

WHY NOT?

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HOW HEALTHY BOUNDARIES SUPPORT CLIENT SUCCESS



Hi there!

In the chat box, please share:

Name- Organization- Spirit Animal

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What if...

...I asked you to also share your weight in the chat box?

- What's your initial reaction?
 - Violence? Anger? Shame? Discomfort?
- How do you feel about me even asking? Timing?
- How would asking that impact our relationship?
- How would that impact your receptiveness to me and what I have to say going forward?

- Asking sensitive questions AND bad boundaries = disaster!

MY Default Slide

It's your responsibility to know the expectations of your employer

When employer expectations are unclear or you're unsure,
ALWAYS ASK

Put things in writing as desired/needed

- **I am providing tools but please familiarize yourself with employer expectations. When in doubt, ask questions.*

Common Questions... Do I?

Give rides to
clients

Accept gifts

Lend money

Buy food

Use terms of
endearment

Hug

Work with
people I
already know

Give out my
cell

You do it all the time!

We are no stranger to expecting and applying boundaries each day.

As professionals, when we work with clients, we can encounter

gray areas

where it's necessary to make 'the right decision' about where to draw that line.

You don't care if I drop by each day to inspect the cleanliness of your house, do you?

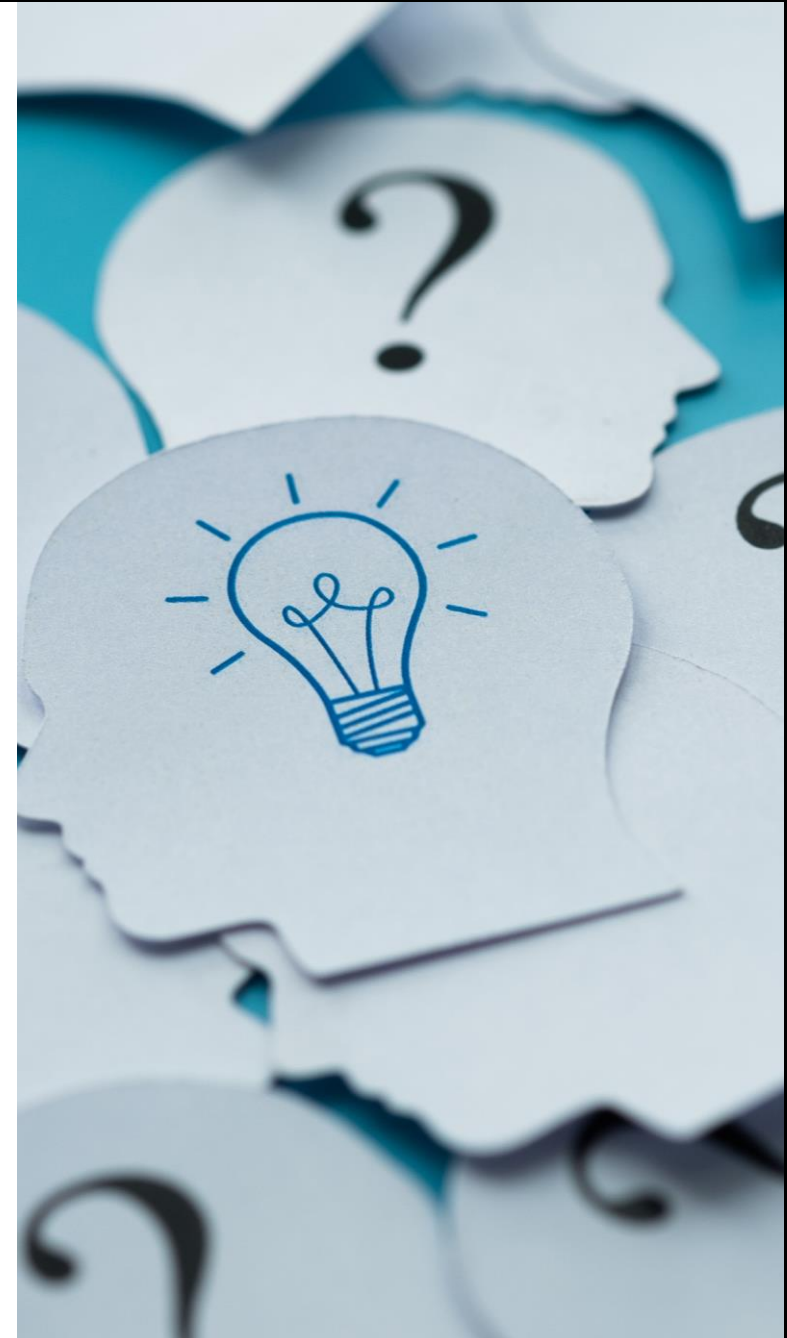


Mother-in-law

What are you trying to do?

- Are you trying to **PROVIDE** for the clients?
 - Could get expensive
 - NOT professional
 - NOT sustainable
 - Whew-pressure!

- Are you trying to **SUPPORT** the clients in **PROVIDING FOR THEMSELVES?**
 - Building pride, self-worth, sustainability



“I don’t judge people.”

Perception Impacts EVERYONE

