



CLIENT INTERACTIONS and PROFESSIONAL BOUNDARIES

Policy Statement

Switchpoint philosophy is grounded in the belief that all people deserve to be treated with dignity and respect, and in the power of humane, caring relationships between staff and clients. Switchpoint is committed to always setting and maintaining a high standard of professional conduct for its staff including volunteers, contractors, interns, board members, etc. who are responsible for maintaining these boundaries in their day-to-day work with those that we serve. Professional boundaries enable staff and clients to engage safely and effectively in healthy, supportive, human service relationships. Switchpoint strives to create a safe and supportive environment for all clients who access services. In the process of providing services, Switchpoint recognizes the value and importance of staff building rapport and appropriate professional relationships with the clients. Accordingly, this policy and procedures assist staff to focus on professional client-driven, positive outcomes.

Purpose

- Help and support clients to the best of our ability and ensure that what is done does not harm the client.
- Ensure that our actions are based around the needs of the clients wherever possible.
- Act in a trustworthy and responsible manner in all dealings with and for clients.
- Be truthful and honest in our interactions with clients.
- Respect the clients' rights as individuals.
- Ensure that all current and potential clients have an equal opportunity to access and benefit from our services.
- Work for the good of our teams and Switchpoint.

Scope

This policy applies to all Switchpoint employees, students/interns, volunteers, contractors, and Board Members, etc. that interact with clients. For the purpose of this policy, reference to "staff" is inclusive of all persons listed above.

Definition of Terms

Professional boundaries are a set of guidelines, expectations and rules which set the legal, ethical, and technical standard in the work environment. They set limits for safe, acceptable, and effective behavior by staff in client relationships and interactions.

Boundaries are the lines that separate the professional from non-professional relationships.

Power imbalance is the difference in power relations between a staff member and the clients in our care. This can be due to the vulnerability of the person, the sensitive information staff have access to, or the role of the staff member in providing or giving access to the services and support the client needs.

Clients are those that seek access to and/or receive Switchpoint services. This includes residents, patrons, customers, anyone using Switchpoint services, etc.

Former Clients are anyone that has received any Switchpoint services within the past year.

Staff refers to anyone that interacts with the clients as has been defined. This includes employees, students, interns, volunteers, contractors, board members, etc.

Policy/Procedure Details

This policy provides guidance for appropriate behavior to maintain professional relationships between staff and clients. Due to the limitations of this policy and procedures to provide recommended behavior that covers all role-related scenarios, it is vital that all other Switchpoint Standards and Ethics of Conduct be reviewed and adhered to along with adopted Codes of Conduct from agencies that license and provide funding for our programs. It is expected that anyone who falls under the scope of this policy will always exercise good professional judgement and ask for assistance from a supervisor when unsure.

Professional Boundaries

Staff have a duty and responsibility to treat clients with respect and provide client-centered support that meets their needs without judgement or bias. Professional boundaries require staff recognition of potential conflicts, risks, and complexities of interacting with and supporting clients. Be mindful of this, especially when working with clients long-term. It can be challenging, and staff can/should bring concerns or training needs to their supervisors and/or HR.

Early in the client relationship, staff should always inform the client of the professional nature of their role to avoid misunderstandings. Despite best efforts to maintain professional relationships, boundaries may be crossed. In situations where the professional relationship has been compromised, staff will work towards mending where possible.

Some signs of compromised boundaries are:

- Setting aside time outside of work to assist a client.
- Possessive or secretive behavior such as: Becoming defensive in matters relating to a client or not sharing information with a supervisor.
- Judgmental attitudes that might cause you to withhold support from, do special favors for, criticize staff based on hearsay, or to criticize a client for the same reason.
- Social relationships between staff and clients are inappropriate including friendship, socializing, social relationships via social networking sites or electronic means, or entering any other relationship apart from a professional one. To do this is a breach of professional boundaries.
- Staff should avoid giving advice that is outside of their training or expertise.
- Staff required to make home visits must do them for work-related purposes only as required by their job description and/or grant/funding policies. Requests from clients for staff to visit their homes outside of these arrangements will be declined, documented, and discussed with supervisor.
- Staff are expected to declare to their supervisor and complete a Conflict-of-Interest Reporting Form, if there is a pre-existing personal/social relationship (acquaintance, friend, relative connection, etc.) with a client as soon as they are aware of the client receiving Switchpoint services that impact their department/work sphere.
 - Supervisors will manage any declarations sensitively, reassign duties when necessary, always maintain confidentiality and only inform others on a need-to-know basis.

Any breach to a professional boundary will be managed in line with relevant Switchpoint policies and procedures to ensure the safety of staff and clients is managed accordingly.

Request and Disclosure of Information

Staff will avoid requesting information that is not necessary for the purposes of providing client services and care.

Further, staff shall not disclose any unnecessary personal information relating to themselves or others at Switchpoint. This is important, especially when the disclosed information has potential to affect professional relationships. Before making any voluntary disclosures, staff should always question the motive behind the disclosure, whether the information would help the person and consider the unintended consequences that can arise from the disclosure.

Accepting and Giving of Gifts

In general, gifts should not be exchanged between staff and clients, and this should be clearly communicated early in the professional relationship. Staff should not give a client a cigarette, personal food or other items, lend them a book, etc.

However, it is understood that in certain situations, cultures, and contexts, refusing gifts could appear offensive and may damage the established good working relationship. In these cases, please consult with a supervisor. The gift should not be excessive, not conditional upon any action or services being rendered, and nothing is expected in return. Staff are always encouraged to dissuade gift giving. When it is necessary to accept gifts, staff should state they are accepting on behalf of the “team” or “Switchpoint” to remove the personal element. All gifts should be reported to a supervisor.

