Zoom Logistics and Netiquette

1. Camera
2. Video
3. Audio
4. Mute
5. Proper name
6. Presence
7. Chat feature
8. Screen sharing
9. Participation
10. Breaks

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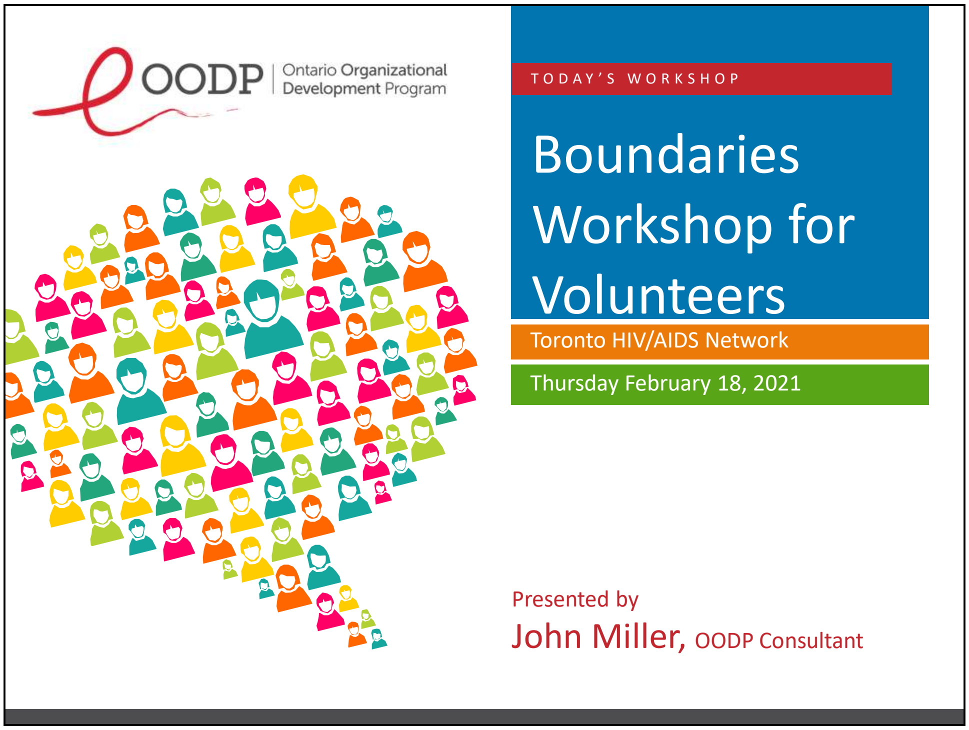
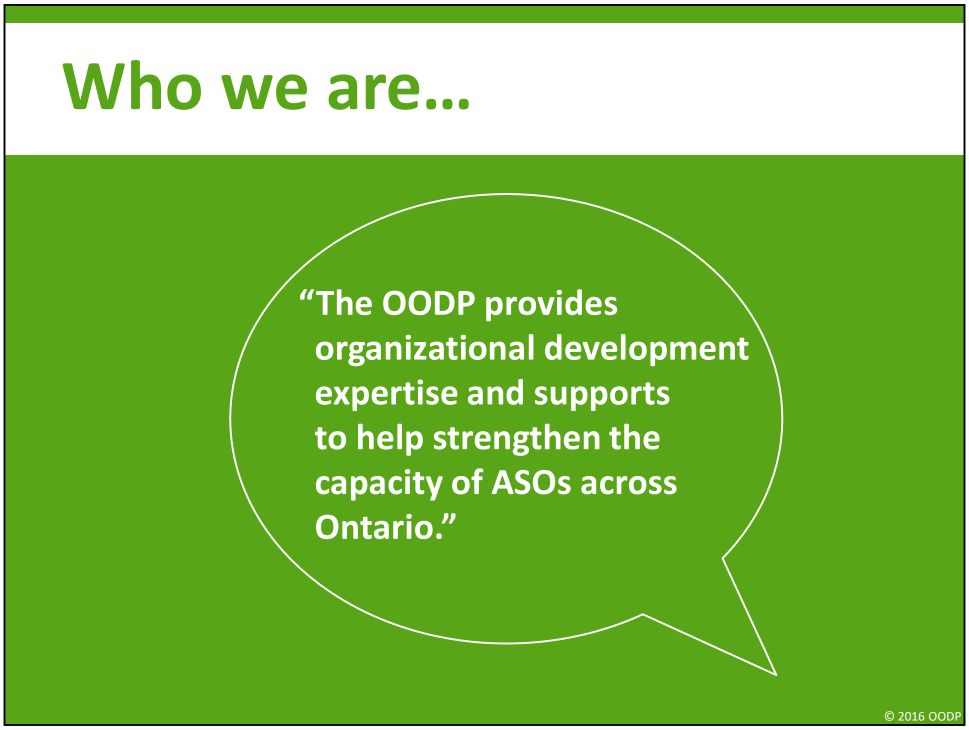
1. Camera – position your camera to be at eye-level, if possible
2. Video – turn on your video, if possible
3. Audio –**use a headset, if possible as it will improve sound quality for you and others**, check audio settings to make sure the correct microphone is selected
4. Mute – mute your microphone by default
5. Proper name – use your name in the name box so that we can properly identify you, **please also include the pronouns you would like us to use**: hover over your name, click "More" then "Rename"
6. Presence – be present by turning off all other programs and apps, e.g. Outlook
7. Chat feature – use it for questions, comments and to share resources. If you must use private chat, do so sparingly
8. Screen sharing – when we're screen sharing, you can adjust the view to reduce the slide size and increase the number of participants you can see: go to "View Options", "Side by Side Mode", then hover over the screen until you see the vertical bars and drag them to the left or right until you get to your preferred size
9. Participation – feel free to use participation images, e.g. raising a hand, reactions (thumbs up, clapping), etc.
10. Breaks – during breaks, ensure you're on mute and consider turning off your video. **When returning from breaks turn your video back on, check your audio and close other apps and program.**



Production of Boundaries Workshop has been made possible through financial contributions by the Public Health Agency of Canada's AIDS Community Action Program (ACAP) and the AIDS Bureau, Ontario Ministry of Health and Long-Term Care.



For those new to the sector – who may not be familiar with our organization….

- established 1995
- Government response to ASO requests for long term organizational development (OD) support

Mission:
- strengthen the capacity of ASOs and HIV-funded programs in Ontario to determine direction with awareness
- Foster a culture to take responsibility for their own organizational development

For complete description – visit website at www.oodp.ca

Snapshot:

- Workshops (Governance, Boundaries, ARAO, GIPA/MIPA, etc.)

- Planning (Strategic Planning, Annual Work Plans Staff and Board)

- Coaching –
- and Board Chairs

- Individualized Consult Requests

Presentation Overview

- Introduction
- Let’s Talk About Boundaries
- Four Challenges
- Questions to Ask Ourselves
- Recap

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Shared Principles

- Indigenous land and/ or reconciliation acknowledgement
- Respect and inclusion: accessibility, cultural relevance and equity for all participants
- Self-care and monitoring
- Phones on silent or vibrate
- All points of view welcome, but use “I” statements – speak from your own perspective
- Share the air
- Confidentiality
- Other?

