NEW YORK STATE OF OPPORTUNITY

Justice Center for the Protection of People with Special Needs

Professional Boundaries

An Interactive Training for Service Providers

Supporting People Receiving Addiction Services

Facilitator Guide

Course Overview

This training was developed by NYS Justice Center for People with Special Needs to support the use of professional boundaries in the provision of care at provider agencies. At the Justice Center, we recognize that professional boundaries play a key role in preventing abuse and neglect and providing good quality of care.

This training will define professional boundaries and discuss a concept called zone of helpfulness. This information should be used to discuss case scenarios covering three types of boundaries physical, interpersonal, and psychological. This training will culminate with a discussion of self-awareness and self-help and finish by looking at tools and resources available from the Justice Center.

The content of this course is delivered over a 2.5–3-hour period depending on the size of your group and the amount of time devoted to discussion. The intent of this training is for agencies to use the recorded professional boundaries training and stop at your discretion to ask questions, discuss agency policies and procedures and to discuss the scenarios.

Options for stopping the video and asking questions are included in this guide. As the facilitator of this training, use your discretion in when to stop the video and ask questions and have a discussion.

Preparing for the Learning Course

Preparation

It is critical that facilitators review the online training, the participant guide, and the material in this *Facilitator Guide* before presenting.

Facilitator Roles

As the facilitator, you have several roles in ensuring a successful training session. The roles and the duties associated with each include:

Coordinator

If in person, arrange the room so that participants are at tables of five to six people, and/or able to easily turn to other participants for discussion in pairs. Interaction is important. Make sure the size and shape of the room will accommodate your seating arrangements and that participants are able to see visual aids. Allow approximately four-square feet for each participant.

Confirm that participants have received communications about the date, time, location(s) for training, and materials to bring.

Instructor

Read the Facilitator Guide thoroughly before the course begins to understand the purpose and content of training. Learn how to use any equipment needed for the presentation. Present key ideas and information with conviction. It is important to project enthusiasm and a positive attitude.

Facilitator

Establish a positive learning environment to allow the group to participate in the discussion, share opinions, and ask questions. Encourage expression of viewpoints without passing judgment. Solicit opinions, comments, questions, experiences, and observations from all participants.

Equipment and Media Needs

- Equipment that will allow you to play the video
- Internet access
- Speakers
- Extension cords (if necessary)
- Participant workbooks (one per participant)
- Facilitator Guide (one per facilitator)

Course Delivery Setup and Considerations

This course is constructed in a manner that permits flexibility; however, it is best taught in a group of 15-25 participants.

If you are facilitating this training in a virtual setting, we highly recommend utilization of interaction tools available on your platform to increase engagement. You may also consider using breakout groups during the scenario to increase opportunities for discussion.

Each participant should receive a participant workbook.

The Justice Center recommends that participants who attend a facilitated group training receive a certificate that identifies the agency and trainer who provided the facilitated training. Where facilitated group training is not feasible, those who complete the course through self-study may print a completion certificate at the end.

General Guidelines for Training Adults

- **Treat Adults with Respect**
  Arrive early and welcome participants as they enter the room. Chat with participants about their jobs and acknowledge interests and opinions to establish a positive environment.

- **Encourage Active Participation**
  Methods which build on and make use of the experience of learners will produce the greatest behavioral change. Providing the opportunity for participants to express their issues and concerns may help make the course more meaningful.

- **Encourage Participants to be Resources**
  Acknowledge experience and expertise while encouraging the sharing of ideas among the participants.

- **Focus on Real Life Experiences**
  Learning experiences organized around real-life topics will be perceived as more relevant than those organized around abstract topics.

- **Demonstrate Practical Application**
  Incorporate examples to illustrate how participants can apply the information you present. Highlight the benefits of applying the information.

- **Allow Debate and Sharing of Ideas**
  Adults have a broad range of experiences and opinions. Exploring perspectives and differing opinions can help participants deepen their understanding of the course content.

Guidelines for Facilitating Group Discussions

- **Ask Questions**
  Plan the questions you will use to stimulate discussion. Listen and wait for the responses. Sometimes a period of silence follows a question. Some might find this awkward; be patient and someone will respond.

- **Why Ask Questions?**
  - Shows your interest in the learner
  - Draws participants out
  - Allows you to hear more about participants' concerns or level of understanding
  - Keeps participants engaged in the course
  - Helps participants figure out how the information relates to them and how it fits with what they already know

- **Use Open-Ended Questions**
  Open-ended questions require more than a yes or no answer and encourage the participants to think. The following are examples of open-ended questions:
  - How would you handle this situation?
  - What do you think of this approach?
  - When would you use this technique?
  - How do you feel about this situation?
  - What is an example of that?
  - What would happen if we did it this way?
  - What other aspects should we consider?
  - Who has another situation to share with the class?

- **Redirect Questions**
  When participants ask questions, try to redirect them back to the group by saying something like "What do some others think?" or "How do the rest of you feel about that?" Be careful not to do this too often as overuse will undermine your role as the facilitator.

- **Encourage Discussion**
  Use neutral phrases such as "Say more about that" to encourage participants to open up and keep the discussion going.

- **Control the Discussion**
  Recognize people who want to contribute by using their names. If several people have their hands raised to contribute, "line them up" by telling them who is first, second, etc. When participants know when they will be called on, they can focus on listening to others while they await their turn.

- **Paraphrase, Summarize, Clarify**
  Paraphrase a person's contribution if you think others may not have heard or understood it. You can say something like "If I understand you correctly, you think _____ (fill in the blank). Am I on target?"

- **Practice Active Listening**
  Active listening shows that you understand the participants' contributions.

  Active listening skills include:
  - Giving your undivided attention to the speaker
  - Avoiding the desire to mentally prepare a response
  - Listening for the complete message, not just what is said

- **Be Flexible and Manage Time Wisely**
  Participants may need to spend more time on a topic than you had planned. If the discussion is relevant and valuable, it's worth spending extra time. Yet be cautious and do not let the whole agenda get sidetracked. The key is to know your material and curriculum well enough to know when you can be flexible and when it is time to move on. If you do stray from the planned timeframe, you will need to reevaluate the time planned for other topics and adjust.

Recommendations from the Governor's Office of Employee Relations (GOER)

Before Starting the Training

Introduce yourself and the format of the training: This training is designed to be interactive because the content is best understood through dialog. At times, I will play the online training and at times, I will stop the training for a more in-depth discussion. Your participation is greatly appreciated.

Participant workbook: Each person has a participant workbook in front of them which contains the PowerPoint slides and notes. Please feel free to take notes in your workbook.

State: *This Professional Boundaries training was designed in response to the high volume of cases processed by the Justice Center that involve issues with professional boundaries. To assist staff and agencies in preventing these incidents from happening, we created this resource for easy access to learning and skill development in maintaining professional boundaries*.

Click on Full Version for all other users to begin the training or the text-only version for individuals using assistive technology.

Welcome to Professional Boundaries Online Training. My name is Carla and I'll be your guide today. This training was developed by NYS Justice Center to support the use of professional boundaries in the provision of care at provider agencies.

This training is designed to be effective for individual self-study. However, for the best understanding and application of the training principles, we strongly encourage audiences to view this training in a facilitated group. This will support important discussion and problem solving of the questions and scenarios that reflect the dynamic and complex nature of direct care.

To advance through the training use the next button or the back button to return to a previous page.

