



BCCNM LEARNING MODULE — WORKBOOK

Professional Boundaries

In Nursing Practice



900 – 200 Granville St
Vancouver, BC V6C 1S4
Canada

T: 604.742.6200
Toll-free: 1.866.880.7101
bccnm.ca



Introduction

This workbook offers activities that allow you to apply ideas presented in the module. It is organized in three sections:

Part 1 includes Workbook Activities that are related to various topic areas. As you work through the module, you will be directed to complete a specific Workbook Activity. This section also includes pages for you to record your reflective thoughts and insights related to your exploration in this module.

Part 2, “Applying My Learning”, includes a case scenario and associated questions. Completing this activity provides an opportunity for you to apply all of the information that has been offered in the module in the context of this practice-based scenario. When you have completed this case, you may wish to compare your responses with those provided in the “Applying my Learning: Perspectives” located in Part 3.

Part 3 presents sample responses to workbook activities and the case scenario in Part 2. These responses provide the perspectives of the course writer and others on the case scenario.



PART 1

Workbook Activities

1

Workbook Activity #1

Consider the following questions. Record your responses in the spaces below. These thoughts, ideas, and responses will help you decide what you would like to focus on in this module. They may also form part of the basis for your professional development planning as part of your quality assurance requirements.

1. What are my strengths in relation to therapeutic relationships and professional boundaries?

2. What aspects of therapeutic relationships and professional boundaries would I like to know more about?

3. Am I aware of the resources available that can support my practice in relation to therapeutic relationships and professional boundaries?

2

Workbook Activity #2

1. Think back to the case scenario, and pretend you are Saira.

Would you do the same thing she did (purchasing a toy for Annie)?

Why or why not? If not, what would you do? What contextual factors from the scenario are influencing your choices and decisions? Write your thoughts in the space provided.

You may wish to compare your answers with the discussion in Part #3, Perspectives at the end of this module.

2. Reflection Point

Think of a time in your own practice where you made a decision in relation to professional boundaries. It could be anything . . . you may have decided to take extra time with a client, decided to give a client or family member a hug; you may have had a Facebook friend request from a client or family member or you may have considered doing a personal favour to help a client, etc. Once you have thought of scenario, think about the contextual factors that influenced your thoughts, decisions, and actions. Would you have made different decisions, or done things differently if circumstances, or the context, were different? How did the context influence you? Record your thoughts on the "Thoughts from Reflection Points" page of this workbook. At the completion of the module, you will have an opportunity to use the insights and affirmations gained in various learning activities, as part of your planning for future professional growth and development.

3

Workbook Activity #3

In this activity you will explore the direction provided within your professional regulatory body's website resources for establishing and maintaining professional boundaries in nursing practice. The documents and resources can be accessed from the relevant links below.

-
1. Review the Professional Standards for your professional group, for example, registered nurses and nurse practitioners. As you review the standards and associated indicators, consider how they relate to your use of professional boundaries in therapeutic relationships. In what ways do the standards and indicators provide direction for competency related to professional boundary maintenance in nursing practice? Write your answers down in your Workbook.
-
2. The professional regulatory body websites have many different resources available regarding professional boundaries in nursing practice. Take some time to explore the website of your college and find what other resources the website provides. List these resources in your Workbook. You may wish to explore these resources in more detail either in the future, or right now.
-
3. The Canadian Nurses Association provides some direction for professional boundaries in the Code of Ethics for Nurses. Please take some time to investigate what direction this resource provides for you in terms of professional boundaries. You may wish to jot down some thoughts and ideas this resource provides for you. A link to this website and many other relevant resources may be found by visiting the module Resource Section on the [BC College of Nurses & Midwives website](#) or downloading the [Module Resource Section pdf](#).

4

Workbook Activity #4

Go to the web site for your regulatory body and review the Boundaries in the Nurse-Client Relationship Practice Standard. A link to a pdf of this document is also available below. Answer the following questions in your workbook.

Remember, you do not need to share your answers with anyone. This exercise is intended to assist you to become aware of how you utilize the Practice Standard Principles for boundaries in the nurse-client relationship in your practice, and identify any areas for further learning and growth in your practice.

