

Personal and Professional Boundaries

Presented by Lena Sheffield, LMHC, CAP, MAC, CEDS



May 24, 2017



Thomas Durham, PhD

Director of Training

NAADAC, the Association for Addiction Professionals

www.naadac.org

tdurham@naadac.org



Produced By
NAADAC, the Association for Addiction Professionals
www.naadac.org/webinars



www.naadac.org/webinars



The screenshot shows a web browser window with the address bar displaying "www.naadac.org/webinars". The browser's toolbar includes various icons for navigation and extensions. The website's header features the NAADAC logo, the text "THE ASSOCIATION FOR ADDICTION PROFESSIONALS", and a "Member Sign-In" button. A dark blue sidebar on the left contains a vertical menu with icons and labels for: ABOUT NAADAC, MEMBERSHIP, EDUCATION, RESOURCES, ADVOCACY, AFFILIATES, CONFERENCES, CERTIFICATION, PROVIDERS, and WORKFORCE DEVELOPMENT. The main content area is titled "WEBINARS" and includes a graphic of a laptop with the NAADAC logo on its screen. Below this, the "NAADAC INSTITUTE WEBINAR SERIES" is highlighted, with a sub-section for "Recent/Upcoming Free Webinars On Demand Webinars". A circular logo with a globe and the text "NAADAC Webinars" is positioned to the right of the text. The "RECENT/UPCOMING FREE WEBINARS" section lists two webinars: "Comparing Alcohol Use in the DSM-IV-TR, DSM-5, and ICD-10" and "Managing the Medusa: The Neurobiology of Addiction, Intervention, and Recovery". Each listing includes the date, time, CE credits, and a "Register Now" link. A "Webinars" section on the right side of the page lists several topics: "Webinar Series Frequently Asked Questions", "Comparing Alcohol Use in the DSM-IV-TR, DSM-5, and ICD-10", "Managing the Medusa: The Neurobiology of Addiction, Intervention, and Recovery", "Connecting the Continuum: How Prevention Fits with Treatment", "Cutting Edge: Understanding Clients Who Engage in Self-Injurious Behaviors", "Schizophrenia vs PTSD? Why it Matters in Trauma-Informed Systems of Care", "Mindfulness and Addiction Treatment", and "Clinical Skills for Group Evidence-".

www.naadac.org/webinars

Apps NAADAC Bills Cabinet social media news SBIRT videos travel Misti Story Counselor Gmail Maps Pandora Wells Fargo Zilly

NAADAC
NAADAC.ORG
THE ASSOCIATION FOR ADDICTION PROFESSIONALS

Member Sign-In

WEBINARS

NAADAC INSTITUTE WEBINAR SERIES

Recent/Upcoming Free Webinars
On Demand Webinars

RECENT/UPCOMING FREE WEBINARS

Comparing Alcohol Use in the DSM-IV-TR, DSM-5, and ICD-10

- Thursday, January 8, 2015 @ 3-4:30pm ET (2 CT/1 MT/12 PT)
- Earn 1.5 CEs - click [here](#) for more information
- [Register Now](#)

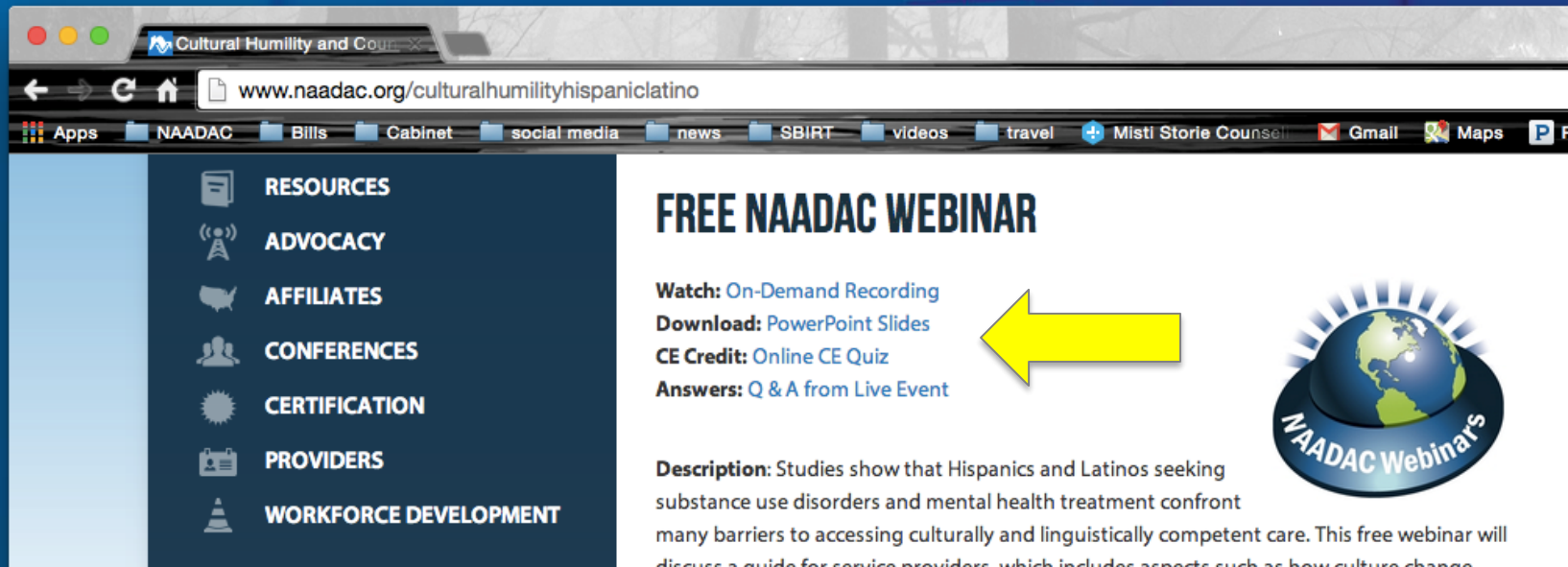
Managing the Medusa: The Neurobiology of Addiction, Intervention, and Recovery

