Creating and Maintaining Ethical Boundaries in Client Relationships
January 24th, 2017 | 10:00 A.M. – 12:00 P.M.

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Agenda

Creating and Maintaining Ethical Boundaries in Client Relationships

Lynda Monk
Learning Objectives

• Define professional ethics and boundaries
• Explore various types of professional boundaries
• Learn some of the common boundary issues or challenges that can lead to ethical dilemmas when serving clients

Learning Objectives (cont.)

• Reflect on the unique boundary and ethical challenges when supporting clients in smaller and/or rural communities
• Understand the role of personal and professional values on creating ethical boundaries
• Consider various approaches to creating and maintaining ethical boundaries

What is a boundary?
What are boundaries?

- A boundary is anything that marks a limit
- Define where something or someone starts and stops
- Invisible line that is experienced and felt in human relationships
- Can be flexible or rigid, present or not present, strong or weak, etc.

Different Types of Boundaries

- **Material boundaries** determine whether you give or lend things, such as your money, car, clothes, books, food, or toothbrush.

- **Physical boundaries** pertain to your personal space, privacy, and body. Do you give a handshake or a hug – to whom and when?

Different Types of Boundaries (cont.)

- **Mental boundaries** apply to your thoughts, values, and opinions. Are you easily suggestible? Do you know what you believe, and can you hold onto your opinions? Can you listen with an open mind to someone else’s opinion without becoming rigid?

Different Types of Boundaries (cont.)

• **Emotional boundaries** distinguish separating your emotions and responsibility for them from someone else’s. It’s like an imaginary line or force field that separates you and others. Healthy boundaries prevent you from giving advice, blaming or accepting blame. They protect you from feeling guilty for someone else’s negative feelings or problems and taking others’ comments personally.

  ![Image](http://psychcentral.com/lib/what-are-personal-boundaries-how-do-i-get-some/)

What are *not* boundaries?

✗ Being rude
✗ Avoiding people/clients
✗ Ignoring
✗ Turning away from
Other?

What are *not* boundaries?

• **Boundaries are not meant to harm or hurt or shut-out**, but rather they are needed to support positive, healthy relationships with others, including clients being served.

  ![Image](http://psychcentral.com/lib/what-are-personal-boundaries-how-do-i-get-some/)
Pause & Reflect

Ethical Boundaries

• Are a key part of overall professionalism

• Many professions have their own Code of Ethics

Poll

• Are you a member of a professional group that has a Code of Ethics guiding your practice and work?
  - Yes
  - No
  - Not sure
A Closer Look at “Professionalism”

Professionalism includes many aspects and considerations, including some of the following:

**Professional Behaviour and Ethics**
The ability to conduct oneself in a professional manner while using professional ethics to guide and enhance practice

**Professional Development**
The ability to commit to continued learning and professional development

**Professional Judgment**
The ability to make sound decisions based on a combination of education, training, professional experience and consultation in combination with the organization’s policies, practice standards and guidelines
A Closer Look at “Professionalism”

Awareness of Personal Values
The ability to describe and understand how personal experiences and values influence the professional role of a Settlement Worker

Ethical Awareness
Ethical awareness is a foundational part of professional practice. The ability and commitment to act ethically is an essential aspect of ensuring quality service delivery by Settlement Workers.

Components of Ethical Practice

Support, Care & Empathy

Human Rights

Context

Client

Worker

Adapted from B.J. Antie, 2005
What is a Code of Ethics?

A Code of Ethics is intended to serve as a guide to the everyday professional conduct of professionals and clarifies the standards and principles that guide the conduct and professional practice of workers.

In the absence of a formal, professional Code of Ethics

We must turn to guidelines and/or competencies for direction on ethical practice.

