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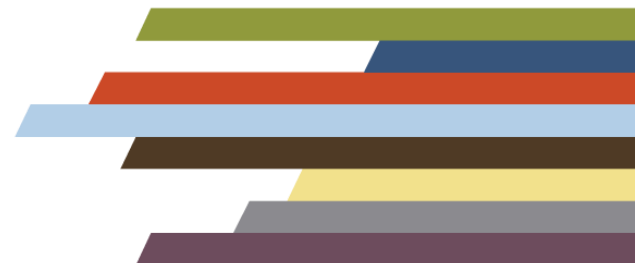
Addiction Technology Transfer Center Network  
Funded by Substance Abuse and Mental Health Services Administration

# Professional Boundaries for Peer Advocates

Presented by Mary McCarty-Arias, MA  
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***SAMHSA***

Substance Abuse and Mental Health  
Services Administration



# Disclaimer

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The use of affirming language inspires hope and advances recovery.

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LANGUAGE MATTERS.

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**Words have power.**

**PEOPLE FIRST.**

The ATTC Network uses affirming language to promote the promises of recovery by advancing evidence-based and culturally informed practices.

# Mary McCarty-Arias, M.A.

More than 25 years experience training in co-occurring disorders, HIV, and vocational rehabilitation.



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# Goals

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- Increase knowledge about the importance of adhering to a code of ethics
- Encourage participants to examine your own values and beliefs about appropriate work behaviors



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# Objectives

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- List the possible job responsibilities of a peer
- Describe the categories in the Code of Ethical and Professional Conduct for Peer Advocates
- Define healthy boundaries
- Define the term “dual relationship”



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# What is a Peer?

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*A system of giving and receiving help based on key principles that include “shared responsibility, and mutual agreement of what is helpful”.*



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# Values for Peer Recovery Programs

- Recovery-oriented
- Person-centered
- Voluntary
- Relationship-focused
- Trauma-informed



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# Performance Domains

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- Advocacy
- Mentoring/Educating
- Recovery/Wellness Supports
- Ethical Responsibility



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# Peer Advocates vs. Counselors

Peer Advocates	Counselors
Facilitate ongoing lifestyle reconstruction	Facilitate recovery initiation
Self-disclosure is used as a tool	Self-disclosure is discouraged
Power inequity but less hierarchical	Power differential
Maintaining contact after discharge	Contact outside of treatment center is discouraged
Relationship may continue	Relationship has a beginning, middle, & end

*(Rosenberry, 2017)*

# Peer Advocates vs. Sponsors

Peer Advocates	Sponsors
Service organization	Voluntary mutual aid
Adjunct to treatment	Isolation from professional helpers
Recovery support across multiple frameworks – “Recovery by any means necessary”	Support in a particular program of recovery
Broad range of supportive services (education, employment, health care, housing, transportation)	12-Step tools used (sharing, meetings, sober activities)

*(Adapted from Rosenberry, 2017)*

# Ethics Defined

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*Ethics are a code of behavior that guides our actions on and off the job.*



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# Categories in the Code of Ethical and Professional Conduct



# 1. Unlawful Conduct

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- No convictions for any misdemeanor or felony
- No crimes involving possession, sale, or use of a controlled substance



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# 2. Sexual Misconduct

- One of the most violated policies
- No sexual activity with clients, families of clients, or former clients
- Why is it harmful to the client if you have a sexual relationship with them?

**NO**



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# Why is it Harmful to Have Sex with Clients?

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- Breaks down the therapeutic relationship
- Our population is vulnerable
- Creates role reversal – creates boundary confusion
- Increases suicidal risk & depression for clients



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# When a Client Initiates...

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- They may feel “love”
- They may feel dependent
- They might look at you as a savior
- They might look at you as a parent



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# Peer Role

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- Set limits!
- Document any advances
- Use the team at case conference



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# 3. Fraud-Related Misconduct

- Includes false claims
- Shall not use a title or credential that you don't have
- Includes false advertisements



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# 4. Exploitation of Clients

*What does that include?*

- No relationships with clients for financial gain
- No commissions, rebates, etc. for a client referral



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# 5. Professional Standards

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*Standards include...*

- No discrimination on the basis of race, color, sex, sexual orientation, age, religion, national origin, socio-economic status, political beliefs, psychiatric impairment, or physical disability.