Go to the [Boundaries in the Nurse-Client Relationship](#)

1. How familiar am I with the Practice Standard Principles for Boundaries in the Nurse-Client Relationship? Do I regularly independently apply the principles to my practice? How? If not, why not? Write these thoughts down in the space below.

2. Do these principles offer insights or solutions for areas of professional boundaries that you are unsure of or find challenging? How?

3. What is best practice if a client asks if I've ever had the same type of medical treatment he or she is about to receive?

4

Workbook Activity #4 con't

4. Does my agency have a policy about receiving gifts from clients? Where can I find this policy? Am I familiar with it?

5. What should I do if my child's friend becomes my client?

6. My client has asked if I will care for him/her privately, outside my agency's setting. What direction does the practice standard provide in making this decision?

5

Workbook Activity #5

Each agency and employer may have different policies regarding nurses' practice in relation to professional boundaries in nurse-client relationships.

1. This activity will direct you to familiarize yourself with the specific employer policies within your practice setting and how these guide/restrict your practice in relation to professional boundaries. Record these below.

6

Workbook Activity #6

Reflect on your own practice in terms of recognizing, establishing, and maintaining boundaries in nurse-client relationships.

1. Here you are considering the individual nurse level of control on practice. What knowledge, skills, judgement, and attitudes do you hold that may affect your practice in this realm? Write these ideas down. Consider: What do I need to find out, or do, in order to address any gaps? Think broadly while you do this, and remember, you do not need to share this with anybody! This learning activity will form part of your ongoing professional development plan.

7

Workbook Activity #7

Most nurses who violate professional boundaries do not intend to do so, but end up in a situation where their violation potential is high, and they end up travelling down the Slippery Slope. Consider Lesley's story and answer the following questions. You may wish to compare your answers with the discussion in Part #3, Perspectives at the end of this Workbook.

-
1. Identify the factors that contributed to Lesley's Violation Potential in this situation. Consider vulnerability, risk factors, and context in your answer.

-
2. Looking back at Lesley's story again, trace her path down the slope to boundary violation. At what points did she engage in boundary drift, boundary crossing, and boundary violation?

8

Workbook Activity #8

If you are working with a colleague whom you believe is crossing or violating a professional boundary you have a responsibility to take action. Consider Simone's situation and answer the following questions. You may wish to compare your answers with the discussion in Part #3, Perspectives at the end of this workbook.

-
1. Refer back to the Boundaries in the Nurse-Client Relationship Practice Standard and apply the Principles to Simone's situation. What guidance does the Practice Standard give for Simone?

Go to the [Boundaries in the Nurse-Client Relationship](#)

-
2. List the actions Simone should take in the situation.

-
3. Find out the procedure in your agency for dealing with a boundary violation by a colleague. If there is no written policy, you may need to have a conversation with your manager in order to find out your agency's approach.

9

Workbook Activity #9

CASE ONE

Do you remember Daniel's story from earlier in the learning module? Refresh yourself on his situation and then use the thinking tool to help him decide what to do by answering the following questions. Once you are done, you may wish to compare your answers with the discussion in Part #3, Perspectives at the end of this Workbook.

Daniel is the charge nurse of the emergency room in a small rural community. He is also well-known in the community as he coaches his children's sports teams and through other community events. Daniel also plays recreational hockey on a local team. During one shift, one of Daniel's hockey teammates, who also happens to be one of Daniel's son's high school teachers, arrives in the ER with a small laceration that requires sutures. Daniel's son has applied for a big scholarship, and this teacher is on the application review committee. The ER is extremely busy and the teammate will need to wait a long time to have this done. The teammate asks for his friend, Daniel, to fast track him so that he can get his injury attended to faster.

1a. Ask, "WHO will benefit from this action"? If Daniel fast-tracks his teammate and son's high school teacher, who benefits?

1b. Ask, "WHOSE needs will be met?" Will the client's needs be met? Will Daniel's? Will the needs of other clients be met?