English Language Development and Settlement Service Worker - Complete Competency Dictionary

The purpose of the Dictionary is to identify the competencies (skills and knowledge) that will inform the training of staff providing English language development and settlement services. It represents a blueprint of good practice that can guide the development of new and experienced practitioners and support the development of their respective organizations. These competencies are designed to ensure that immigrants across BC receive consistent, high quality and relevant services to aid their settlement, adaptation and integration in Canadian society.
Competency Framework

<table>
<thead>
<tr>
<th>Act ethically</th>
<th>Demonstrate an understanding of privacy protection and informed consent; demonstrate confidentiality</th>
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<tbody>
<tr>
<td></td>
<td>Understand the impact of personal values and beliefs on practice</td>
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<td>Understand and recognize situations involving conflict of interest</td>
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<td>Act with integrity</td>
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<td>Recognize personal limitations</td>
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<td>Demonstrate a knowledge of codes of ethics</td>
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<td>Be accountable to immigrants, community members, colleagues, managers, funders and others</td>
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Influential Factors on Boundaries

- Unequal power relations
- Community influences
- Mental illness, codependency, addictions, etc.
- Personal/professional experiences
- Training/professional development in this area

Cultural Considerations

- Context matters when it comes to boundaries
- Cultural considerations are a key part of the context in your work
- Culture must be considered from many different perspectives, for example:
  - Culture of the individual (worker and client)
  - Cultural group
  - Cultural influence
  - Cultural needs
Common Challenges: Ethical Dilemmas

- There are many competing imperatives and challenges within Settlement Work
- For example, practice guidelines that are constructed within an urban environment may be difficult to follow in an isolated or more remote rural community (i.e., dual relationships)
- As a result, many challenges and problem areas can contribute to ethical dilemmas relevant to boundaries.

Ethical Dilemmas: Boundary Issues

Some of these challenges include, but are not limited to, such things as:
- personal self-disclosure
- client-staff relationships
- dual relationships
- gift-giving/receiving
- physical contact
Other?

Creating and Maintaining Ethical Boundaries in Client Relationships

Tahira Saeed
South Okanagan Immigrant & Community Services
South Okanagan Immigrant & Community Services (SOICS)

One-stop shop providing Language & Settlement support for over 40 years in the South Okanagan-Similkameen region

- 2 Offices – Penticton & Oliver
- Outreach services in 3 towns
- Computer labs include Mac and Windows operating system
- 31 active volunteers
- Serving approximately 1500 clients annually
- Top 2 source countries are India and Philippines
- Services include language classes, settlement support, workshops, employment, community connections, licensed childminding, and LIP
- Annual events include Citizenship ceremony, Multicultural Festival, Volunteer appreciation potluck and Greeting Card contest
- Funding ranges from levels of government and local institutions and sponsorships

Statistics

- 19 team members who speak 12 languages
- 9 are immigrants originating from 7 different cultures
- 4 are 2nd generation immigrants originating from 4 additional cultures
- 6 are Canadians, 2 of whom are married to immigrants
- 2 males and 17 females

Team Dynamics
Case Study – Physical Contact

- Client has been residing in Canada for approximately 3 and a half years as TFW. 2 weeks ago he became a PR and came in to share this information with the settlement worker.
- Settlement worker is a 2nd generation female immigrant whose parents immigrated from a European country. The client is a male immigrant originating from a Muslim country in Asia.
- She is happy for him and genuinely congratulates him while holding her arms still on her side and almost bouncing up and down with excitement. I can see that she wants to hug him, however is aware of her professional conduct and cultural sensitivities. Working with the client for more than 2 years, I was aware that the client is a forward thinking individual who is well on his way to actively engaging in Canadian norms. Therefore I say to the settlement worker that, if she wants to, she can hug him. When he smiles at her, she can’t stop herself and hugs him.

Knowledge Sharing and Support

- For any settlement team (immigrants or non-immigrants), two things are vital.
  - Open to learning and comprehending new/diverse information
  - When unsure, ask
- Formal Guidelines – Codes of Conduct, job descriptions, performance evaluations, staff meetings, etc.
- Settlement organisations in the Thompson-Okanagan region have been sharing expertise and resources.
- With budget cuts, revised funding criteria, and an increase in new immigrant arrivals, we often need guidance on how best to approach these circumstances.

Land the Learning

How might you use the information from Tahira’s case example in your own work and/or agency?
Boundary Issue 1: Personal and Professional Space

The amount of overlap between the “personal space” and “professional space” for is influenced, in part, by community size and community location. Geography and space influence how we practice and also how one regards themselves as a settlement worker.

Boundary Issue 1: Physical Space

Physical space, such as the size and layout of office space and/or meeting places with clients also influence boundaries (including confidentiality – for example, in open gathering or meeting spaces).