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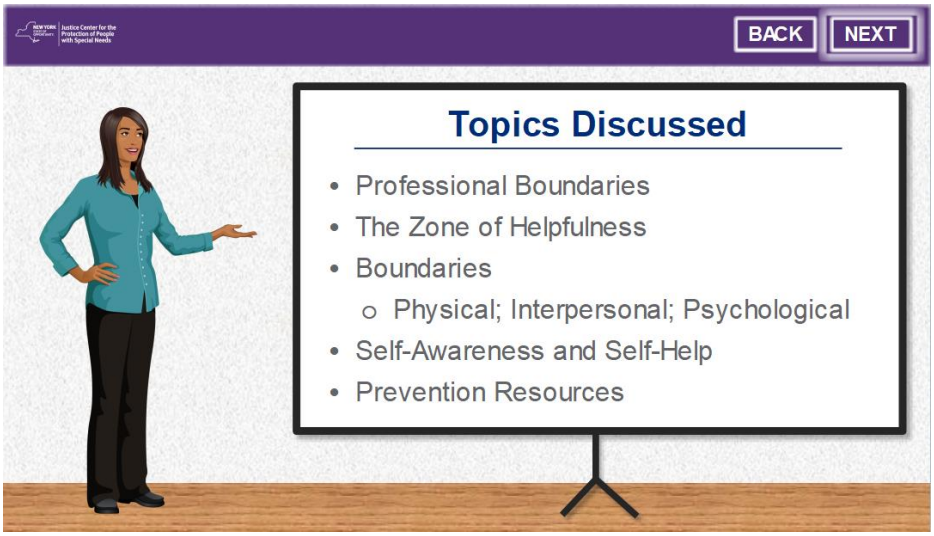

During this training we will define professional boundaries and discuss a concept called the zone of helpfulness. We'll then apply what we've learned to case scenarios covering three types of boundaries - physical, interpersonal, and psychological.

We will discuss the importance of self-awareness and self-help and finish by looking at tools and resources available from the Justice Center.

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Understanding professional boundaries begins with defining what we mean when we use the term boundaries. What images comes to mind when you hear the word "boundary?"

Pause

Potential discussion question: Restate the question, *what image comes to mind when you hear the word "boundary?"*

Give participants a few seconds to write down their thoughts and then solicit answers from participants. (Participant workbook page 3)

What do these pictures tell us about the purpose of boundaries? Boundaries serve to protect us and what is ours from external forces or influences. Boundaries contain us and prevent us from crossing over others' boundaries. Now take a moment to consider what your personal boundaries are?

Pause

Potential discussion question: Restate the question, *what are your personal boundaries?*

Option: Start by giving your own personal example (Example, *"One of my personal boundaries is that I don't accept friend requests on Facebook from people I don't personally know."*)

Give participants a few seconds to write down their thoughts and then solicit answers from participants. (Participant workbook page 3)

Do you lock your front door? Do you discuss private matters in front of strangers?
Do you feel uncomfortable when someone steps too close to you? How do you respond if this happens? Does it depend on who the person is, why they are entering your personal space? How you are feeling at the moment?

Our personal boundaries are uniquely our own. Some may be quite fixed or rigid and some may be very flexible and based on the circumstances.

A simple definition of a boundary is a separation between two things or a line that sets the limits of an area.

Personal Boundaries are limits or parameters that we establish for ourselves and things that belong to us, and for others and things that do not belong to us.

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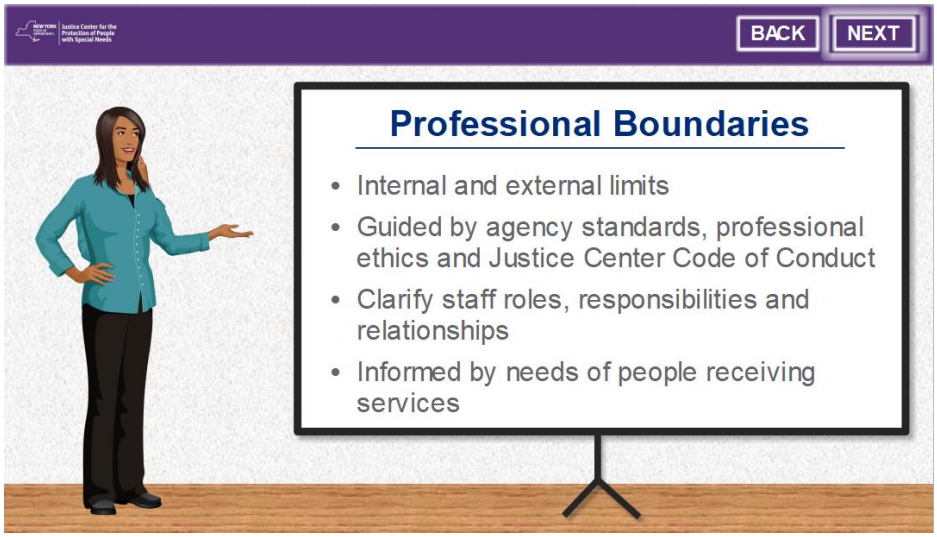

So what do we mean by professional boundaries? The term “Professional” reminds us that we have a specific role as a service provider, different from that of a family member or friend.

Professional Boundaries are founded on the standards set by your agency, the ethics of your profession, and the Justice Center Code of Conduct. They help to clarify your responsibilities as a service provider, and shape how you build relationships with people receiving services.

Maintaining professional boundaries includes understanding the standards set through agency policy and regulations and working within them to respect the personal boundaries of people who receive your services and of others you interact with in the workplace.

NEXT

As a service provider, your primary role is to promote the health and safety of people receiving services while providing a therapeutic environment that supports their growth and development.

Professional boundaries are vital to achieving these goals. Professional boundaries protect the health and safety of people receiving services. For example, requiring visitors to identify themselves before entering a program or residence is a protective boundary.

Professional boundaries are empowering and can support a person's growth, independence, and personal rights. For example, a person receiving services who is accustomed to having others speak for them will benefit when you support the person to speak for themself.

Professional boundaries may provide corrective experiences for people receiving services that can help them heal from past hurts or trauma and develop positive, trusting relationships. For example, treating a person who has been bullied or verbally abused by a loved one, with respect and understanding**,** empowers them to express themself without fear and opens opportunity for growth.

When you set healthy boundaries, you serve as a positive role model to people receiving services and you help them build the skills they need to set healthy limits with others. Professional boundaries also protect you from engaging in inappropriate relationships and limiting your ability to work effectively with people receiving services, or even jeopardizing your job.

Potential discussion question: You serve as a role model to people receiving services and you can help them build the skills they need to set healthy limits with others.

What specifically can you do to be a positive role model in setting healthy limit with others? (Participant workbook pages 4-5)

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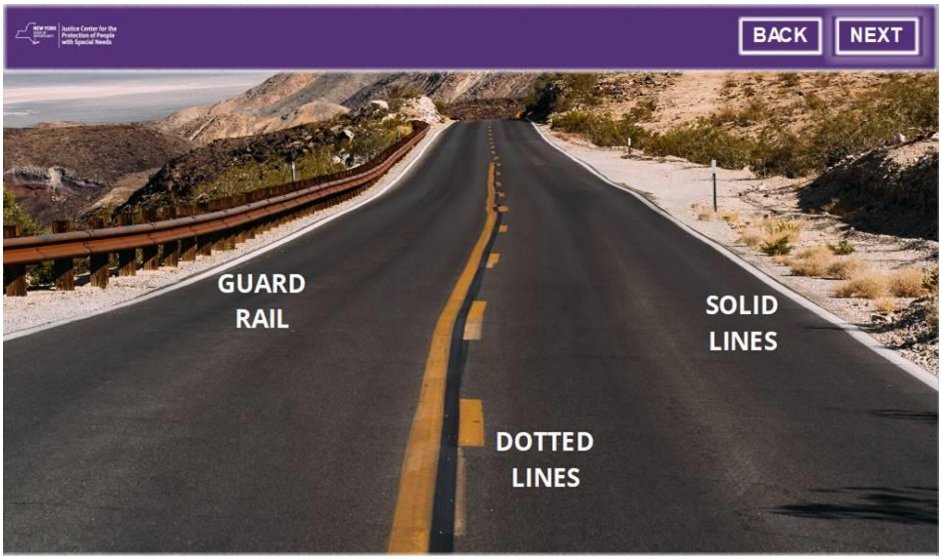

As a service provider, you receive a good deal of training. Some of that training is relatively clear-cut, with step-by-step instructions and parameters, such as training on medication administration and food preparation.