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“In all OODP consults, we try to ensure a climate of accessibility, cultural relevance and equity for all workshop participants. To that end…”

- ***(If the organization has a regular practice for recognizing the organization’s presence on Indigenous territory and/or a practice that communicates the organization’s efforts to align with the Calls to Action from the 2015 Truth and Reconciliation Commission, let them proceed at this point.)***
- “So, let’s agree today to foster inclusion and respect for all workshop participants, to honour our various identities by being our best and most generous selves. We want to encourage discussion as much as possible. In so doing, there may be times when we need to provide feedback to each other about missteps (intentional and unintentional). We also welcome feedback. We are all continuing to learn.
- ***(If the organization has a particular practice around recognizing and normalizing the participation of trans, gender non-conforming and non-binary workshop participants, use that practice here, instead of…)*** “In that spirit, let’s agree to be respectful of the pronouns people use. If I unintentionally mis-gender someone, I hope you’ll forgive me and correct me.”
- “If you feel comfortable, please let us know about any accommodations you may need whether it be about ability-related access needs, pronouns used and/ or anything else you think we should know to support equitable access and your active participation.”
- ***(Point out any gender non-specific washroom facilities or acknowledge with regret that there aren’t any and say,)*** “If anyone is concerned about safety in the washrooms in this building, we invite you to speak with us so that we can problem-solve together.”
- “And, finally, let’s talk what else is important in how we work together today.” (***Point out the other items on the slide.)***

Introductions

In the chat window, please type the following:

- Your name and organization
- What is/ will be your volunteer role?
- One thing you hope to get from the training

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This is the question we want you to take away from today's workshop, if you remember nothing else:

Always ask yourself: "Is my behaviour appropriate?" And, "Is my behaviour ultimately going to be helpful – not just in the moment, but in the future."

And will it be helpful to to the organization, to its clients, and to me? The challenge with boundaries is that we have to think of all three at the same time.

Implied in the question is what to do if the answer is no, or if you're unsure, which is to manage your response to the situation, and get help in managing the response when necessary.

Introduction ✓

Let’s Talk About Boundaries

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bound·ary
(in human relations)

Something that defines limits in personal or professional behaviour and relationships.

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Why Are Boundaries Important?

(please type an answer in the chat)

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Why Are Boundaries Important?

Because they help to prevent complications arising from conflicting roles or expectations.

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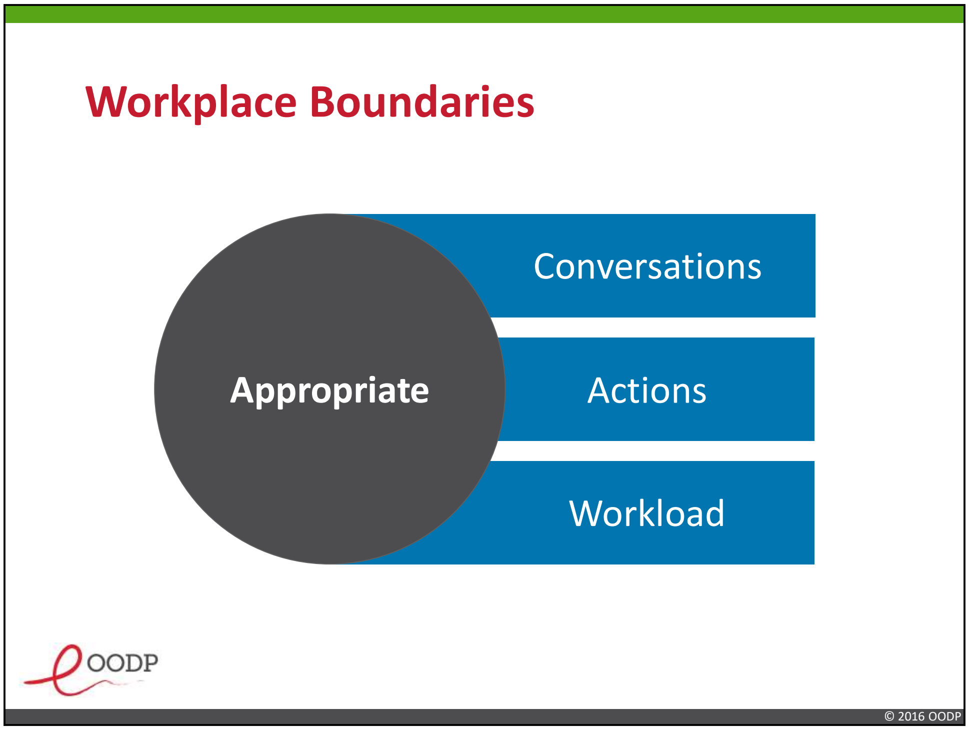


What do we mean when we say "appropriate"?

Here, we're talking about three things:

1) CONVERSATIONS: Putting limits on what we talk about and with whom so that it doesn't complicate relationships, cause offence or cause harm

   – As staff, volunteers, and Board members

   – e.g. inappropriate sharing and disclosure

2) ACTIONS: Putting limits on our behaviour to make sure it's appropriate to our role(s) and doesn't cause harm

   – For employees, volunteers and Board members

   – an example of inappropriate behaviour would be sleeping with a client

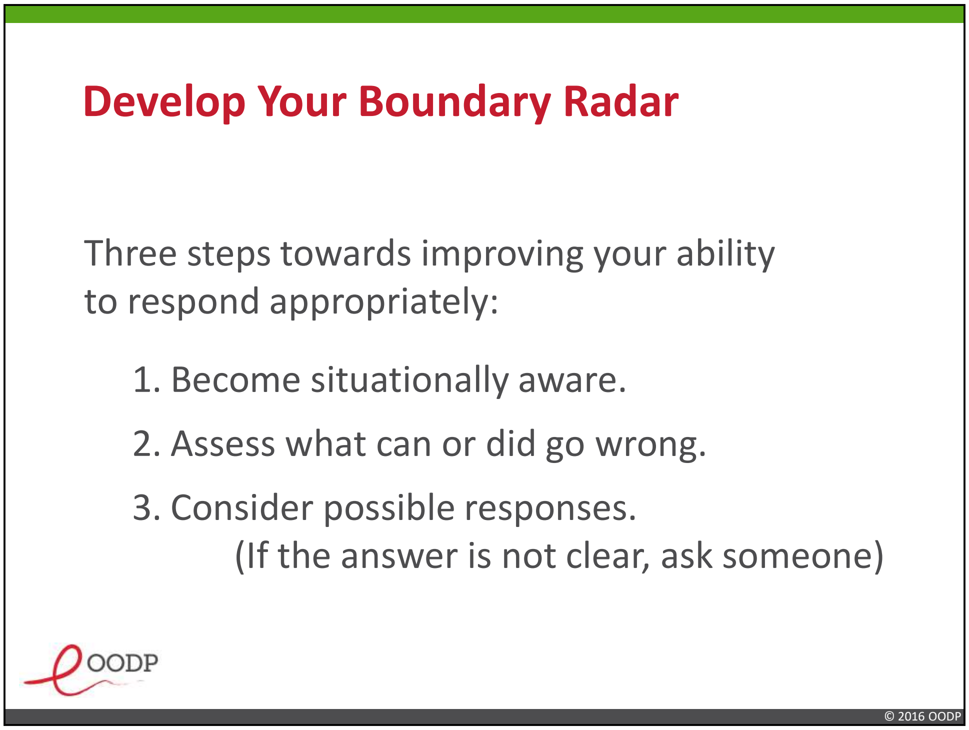
3) WORKLOAD: Putting limits on our workload, and on requests or complaints from staff, volunteers or clients to