- Yes, you too!
- Your experiences and beliefs shape you, this isn't bad
- Judging people and situations is healthy and normal

- There will be clients you struggle to work with
- Know your limits
- Talk to your supervisor/ seek guidance

“I don’t know what to do. I don’t have many options but really think I need to get an abortion. My parents can’t find out and there’s no way I can raise a child by myself. What do you think?”

Hot Topics

- Know your limitations/bias
 - Sometimes religion and morality can impact too
- Acknowledge and understand the effect on your work
- Do your research
- If you cannot provide equitable, unbiased service then:
 - Speak to your supervisor
 - Identify resources/referral sources

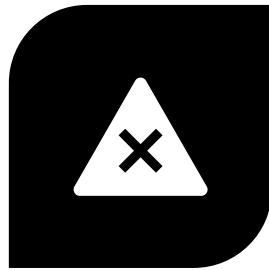
- NEVER PREACH!



A Few General Tips



YOUR GUT
INSTINCT IS
IMPORTANT



ANY SHADOW OF
DOUBT? THEN ASK
OR GET
PERMISSION



CAN YOU STAND
WITH CONFIDENCE
BEHIND YOUR
DECISION?



WHAT WOULD
YOU THINK OF A
COWORKER THAT
MADE THAT
DECISION?

CAUTION!

- Things that can lead to crossing that line:
 - Touching
 - Terms of endearment
 - Self-disclosure Sally
 - Favoritism
 - Over-involvement in nonwork tasks
 - Accepting gifts
 - **KEEPING SECRETS**



RED FLAGS!!!



- “We share a special bond.”
- “Nobody knows me like you do.”
- “I can’t do this without you.”
- “You have no idea how much you mean to me.”
- “You’re such a great friend.”

Let's talk...

- Be clear, firm, and consistent
- “That’s really not ok to say that”
- Discuss with offender individually if becomes frequent
 - Describe impact
 - Demonstrate ongoing professionalism
- Reinforce appropriate working relationship to client afterwards



“What’s going on, baby girl?”

Pet Names

- AVOID
- Consistency across clients
- Favoritism
- Confuses relationship to others



To hug or not to hug?