Understanding and applying professional boundaries can be more challenging because it is often not clear cut. The wide range of circumstances that you experience on any given workday includes many gray areas.

Highways offer a great metaphor for professional boundaries. What is it about this highway, that keeps people safe?

Pause

Potential discussion question: Restate the question, *what is it about this highway, that keeps people safe?*

Give participants a few seconds to write down their thoughts and then solicit answers from participants for a discussion. (Participant workbook page 5)

The paved road, the guard rail, the white lines and the yellow lines are all boundaries designed to keep drivers, their passengers, and others on the road safe. *Please click on these boundaries to learn more.*

Guard Rail: The guard rail tells us very clearly "don't go there". It is a clear-cut physical boundary. Physical assaults like hitting, kicking, choking and any sexual engagement with people receiving services, or failure to report such behavior, is never okay. These are clear professional boundaries that should never be crossed.

Solid Lines: The solid yellow and white lines also keep us safe while driving but may be less clear cut. For example, crossing the white line may be appropriate if the driver has a flat tire, driving fatigue or another unexpected emergency. When crossing this boundary, drivers need to use additional safety measures, such as turning on their directional and flashers, and calling for help. Similarly, in a direct care setting, if a staff person feels too ill to fulfil their duties or has a strong personal reaction that interferes with their ability to maintain composure and use good boundaries, they may need to notify other staff, so they can safely step away from their duties until the problem is resolved. These are examples of staff appropriately crossing a white line.

Dotted Lines: The yellow dotted line indicates that *at times*, it can be helpful to cross this boundary. When a driver considers crossing a dotted line, they need to be fully focused on what they are doing and use the other lane for only limited time and a valid purpose. Drivers know this is not their lane and it is their responsibility to not linger there, but to move quickly back into their own lane. Staff deciding if, or when, it is appropriate to share personal information is one example of crossing a yellow dotted line. Sometimes it's okay to share personal information, and sometimes it's not okay. Deciding whether or not to share personal information, should be done thoughtfully and cautiously.

Potential discussion questions: (good pair or small group activity) *Does anyone have any comments or questions about the guard rail, solid line or dotted line?*

Can someone give me an example of a professional boundary that you might consider a dotted line or an example of boundary that you might consider a solid line? (Participant workbook page 5)

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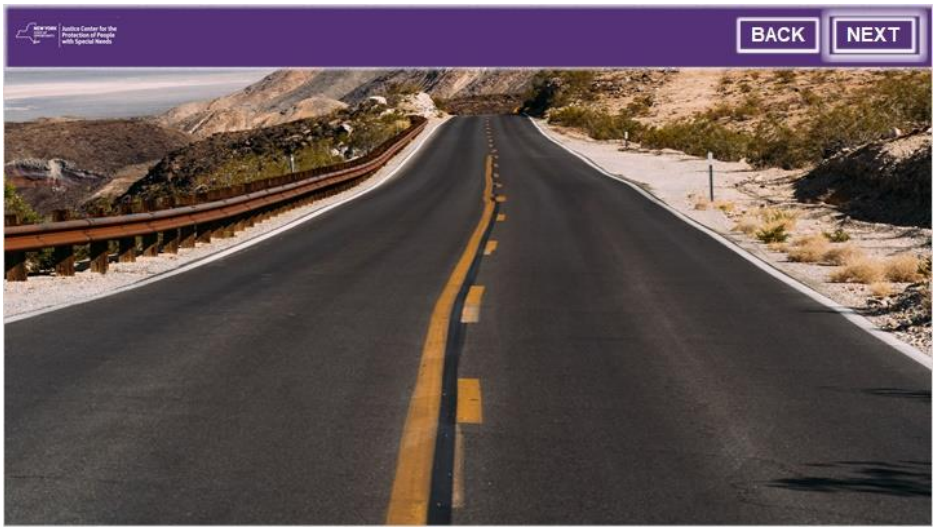

You, like a driver on this highway, are responsible for the service you provide, the driving you do. Similarly, your agency, like the highway department, is responsible for maintaining a safe facility, effective policies and procedures, and providing training and adequate staffing to keep you and others safe, and to offer the best possible services to people in your programs.

Does your agency have a professional boundaries policy? If not, who can you approach to discuss addressing this important topic?

Potential discussion question: Restate the question, *does our agency have a professional boundaries policy?*

If so, discuss the policy. If you do not have one, discuss who you can talk with to establish a policy. (Participant workbook page 5)

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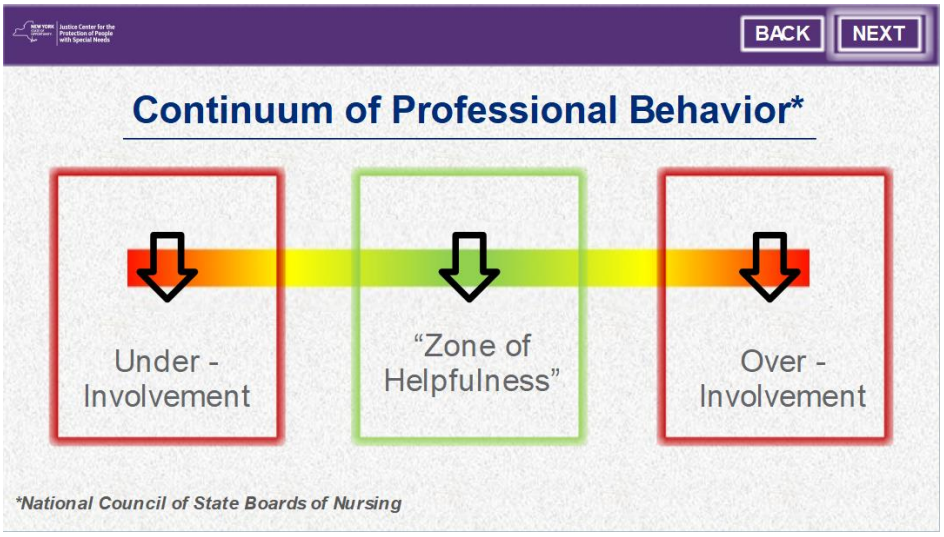

Your interactions with people receiving services can be viewed on a continuum. Consider this continuum as a guide to help identify when your thoughts, feelings and interactions are within a therapeutic and professional range. By therapeutic, we mean, having a healing effect, or tending to make a person healthier.

The far left and far right red zones are like the guard rails on a highway. The most egregious examples of abuse and neglect, described here as extreme under-involvement and extreme over-involvement, fit on these ends of the continuum.

It is your responsibility to strive to stay in the green, therapeutic zone and your agency's responsibility to provide the information and resources you need to stay in the green zone, also known as the zone of helpfulness. *Click on the under-involvement and over-involvement to learn more.*

Click Under-involvement (Read out loud)
Examples of under involvement include staff ignoring blatant safety issues, such as when a person needs supervision to safely navigate the community and is left alone in an unfamiliar place; or staff interacting with co-workers and not the people receiving services that they should be engaging with and supporting; or staff not making effort to know the person, their needs, or their treatment plan.

Click the X

Click Over-involvement (Read out loud)
Examples of over-involvement include sexual or physical abuse; or excessive over-protection and smothering of a person receiving services that interferes with their independence and personal development; or sharing strong and unsolicited personal opinions about the person's life.