2. Ask, "WHY? Will this action contribute to the therapeutic nurse-client relationship?" If Daniel fast tracks his team mate, will this help or hinder the nurse-client relationship? How?

3. Ask, "WHAT? Is this action consistent with the client care plan?" What is the care plan for the client? Does it include this aspect?

4. Ask, "HOW? Is this action something I would be comfortable with other people knowing I had engaged in with the client?" Would Daniel be comfortable with other people or colleagues knowing he fast tracked the client?

5. If you were Daniel, what is your decision? Why?

CASE TWO

Let's try another case scenario. Here you will meet Scott, a nurse who works in a rehabilitation centre. Again, you may wish to compare your answers with the discussion in Part #3, Perspectives at the end of this workbook.

Scott works in a spine rehabilitation centre with clients who have sustained serious spinal cord injuries. Most of Scott's clients are in the rehabilitation centre for at least several weeks, and Scott and his colleagues often get to know the clients well. Scott is caring for Grant, a young lawyer who sustained a thoracic spinal injury in a snowboarding accident. Grant has always been a very athletic man, and has had a difficult time adjusting to his new disabilities. He is also an ardent hockey fan. Scott has many similar interests as Grant, and the two men have established a very effective rapport. Grant trusts Scott and responds well to his treatment and intervention regime with Scott as his caregiver. In conversation one day close to Grant's discharge from the rehabilitation centre, Grant and Scott discover they are both fans of the same local hockey team. Scott expresses regret about being unable to attend any of the team's playoff games due to other financial priorities. At discharge, Grant gives Scott an envelope addressed to him. Inside is a handwritten thank you note and a pair of hockey tickets to the local team's playoff games.

1a. Ask, "WHO will benefit from this action"? If Scott accepts Grant's gift, who benefits?

1b. Ask, "WHOSE needs will be met?" Will Grant's needs be met? Will Scott's needs be met?

2. Ask, "WHY? Will this action contribute to the therapeutic nurse-client relationship?" If Scott accepts the tickets, will this help or hinder the nurse-client relationship? How?

3. Ask, "WHAT? Is this action consistent with the nursing care plan?" What is the care plan for Grant?

4. Ask, "HOW? Is this action something I would be comfortable with other people knowing I had engaged in with the client?" Would Scott be comfortable with other people or colleagues knowing he had been given expensive hockey tickets by a client?

5. If you were Scott, what is your decision? Why?

10

Workbook Activity #10

Go through the workbook that you have completed. Notice areas where you have further questions, further interest, or need further development. Notice areas where you have strengths in relation to professional boundary maintenance, too.

Pick one area that you would like to develop further and create a learning plan for you to meet your own learning needs. You may find the following framework helpful for you to structure your learning plan. A Professional Development Portfolio that can be completed electronically is also available on the BCCNM QA web page.

Go to the [Professional Development Plan template PDF](#). Make sure that you save it to your computer to complete it.

My Plan for Growth

Goals

1.

2.

3.

Action Plan

People or places that I can investigate for learning strategies to help me meet my goals for growth are:

1.

2.

3.

My Plan for Growth

STRATEGY	RESOURCES NEEDED TO IMPLEMENT STRATEGY	TARGET COMPLETION DATE	OTHER THOUGHTS

Notes from Reflection Points

Professional Boundaries in My Nursing Practice

Affirmations and Insights



PART 2

Applying My Learning

Applying My Learning

Do you want more? In this section, *Applying My Learning*, there is a more complex case scenario for you to work through in order to further integrate and apply the understanding you have built throughout the module.

This section is optional for those who want more practice applying what you have learned to nursing practice.

CASE STUDY

Please read the following case scenario about Janice, a registered nurse who works in a bone marrow transplant unit. When you have finished, analyze the scenario using the information you have learned about in this module, and make a decision about what Janice should do. When you have completed this activity, you may wish to compare your responses with those provided in the “Perspectives” section at the end of this Workbook.

