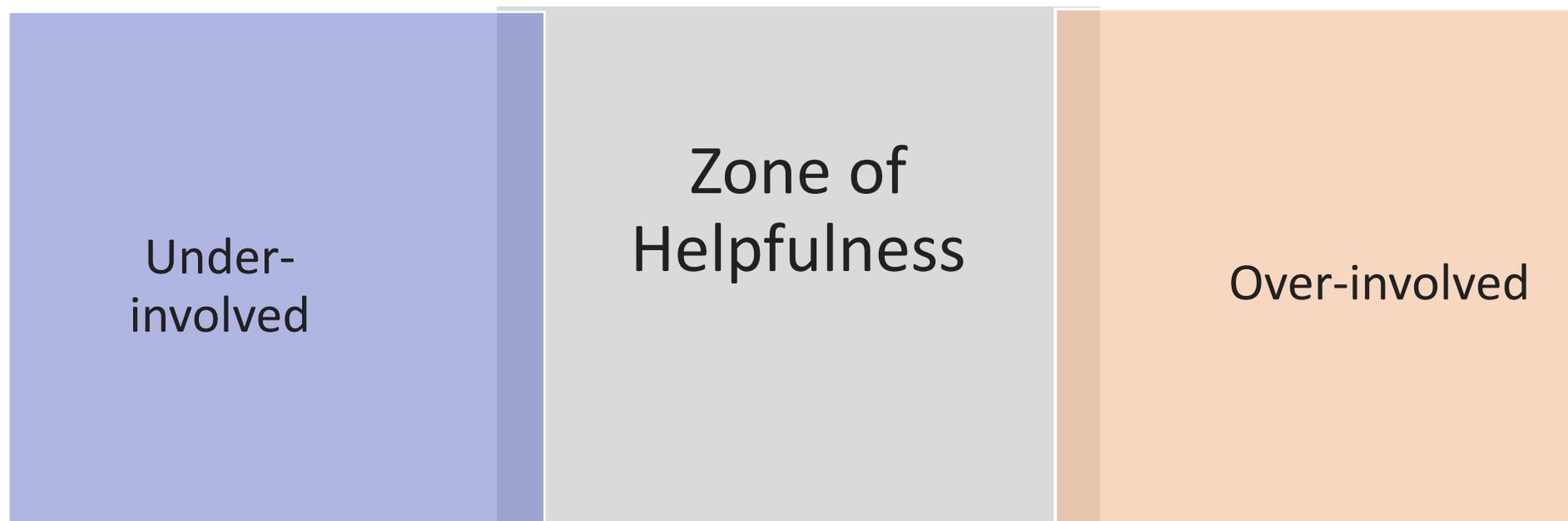
If I enter into a dual relationship with this client will the secondary relationship enhance the therapeutic relationship?

Before shifting a boundary, have I thoroughly discussed the shift with my client to ensure that the client understands and accepts the change?

Have I considered the possible consequences - What is the best/worst thing that can happen?



THE CONTINUUM OF PROFESSIONAL BEHAVIOR



CONTINUUM OF PROFESSIONAL BEHAVIOR - ISSUES



UNDER-INVOLVED

- Disconnected from others
- Lacking warmth, compassion, interest
- Carelessly breaches confidentiality
- Doesn't seek information, support, training or supervision
- Lack of curiosity
- Lack of awareness of the safety and well-being of others
- Relieved when clients don't show
- Blame clients for their problems
- Poor documentation

OVER-INVOLVED

- Does for, not with, undermining independence
- Overextends self to the point of risking quality and safety
- Keeps and tells secrets
- Overprotective
- Overly permissive
- Spends more time with favorite clients
- Bends rules for their favorites
- Driven by own feelings and needs, not client's
- Disregard for privacy
- Flirtatious



WHAT HAPPENS IN THE ZONE OF HELPEFULNESS

Provide flexible support, promote independence

Work as part of a team to meet client needs

Communicate and document clearly, fully and in a timely way to ensure client needs are met