Both under-involvement and over-involvement put people receiving services at risk of harm. When you stay in the green zone, or the zone of helpfulness, you are using professional boundaries to provide a safe, supportive, and respectful environment that fosters opportunities for learning and personal development.

Potential discussion question: *Can someone give me a specific situation in which you, or someone you observed, were in the green zone or therapeutic helpfulness?* (Participant workbook page 6)

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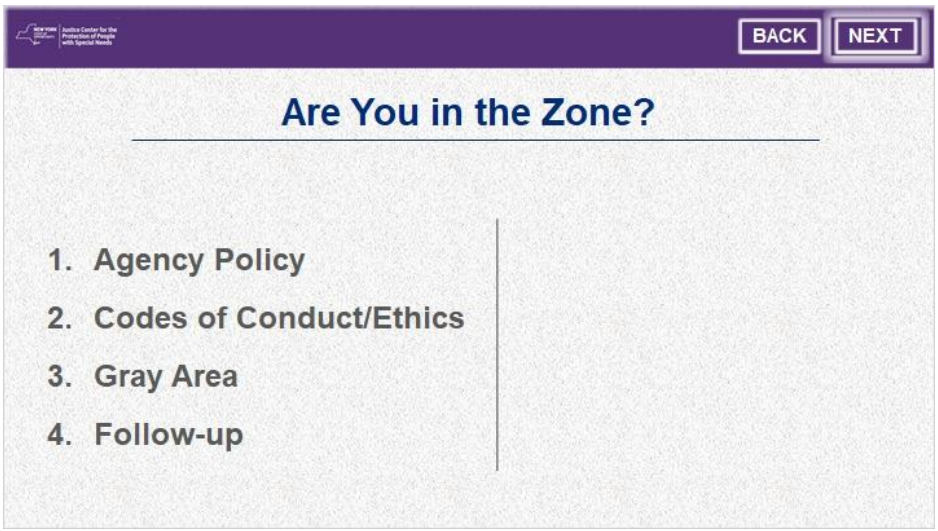

Click on each of these topics to find questions that will help you stay in the zone of helpfulness.

Click Agency Policy (Read out loud)
What is my agency policy?

Click Code of Conduct/Ethics (Read out loud)
Are my actions in line with the Justice Center Code of Conduct and other professional codes of ethics that I am required to follow?

Click Gray Area (Read out loud)
Is this a gray area that needs further discussion with a supervisor?

Click Follow-up (Read out loud)
When can I follow-up with a supervisor or team to review this situation?

Potential discussion question: *How can these questions assist you in making choices that are within the zone of helpfulness?* (Participant guide page 6)

NEXT

A critical, but challenging aspect of being in the zone of helpfulness, is identifying what is in the best interests of the person receiving services. To understand how challenging this can be, let's look at examples that we might encounter in our personal lives.

If you have an aging parent or grandparent that is a driver, how do you determine if it is in their best interest to continue to drive? What are the risks to the person and to others? What is the safe solution for everyone?

If you are the parent of a young person and you need to leave town for a few days, is it in the best interests of your coming-of-age child to allow them to stay home alone? What history and other factors should be considered? What are the short- and long-term risks?

When you are facing similarly challenging circumstances in your professional life, asking yourself the following may help to clarify the question of best interests.

- ✓ Does the person have a care plan that would help to identify their needs and best interests in this circumstance?
- ✓ How well do you know the person's history and understand their therapeutic needs?
- ✓ Are there long-term effects to consider that may not be in the person's best interests?
- ✓ Are there broader range effects to consider, including the impact on other people receiving services?
- ✓ Have similar circumstances occurred before with this person and, as a result, was anything learned?

Pause

Potential discussion question: *Can someone give me an example of a situation in which you had to consider a person's best interest, the factors you considered, who you consulted with (if anyone), and what was the outcome?* (Participant guide page 7)

Now let's look at some scenarios related to professional boundaries and the best interest of people receiving services.

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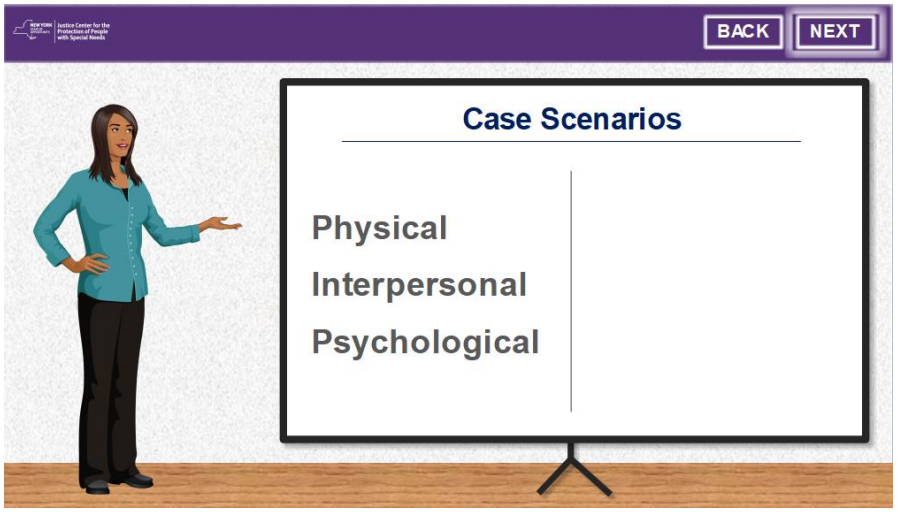

In this segment we'll look at scenarios where physical, interpersonal, and psychological boundaries may have been crossed. As you read these scenarios, consider the following.

- ✓ What is the best interest of people receiving services?
- ✓ Can you see why some actions undermine the therapeutic environment?
- ✓ Based on what you've learned, what approach may have been better?

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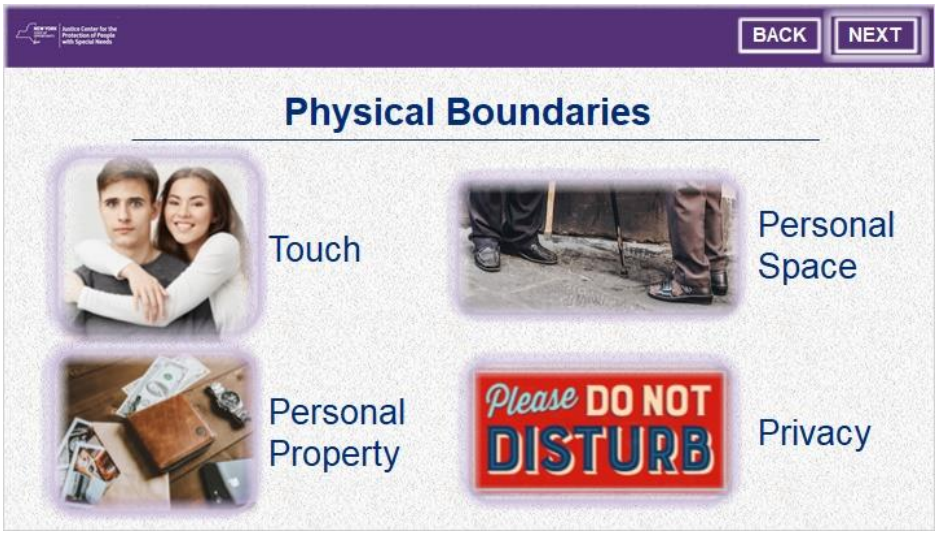

Let's start by looking at physical boundaries, which are the most concrete type of boundary. Physical boundaries include touch, personal space, personal property and privacy.

Touch refers to how, when, and why we touch others and how, when, and why, we allow others to touch us.