- Thursday, January 29, 2015 @ 3-4pm ET (2 CT/1 MT/12 PT)
- Earn 1 CE - click [here](#) for more information
- [Register Now](#)

Webinars

- Webinar Series Frequently Asked Questions
- Comparing Alcohol Use in the DSM-IV-TR, DSM-5, and ICD-10
- Managing the Medusa: The Neurobiology of Addiction, Intervention, and Recovery
- Connecting the Continuum: How Prevention Fits with Treatment
- Cutting Edge: Understanding Clients Who Engage in Self-Injurious Behaviors
- Schizophrenia vs PTSD? Why it Matters in Trauma-Informed Systems of Care
- Mindfulness and Addiction Treatment
- Clinical Skills for Group Evidence-

www.naadac.org/personal-professional-boundaries-webinar



The screenshot shows a web browser window with the address bar displaying www.naadac.org/culturalhumilityhispaniclatino. The browser's address bar and tabs are visible at the top. Below the address bar, a navigation menu lists various resources: RESOURCES, ADVOCACY, AFFILIATES, CONFERENCES, CERTIFICATION, PROVIDERS, and WORKFORCE DEVELOPMENT. The main content area features a large yellow arrow pointing left towards the text: **FREE NAADAC WEBINAR**. Below this, the text reads: **Watch:** [On-Demand Recording](#), **Download:** [PowerPoint Slides](#), **CE Credit:** [Online CE Quiz](#), and **Answers:** [Q & A from Live Event](#). To the right of the text is a circular logo with a globe and the text "NAADAC Webinars". Below the text, a description states: **Description:** Studies show that Hispanics and Latinos seeking substance use disorders and mental health treatment confront many barriers to accessing culturally and linguistically competent care. This free webinar will discuss a guide for service providers, which includes aspects such as how culture change

Cost to Watch:
Free

**CE Hours
Available:**
1.5 CEs

**CE Certificate for
NAADAC
Members:**
Free

**CE Certificate for
Non-members:**
\$20

CE Certificate

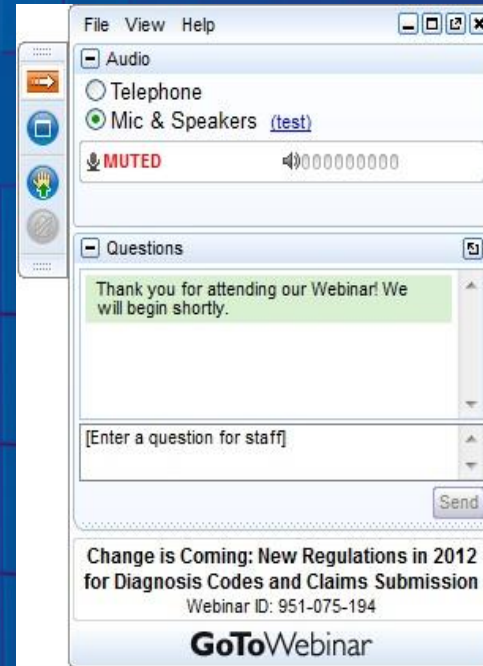
To obtain a CE Certificate for the time you spent watching this webinar:

1. Watch and listen to this entire webinar.
2. Pass the online CE quiz, which is posted at
www.naadac.org/personal-professional-boundaries-webinar
3. If applicable, submit payment for CE certificate or join NAADAC.
4. A CE certificate will be emailed to you within 21 days of submitting the quiz.