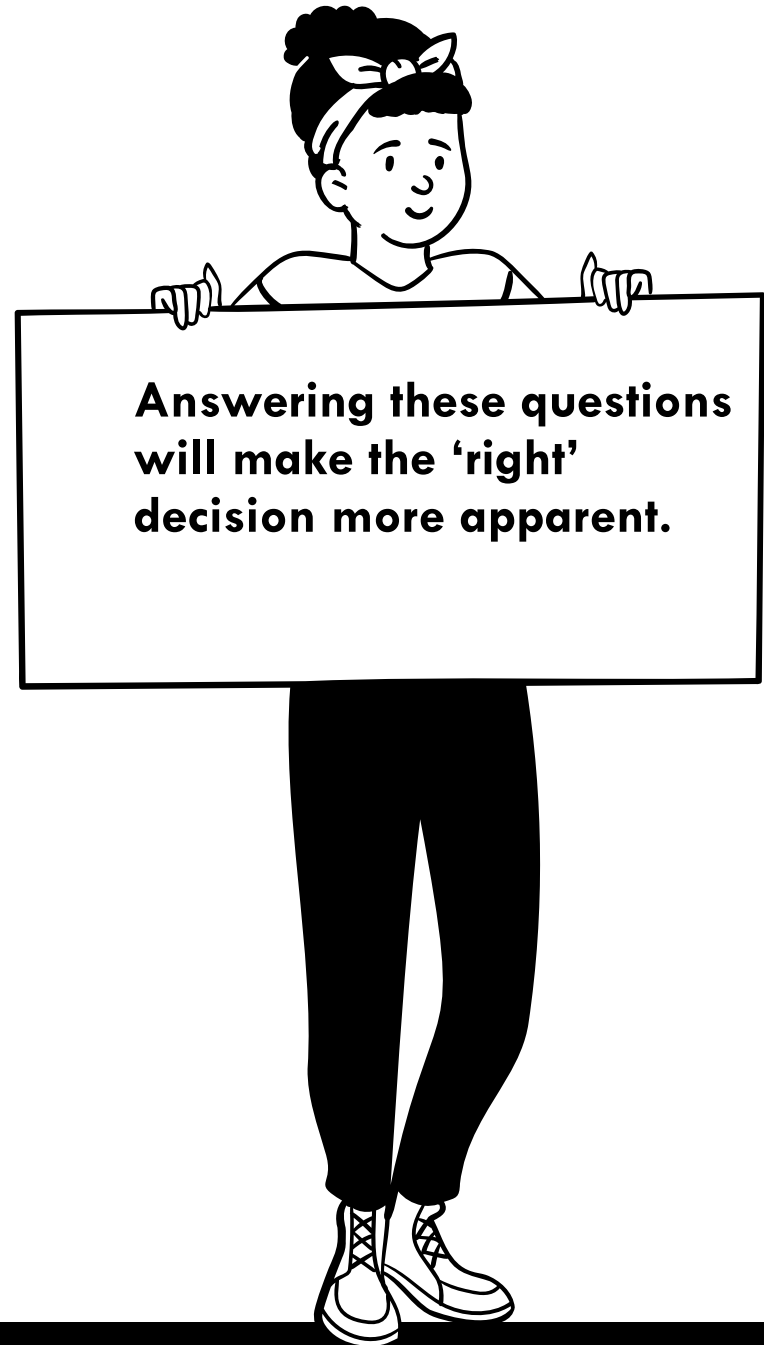
- Comfort, reassuring
- Culture
- Types of hugs

- Once we allow hugging and touching:
 - Future expectations
 - Consistency across clients
 - Misinterpreted by others around
 - Necessary for our role?