Personal Space is the physical distance that we maintain between ourselves and others.

Personal Property includes belongings, such as clothing, a person's wheelchair, hygiene products and food.

Privacy includes how we maintain physical privacy in our homes, including closed doors, locks, phone calls and visitor logs.

These boundaries can be impacted by many factors including mental health, physical abilities and conditions, trauma history and family/cultural experiences.

Potential discussion question: *What questions or comments do you have about physical boundaries?* (Participant guide page 8)

If your audience experiences challenges with maintaining physical boundaries, consider providing more examples of that type of boundary. (ex. hugging – when is it okay, when is it not okay?) Use the guidelines provided above to help the group problem solve.

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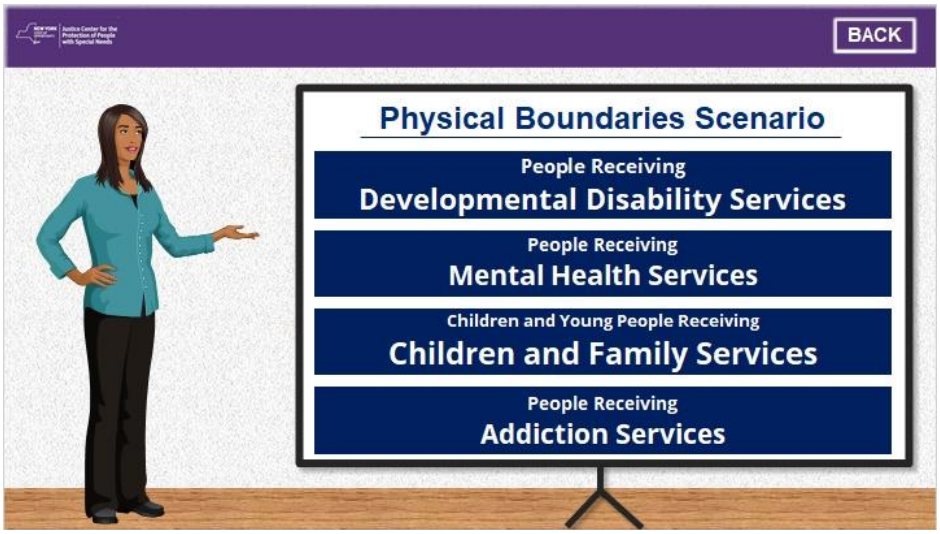
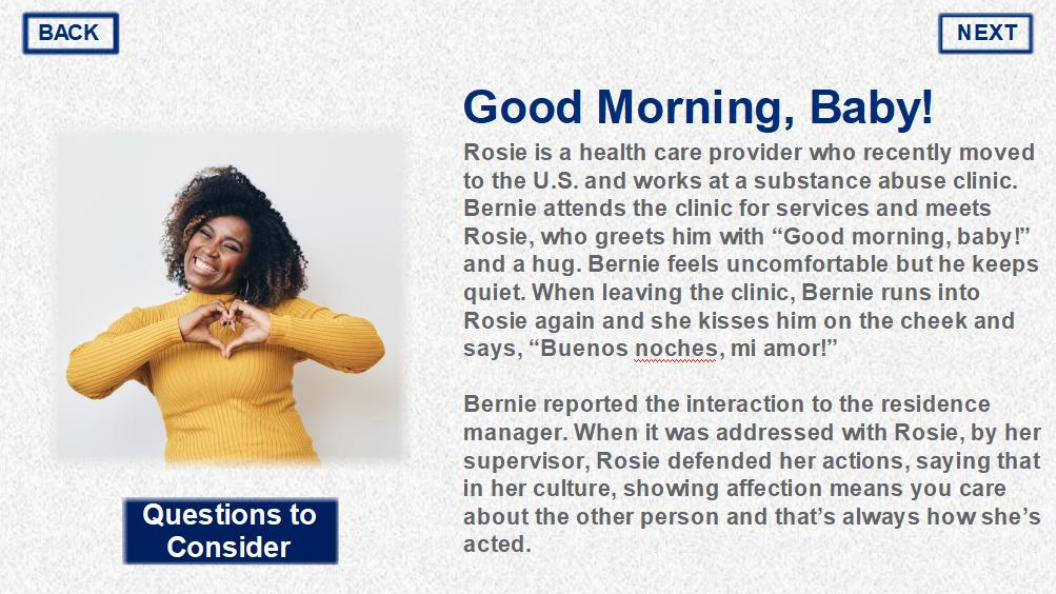


To explore case scenarios related to physical boundaries, please click on the button that pertains to people receiving services in your workplace. Take a moment to read the scenario and click the, "questions to consider" button when you are ready.

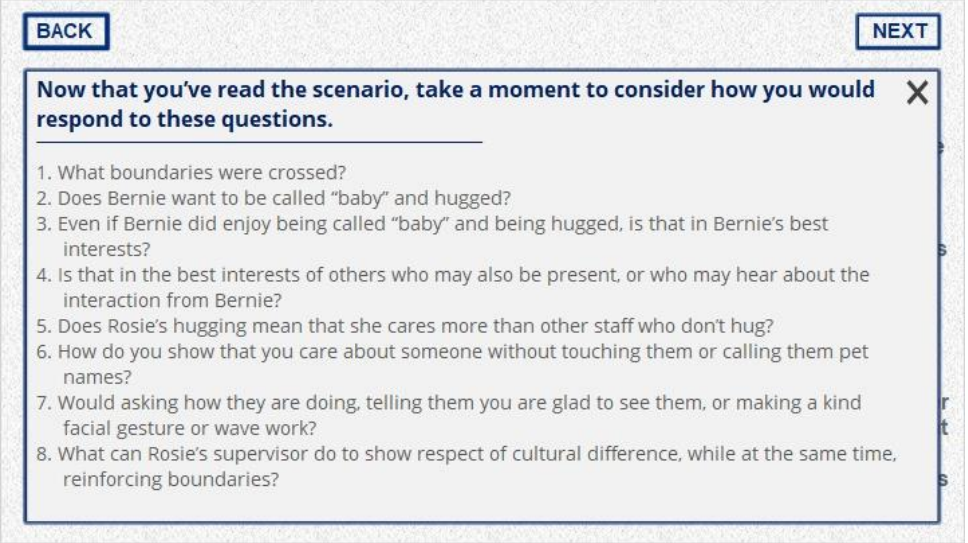
Facilitator Note: Answer the questions in the space provided for each scenario so you are fully prepared to facilitate a discussion.

Physical Boundaries Scenario



Options: You can read the scenario to participants, a participant can read the scenario out loud or have participants read the scenario silently. (Participation guide, page 8)

Click Questions to Consider.



Options: Participants can write answers to the questions individually and then discuss, discuss in small groups or as a large group. (Participant guide page 11)

1. What boundaries were crossed?

_____
_____
_____

2. Does Bernie want to be called "baby" and hugged?

_____
_____
_____

3. Even if Bernie did enjoy being called baby and being hugged, is that in Bernie's best interest?

_____
_____
_____

4. Is that in the best interest of others who may also be present, or who may hear about the interaction from Bernie?

_____
_____
_____

5. Does Rosie's hugging mean that she cares more than other staff who don't hug?

_____
_____
_____

6. How do you show that you care about someone without touching them or calling them pet names?

_____
_____
_____

7. Would asking how they are doing, telling them you're glad to see them, or making a kind facial gesture or wave work?

_____
_____
_____

8. What could Rosie's supervisor do to show respect of cultural difference, while at the same time, reinforcing boundaries?