Using GoToWebinar – *(Live Participants Only)*

- Control Panel
- Asking Questions
- Audio (phone preferred)
- Polling Questions





Webinar Presenter

Lena Sheffield,

LMHC, CAP, MAC, CEDS

305-857-0050 ext 25 or 305-915-9298

lenalsheffield@gmail.com

The Counseling Group of Miami

2840 SW 3rd Avenue, Miami, Florida 33129

&

Your

Sober College School of Addiction Studies

Webinar Learning Objectives

1

LO #1

Identify appropriate boundaries, boundary crossings and boundary violations in the work setting.

2

LO #2

Identify vulnerabilities for blurry or unhealthy boundaries.

3

LO #3

Identify tips for setting healthy and appropriate boundaries in work setting.

Boundaries

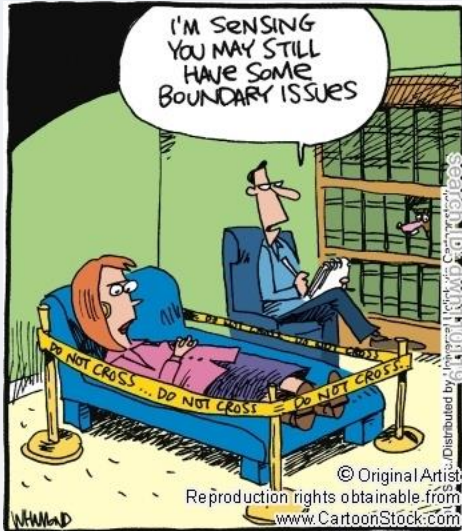
and sense of self go hand in hand

- protect us from unsafe spaces
- separate what is our business and what isn't our business



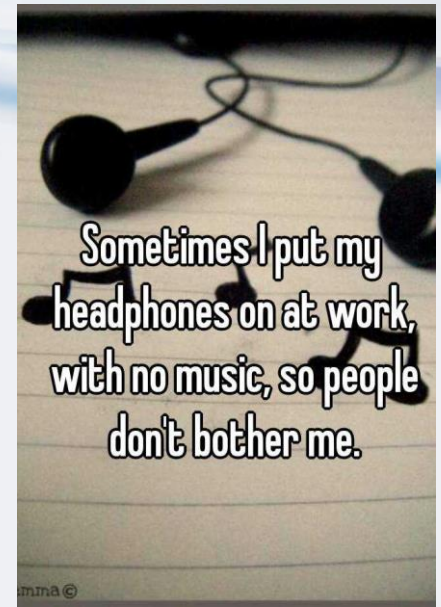
Boundaries

- help define who we are



Body's natural boundary system

Our autonomic nervous system and minds scan to protect us
Our immune system detects something foreign and fights
Our digestive system detects imbalances and reacts
Our senses react when something is unwanted



Professional Boundaries in Addiction Tx

The limits of a *fiduciary* relationship in which one person entrusts his or her welfare to another (Montgomery, 2012).

Professional Boundaries in treatment setting

- therapeutic relationships require trust and safety
- client enters treatment anxious and vulnerable
- an implicit power differential
- professional is *responsible* for providing core conditions of safety and trust
- treatment providers have the *obligation* to establish and maintain consistent and clear boundaries
- boundaries are our “therapeutic frame”
- boundaries are determined by our role, context, practice and contract.

Appropriate?

Professional boundaries in tx setting

client factors (*culture, age, gender, hx, personality, current physical and emotional state, etc*)

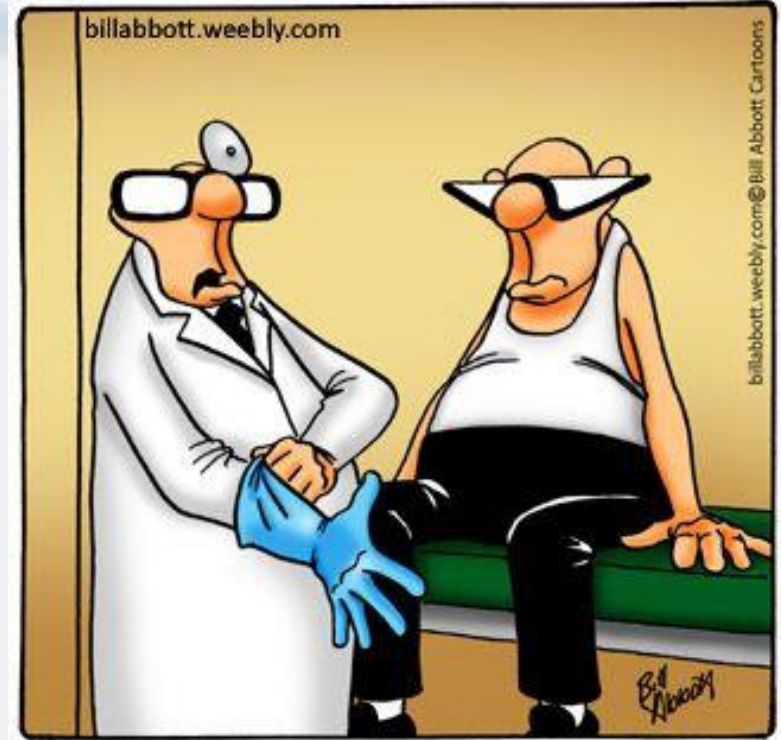
treatment role

setting and context

treatment practice

contract

Roles



“And now, sadly for both of us,
I have to invade your personal
space.”