   a) better serve clients as an organization; and

   b) to reduce our stress level

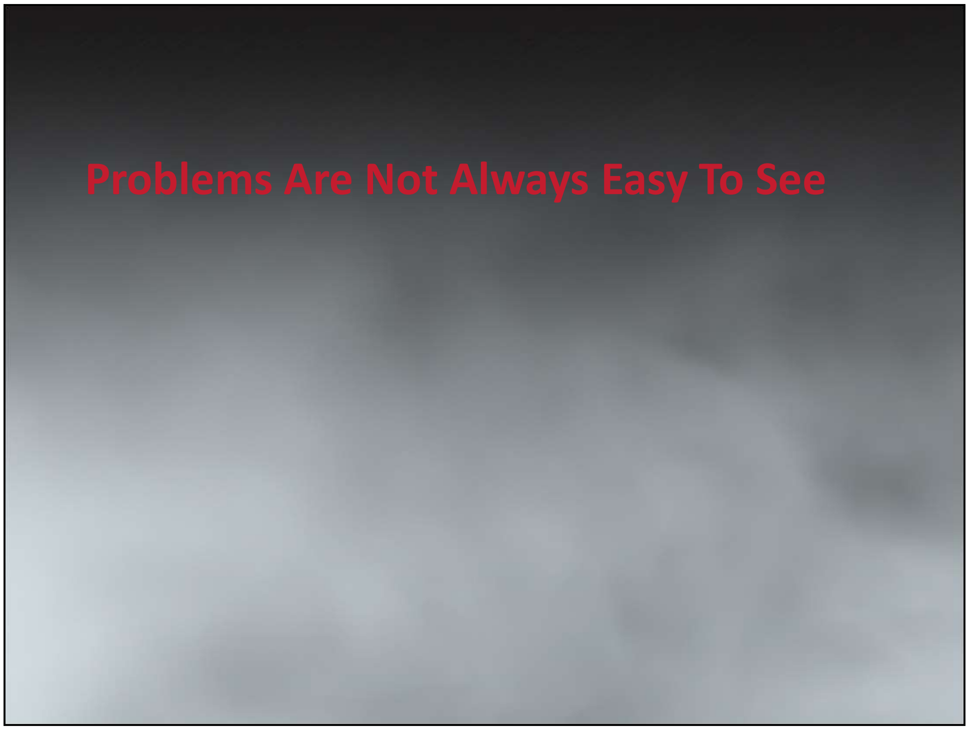
   – e.g. improve our ability to say no, or to redirect requests when appropriate

BUT FIRST, we need develop and fine-tune our boundary radar—the radar we use to detect and hopefully avoid problems that can arise from boundary situations.



There are three steps towards improving your ability to respond appropriately to boundary situations:

1. Becoming situationally aware.
2. Assessing what can go wrong.
3. Considering possible responses (and asking someone, if the answer isn't clear)



Becoming situationally aware is hard. Problems are not always easy to see.

We need to cut through the fog with our Boundary Radar…

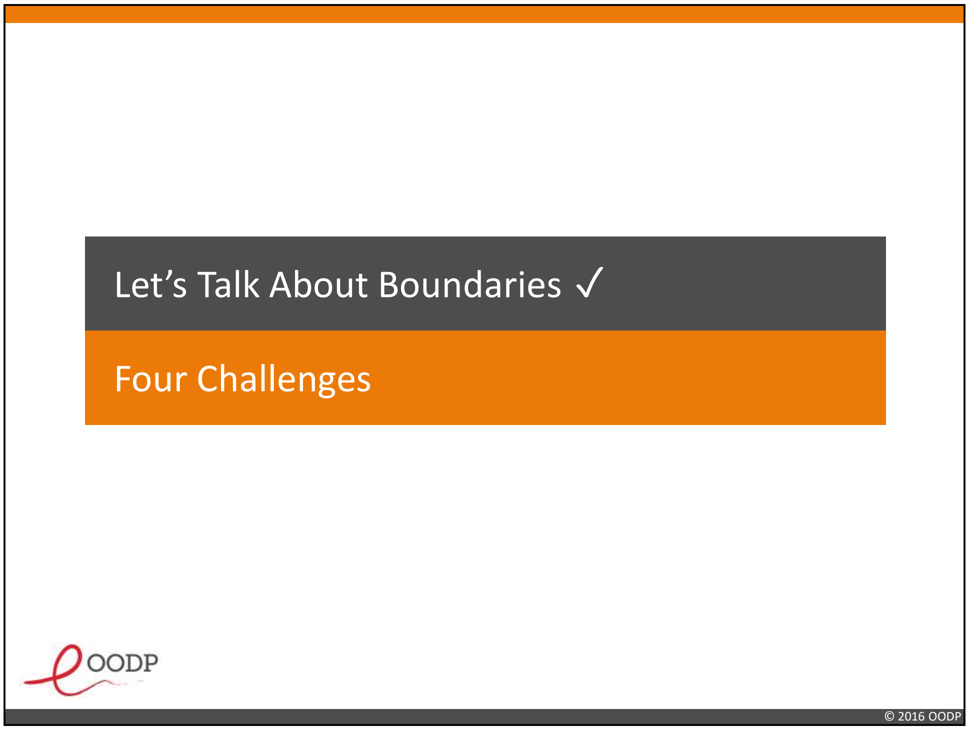
When we do, we see... There may be an iceberg.

If we see the iceberg, we can assess what can go wrong, and start to think about what to do about it.

If it’s too late, and we’re going to hit the iceberg, or if we’ve already hit it… well, we need to figure out how to manage the situation more agressively.

So, we come back to our guiding question.

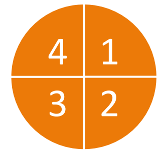
We're getting closer to being able to tell: Is my behaviour appropriate and, ultimately, helpful?



We’ve now defined what a boundary is, and talked about the need to develop our boundary radar.

Now, to improve our ability to identify boundary situations and to respond to them, we’re going to discuss four challenges to maintaining boundaries.