Be sure to consider:

The therapeutic nurse-client relationship

The directives for practice in relation to professional boundaries

The slope of boundary violations

Violation potential

The thinking tool for professional boundaries

Applying My Learning

Janice cared for Mrs. Black, who was hospitalized on the bone marrow transplant unit following a transplant for her acute leukemia. Janice, who graduated from her nursing program 18 months ago, really enjoys working on the unit. She enjoys the acuity of care, but she particularly likes getting to know her clients and their families. She finds the work both challenging and rewarding.

Mrs. Black was a client on the unit for several weeks, and had experienced many downturns in her condition. In the periods of time when Mrs. Black's condition stabilized, she talked frequently with Janice about wishing she would live long enough to see grandchildren born. Mrs. Black reminded Janice of her favorite aunt, Bonnie, and Janice developed a close, friendly relationship with her.

The frequent relapses in Mrs. Black's condition made for a very tumultuous time for her close-knit family. Janice got to know all the family members quite well, including Mrs. Black's 32-year-old son, Hugh, who visited daily. Janice liked Hugh as he had a great sense of humor and Janice had an easy rapport with him. Hugh requested to be Facebook friends with Janice, and she accepted. Hugh would send websites and jokes he thought Janice would enjoy and Janice would occasionally do the same.

Eventually, Mrs. Black's condition inevitably deteriorated and she ultimately passed away in the bone marrow transplant unit. Janice and two other nurses from the unit attended Mrs. Black's funeral. Janice felt badly for the family members who had always been so hopeful about Mrs. Black's condition. She let them know at the end of the funeral that she would be available to support them if they needed her.

A few weeks after the funeral Hugh contacts Janice and asks if she could meet him for coffee. Janice agrees, and she and Hugh have a nice conversation reminiscing about Hugh's mother and generally catching up with each other. As Janice stands up to go, Hugh asks if he can have her telephone number; he'd like to ask her out for a date sometime, saying "Even my mom wanted me to ask you out!". Janice blushes as her heart rate increases slightly . . . Hugh is very attractive, and she really enjoys his company.



PART 3

**Workbook Activities
and
Case Perspectives**

2

Workbook Activity #2

There are a number of contextual factors that are influencing Saira's decision in this case. Here are some to consider when you answer this question. You may have other ideas as well.

CONTEXT

What are the rules, regulations, policies, standards, and guidelines that govern my practice in relation to professional boundaries? What, if any, are the exceptions to these?

What is my unit's policy on gifts? What is my unit's policy on clients' birthdays?

How does this fit with the client care plan?

Would I have my manager's support for the decision I make?

Are there other colleagues or people I should involve in this decision?

How would the client feel about my action? How would her family feel about it?

Would I do this for all the unit clients?

How comfortable am I with the various options? What are my beliefs about each?

7

Workbook Activity #7

Consider Lesley's story and answer the following questions.

-
1. Identify the factors that contributed to Lesley's Violation Potential in this situation. Consider vulnerability, risk factors, and context in your answer.

Factors that contributed to Lesley's Violation Potential in this situation include:

- **Vulnerability:** Lesley's client's husband is in a vulnerable position as he is coping with his wife's illness as well as his children, job, and other responsibilities
- **Context:** Lesley has worked with the client and client's husband over a long period of time and has come to know them well via a continuous caring relationship.
- **Catalyst:** Lesley experiences a divorce, which increases her vulnerability.

-
2. Looking back at Lesley's story again, trace her path down the Slippery Slope to boundary violation. At what points did she engage in boundary drift, boundary crossing, boundary violation?

Boundary drift and crossings:

- Developing a friendship over time
- Having coffee together, sharing photos of kids, talking about outside life and other things

These activities were crossing from the professional realm into the personal realm. These activities would not be a part of the professional nurse's role, the client's care plan, and/or the nurse's work time. Lesley should have rotated client assignments when she found herself wanting to spend more time with Luke.

- Unable to "cope with all the emotion and stress" on her own, and progressing to seeing the client's husband romantically. This is a clear boundary violation.

Lesley needs to seek out and develop personal support networks. She may consider employee assistance programs offered by her employer.

Consider Simone's situation and answer the following questions.

1. Refer back to the Boundaries in the Nurse-Client Relationship Practice Standard, and apply the Principles to Simone's situation. What guidance does the Practice Standard give for Simone?