Context



Context

setting and context (treatment center, office, rural, metropolitan, university, military, public or private location, etc)

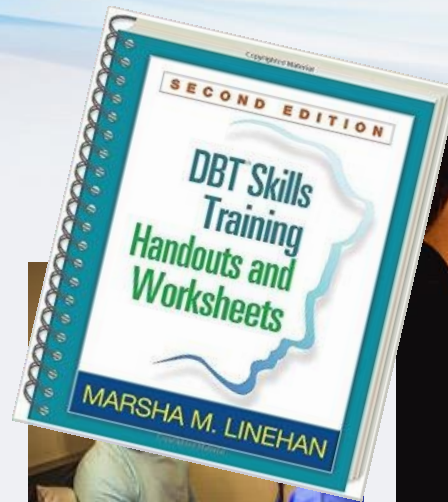


Practice

Actual description of your practice.

Professional scope

Competencies



Contract

What is the agreement and implied boundaries?

Agreed upon treatment goals and treatment plan

Verbally describing confidentiality

Informed consent

Maine Board of Licensure reports that 1/3 of the cases it investigates include allegations of failure to obtain adequate and meaningful informed consent (Nyberg, 2013, p. 20)

Informed Consent

- a. explicit explanation as to the nature of all services to be provided and methodologies and theories typically utilized,
- b. purposes, goals, techniques, procedures, limitations, potential risks, and benefits of services,
- c. the addiction professional's **qualifications**, credentials, relevant experience, and **approach** to counseling,
- d. right to **confidentiality** and explanation of its limits including **duty to warn**,
- e. policies regarding continuation of services upon the incapacitation or death of the counselor,
- f. the role of technology, including **boundaries around electronic transmissions with clients and social networking**,
- g. implications of diagnosis and the intended use of tests and reports,
- h. fees and billing, nonpayment, **policies** for collecting nonpayment,
- i. specifics about clinical supervision and consultation,
- j. their right to refuse services, and
- k. their right to refuse to be treated by a person-in-training, without fear of retribution.

NAADAC Code of Ethics I-3, 2016

Boundary Crossings

outside common practice

often benign and not **harmful or exploitive**

isolated event

non-progressive

can be explained, talked about, documented

can be learning opportunity or therapeutic

Boundary Violation

- **harmful** (to the client, family, colleagues, industry, society)
- when someone trespasses on the other personhood, crosses the line
- tries to control the feelings, attitudes, behaviors, choices and values of the other
- power differential & exploitative
- judgment is based on **harm** to the client



Polling Question #1

Have you had to defend your profession because of behaviors of a colleague in the industry?

Yes or No

Dual relationships

Acceptable  Risk of Exploitation

- They exist
- Identify upfront before engaging in professional relationship
 - simultaneous relationship

Dual relationships

Appropriate



Risk of Exploitation

- They exist
- Identify upfront before engaging in professional relationship
 - same time
 - earlier time
 - in future
- Selling or buying from clients (family)?
- Additional payments ?
- Relationships outside of work setting ?
- Assess the risk from the perspective of the client, not the professional (Gottlieb, 1993)

Dual relationships

- Addiction Professionals shall make every effort to avoid multiple relationships with a client. When a dual relationship is unavoidable, the professional *shall take extra care* so that professional judgment is not impaired and there is no risk of client exploitation.
- Such relationships include, but are not limited to, members of the Provider's immediate or extended family, business associates of the professional, or individuals who have a close personal relationship with the professional or the professional's family.
- When extending these boundaries, Providers take appropriate professional precautions such as informed consent, consultation, supervision, and documentation to ensure that their judgment is not impaired and no harm occurs.
- Consultation and supervision shall be documented.

NAADAC Code of Ethics I-11, 2016

Dual relationships

Acceptable



Risk of Exploitation

- They exist
- Identify upfront before engaging in professional relationship
 - simultaneous relationship
 - prior relationship

Addiction Professionals recognize that there are inherent risks and benefits to accepting as a client someone with whom they have a prior relationship. This includes anyone with whom the Provider had a casual, distant, or past relationship. Prior to engaging in a counseling relationship with a person from a previous relationship, the Provider *shall seek consultation or supervision*. **The burden is on the Provider to ensure that their judgment is not impaired and that exploitation is not occurring.**

NAADAC Code of Ethics I-12, 2016

Polling Question #2



Typically I have known professional boundary violations to be:

- a. Turned into a bigger deal than need to be
- b. Covered up or overlooked
- c. Usually addressed appropriately

Social Media



High risk for exploiting clients, family, colleagues and industry

High risk for self-indulgence and self promotion

Marketing and sales people do not follow the ethical and legal standards of the addiction counseling/ treatment industry

Educate them

Set standards up front

You are responsible for confidentiality on your page.
HIPAA applies.