Four Challenges To Maintaining Boundaries



1. Intersecting values and cultures
2. Multiple, conflicting, or unclear roles
3. The helper-client relationship
4. Protecting and sharing information

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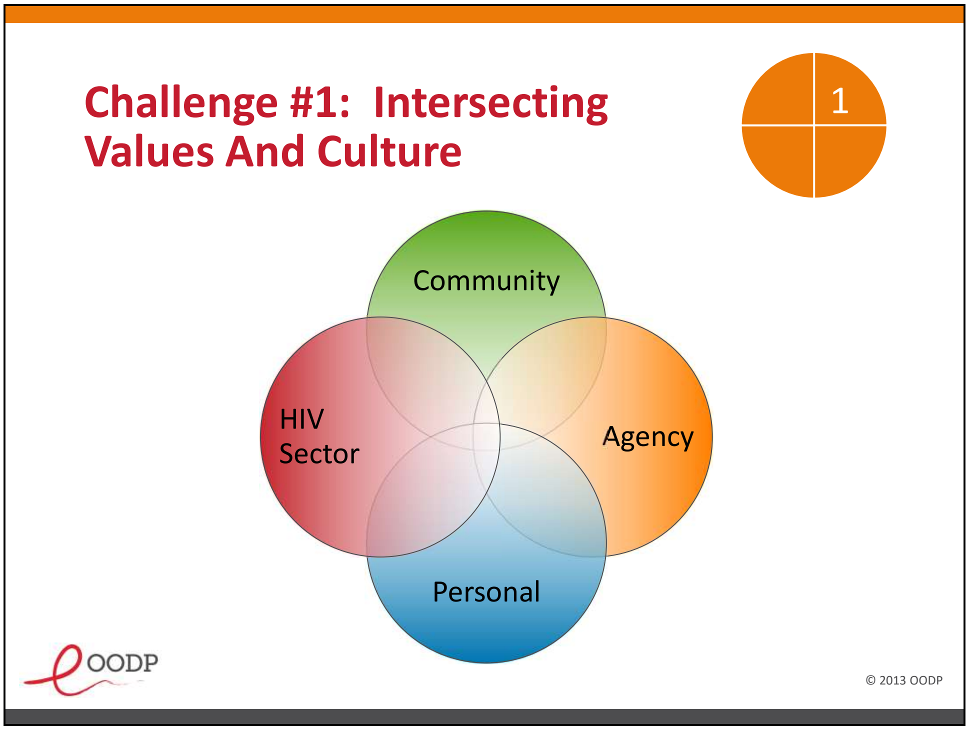


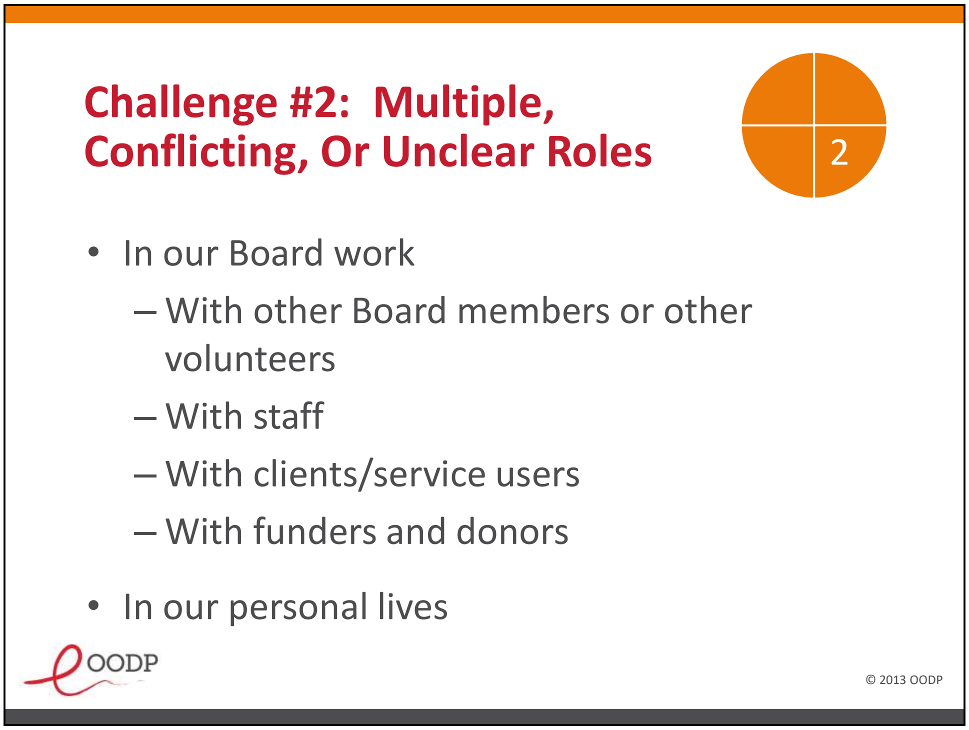
Challenge #1 is Intersecting values and culture

As volunteers, we have to manage the competing and overlapping values and cultures of

- The community in which we work;
- Our agency;
- The HIV sector; and
- Our own personal values and preferences, which are different for each of us.

We're going to leave our personal values and preferences aside for now, because they're the focus of a few exercises we'll be coming to shortly.

There may be a lot of commonality between community, agency and the HIV sector's values and culture, but it's the tensions between these three that make it difficult to manage boundaries.



Challenge #2 is Multiple, Conflicting or Unclear Roles

Implementing GIPA/MEPA

We may have multiple, conflicting or unclear roles when we deal with any of these organizational stakeholders..

And in our personal lives, we play multiple roles.

This is another way of saying that different facets of our identity influence us to approach situations in different ways—including, for some of us, being people living with HIV.

The challenge is figuring out, among all of these roles, which role is the primary one in any given work situation.

Our first exercise, which you will have completed in advance, is called "What We Say and Hear" and it's one that each of you was to have completed before arriving at today's workshop.

The objectives were to:

1. To explore our boundaries around conversations; and
2. To discuss appropriate limits.

This exercise brings us to the fourth circle from a few slides back, which is about our personal values and preferences.

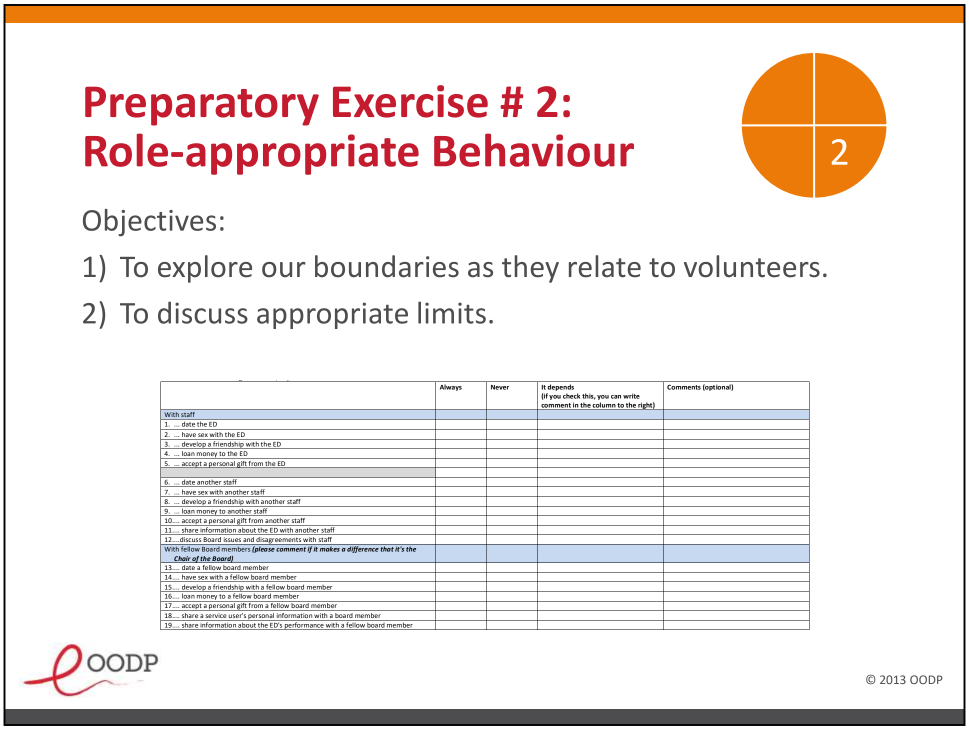
The 1st exercise begins to get at the fact that we all wear multiple hats.