Creating and Maintaining Ethical Boundaries in Client Relationships

Saša Loggin
Skeena Diversity Society
Creating and Maintaining Ethical Boundaries in Client Relationships
AMSSA Webinar January 24, 2017
Presentation by Sasa Loggin, Skeena Diversity Society, Terrace, BC
HISTORY
2000: Formed as a community partnership to address institutional racism
2010: Welcoming and Inclusive Communities & Workplaces Project Welcome Centre opens
2014: Settlement Services

VISION:
Skeena Diversity believes in the strength and creativity of a diverse, inclusive race-free community

PROGRAMS & SERVICES:
- Settlement Services
- Community events
- Youth projects
- Art shows
- Movie nights
- Workshops
- Dance workshops
- Meeting & gathering place

STAFF & VOLUNTEERS:
- 1 Full-time executive & project director
- 2 Part-time – settlement worker & project assistant
- Contractors – special programs
- Volunteers

Welcome to Skeena Diversity Centre
SOLUTIONS:
• Quick assessment of client’s needs
• Flexibility of approach
• Staff internal communication: Google Docs
• Booking appointments
• Meeting offsite

CHALLENGES:
• Ensuring privacy for clients in our multi-use busy environment

PURPOSE OF OPEN SPACE:
• Creating a friendly, welcoming space
• Building a community, sense of belonging
• Opportunity for learning, sharing of ideas and community engagement
SOLUTIONS:
- Skeena Diversity staff takes messages & shares with families or sponsorship groups
- Established Steering Committee for all sponsorship groups
- Media contact
- Drop off place for donations - hosted Clothing & Toy Swap
- Create a safe place for families to visit

CHALLENGE:
- Everyone in the community wants to meet Syrian refugee families

Land the Learning

How might you use the information from Saša’s case example in your own work and/or agency?

Boundary Issue 2: Anonymity

In smaller and rural communities anonymity is very difficult to achieve, the settlement worker is more exposed and visible in both their personal and professional lives, not separate from but part of the community.
Boundary Issue 3: High visibility/high accessibility

In close knit communities (defined either by size and/or relationships) there may be a lack of privacy as a settlement worker and it might feel like your personal life is on display or that you are always working. For example, a client might approach you for help or to have a conversation while you are doing your grocery shopping in the local store, professional boundaries can be harder to maintain.

Boundary Issue 4: Dual or multiple relationships

A dual relationship is any relationship outside the professional helping relationship. A multiple relationship involves more than one relationship outside the professional helping relationship. You may be the person's settlement worker and also their teammate in a sports league, a member on the same committee or board, a friend, etc.

Creating and Maintaining Ethical Boundaries in Client Relationships

Katelin Mitchell
Kelowna Community Resources
KCR
620 Leon Avenue,
Kelowna, BC
250 763 8008
www.kcr.ca

KCR
- CARF accredited not for profit
- In operation since 1983
- Approximately 45 staff across 5 departments: Adoption services, Community and Volunteer services, Employment services, Family services and Immigrant services.
- IS department:
  - settlement services throughout the Central Okanagan
  - partnerships with other service providers in the Thompson Okanagan region (RRT, Respect Network)
  - LIP contract for the Central Okanagan

EMPOWERMENT VS. RELIANCE
STORYTELLING
Waiting for a new home
The Canadian Press - Mar 12, 2016 / 8:58 am | Story: 160610

Photo: The Canadian Press

KCR Policies & Procedures
• Extensive Policies and Procedures
• Education opportunities:
  - new hire orientations
  - annual reviews of our Employee Handbook
  - Board orientation process
• Participant Information Manual

Land the Learning

How might you use the information from Katelin’s case example in your own work and/or agency?
Boundary Issue 5: Professional Diversity

The “Code of Ethics” in and of themselves do not specify which values and principles are most important and which outweigh others in instances of conflict.

Source: (Gladue et. al, 2008, Presentation)

Pause & Reflect

What specific or broader challenges might you face as a Settlement Worker that could lead to ethical dilemmas or problems related to boundary issues in your work?

Boundaries Can Be Created Through…

- Awareness of personal and professional values
- Compliance with professional practice guidelines
- Informed consent
- Critical Reflective Practice
- Ethical decision making
- Containing difficult stories
The Impact of Core Values on Settlement Work

- We all have personal values which are formed and influenced by many factors such as life experience, worldview, family, culture, religion, age, gender, education, peer relationships, and more.