Discourage and educate clients about posting on line.

They should NOT do your marketing

Social Media



- Set up separate professional and personal pages with strict privacy settings.
- Set up your rules about who and what content you will allow on your profile.
- Once clients come on your page and give input your responsibility is implied.
- Do you want to allow clients to know about each other online?
- Include your online policies in your Informed Consent.




Social Media



- Set up rules for yourself about “friending” or “connecting” with colleagues.
- Be mindful about promoting others...
- Be mindful about sharing posts...
- Be mindful about liking or retweeting content.....

it reflects on you, your organization and our profession

USE EDIT & DELETE



KNOW YOUR
BOUNDARIES



I KEEP MY BOUNDARIES LOW AND FLIMSY. OTHERWISE I FIND THEM JUST TOO MUCH WORK TO ENFORCE.

When you're tired of people standing too close to you



Personal Boundaries

Blurry boundaries that give others the message it's ok to violate your boundaries.

- ① Being too responsible for others - 'better if I do it myself' can lead to burn out.
- ② Too much empathy - taking on moods and feelings of others makes it difficult to see yourself as separate and distinct from others. Are you making excuses for them?
- ③ Pleasing, victim role, sacrificing, often leads to resentment and more invalidation.
- ④ Saying yes, always volunteering, feeling obligated to say yes, often leads to passive aggressiveness and lack of validation.
- ⑤ Not expressing your wants, preferences, needs.
- ⑥ Overstepping others boundaries.

Personal Boundaries

Where do you tend to take over?

Take responsibility for others?

Volunteer because it's expected?

Forfeit to be nice

What if you didn't?

Checking your boundaries

What things that they ask of you, do you want to say No to?

How have you felt when you set appropriate boundaries?

Who are the people in your life you want to learn to say No to?

What might happen if you set more appropriate boundaries?

What are some things you would like to be less passive about?

Characteristics that may be a personal boundary violation

- Tries to instill guilt in you
- Name calling
- Yelling at you
- Sarcasm
- Dismissive or disregards your thoughts, beliefs, feelings or value
- Treats you inferior
- Takes over conversation
- Mocks or sets you up for ridicule or failure
- Excessive teasing
- Condescending
- Breaks confidences
- Often breaks promises
- Demanding
- Withholding
- Threatens with ultimatums or gestures
- Physically assaultive
- Sexually assaultive
- Makes up lies about you
- Exploits your vulnerabilities

Vulnerabilities

- Illness or physical challenges
- Issues that interfere with your competency
- Relationship struggles
- Life crisis
- Financial difficulties
- Major decisions or transitions
- Professional insecurities or overzealousness
- Loneliness, lack of social network
- Not working on behavioral health issues

Warning Signs

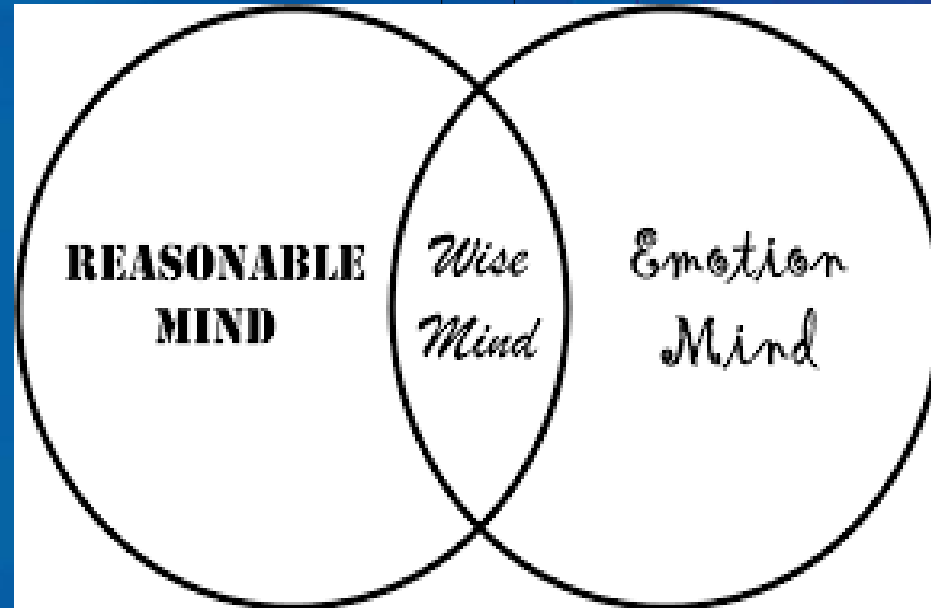
- specialness, enjoying time with client, thinking you are very special to the client
- making recommendations outside the scope of your profession
- increased socializing during and after sessions
- making more exceptions for one client over another
- favors outside of treatment plan, providing or requesting
- enabling, wishing you could rescue
- enjoying being needed by them
- being attracted and being more attentive to your appearance
- strong negative emotions when they do not comply