_____
_____
_____

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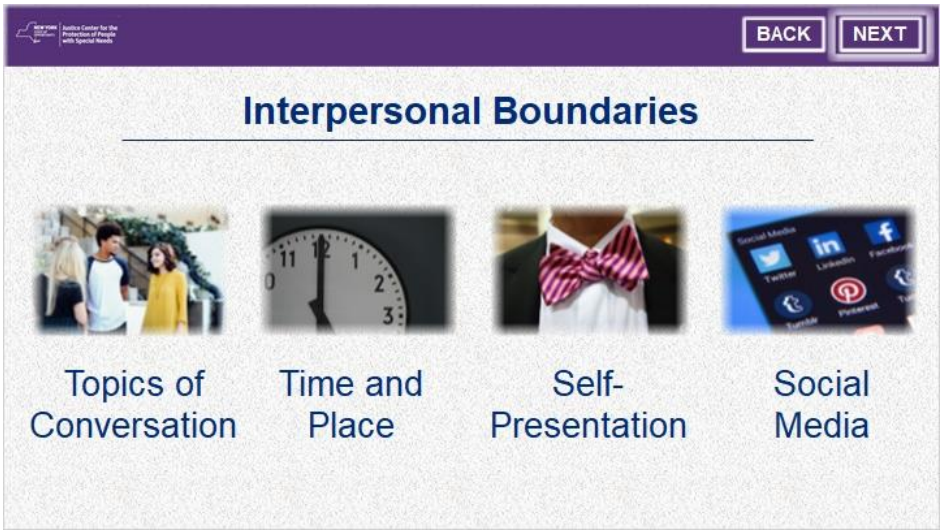


Now let's look at interpersonal boundaries, which includes topics of conversation, time and place, self-presentation and social media. *Click on each of the images to learn more*.

Topics of Conversations are conversations that are with, or in earshot of, people receiving services need to adhere to professional boundaries. Consider topics like your family or personal

health issues, your political or personal values, or your opinion on various subjects. While some degree of self-disclosure may be helpful to establishing a supportive working relationship, such instances should always be in the best interests of the person receiving services, support the therapeutic environment and abide by agency standards and ethics.

Some guidelines on self-disclosure to maintain good professional boundaries include:

- ✓ Do not disclose information to a person receiving services that you are not comfortable sharing with others in your workplace.
- ✓ Never convey to a person receiving services that they are expected to keep personal information that you share with them secret or confidential.
- ✓ If you become aware that a person receiving services has overheard or perhaps been a part of a questionable personal conversation with staff, share that information with your supervisor or others on your team.

If your agency's policy and practices permit some degree of self-disclosure, err on side of not disclosing when in doubt about the therapeutic value. Consider disclosing in the presence of more than one person, preferably with other staff present, limit information you disclose to that which you have already openly shared with others on your team, always consult with your supervisor or team any time you feel boundaries have been crossed.

Potential discussion question: *How much personal information do you disclose and why?* (Participant guide page 10)

Time and Place relates to where and when you talk about certain topics. For instance, is it okay to yell across a room to a person receiving services that it's time to take their medication, when others are present? Is it okay to correct a person receiving services choice of attire when they arrive at the dinner table? Is it okay for you to discuss workplace grievances or personal matters with your co-workers, when people receiving services are in earshot? Unless it is an emergency, planning appropriate times and places for such conversations is using good professional boundaries.

Potential discussion questions: *Is it okay to yell across a room to a person receiving services that it's time to take their medication, when others are present?*

Is it okay to correct a person receiving services choice of attire when they arrive at the dinner table?

Is it okay for you to discuss workplace grievances or personal matters with your co-workers, when people receiving services are in earshot? (Participant guide page 10)

Self-presentation is about our body language, tone of voice, and attire. All of these self-expressions can communicate messages stronger that the words we speak. It's important to consider the message we are communicating and if that message supports or undermines our professional boundaries.

Potential discussion question: *Does anyone have any comments or questions about self-presentation?* (Participant guide page 10)

Social Media is about whether it is appropriate to connect with people receiving services on social media platforms, like Facebook, Instagram, TikTok and Twitter. Agency social media policies can provide important guidance in this area. If your agency doesn't have a social media policy, consider speaking with your supervisor or administration about adopting one, to support professional boundaries in your workplace.

Is connecting on social media ever okay? How do you disengage with someone on social media if know you are providing them services? Consider these questions and remember, your interactions on social media are typically permanent and you have no control over how and when information is shared.

Potential discussion questions: *Is connecting on social media ever okay?*

How do you disengage with someone on social media if know you are providing them services? Do we have a social media policy?

If so, discuss this policy. If not, consider speaking with your supervisor or administration about adopting one, to support professional boundaries in your workplace. (Participant guide page 10)

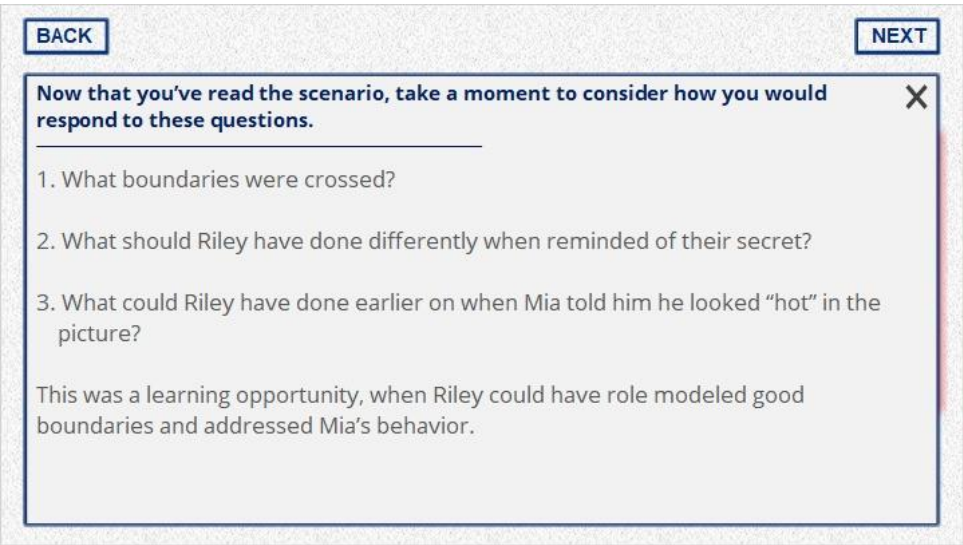
NEXT

To explore case scenarios related to interpersonal boundaries, please click on the button that pertains to people receiving services in your workplace.

Interpersonal Boundaries Scenario #1

Options: You can read the scenario to participants, a participant can read the scenario out loud or have participants read the scenario silently.

Click Questions to Consider.



Options: Participants can write answers to the questions individually and then discuss, discuss in small groups or as a large group. (Participant guide page 11)

1. What boundaries were crossed?

_____

_____

_____

2. What should Riley have done differently when reminded of their secret?

_____

_____

_____

3. What could Riley have done earlier on when Mia told him, he looked hot in the picture?

_____

_____

_____

This was a learning opportunity when Riley could have role modeled good boundaries and addressed Mia's behavior.