The top row of images shows 3 examples of hats all worn by people who are working on a ship together, perhaps playing different roles on the ship, but all of them trying to work together to steer the ship properly, and avoid icebergs.
But everybody on the ship also has different roles in their personal lives.

In addition to your role(s) in the organization, you may be a: friend, family member, partner, parent, patient, community leader, client, citizen, neighbour, volunteer… or PHA.

Those are all part of your identity. They don't disappear just because you're sitting at the Board table. But they may contribute to boundary situations, or they might affect how you respond.

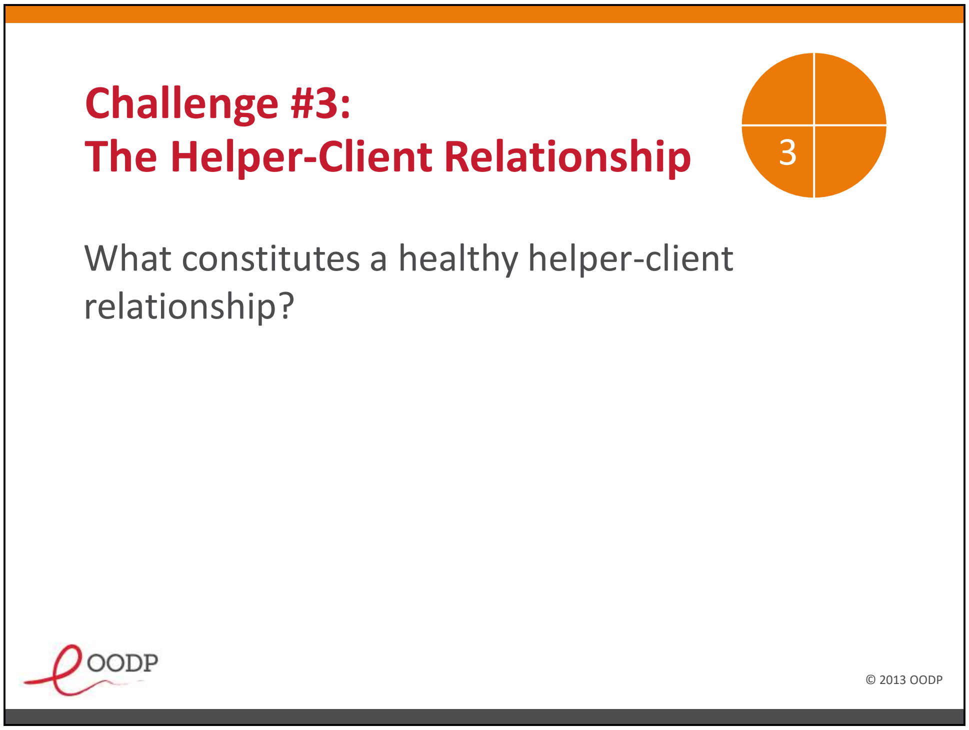
For instance, being a PHA means that you might have several roles in your community outside of being on the Board. It also might affect how you feel about disclosing that to fellow Board members, staff or clients. Or if it's known that you are HIV positive, it might affect what people assume they can share with you.



	Always	Never	It depends (if you check this, you can write comment in the column to the right)	Comments (optional)
With staff				
1. ... date the ED				
2. ... have sex with the ED				
3. ... develop a friendship with the ED				
4. ... loan money to the ED				
5. ... accept a personal gift from the ED				
6. ... date another staff				
7. ... have sex with another staff				
8. ... develop a friendship with another staff				
9. ... loan money to another staff				
10.... accept a personal gift from another staff				
11.... share information about the ED with another staff				
12....discuss Board issues and disagreements with staff				
With fellow Board members ***(please comment if it makes a difference that it's the Chair of the Board)***				
13.... date a fellow board member				
14.... have sex with a fellow board member				
15.... develop a friendship with a fellow board member				
16.... loan money to a fellow board member				
17.... accept a personal gift from a fellow board member				
18.... share a service user's personal information with a board member				
19.... share information about the ED's performance with a fellow board member				

Now let's take up the 2nd exercise, which you will also have done in advance, and which is about Role-appropriate behaviour.

The exercise looks like this.
The objectives were similar to the previous exercise.



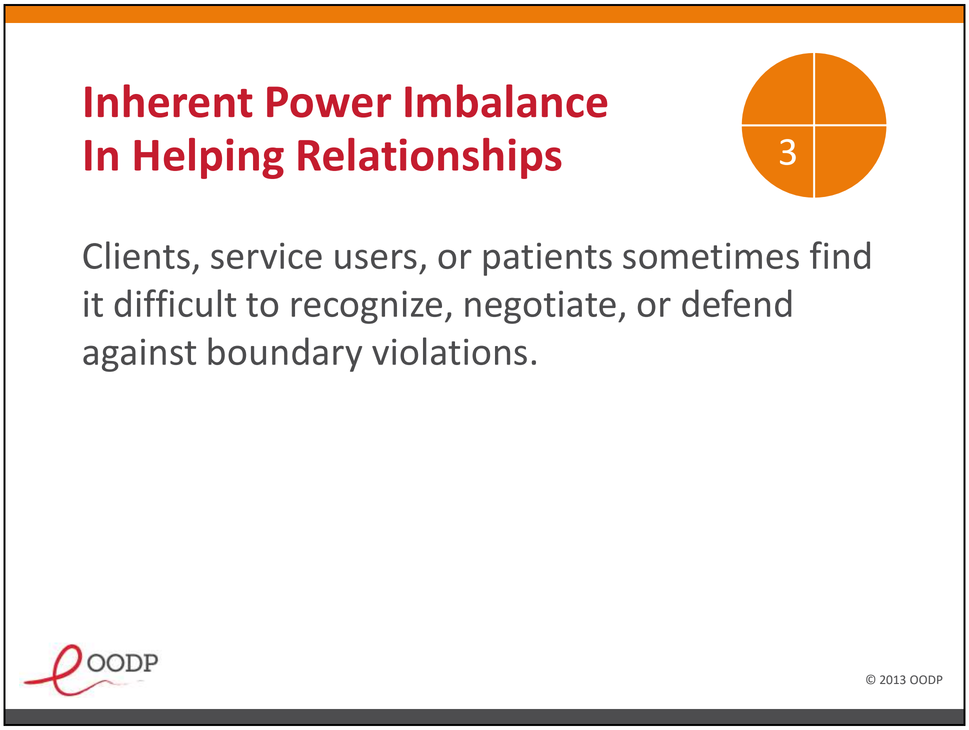
Challenge #3 is the helper-client relationship

It's important for volunteers and peers to understand the basics.