Contact

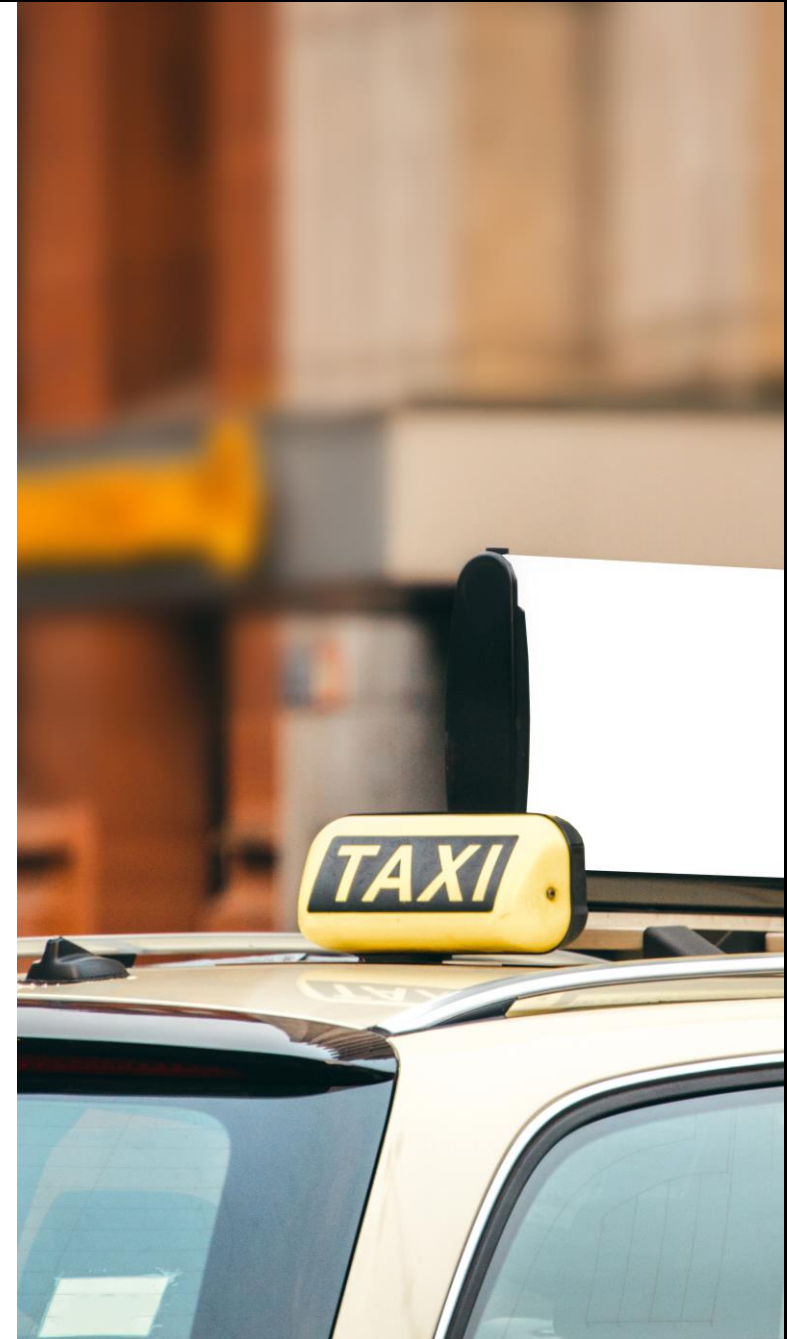
- In what way does it build relationship?
- Does it create expectation?
- Who does it serve? You? Them? Both?
- Equipped to DEFLECT it now/future
- Consistency across clients
- History of trauma
- DOES IT MOVE CLIENTS CLOSER TO GOALS?



“Can I get a ride to my appointment?”

Care Manager Cab

- Know company expectations
- Understand risks
 - Smells
 - Do for one, do for all?
 - Accusations
 - Creating reliance
 - 'More personal'
- Be VERY CLEAR with boundaries
- Avoid if possible