Are you too desperate in your current life to
sell your integrity and ethics for money?

“My ethics are not for sale”

SOURCE: SUMMITBUSINESS MAGAZINE. NET. VOL.09 ISSUE 05 October 2016

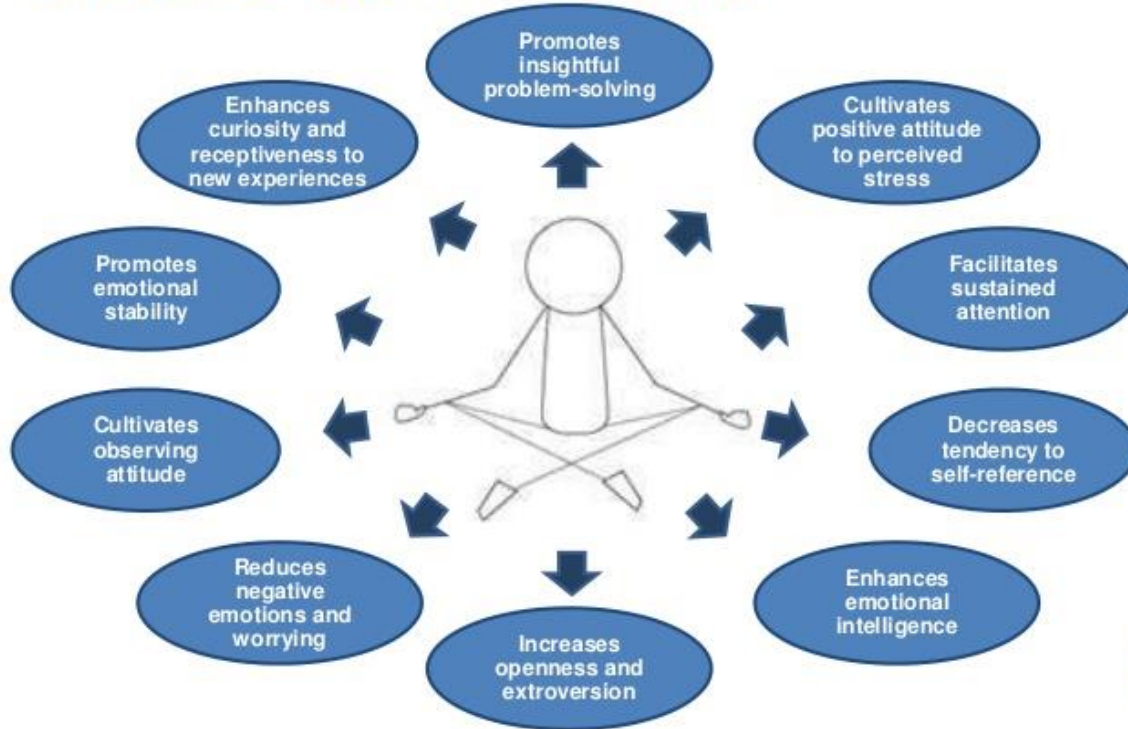


Mindfulness Practice

*“Mindfulness means
paying attention
in a particular way;
On purpose, in
the present moment
and non-judgmentally.”*

Jon Kabat-Zinn

MINDFULNESS PRACTICE HAS MULTITUDE OF EFFECTS OF COGNITIVE FUNCTION



Copyright 2012 Dr Shanida Nataraja, Author of *The Blissful Brain: Neuroscience and Proof of the Power of Meditation*

Best
response
based on
context

Restoring Harmony to your lifestyle

Balance doesn't mean doing everything.

Examine your priorities and set boundaries.

Be firm in what you can and cannot do.

Follow expected behaviors for your industry, work setting and personal values

Self Care

- Manage your schedule (realistically)
- Simplify your paper work/ email correspondence
- Communicate clearer - up front
- Nurture yourself according to your likes and abilities and accessibilities
- Set aside time for play and physical activities
- Protect your time off
- Sleep 7- 9 hours per night
- Eating variety and intuitively
- Bolster your support system

Poletto, 2009

Support System

- Professionals with similar ethical standards
- Friends and family who respect the integrity of your work
- Non-work network that stimulate your mind outside the field
- Supervisor/ mentors
- Access to ethical / legal resources
 - NAADAC
 - State credentialing agency
 - Risk Management
 - Malpractice liability carrier
 - Professional health program for your state (professional EAP for your credentials)
- Professional Code of Ethics and state statutes for your credentials.
- Who else?