What constitutes a healthy helper-client relationship?

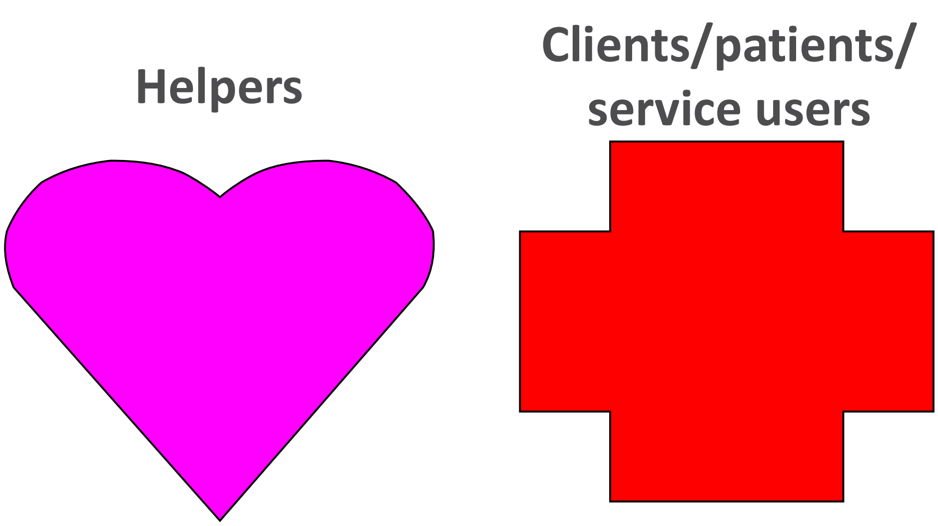
The following are key:

- Maintaining a professional relationship.
- Setting parameters on how services are delivered.
- Being aware of the inherent power imbalance.
- Volunteers being aware of their own potential conflict of interest: what are they getting out of helping?
- Being guided by what is in the best interest of the client, while not losing sight of how, ultimately…
    - Staff need to maintain self-care as the helper; and/ or
    - How their help to one particular client might affect the organization—in terms of risk, reputation & resource management.



The following can lead to—or are in and of themselves--boundary crossings or violations:

- Being too familiar with a client—emotionally or physically
- Blurring the lines between professional and friend;
- Intimate relationships—sexual or otherwise;
- Sharing personal information or experiences so that clients can relate – if those experiences are not firmly in the past, and resolved for the helper (otherwise, the client may feel the staff themselves need support)



The Zone of Fabulousness*

- Vikki Reynolds – www.vikkireynolds.ca

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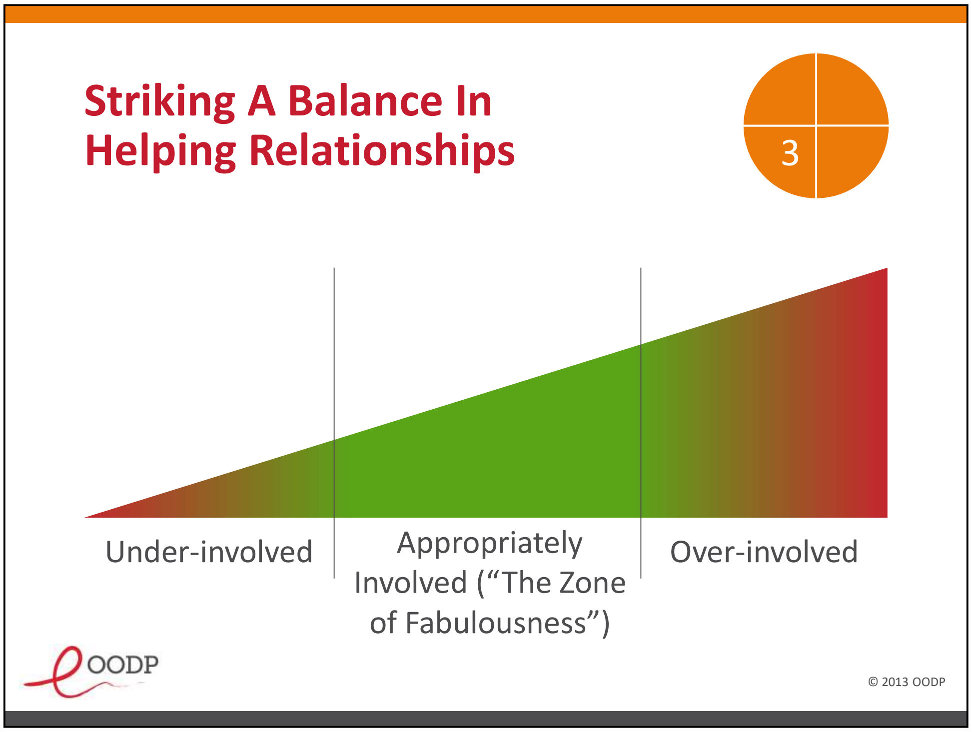
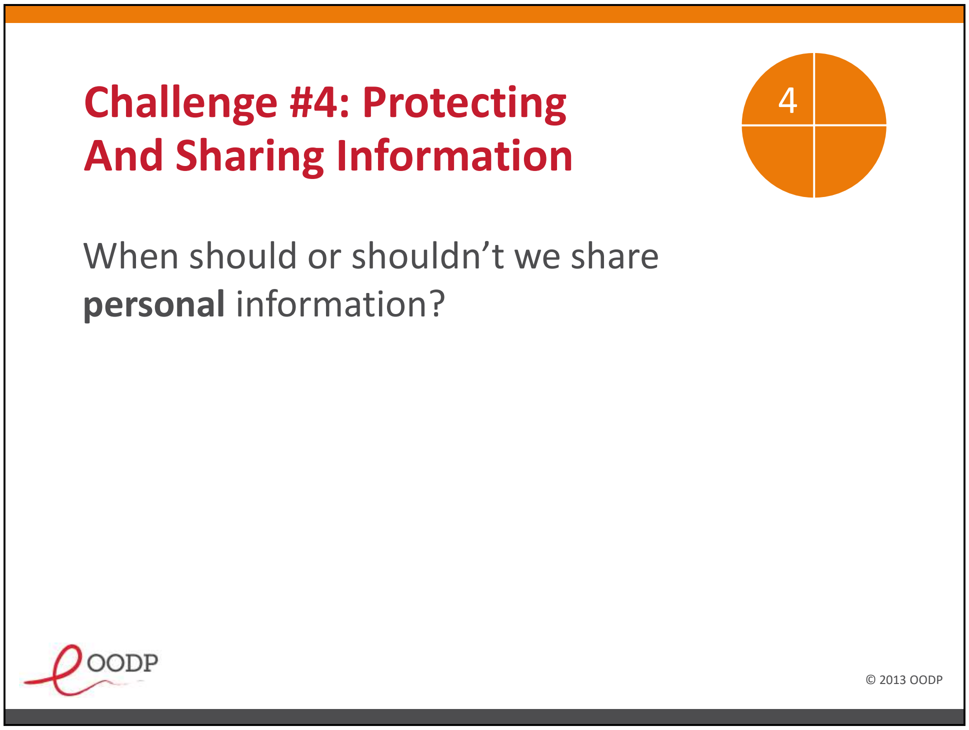


Being appropriately involved—figuring out what is neither under-involved or over-involved--ties back to the “ultimately” part of our key question, “Is my behaviour appropriate and, ultimately, helpful?”