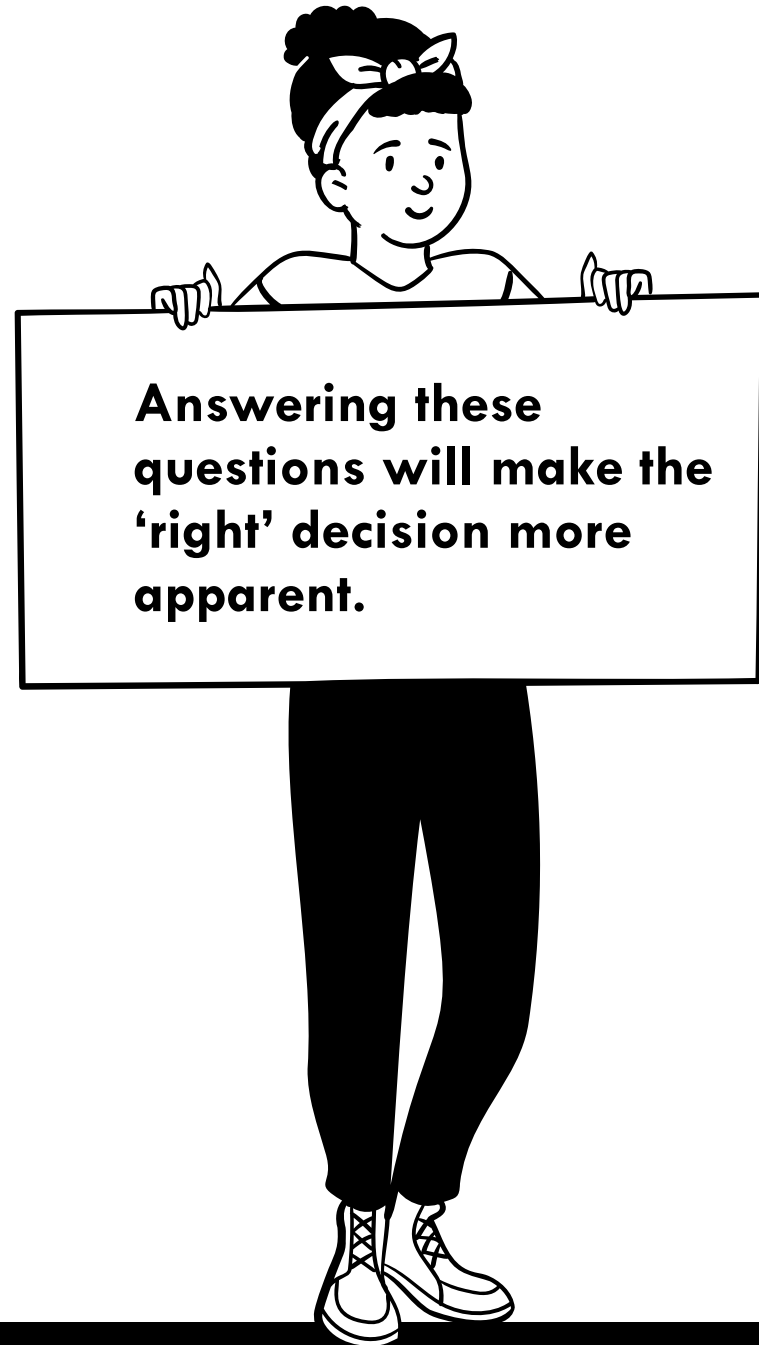


“Was it ok that I bought a bag of chips for my client?”

I really did.

Context is important.

- Did I create expectations?
- Did I show favoritism?
- Is this a secret?
- Was it costly?
- Did it impact our relationship professionally?
- Why did I do it- what was the motivation or expected outcome?



All that and a bag of chips



REHAB CARROT

- No expectation created
- No 'witnesses'
- No secrets
- Not costly
- No big impact on relationship
- Did it to keep in seat, distract from visible symptoms and discomfort to accomplish their goal

