Establishing Professional Boundaries: How to create and maintain the proper environment for positive and healthy professional relationships with your families

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Today is a success if you:

- Recognize the importance of establishing and maintaining professional boundaries
- Identify barriers to maintaining boundaries
- Learn ways to assess boundary issues
- Learn methods to establish healthy boundaries
Question #1

When referring to the relationship between the client and helper, boundaries are:

A. Actions that are not appropriate in client care
B. Whatever the client feels is appropriate
C. Whatever the helper feels is appropriate
D. The limits that define the helper-client relationship
Question #2

Boundaries are essential to protect clients from the helper’s

A. Power differential
B. Anger
C. Poor decisions
D. Lack of knowledge
E. Attraction Feelings
Which is one of the clearest signs that a boundary violation has occurred in the helper-client relationship?

A. The client is not happy with his or her care
B. The helper hugs the client
C. The helper asks for a change of assignment
D. The needs of the helper are being met
E. The helper accepts a gift from a client
Why focus on “Setting Boundaries” for those who provide care to children and families in need?

• Service providers often work in dangerous, inhospitable, threatening environments.
• It’s foundational to any professional “helping” relationship.
• Necessary to ensure both physical and emotional well-being.
• It empowers the professional and therefore empowers the family.
Self-Care is a priority and necessity - not a luxury - in the work that we do.

And so is Boundary setting
What are Professional Boundaries?

• “Clearly” established limits that allow for safe connections between service providers and their clients

• Understanding of the limits and responsibilities of your role as a service provider
Boundary Issues: The Concept of Dual R

- Relating to clients in more than one relationship (professional, social, or business)

- Dual R can occur simultaneously or consecutively

- Dual R are not necessarily unethical. You must distinguish between:
  - **Boundary crossings**: acceptable, perhaps inevitable or unavoidable, dual relationships
  - **Boundary violations**: unacceptable exploitation or conflicts of interest
Why Professional Boundaries are Important

• It models appropriate relationships and effective communication
• Leads to practice of self-care, self-respect, and respect of other
• Creates time/space for positive interactions
• Avoiding “rescuer” role
• Avoiding compassion fatigue (burn-out)
• Maintaining physical and emotional health and safety
• Emphasizes “No Harm” to clients/families
• Avoids abuse of “power differential” & recognizes extent of “vulnerability” of client
Boundary Crossings and Violations
Unavoidable and Unanticipated Circumstances

- Geographical proximity
- Cultural, social, ethnic communities
- Conflicts of interest (e.g., divorce/custody proceedings, providers’ family members, students)
- Professional encounters
- Social encounters (e.g., family events)
Why is it so difficult?

• Dual relationships are inevitable—service provider & client know each other from another setting
• Values conflicts—client and service provider do not share similar viewpoints on choices, relationships, lifestyle, etc.
• Playing the “hero”—service provider feels the need to “save” the client
• Emotional Impact of the job—service provider may experience trauma symptoms due to hearing about client’s experiences
Potential problem areas

1. Self disclosure
2. Gift giving and receiving
3. Dual relationships
4. Altruism
5. Humor
6. Physical contact
Challenges to Helper in Maintaining Boundaries

No one is more vulnerable than the person who lacks self-awareness.
## Consequences of Poor Boundaries

<table>
<thead>
<tr>
<th><strong>US</strong></th>
<th><strong>Our Families</strong></th>
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<tbody>
<tr>
<td>• Compassion fatigue – service provider’s role may not feel sustainable</td>
<td>• Client may not receive appropriate or helpful services</td>
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<td>• Teamwork with other agencies may fall apart</td>
<td>• Might negatively affect willingness or ability to accept future services</td>
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<td>• Reputation of agency or profession may be compromised</td>
<td>• Client may feel betrayed, abandoned, or poorly served</td>
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<td>• Client and/or service provider may be emotionally traumatized</td>
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<td>and/or put in physical danger</td>
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Self-Assessment
Questions to consider when evaluating risk

- Do I frequently think of this client when I am away from work?
- Do I spend time with this client outside of work or my work area?
- Do I share personal information with this client?
- Do I have unnecessary or out of proportion concern for this client?
- Do I advocate for this client more than my other clients?
- Am I treating this client differently (e.g., appointment length, time of appointments, extent of personal disclosures)?
Questions to consider when evaluating risk

- Do I believe that I understand the client better than other staff?
- Could this client hurt my feelings?
- Do I truly believe I can help this client better than ANY other colleagues?
- Am I willing to keep secrets for this client?
- Does this client mean something special to me?
- How would I feel telling a colleague about this?
- Am I comfortable in documenting this decision or behavior in the client file?
Professional Boundary Self-Assessment
Results:
If you have rated 5 or more items with a rating of 5 or higher there is a strong possibility that you are maintaining weak boundaries with your clients and or their families.

http://coping.us/practicalclinicaltopics/boundarymaintenance.html
Compulsive Fixer-Rescuer Self-Assessment
So are you a Compulsive Fixer/Rescuer?

Who are you?

Results:

• 3 or more items with scores of 7 or higher or
• 5 or more items with scores of 5 or higher
• There is a strong possibility that you are maintaining weak boundaries with your clients and/or their families because of your being an “addicted fixer” or “rescuer”
Creating & Maintaining Boundaries

Professional boundaries
Disability
Safety
Respect
Legality
Rights
Support
Awareness
Responsibility
Communication
Creating & Maintaining Boundaries

• At the outset of any professional relationship, establish clear agreements regarding:
  o your role as a service provider
  o your availability
  o best ways to communicate with you
  o what to do if you see each other in a public setting

• Clarify your role and boundaries to ensure understanding throughout the relationship, PRN

• Use your supervisor or professional colleagues as a sounding board if you have questions or concerns
Creating & Maintaining Boundaries

• If you disclose personal information, make sure it is relevant to the client’s goals
• Consider how future interactions impact a client’s confidentiality and physical and emotional security
• Working with a team of providers: Promote positive, open communication and respectful sharing of information
• When boundary issues appear, address them quickly and clearly being sensitive to your client’s feelings
• If necessary, refer the client to another professional
Risk Management Strategies

• Consult, Consult, Consult
  o Consult with colleagues, ethical standards, agency policies, regulations, statutes

• Document, Document, Document
  o any dual relationships in their clinical case notes (Including actions taken to minimize risk of harm)
**Decision Tree**

**Proposed Behavior**

- **YES**
  - Meets a clearly identified therapeutic need of the patient, rather than a need of the provider? For example, is it in the plan of care?
    - **NO** → Abstain from Behavior
    - **YES**
      - Is the behavior consistent with the role of the providers in the setting?
        - **NO** → Abstain from Behavior
        - **YES**
          - Is this a behavior you would want other people to know you had engaged in with a patient?
            - **NO** → Abstain from Behavior
            - **YES** → Proceed with the behavior and document actions.

*Adapted from Therapeutic Nurse-Client Relationship, Revised 2006, College of Nurses of Ontario*
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Vignette Examples
Dilemmas to Answer

1. What Boundaries issues have possibly been violated in this case?
2. What could have been done to avoid the boundary violation in this case?
3. What steps should the service provider in this case take to mitigate the damages which occurred in the violation of boundaries with the client in this case?
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