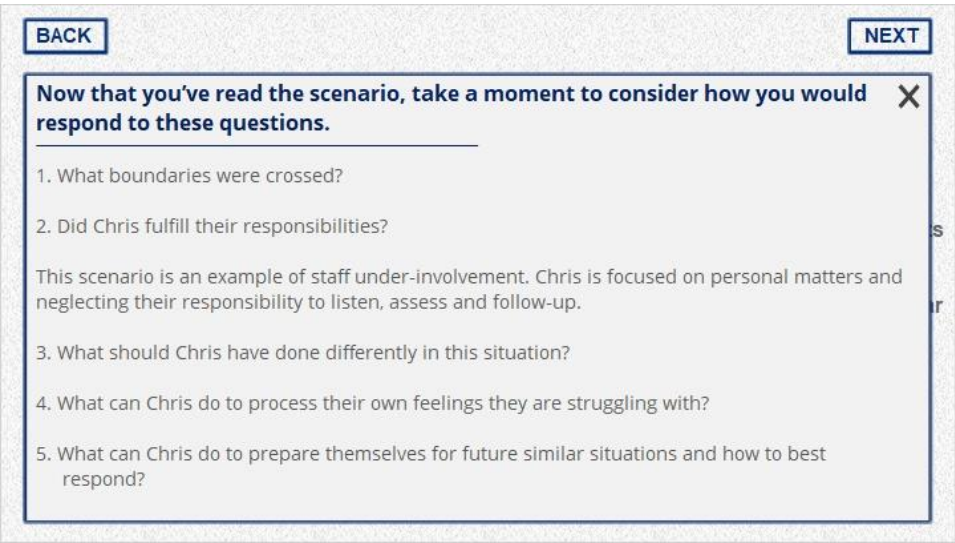
NEXT

To explore another scenario related to interpersonal boundaries, please click on the button that pertains to people receiving services in your workplace.

Interpersonal Boundaries Scenario #2

Options: You can read the scenario to participants, a participant can read the scenario out loud or have participants read the scenario silently.

Click Questions to Consider.



Options: Participants can write answers to the questions individually and then discuss, discuss in small groups or as a large group. (Participant guide page 12)

1. What boundaries were crossed?

_____
_____
_____

2. Did Chris fulfill his responsibilities?

_____
_____
_____

3. Did Chris attend to Lance's needs?

_____
_____
_____

4. Is this an example of under-involvement, over-involvement or in the zone of therapeutic helpfulness and why?

_____
_____
_____

5. What should Chris have done differently in this situation?

_____
_____
_____

6. What can Chris do to process their own feelings they are struggling with?

_____
_____
_____

7. What can Chris do to prepare themself for future similar situations and how to best respond?

_____
_____
_____

NEXT

Last, let's explore psychological boundaries which are about our thoughts and feelings. While our internal world of thoughts and feelings is less concrete than our external world of physical and interpersonal behavior, good psychological boundaries are the foundation of strong external boundaries.

Let's again consider the highway metaphor discussed earlier. We are responsible for our thoughts and feelings in the same way that, as drivers, we are responsible for staying in our lane. Our thoughts and feeling can be triggered by a variety of circumstances we experience at work, such as when a person receiving services is aggressive, disrespectful, overtly sexual, or engaging in power struggles. Or, when a person receiving services triggers a strong feeling of affection or attraction in us. When our thoughts and feelings are triggered, and take us out of our lane, it is our responsibility to safely navigate back into our lane.
Thought processes that indicate we are moving out of our lane include things like mind-reading, overidentifying with a person, personalizing someone's behavior and romanticizing the relationship. *Click on the each of the warning signs to learn more about the first three of these.*

Click on the

sign.

Mind-reading involves making assumptions about what another person is thinking or feeling when we don't have all the facts. When we decide that we know why a person behaved in a certain way without checking our facts, or when we decide that we know how a person will behave in the future, we are making assumptions and mind-reading. While our guess may be accurate, gathering facts and proceeding with caution helps us to stay clear, and focused, and in our own lane.

Potential discussion questions: *Do you mind read? If so, please give me an example of when this occurs.*

Do you recognize that you are crossing a boundary if you assume your mind reading is accurate without explicit confirmation? (Participant guide page 13)

Click on the **sign.**

Personalizing someone's behavior occurs when we conclude that a person's behavior is about us. For instance, if a person receiving services is angry and calls us a derogatory name, it's our job to stay in our lane by not taking their hurtful remarks to heart and recognizing that their behavior is not a reflection on us. Or when a person receiving services reminds us of a loved one, and we have feelings that extend beyond a supportive, therapeutic, working relationship, it is our job to manage these reactions and stay in our lane.

Potential discussion questions: *What are your thoughts about personalizing? Do you do this and if so, what is the outcome?*

Do you recognize when you are having trouble remaining objective? How do you think you could best manage those situations? (Participant guide page 13)

Click on the

sign.

Overidentifying occurs when we have had experiences or circumstances that are similar to a person receiving services and believe that we know best what the person thinks, feels or needs. While a shared experience may help us understand another person and their needs, overidentifying crosses a psychological boundary and is not in our lane.

Potential discussion questions: *If your experiences are similar to a person receiving services, is it difficult to maintain psychological boundaries and recognize their needs and issues may be different than yours?*

What questions or comments do you have about psychological boundaries?

Can someone give me an example of when you were overidentifying a situation with someone you support? (Participant guide page 13)

NEXT

Other thought processes that can indicate you are moving out of your lane are personal triggers that result in romanticizing a relationship with a person receiving services or harming a person receiving services in other ways, veering well out of your lane and into the guard rail. This type of thought process is a red flag that requires immediate attention, to prevent harm to the person receiving services, and to ensure your own health and safety.

Red flags that may indicate a concern with professional boundaries are:

- ✓ going out of your way to spend time with someone
- ✓ feeling excited about working with a specific person receiving services
- ✓ believing you are the only person capable of helping a person receiving services
- ✓ meeting a person receiving services outside of work
- ✓ discussing topics that encourage self-disclosure and secrecy
- ✓ touching a person receiving services in a personal, not therapeutic manner
- ✓ touching some people receiving services differently than others.

Self-awareness is key to developing and maintaining good psychological boundaries and recognizing red flags. If you notice any of these red flags in another staff member or experience them yourself, speak with a trusted supervisor to help prevent an incident of abuse from occurring.

Potential discussion questions: *What questions or comments do you have about red flags? Can two people give me examples of other red flags that you have encountered?*

Remember, red flags are important to pay attention to and report to your supervisor, to ensure safety of people receiving services and staff. It's important to always follow reporting requirements if you suspect abuse or neglect. (Participant guide, page 14)

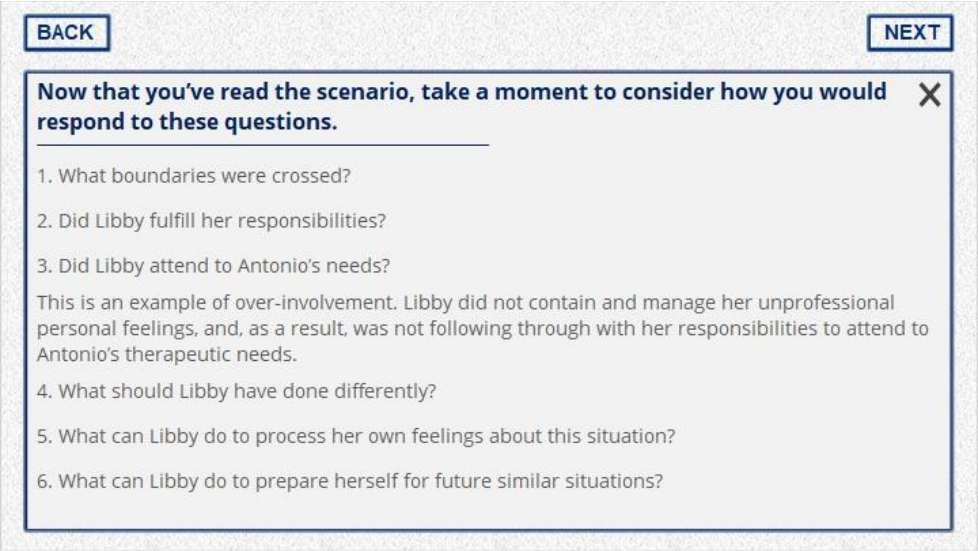
NEXT

To explore case scenarios related to psychological boundaries, please click on the button that pertains to people receiving services in your workplace.