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# 6. Safety & Welfare

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## *Important Information*

- Peers are mandated to report abuse and neglect & comply with mandatory reporting requirements



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# 7. Record Keeping



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# 8. Assisting Unqualified/Unlicensed Practice



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# 9. Discipline in Other Jurisdictions

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# 10. Cooperation with the Board

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# Defining Professional Boundaries



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# Boundaries

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- Limits you set on what you will accept from another person
- Guidelines/rules that a person creates to identify safe ways to behave
- May be material, physical, mental, or emotional



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# What are Boundaries? *(continued)*

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- While ethics may be a specific code of behavior, some boundaries are based on job expectations.
- Others may be based on personal values and choices.



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# What Purpose Do They Serve?

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- Boundaries set parameters.
- Boundaries help protect and inform both workers and clients.
- Boundaries give workers confidence.
- Clear boundaries help to develop trusting relationships.
- Boundaries help to develop professionalism.
- Boundaries help to clarify roles.
- Boundaries help workers separate home from work.

# Activity #1: Do You Believe...?

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Tells the client their own substance use status

- Always
- Sometimes
- Never

*Please write in your response & tell us a reason.*



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# Activity #2: Do You Believe...?

Eats lunch or dinner with the client at a restaurant

- Always
- Sometimes
- Never

*Please write in your response & tell us a reason.*



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# Activity #3: Do You Believe...?

Gives clients their personal cell number

- Always
- Sometimes
- Never



*Please write in your response & tell us a reason.*



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# Activity #4: Do You Believe...?

Accepts a gift from a client (less than \$20 value)

- Always
- Sometimes
- Never



*Please write in your response & tell us a reason.*



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# Activity #5: Do You Believe...?

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Hugs a client as a way of greeting

- Always
- Sometimes
- Never

*Please write in your response & tell us a reason.*



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# Importance of Boundaries

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*The professional...*

- is responsible for establishing and maintaining boundaries with their clients
- is in a position of power because of the knowledge he or she holds and the client's need for that knowledge or service
- must not misuse or abuse the position of power by crossing boundaries to maintain healthy trusting professional relationships

# Boundary Considerations

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- Am I making this decision because I'm uncomfortable?
- Am I sure this is best for the client?
- Have I talked to my colleagues or supervisor about this?
- Am I denying my client an opportunity to grow?
- Am I making this decision because it's the easiest thing to do?
- Is this something I can negotiate with my client?

# Transference

- Feelings a client has about a counselor
- May be triggered by mannerisms, appearance, habits or by internal feelings of clients that resemble previous feeling situations with significant other in the past
- May be experienced by counselor as “client resistance”



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# Countertransference

- Counselor relates to client as though they were someone else
- May be based on appearance, habits, behaviors and/or counselor's internal process
- May be influenced by authority figures, early caregivers, or personal history



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# What are Dual Relationships?

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*A professional enters into a dual relationship when they assume a second role with a client, becoming worker and friend, teacher, business associate, family member, employer or sex partner.*



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# Dangers of Dual Relationships

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- They can impair a worker's objectivity.
- They can be damaging to the client/worker relationship.
- They can confuse roles and responsibilities.
- They can limit a worker's ability to confront clients.
- They may be a violation of agency policy.
- They may be unethical or in some cases, even illegal.

***Remember: Be friendly with your client, but not your client's friend.***

# Being a Friend

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- Friendships are voluntary
- Friendships are reciprocal
- Friendships are not socially sanctioned (e.g., they have no formal code of ethics)
- Friendships are not controlled (e.g., no supervisor or certification requirements)



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# Social Media Best Practices

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- Professionals should not permit their private conduct to interfere with their ability to fulfill their professional responsibility.
- Think about how membership on a social networking site may affect potential or current clients.
- Professionals should respect clients' right to privacy.
- Conflicts of interest (dual relationships), privacy, confidentiality
- Clinical considerations

*Facebook: Ethical and Clinical Considerations*

[http://www.socialworker.com/feature-articles/ethics-articles/Facebook%3A Ethical and Clinical Considerations](http://www.socialworker.com/feature-articles/ethics-articles/Facebook%3A_Ethical_and_Clinical_Considerations)

# More Practice

- Tells the patient agency gossip
- Borrows money from a client
- Buys merchandise from a client
- Attends to the children while the client runs a “quick errand”



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HOPE



# Questions?

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