Guidance from the Practice Standard includes:

- The nurse-client relationship is conducted within boundaries that separate professional therapeutic behaviour from non-professional and non-therapeutic behaviour. Simone is witnessing behaviour that makes her feel uncomfortable, because she believes it is non-therapeutic.
- The nurse, not the client, is always responsible for establishing and maintaining boundaries. Geoff is responsible for the establishment and maintenance of professional boundaries with the client.
- Nurses do not enter into a friendship with clients Simone is witnessing behaviour that is expected within non-professional, friendly relationships, but not in the context of a professional relationship.
- Nurses help colleagues to maintain professional boundaries and report evidence of boundary violations to the appropriate person. Simone must help Geoff to re-establish professional boundaries; this may include just a short, factual conversation with Geoff regarding the Practice Standard, and/or it may include reporting his behaviour to their manager.
- Employers that provide education, supervision, and support related boundary issues will help staff recognize and resolve problems in the early stages Simone may involve her manager to help resolve the issue before it becomes a bigger problem.
- Consider if aspects for the nurse's relationship with the client are hidden from others, the nurse does not want other nurses to have the same relationship with the client, the nurse is giving preferential care or time to the client. Geoff is giving preferential care and time to this client.

2. List the actions Simone should take in the situation.

The regulatory body's web sites provide specific guidance and resources which can help Simone in this situation. An example is a web module on the BCCNM website entitled, [*Taking Action on Concerns About Practice*](#). Simone can also talk to a manager or access the practice consultation and advising service of her regulatory body to help guide her actions.

Case One: Daniel's story

1. Ask, "WHO will benefit from this action"? If Daniel fast-tracks his teammate and son's high school teacher, who benefits?
 - If Daniel's fast-tracks his teammate/son's high school teacher, the teacher will benefit. However, Daniel and his son may also potentially benefit from possible preferential treatment of his son's scholarship application.
Ask, "WHOSE needs will be met?" Will the client's needs be met? Will Daniel's? Will the needs of other clients be met?
 - The client's needs will be met, and Daniel's personal (not professional) needs may be met. However, this will occur at the expense of other clients' needs, since Daniel will not be following standardized triage assessment protocols.

2. Ask, "WHY? Will this action contribute to the therapeutic nurse-client relationship?" If Daniel fast tracks his teammate, will this help or hinder the nurse-client relationship? How?
 - If Daniel fast-tracks this client, he will also be violating a boundary in terms of behaviour related to favoritism. This will hinder the nurse-client relationship.

3. Ask, "WHAT? Is this action consistent with the client care plan?" What is the care plan for the client? Does it include this aspect?
 - This action is not consistent with this client's care plan, since he does not require fast-tracking according to triage protocols. This action is also not consistent with other clients' care plans.

4. Ask, "HOW? Is this action something I would be comfortable with other people knowing I had engaged in with the client?" Would Daniel be comfortable with other people or colleagues knowing he fast tracked the client?
 - Daniel would need to answer this question for himself, however, would you feel comfortable if other people and colleagues knew you had fast tracked this client (if you were Daniel)?

5. If you were Daniel, what is your decision? Why?
 - Daniel should ideally transfer the care of his friend to another nurse (Principle #8 Boundaries in Nurse-Client Relationship Practice Standard). If this is not possible, Daniel needs to clarify that he is acting in a professional capacity and not a personal capacity with his friend (Principles #9 and #10 Boundaries in Nurse-Client Relationship Practice Standard). Daniel may need to involve his manager.

Case Two: Scott's story

1. Ask, "WHO will benefit from this action"? If Scott accepts Grant's gift, who benefits?
 - Scott will directly benefit from this action.
Ask, "WHOSE needs will be met?" Will Grant's needs be met? Will Scott's needs be met?
 - Scott's needs will be met.

2. Ask, "WHY? Will this action contribute to the therapeutic nurse-client relationship?" If Scott accepts the tickets, will this help or hinder the nurse-client relationship? How?
 - Accepting the tickets will not contribute to the therapeutic nurse-client relationship.