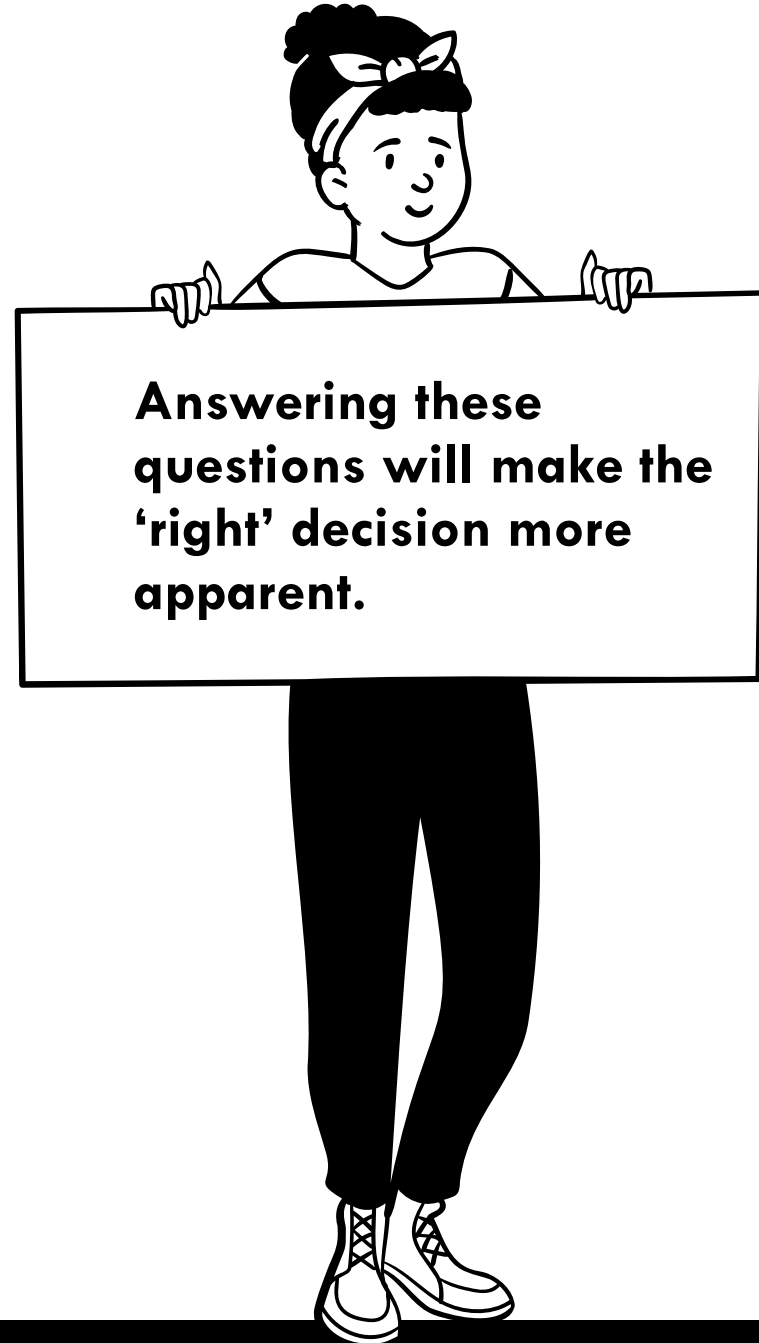
CLIENT ASKED

- Created expectation that willing to feed, do what's asked
- Do I do this for all my clients?
Probably not.
- Did I ask them not to tell anyone?
Secrets and implies favoritism
- Something a friend would do
- Did it to be nice, I have a big heart

“Thank you for all your help! I really want you to have this. Open the card when you get home. It’s the least I can do for you after all you’ve done for me!”

Gifts and Risk

- COMPANY POLICY!?
- What's 'attached'?
- Consistency across clients
- Cost
- Did it impact our relationship professionally?
- For the unexpected piece... open at home? Hhhmmm...



“OMG! I didn’t know you worked here!”

We go way back!

- Working with clients you had a previous relationship with should be avoided when possible
- When it's not possible:
 - Set clear boundaries immediately
 - Acknowledge your role as professional and **STICK TO IT**
 - Be aware of small-talk