Invest in and stay aware of persons' safety and well being

Uphold confidentiality

Show optimism, compassion and warmth

Involve people in decisions and provide choice

Act in person's best interest

Always uphold or improve quality of care

Consult with supervisors and other team members

Acknowledge uncertainty and ask for help



ROLE OF THE SUPERVISOR AND YOUR TEAM

- Be proactive in identifying the typical boundary dilemmas that arise
- Make sure that staff understand their responsibilities and the role they play in the client's recovery and treatment
- Create an atmosphere of openness
- Model clear boundaries in your interactions with staff
- Be aware of your staff's blind spots
- Provide additional support for workers who have client's who are prone to test boundaries





TELEHEALTH AND BOUNDARIES

POLL:

- How many of you are:
- Providing all services remotely via video or phone?
- Providing services both remotely and face-to-face?
- Providing all services face-to-face?



TELEHEALTH AND BOUNDARIES



Considerations related to the Technology

Be fully competent in the use of whatever platform you are using



Considerations related to Time

Avoid lateness or delay due to technical issues
Keep to a specific session time
Sticking to a workday – availability beyond when you would normally be accessible



Considerations related to Setting

Client's environment
Worker's environment

TELEHEALTH BEST PRACTICE RECOMMENDATIONS



KEEP A REGULAR WORK
SCHEDULE AND RESPECT FOR
TIME



ENSURE A PRIVATE,
CONSISTENT, PROFESSIONAL
SETTING



ASSIST CLIENTS IN
ESTABLISHING THEMSELVES IN
A SETTING THAT SUPPORTS
THEIR FULL PARTICIPATION
AND PREVENTS ACCIDENTAL
DISCLOSURES



BE FULLY COMPETENT IN THE
USE OF THE TECHNOLOGY

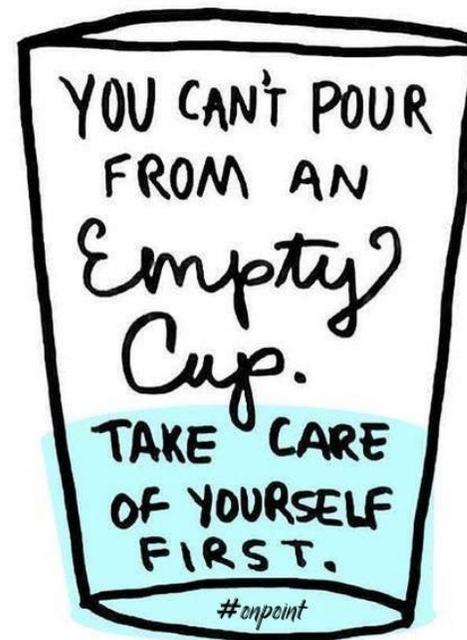


MODEL APPROPRIATE
BOUNDARIES

FATIGUE, BURNOUT AND BOUNDARIES

When we feel exhausted and burned out:

- We experience a great need for comfort, support and validation
- We may create rigid emotional boundaries to protect ourselves





EMOTIONAL RESONANCE

- When we witness someone else in pain, the pain centers in our brains become active.
- This is called Emotional Resonance
- Emotional Resonance is adaptive – it is the basis for empathy and compassion
- Too much exposure to pain and suffering can lead to “compassion fatigue” or “empathy fatigue” which can lead to burnout.
- So, what does this have to do with boundaries?



IMPORTANCE OF SELF CARE

Self-care is critical to maintaining professional boundaries

- We tend to struggle with setting boundaries when we're feeling emotionally vulnerable and experiencing empathy fatigue, secondary trauma or burnout.
- Setting boundaries between work and your personal life is what creates the time to do the things that you find restorative
- Being compassionate towards yourself – not trying to be all things to all people
- Setting appropriate limits to your workday – not feeling like you need to be available all the time





SELF-COMPASSION MEDITATION

Self compassion phrases:

- I am having a hard time right now
- Everyone feels this way sometime
- May I be kind to myself in this moment
- May I give myself the compassion I need



FINAL WORD ON MANAGING BOUNDARIES



Maintain clear documentation



Regular consultation with your supervisor, prior to initiating your plan and during the course of your work



Continuous self-reflection, self-care and self-compassion



Ongoing training and education



Remaining curious and humble

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