- You also have professional values informed by your sector of work, that shape guidelines, practice competencies and ethics.

Personal Core Values

- Our values represent what is important to us and they show up in our choices, actions, thoughts, attitudes, and beliefs.
- You might have core values related to love, family, self-determination, fairness, compassion, justice, integrity, doing your best, friendship, health, finances, kindness, freedom, community, pro-choice, right to life, and so on.

Pause & Reflect: In your experience...

Consider how holding certain personal values (attitudes, beliefs) might impact the help being offered to your client(s).
Professional Core Values from Best Settlement Practices

- User-defined services
- Holistic approach
- Respect for the individual

- Inclusion
- Client empowerment

- Cultural sensitivity
- Community development

- Accountability
- Orientation towards positive change

- Reliability
- Collaboration
- Access

Professional Values Inform Practice Guidelines...

Services are delivered in a manner that fully respects the rights and dignity of the individual. Respect for the individual is assured by:

- confidentiality
- services free of racism, sexism and other forms of discrimination
- respecting the fundamental rights of each participant
- compliance with a Code of Ethics
- offering a professional quality of services
- recognizing the uniqueness of each person
- giving full and accurate information
- making human contact
- good monitoring, selection and training of volunteers

Informed Consent

Informed consent helps people understand the nature of the help they are receiving, the scope of this help and also the limitations of it – such limitations are part of the boundary setting.
Critical Reflective Practice

Critical thinking involves being able to assess how one’s own behaviour, choices, boundaries – are impacting clients and others.

The Purpose of Critical Reflective Practice

• to learn from experience and therefore
• improve practice (by learning directly from own practice experience) (Janis Fook)

Ethical Decision Making

Ask yourself:
• Am I placing the client first? Am I motivated by my own needs?
• Are professional boundaries being challenged? Have I set clear boundaries with my client?
• Would I consider it reasonable for another worker to make a similar decision?
• Can I explain the rationale for my decision and link it to my practice guidelines (or Code of Ethics)?
Contain the Stories

• Develop a place and process for you.
• Protect time and space to reflect and tune into self.
• Containment strategies involve putting a boundary around the stories (write, journal, art, release, talk to someone, etc.)
• Build clearing and containment strategies into your work routine.

Strategies for Maintaining Boundaries

• Role of supervision
• Peer supervision
• Debriefing
• Paying attention/reflective practice
• Client feedback
• Increased training in this area (ethical practice, boundaries)
• Self-awareness through regular self-reflection and self-care (journaling, mindfulness practices, etc.)

Caring for the Helpers

Adrienne Carter
Vancouver Island Counselling Centre for Immigrants and Refugees
Importance of Self Care & Support

“In dealing with those who are undergoing great suffering, if you feel "burnout" setting in, if you feel demoralized and exhausted, it is best, for the sake of everyone, to withdraw and restore yourself. The point is to have a long term perspective.”

- Dalai Lama
“Rest and self care are so important. When you take time to replenish your spirit, it allows you to serve others from the overflow. You cannot serve from an empty vessel.

Eleanor Brown

If your compassion does not include yourself, it is incomplete.

-Jack Kornfield,

**Why Do Ethical Boundaries Matter?**

- Quality service delivery
- Better client outcomes
- Reduced risk of overwhelm and burnout for Settlement Workers
- Less conflict and/or client complaints
- Ensures professional guidelines and competencies are being respected
Why Do Ethical Boundaries Matter?

- Prevents blurred roles and enmeshment in client-worker relationship
- Can help create expectations, parameters for the work
- Boundaries help empower people
- Boundaries can improve a sense of security, stability, and encourage a more relaxed, nonjudgmental and overall helpful, caring atmosphere

Remember…

Poor boundaries lead to less effective professional relationships with clients, ethical dilemmas, challenges, overwhelm and greater risk for both conflict and burnout.

Remember…

Good boundaries lead to quality service delivery, better outcomes, greater respect and clarity, integrity, as well as increased professionalism and ethical practice.
Ultimately…

Ethical boundaries are important to both your own and your clients’ best interests.

Land the Learning

What is one key thing you learned in this webinar that has value for you and your work?

Submitting Questions

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Closing Remarks

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• Sign up for SetNet: http://www.amssa.org/settlement-net/

Thank you!