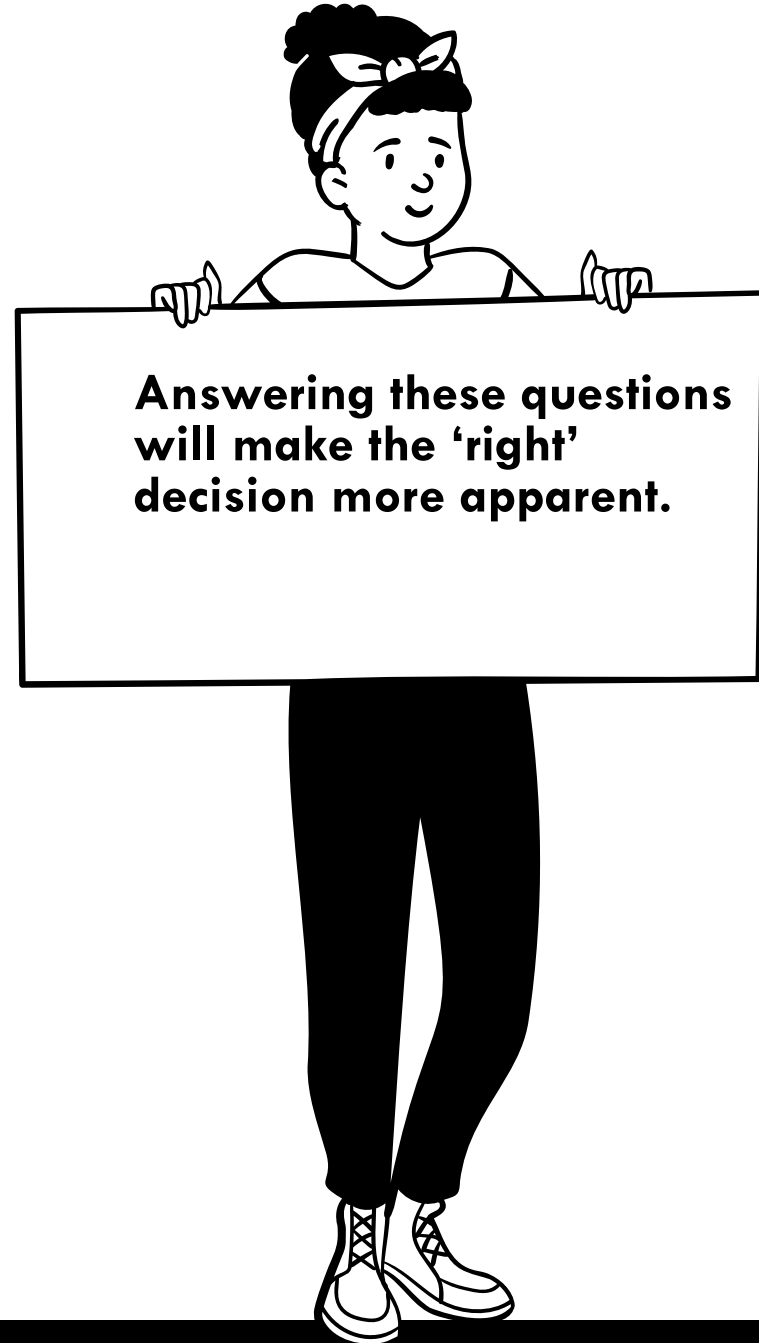


“I don’t want to stop working with you.
You’ve helped me so much.”

(and YOU want to keep them too!)

When to discharge

- Did they achieve their goals?
- Have you provided all the tools you can?
- Are they capable of managing their own health now?
- Why are YOU reluctant to discharge?
- Would you apply the same standard to other clients?
- Are you concerned with losing relationship with client?
- Hanging on takes away from helping others who may genuinely need it



“I’m not your client anymore. Let me buy you a drink sometime.”

Decisions... Decisions...

- They aren't a client anymore.
 - There's no rules from your employer you are breaking.
 - You're both consenting adults.
 - You know each other (well?).
 - You've achieved something together.
- Relationship started with one party having authority over another.
 - Is there doubt that the shift from professional to personal interest occurred after discharge?
 - What will happen if the client needs to re-engage with your organization?
 - What message does this send to other clients?
 - Would you be embarrassed to introduce to friends/family/coworkers?
 - How will you feel when asked about your love story?
 - REVENGE IS REAL!





Home Visits

- SAFETY IS PRIORITY
 - Don't offend but don't risk it
- Your preparation for guests may differ
- Versions of 'clean' (don't judge me by my desk!)
- Do I take off my shoes?
- Do I sit down or bring a chair?

- Establish safe boundaries that protect you

“I’m not doing anything until SHE leaves the room! I don’t want her here.”

MY MOM DOESN'T GET ME!!!

- When caregiver disagrees medically:
 - Legally: depends
 - NYS: 'mature enough' to consent
 - NYS: sexual health decisions, mental healthcare, sexual assault treatment, certain SUD services
 - NYS: not vaccines
- **Ideally:**
 - **Get parents on board**
 - **Link when emancipation warranted**
 - **Bridge/mediate or identify appropriate resource**
- CONSULT WITH COMPLIANCE/LEGAL