Challenge #4 is about Protecting and Sharing Information.

Notice that we are not just talking about the issues of client confidentiality—or even only about clients.

We're talking about when it is appropriate to protect information, and when it is appropriate to share it.

Let's talk about ***personal*** information (workshops for staff and Board also need to think about organizational information).

Here, we're talking about information pertaining to:

- Staff;
- Volunteers;
- Donors;
- Clients; and/or
- Children of clients

Question: When shouldn't we—and when should we—share information?

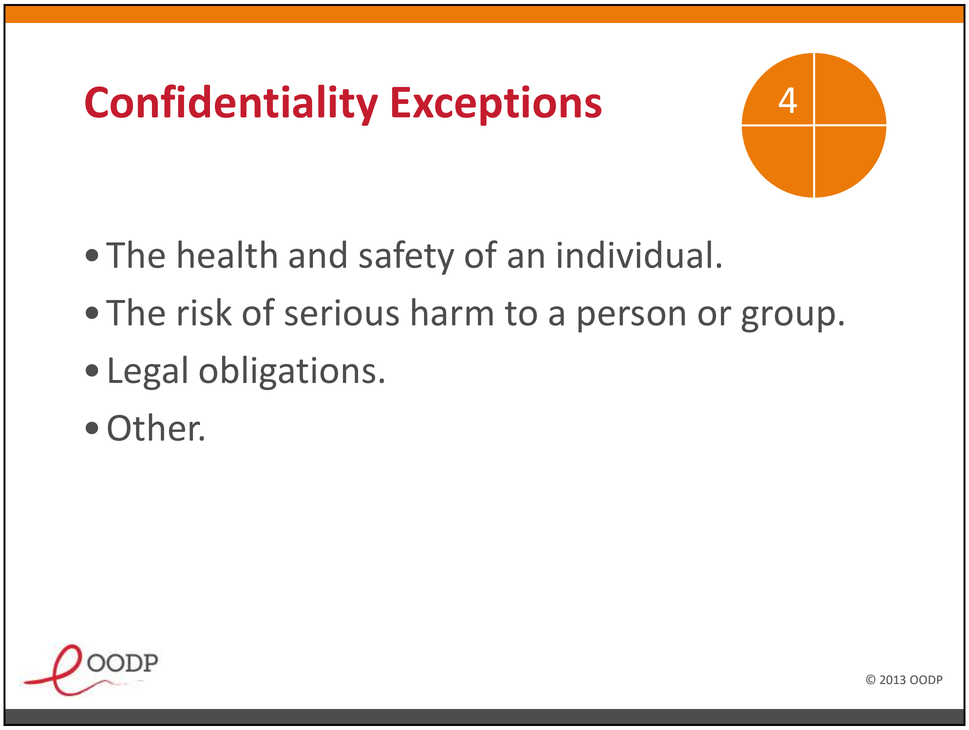
Answer: When it's in the best interest of the person to share it (when it's ultimately helpful)

... and when you've either received consent, or there are exceptions to when consent hasn't been received (we'll come back to this in a couple of slides)

In social services and health care, striking this balance is another way of thinking about the zone of fabulousness. "Under-involvement" in this case, means disclosing too much information – caring too little about confidentiality or privacy. "Over-involvement" looks like guarding private information as if you are the only one who can be entrusted with it – it ignores that there's a 'circle of care' and that good service means sharing appropriately in order to give good service.

These are the different statutes and organizational documents that help to safeguard both

- Privacy, and/or
- The right to information

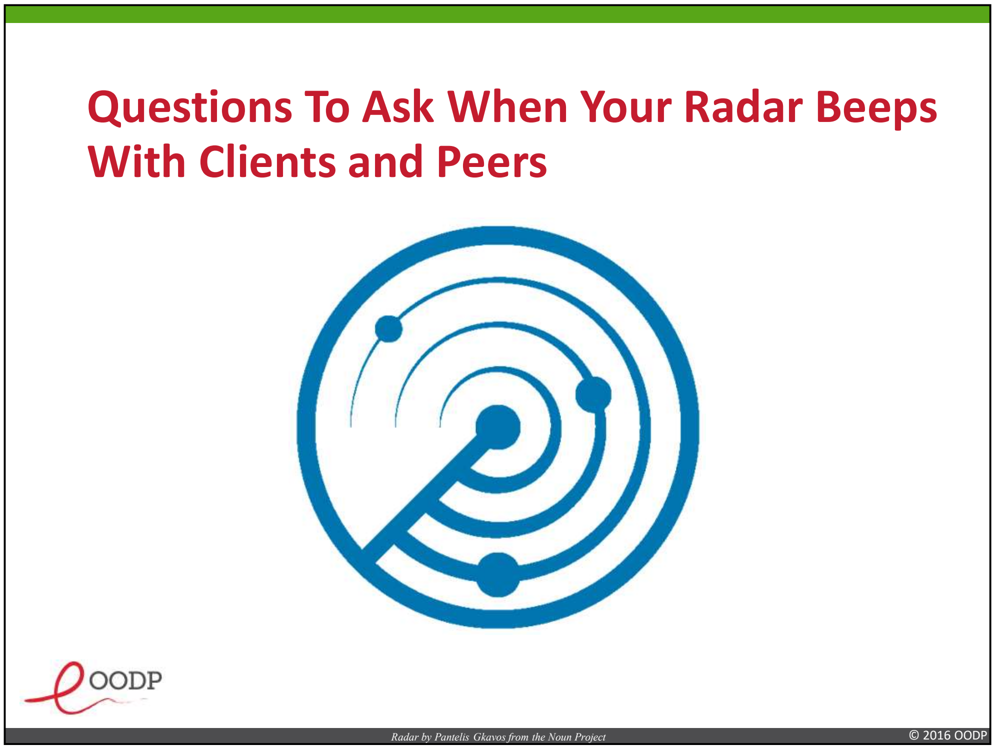


Exceptions to in Maintaining Confidentiality in Social/Health Service Organizations

- Health and safety of an individual/Risk of serious harm to person or group
  - Child abuse
  - Suicide risk
  - Imminent risk of serious bodily harm or death
  - Medical emergencies
- Compassionate circumstances that aren’t about health & safety
- Disclosures to public health authorities
  - Reportable illness;
  - Situations posing public health threats
- Other legal obligations
  - Subpoenas
  - Search warrants

Once again – as we wrap up this section on the Four Challenges...

...let's come back to our guiding question: "Is my behaviour appropriate and, ultimately, helpful?"