Polling Question #3



Do you feel comfortable going to your supervisor or professional colleague to discuss possible dilemmas regarding boundary issues with clients?

Yes or No

Try to be a good role model
for clients
and the treatment field.



Thank You!

Lena Sheffield,

LMHC, CAP, MAC, CEDS

305-857-0050 ext 25 or 305-915-9298

lenalsheffield@gmail.com

The Counseling Group of Miami

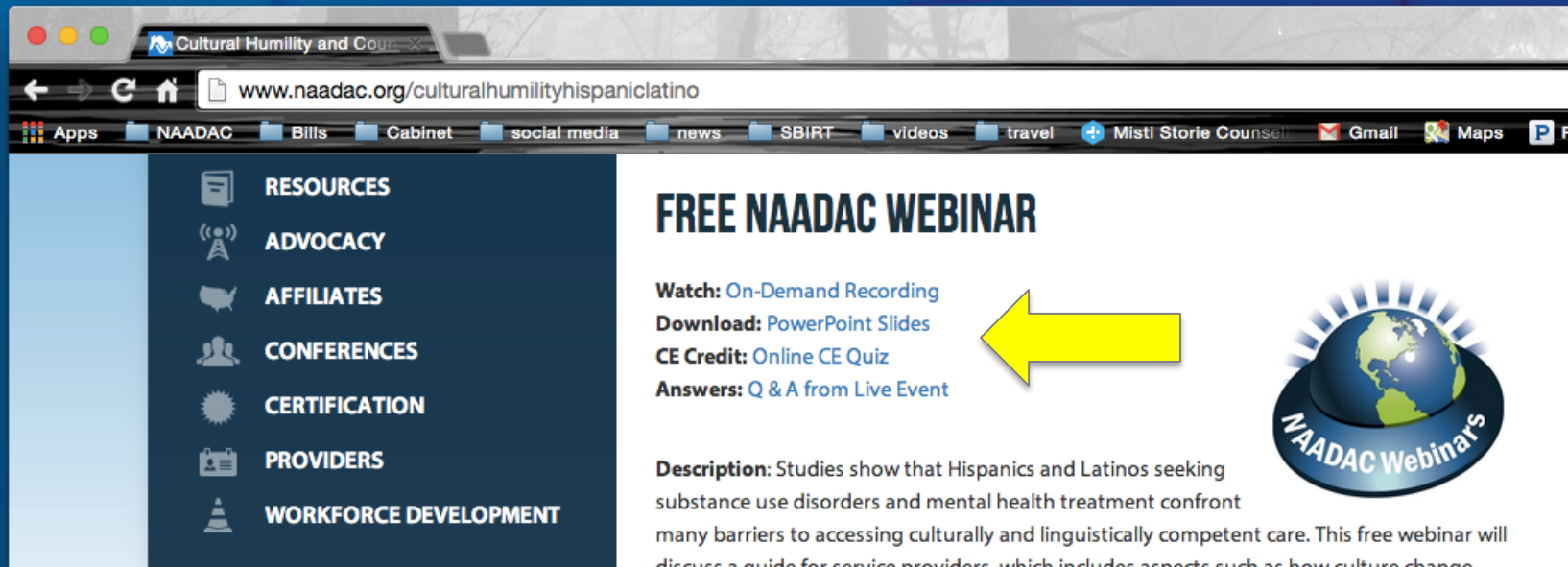
2840 SW 3rd Avenue, Miami, Florida 33129

&

Your

Sober College School of Addiction Studies

www.naadac.org/personal-professional-boundaries-webinar



The screenshot shows a web browser window with the address bar displaying www.naadac.org/culturalhumilityhispaniclatino. The browser's address bar and tabs are visible at the top. Below the address bar, a navigation bar contains links to various resources: Apps, NAADAC, Bills, Cabinet, social media, news, SBIRT, videos, travel, Mistl Story Counsel, Gmail, Maps, and P. The main content area features a sidebar on the left with a dark blue background and white text, listing categories: RESOURCES, ADVOCACY, AFFILIATES, CONFERENCES, CERTIFICATION, PROVIDERS, and WORKFORCE DEVELOPMENT. The main content area has a white background and features a large yellow arrow pointing left towards the text. The text reads: **FREE NAADAC WEBINAR**. Below this, it lists: Watch: [On-Demand Recording](#), Download: [PowerPoint Slides](#), CE Credit: [Online CE Quiz](#), and Answers: [Q & A from Live Event](#). To the right of the text is a circular logo with a globe and the text "NAADAC Webinars". Below the text, a description begins: **Description:** Studies show that Hispanics and Latinos seeking substance use disorders and mental health treatment confront many barriers to accessing culturally and linguistically competent care. This free webinar will discuss a guide for service providers, which includes aspects such as how culture change