3. Ask, "WHAT? Is this action consistent with the client care plan?" What is the care plan for Grant?
 - Grant is being discharged, however, accepting the tickets would not be a part of the plan of care for Grant.

4. Ask, "HOW? Is this action something I would be comfortable with other people knowing I had engaged in with the client?" Would Scott be comfortable with other people or colleagues knowing he had been given expensive hockey tickets by a client?
 - Scott would need to answer this question for himself, however, would you feel comfortable if other people and colleagues knew you had accepted these tickets (if you were Scott)?

5. If you were Scott, what is your decision? Why? Would your decision have been different if Grant had given Scott the tickets during his hospitalization? Why?
 - Scott needs to explain to Grant that he is unable to accept the significant gift, although he truly appreciates the gesture. He cannot accept them, but if Grant is insistent, Scott could suggest that Grant speak to the manager about it. There may be specific agency policy in place regarding substantial gifts; for example, agency policy may allow for something like a staff draw (Principle #17 Boundaries in Nurse-Client Relationship Practice Standard).
 - The decision would not be different if the tickets were offered during Grant's hospitalization. Scott could discuss the issue with his manager and colleagues to ensure that there is a consistent understanding of professional responsibilities and agency policy: Given the context of rehabilitation, and the long term nature of the nurse-client relationships, it may be anticipated that this type of situation may arise again.

Case Perspectives

Trust: Trust is critical in the nurse-client relationship because the client is in a vulnerable position. Hugh trusted Janice to care professionally, ethically, and competently for his mother. His mother was in a vulnerable position, and Hugh is too. Dating Hugh would take advantage of this vulnerability.

Respect: Respect is the recognition of the inherent worth, dignity, and uniqueness of each individual. At this point, respect seems to be intact within this nurse-client relationship.

Professional intimacy: Professional intimacy includes physical activities that create closeness (for example, bathing, and also psychological, spiritual, and social aspects of care. Janice's relationship with Hugh has a sense of intimacy from a professional standpoint because of the intimate care she has provided to his mother as well as the psychosocial nursing care she has provided to Hugh. Dating Hugh would violate the professional nature of this intimacy.

Empathy: Empathy allows the nurse to provide compassionate and ethical care to clients and families. Empathy, however, also include appropriate emotional distance from the client to ensure objectivity and an appropriate professional response. This emotional distance will be negated if Janice dates Hugh.

Power: The nurse has more power than the client in the nurse-client relationship. Janice and Hugh are not on equal footing.

Levels of Control on Practice

The [LPN](#), [NP](#), [RN](#), and [RPN](#) Boundaries in the Nurse-Client Relationship practice standards provide direction for Janice's practice. Principles #1, #3, #5, #6 apply here.

VIOLATION POTENTIAL

Janice's violation potential was mostly impacted by the context of caring for a client over a period of time, in emotionally charged circumstances. The catalyst here was Mrs. Black's death.

SLIPPERY SLOPE

Janice started down the slippery slope without meaning to. Boundary crossings often start off as innocuous. Janice began to cross boundaries when she:

- began thinking of Mrs. Black as her aunt
- developed a close, friendly relationship with her
- accepted Facebook friendship with Hugh
- shared jokes and websites with Hugh
- offered to be available to support them if they needed her

Case Perspectives

Thinking Tool

1. Who? If Janice goes out with Hugh, Janice benefits.
2. Whose needs are being met? Janice's social needs are being met if she dates Hugh.
3. Why? Does this help or hinder the therapeutic nurse-client relationship? As noted in the discussion earlier, Janice risks altering the therapeutic nurse-client relationship so that the client's needs (Hugh's needs are no longer in the centre of safe, appropriate, competent and ethical client care.
4. What? Janice dating Hugh is not consistent with the client or family care plan.
5. How? Would Janice be comfortable with colleagues and others knowing she was dating Hugh?

Janice needs to respectfully decline Hugh's invitation, and re-establish a professional relationship. Janice may wish to investigate BCCNM resources to help her with this action, or possibly discuss the situation with her manager. This may be an opportunity to initiate some discussion and shared learning with colleagues about professional boundaries.