Prohibited Relationships

While working closely with clients and providing services, staff may develop feelings for clients or vice versa. Staff must remember that it is their responsibility to conduct themselves professionally and maintain professional boundaries with all clients. If staff notices a change in the relationship or signs the client seeks a change in the relationship, staff must inform their supervisor and discuss ways to maintain the professional nature of the relationship or whether a reassignment is needed.

Some Examples of Relationships that are Prohibited:

- Personal Relationships – such as friends, or assuming the role of parent/guardian
- Any Romantic or Sexual Relationship or contact.
- Financial or Business Relationship – entering into contracts, giving or lending of money, etc.

Staff must NEVER seek out relationships with former (within one year of receiving client services) or current clients and will use caution with exchanging messages, making connections on social media/networking sites and other electronic means with clients/former clients. Any staff that has questions or concerns should visit with their supervisor about appropriate conduct and timeframes.

Confidentiality & Reporting

All staff must familiarize themselves, be vigilant, and adhere to the *Switchpoint Privacy and Confidentiality Pledge*, along with applicable *Non-Disclosure Agreements*, *Codes of Conduct*, etc. in protecting information obtained in the course of their work.

Client confidentiality must never be breached except in cases where it concerns the safety of a client or child. If this is the case, staff will approach their supervisor for guidance and recommended course of action(s). Concerns of Abuse must always be reported to the proper authorities.

If any member of staff is aware of or witnesses a breach of professional boundaries by another staff member, they will report it to their supervisor so it can be investigated.

Some Specifics

- As staff we are role models for our clients. Clients will often mirror a member of staff's behavior and attitudes. Emotions and attitudes are contagious. Be sure to mirror the behavior we want our clients to have.
- Empower clients by matching their willingness. Help the client not fall into an entitlement or victimhood mindset. Provide support without doing a task that a client can do for themselves.
- Staff will not become involved in romantic or sexual relationships with clients or former clients.
- Physical contact with clients should be limited to handshakes, pats on the back/arms or other acts whose intentions are not likely to be misinterpreted or send confused messages. Physical contact that is specifically prohibited includes, however not limited to, holding hands, sitting on laps, caressing, etc.
- Staff may not initiate hugs with clients.
- Dress appropriately for your role and duties. Your style of dress will also signal your professional boundaries to the clients you work with. Avoid wearing low-cut or revealing or extreme styles of clothing as this can make a client feel uncomfortable and could send the wrong signals or messages.
- Staff language should be appropriate and professional. Avoid profanity – even if the client speaks this way. Avoid derogatory language like insults or slurs – even if your client uses this type of language. Be mindful that your language does not label the client such as calling them “dependent” or “vulnerable”.
- Be very careful that your compliments are unambiguous and could not be misinterpreted as flirting, a sexual advance or as an indication of a more personal relationship between you. Make sure compliments are accurate, appropriate, and not too personal.
- Do not give out personal information such as phone numbers, emails, home addresses, or access to social media/networking sites to clients.
- Refrain from discussing your personal life. Sharing personal information could confuse your clients and blur relationship boundaries.
- Staff must follow the Switchpoint *Social Media Policy*. Switchpoint encourages staff to set privacy settings on social media accounts that keeps personal information/life separate and safe.
- Current/former clients will not visit the residences of staff without prior approval from management.
- Staff are prohibited from taking current/former clients to his/her home without prior approval from the Regional Director or CEO.
- Staff will not give or receive gifts from current/former clients—this includes cigarettes, lending books, etc. (See *Accepting and Giving Gifts*)
- Staff shall not engage in any business transactions with clients without prior approval from the Regional Director or CEO.
- Staff must be respectful and nonjudgmental of all possible variations of background, color, race, sexual orientation/preferences and experience of clients and other staff.
- Remarks or jokes which may be perceived as racial, ethnic, cultural, sexual slurs, or which demean any group of people will not be tolerated.

- Strive to always maintain an unbiased and balanced viewpoint of clients. Be objective not subjective when working and interacting with clients.

OBJECTIVE	SUBJECTIVE
Can be observed	Formed by opinion
Can be described	Based on personal judgement
Can be counted or quantified	Based on a belief
Close to 'the truth'	Varies from person to person
Factual	Based on myth or rumor

Support

Where staff have a concern or question about professional boundaries, they should seek guidance from their supervisor. Especially when an employee has a personal relationship or conflict of interest that may impact their ability to perform their role without breaching the definition of a “professional boundary”. If this is not possible, then the staff will need to discuss this with the HR department.

Where appropriate, the supervisor will direct staff to obtain professional support for any distress experienced while providing services in their Switchpoint role. When available, staff members should utilize the Employee Assistance Program (EAP), which offers short-term confidential counseling services.

Manager support can be provided to staff, including the potential to extract them from instances where professional boundaries may be challenged. A supervisor and staff discussion may occur to develop a strategy to support staff to feel safe to perform their duties subject to the circumstances.

Managers may consider discussing any concerns and questions about professional boundaries in team meetings where appropriate, to explore best practices and effective ways to maintain professional boundaries and seek relevant training to ensure best practices and consistency.

Disciplinary Action

Where there has been a report of a possible professional boundary breach, the matter will be investigated and may result in disciplinary action. The severity of the disciplinary outcome will depend on the seriousness of the breach. A manager should contact their HR department for advice on this matter.

I have read, understand, and will follow the Switchpoint Client Interactions and Professional Boundaries Policy.

Employee Signature _____ Date _____

Employee Full Name (print please) _____