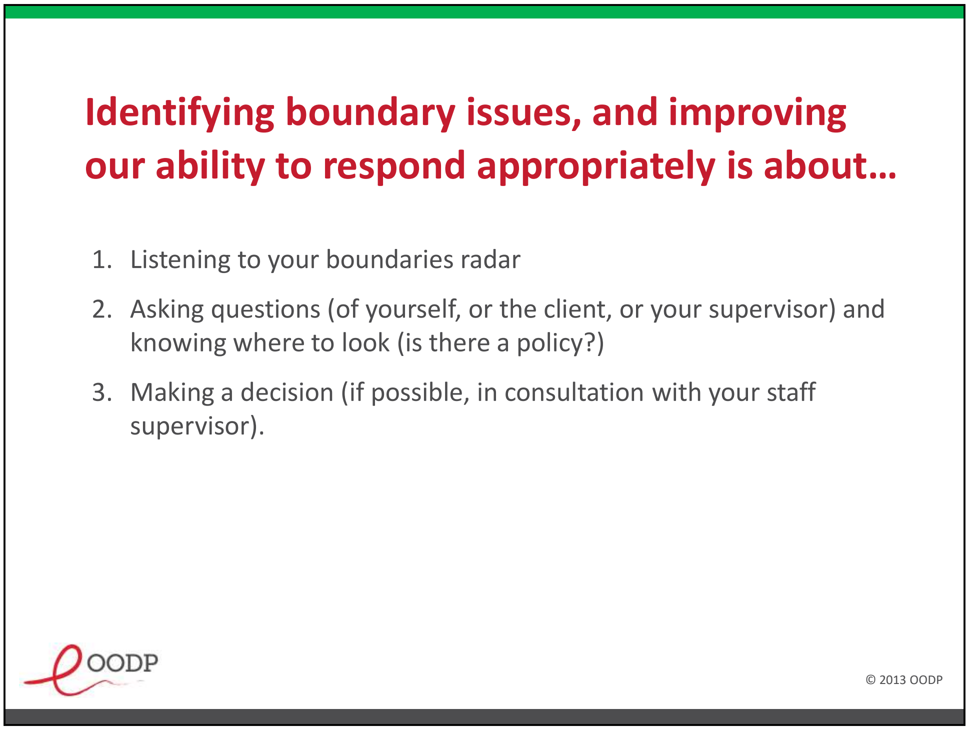


What questions should we ask ourselves if our radar beeps with clients and peers?

1. Is this in the client’s or peer’s best interest?
2. Is there a policy that guides this?
3. Whose needs are being served? Mine or the client’s/ peer’s?
4. Am I benefiting from this situation?
5. Am I treating this client or peer differently than others?
6. Will this have an impact on the service I am delivering?
7. How might this situation be viewed by the client’s or peer’s family?
8. Should I discuss this with another volunteer, a staff or my organizational supervisor?
9. Might this be a liability issue for the agency?
10. Is the client or peer drawing me into something that does not feel right?
11. If I was the client or peer, would I want this?

What questions should we ask ourselves if our radar beeps with your fellow volunteers

1. Does this situation feel right?
2. Is there a policy that guides this?
3. Am I being treated fairly?
4. Am I benefiting from this situation?
5. Will this have an impact on the service or task I am delivering?
6. How might this situation be viewed by other volunteers, by staff or by people outside the agency?
7. Should I discuss this with a fellow volunteer, or my staff supervisor?
8. Might this be a liability issue for the agency?



Note that your radar goes off, you don't need to memorize every relevant organizational policy, guideline or code of conduct, but you should be able to recall that one exists and where to find it, or you should know who to turn to for more organizational info on expectations and requirements.

Let's take up Preparatory Exercise #3

FOCUSING ON THIS SCENARIO: "Your work mobile phone is broken and one of your clients needs to be able to contact you about the outcome of a custody case on a day that you are working out of the office."

What do you do? Remember the previous slide said:

1. Listen to your boundaries radar
2. Ask questions (of yourself, or the client, or your supervisor)
3. Make a decision (if possible, in consultation with your staff supervisor).

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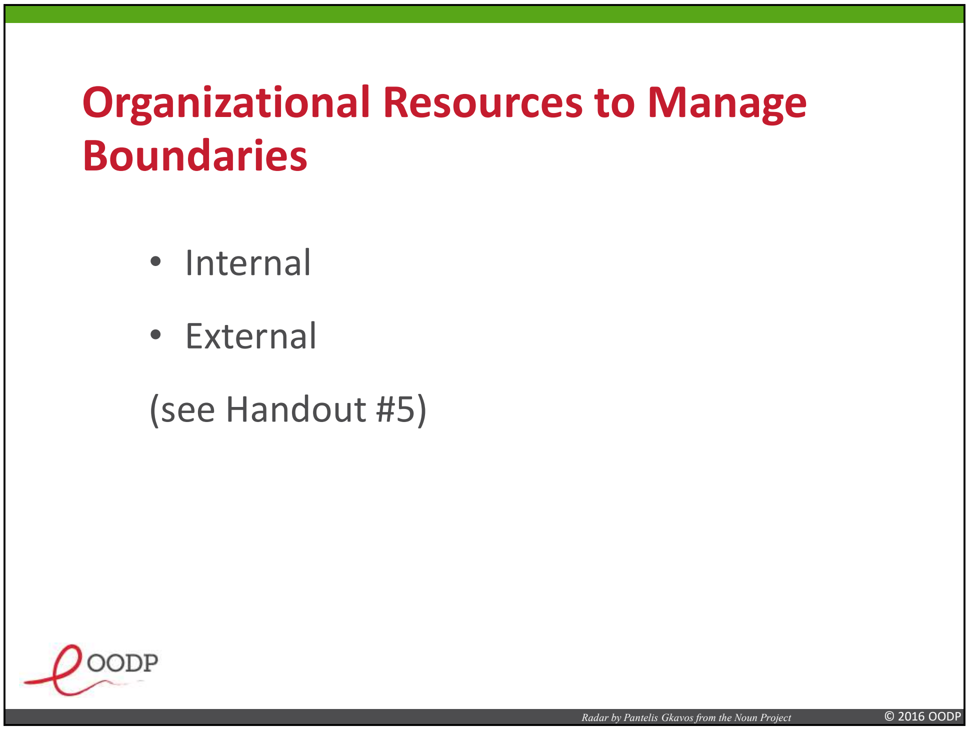

- Internal
  - Job descriptions
  - Senior Staff (including Supervisors/Coordinators/Managers of Volunteers)
  - Policies & procedures
- External
  - Further Training (Note that a version of this training is also available for Staff)
  - OODP individualized consults in more serious situations—or to develop policy – oodp.ca
  - Provincial legislation
  - Federal legislation
  - Professional guidelines
  - Ethics-based tools & guidance – i.e. www.careworkerethics.org (free decision-making tool and training slides in English & French)

What questions does this bring up for you about work within your own agency?

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Radar by Pantelis Gkavos from the Noun Project

As we finish the section on which questions to ask ourselves, let's come back again to our guiding question:

"Is my behaviour appropriate and, ultimately, helpful?"

Wrap-up (check-out)

Evaluating today's workshop

On the next business day, you will receive a brief, anonymous on-line evaluation form for today's workshop. Please complete and return it as instructed.

In approximately 3 months you will receive a second online Outcome Evaluation form to complete and return.

Your responses are important for ensuring that the OODP's work meets its – and your – objectives.

Thank you for your time and consideration.

OODP

Thank you!

oodp.ca