FREE NAADAC WEBINAR

Watch: [On-Demand Recording](#)
Download: [PowerPoint Slides](#)
CE Credit: [Online CE Quiz](#)
Answers: [Q & A from Live Event](#)

Description: Studies show that Hispanics and Latinos seeking substance use disorders and mental health treatment confront many barriers to accessing culturally and linguistically competent care. This free webinar will discuss a guide for service providers, which includes aspects such as how culture change

NAADAC Webinars

Cost to Watch:
Free

**CE Hours
Available:**
1.5 CEs

**CE Certificate for
NAADAC
Members:**
Free

**CE Certificate for
Non-members:**
\$20

CE Certificate

To obtain a CE Certificate for the time you spent watching this webinar:

1. Watch and listen to this entire webinar.
2. Pass the online CE quiz, which is posted at
www.naadac.org/personal-professional-boundaries-webinar
3. If applicable, submit payment for CE certificate or join NAADAC.
4. A CE certificate will be emailed to you within 21 days of submitting the quiz.



Upcoming Webinars



June 14, 2017

**Self-Care for Addiction Professionals:
Why It Counts and How to Do It**
by David Mee-Lee, MD and Deborah Teplow, PhD



July 12, 2017

**Treating Eating Disorders as
Substance Use Disorders**
by Marty Learner, PhD



June 28, 2017

Motivation There's no Place Like Home
by Scott Breedlove, MS, MARS, MRSS-P



July 26, 2017

**Now What're We Supposed to Do?
EBPs for Medication-Assisted Treatment**
by Michael Bricker, MS, CADAC-2, LPC

www.naadac.org/webinars



www.naadac.org/webinars

Webinars

www.naadac.org/webinars

Apps NAADAC Bills Cabinet social media news SBIRT videos travel Misti Story Counseling Gmail Maps Pandora WellsFargo Zifty

NAADAC
NAADAC.ORG
THE ASSOCIATION FOR ADDICTION PROFESSIONALS

Member Sign-In

THE ASSOCIATION FOR ADDICTION PROFESSIONALS

WEBINARS

NAADAC INSTITUTE WEBINAR SERIES

Recent/Upcoming Free Webinars
On Demand Webinars

RECENT/UPCOMING FREE WEBINARS

Comparing Alcohol Use in the DSM-IV-TR, DSM-5, and ICD-10

- Thursday, January 8, 2015 @ 3-4:30pm ET (2 CT/1 MT/12 PT)
- Earn 1.5 CEs - click [here](#) for more information
- [Register Now](#)

Managing the Medusa: The Neurobiology of Addiction, Intervention, and Recovery

- Thursday, January 29, 2015 @ 3-4pm ET (2 CT/1 MT/12 PT)
- Earn 1 CE - click [here](#) for more information
- [Register Now](#)

Webinars

- Webinar Series Frequently Asked Questions
- Comparing Alcohol Use in the DSM-IV-TR, DSM-5, and ICD-10
- Managing the Medusa: The Neurobiology of Addiction, Intervention, and Recovery
- Connecting the Continuum: How Prevention Fits with Treatment
- Cutting Edge: Understanding Clients Who Engage in Self-Injurious Behaviors
- Schizophrenia vs PTSD? Why It Matters in Trauma-Informed Systems of Care
- Mindfulness and Addiction Treatment
- Clinical Skills for Group Evidence-Based Treatment

Free CEs for Members

Levels:
Professional
Associate
Student

www.naadac.org/join

WEBINAR SERIES

Over 75 CEs of free educational webinars are available. Education credits are FREE for NAADAC members.

MAGAZINE ARTICLES

In each issue of *Advances in Addiction & Recovery*, NAADAC's magazine, one article is eligible for CEs.

FACE-TO-FACE SEMINARS

NAADAC offers face-to-face seminars of varying lengths in the U.S. and abroad.



INDEPENDENT STUDY COURSES

Earn CEs at home and at your own pace (includes study guide and online examination).

CONFERENCES

NAADAC Annual Conference,
September 22-26, 2017, Denver, CO

CERTIFICATE PROGRAMS

Demonstrate advanced education in diverse topics with the NAADAC Certificate Programs.



Contact Us!

NAADAC

44 Canal Center Plaza, Suite 301
Alexandria, VA 22314

phone: 703.741.7686 / 800.548.0497

fax: 703.741.7698 / 800.377.1136

naadac@naadac.org

www.naadac.org



NAADACorg



Naadac



NAADAC



NAADAC
NAADAC.ORG

THE ASSOCIATION FOR ADDICTION PROFESSIONALS