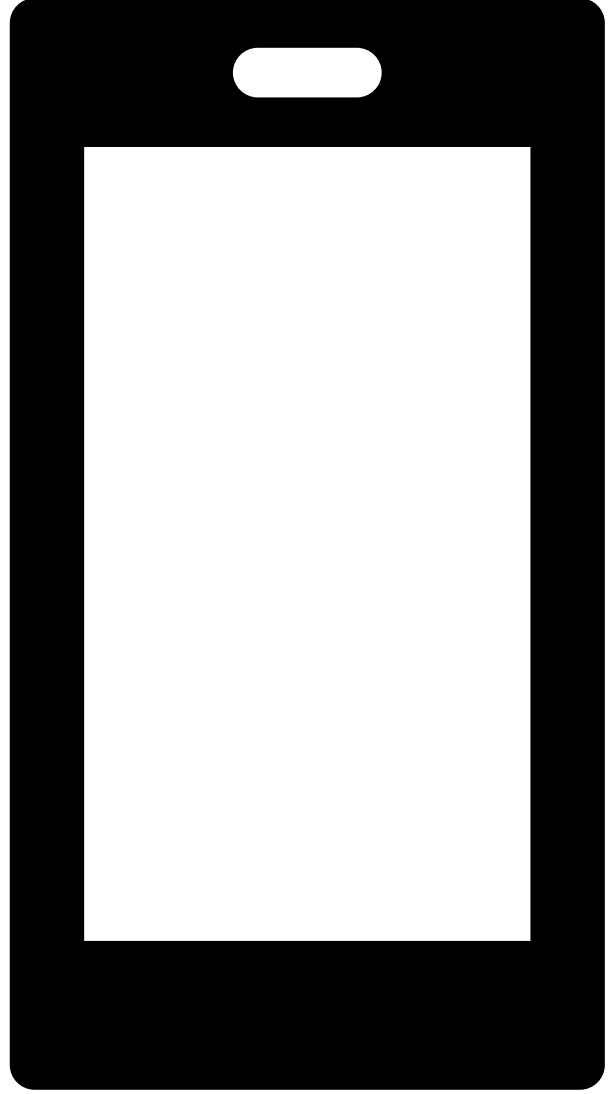


“Can I get your number? I don’t know what I’ll do this weekend if I can’t reach you.”

Cell Phones and After-Hour Connectivity

- Personal cells should not be provided to patients
- Provide clients with clear boundaries about availability
 - On business card?
 - Back-up general number
- Esp. for clients that may struggle with mental health or suicidal ideation, provide 24/7 resources
 - Even if you did give your cell, what if you can't answer or were sleeping, etc.?

Remember your goal: support client self-efficacy! We can't be everything for everyone!



Social Media

NO NO NO NO NO NO NO NO NO NO NO NO NO NO NO

- Don't let clients follow you
- Don't like their photos and comment on their posts
- BE WEARY or completely avoid accepting requests from people you don't know
- Be paranoid about what you post generally

- Where there's a will, there's a way!



Uber, DoorDash, and Care Manager?

- Dropping off food and items to clients...
 - Certain things were necessary during a global pandemic/crisis
 - Clients may have gotten used to provisions/support
 - Why were we initially providing this food? Has anything changed?

- Be clear about changes in roles...
 - ...and WHY they changed

- Remember that goal again... SELF-EFFICACY

- If we are creating systems where clients consistently rely on us, our work is counterproductive!

“Sorry about that voicemail I left you this weekend. Please don’t say anything to anyone. I was drunk and didn’t mean to call you and say those things. Let’s just forget about it.”



Consider:

- Client is on parole (contingency management?)
- This was their first slip up (that you are aware of at least)
- Client said some pretty inappropriate things about the way you look and their feelings towards you
- Client is asking you to keep a secret
- Relapse can be considered part of recovery process
- Relationship HAS changed now

WHAT WOULD YOU DO?

BREAKOUT ROOM TIME!

THOSE Talks

- Time to chat with your client about your role:
 - Make sure YOU know what and why
 - Be firm and consistent
 - Align with employer policies and expectations
 - Ask your supervisor for guidance
 - Request additional support when needed
 - Physical presence
 - Other departments/resources



Quick Recap



Trust yourself and your instincts



Ask for help when needed



Evaluate your decisions with common sense questions



Always keep in mind professional relationship with client



Clients can experience more success when you set healthy boundaries

THANK YOU!

Have an awesome day! 😊