Psychological Boundaries Scenario #1

Options: You can read the scenario to participants, a participant can read the scenario out loud or have participants read the scenario silently.

Click Questions to Consider.



Options: Participants can write answers to the questions individually and then discuss, discuss in small groups or as a large group. (Participant guide pages 14-15)

1. What boundaries were crossed?

_____
_____
_____

2. Did Libby fulfill her responsibilities?

_____
_____
_____

3. Did Libby attend to Antonio's needs?

_____
_____
_____

4. Is this an example of under-involvement, over-involvement or in the zone of therapeutic helpfulness and why?

_____
_____
_____

5. What should Libby have done differently?

_____
_____
_____

6. What can Libby do to process her own feelings about this situation? To prepare her for future similar situations and how to best respond?

_____
_____
_____

NEXT

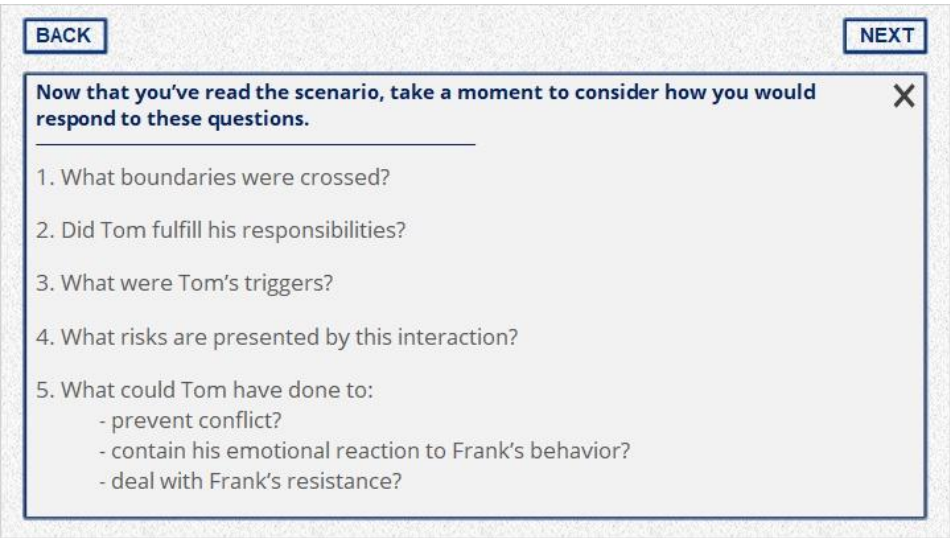
To explore another scenario related to psychological boundaries, please click on the button that pertains to people receiving services in your workplace.

Options: You can read the scenario to participants, a participant can read the scenario out loud or have participants read the scenario silently.

Psychological Boundaries Scenario #2

Options: Participants can write answers to the questions individually and then discuss, discuss in small groups or as a large group. (Participant guide page 15)

Click Questions to Consider.



Options: Participants can write answers to the questions individually and then discuss, discuss in small groups or as a large group. (Participant guide page 16)

1. What boundaries were crossed

_____
_____
_____

2. Did Tom fulfill his responsibilities?

_____
_____
_____

3. What were Tom's triggers?

_____
_____
_____

4. What risks are presented by this interaction?

_____
_____
_____

5. What could Tom have done to prevent conflict?

_____
_____
_____

6. What could Tom have done to contain his emotional reaction to Frank's behavior?

_____
_____
_____

7. What could Tom have done to deal with Frank's resistance?

_____
_____
_____

NEXT

Self-Awareness and healthy self-care strategies are important skills to learn that will help you to maintain effective psychological boundaries and offer benefits both personally and professionally.

Personal reactions to people or situations at work can greatly influence how you conduct yourself. Developing awareness of your personal triggers gives you the opportunity to use self-care strategies that can help you to regain the calm, clarity, and composure you need to take care of yourself and provide quality care for others.

When you are supporting a person who has experienced trauma, such as abuse, and you hear their stories of the abuse, this can cause a strong emotional reaction or negative psychological impact in you. These reactions are often referred to as secondary trauma or vicarious trauma.

On a similar note, if you have a history of Adverse Childhood Experiences, commonly referred to as ACEs, this can also trigger strong emotional reactions to day-to-day work experiences.

NEXT

Developing self-awareness and effective self-care strategies can help you to cope with these and other personal reactions, and make you feel more prepared to:

- ✓ begin your workday
- ✓ to begin work with a specific person receiving services
- ✓ to cope with stressful circumstances, such as low staffing, long shifts, specific events or personal stress
- ✓ manage personal triggers, trauma reactions, or other reactions you may experience.

What strategies do you use, to prepare for the day ahead, and to handle stressful situations you may encounter throughout your day?

Pause

Potential discussion question: Restate the question *What strategies do you use, to prepare for the day ahead, and to handle stressful situations you may encounter throughout your day?* (Participant guide page 17)

Getting adequate nutrition, sleep and exercise are a few important behavior-based self-care strategies that can help you feel better prepared for your day.

Practicing mindfulness and constructive self-talk are cognitive strategies that can help you to both prepare for your day and manage emotional stressors when they arise. These strategies can help you tap into more productive, rational and objective thoughts, to cope with your personal reactions and to solve problems more effectively.

A strong team connection within your agency, as well as EAP and other community resources are also very useful tools to support both your personal and professional wellbeing. All of these and other self-care you may already be using, can help you to think, feel and act better. In order to care for others, it is important that you take care of yourself.

Potential discussion question: Option: Start with a personal example of a self-care strategy. *What self-care strategies do you use?* (Participant guide pages 17-18)

NEXT

Hopefully the material we've discussed thus far has given you a fuller understanding of professional boundaries, how to develop and use them, and their importance in providing services to vulnerable people.

We also want to recognize some of the added challenges that you may face with maintaining effective boundaries, that may require attention and discussion within your agency.
Some external challenges to professional boundaries that you may encounter include:

- ✓ inadequate training, supervision and peer support
- ✓ unclear agency guidance or policies
- ✓ an inadequate physical environment at the facility
- ✓ an agency culture that doesn't reinforce and support professional boundaries.

If these conditions exist in your workplace, talk about them with your team and administration and consider ways that you can foster improvements in these areas.

One way to take further positive action is to increase your knowledge of abuse prevention strategies that you can use, to safeguard people receiving services in your agency. Never

underestimate the importance of the work that you do to support vulnerable people. At the Justice Center, we value your effort and have created several abuse prevention resources to support you in our shared mission: to provide good care to people receiving services in New York State. Let's finish this training by taking a look at some of the resources available.

NEXT

To learn more about prevention tools and resources available on the Justice Center Website, click on the video.

NEXT

That concludes the training. As a quick recap we defined boundaries and their importance in achieving our professional responsibilities, maintaining a therapeutic environment, and providing for the best interests of people receiving services.

We explored case scenarios covering examples of physical, interpersonal, and psychological boundaries, and we talked about the value of self-awareness and self-care strategies for maintaining boundaries and managing stressful situations.
I am providing here the numbers to call for reporting abuse or neglect, contacting our Individual and Family Support unit, and for requesting general information or resources from the Justice Center.

Report Abuse and Neglect: 1-855-373-2122

Individual Family Support Unit: 1-800-624-4143

General Information and Resources: 1-800-624-4143

If you have any suggestions regarding the prevention of abuse or neglect, we'd love to hear from you. Please email us at prevention@justicecenter.ny.gov.

Thank you for participating in this training and for your effort to create a safe and caring environment for the people whom you provide service.

We encourage you to discuss what you learned today with your colleagues – maintaining professional boundaries is always easier with team support!

Potential discussion question: *What are your ideas for preventing abuse or neglect?* (Participant guide, page 19)