



## Policy Data Sheet

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### 1. Aim

This Policy aims to ensure staff and representatives on behalf of Beetroot Consulting have safe and constructive relationships and maintain good professional boundaries at all times.

### 2. Scope

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Document No. BC005

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This policy applies to **ALL** staff, volunteers, casual or bank workers, and sub-contractors. For the purpose of this policy “staff” is defined as anyone who delivers a service on behalf of Beetroot Consulting regardless of job role, title, employment or professional status. All staff are expected to be made aware of and adhere to the content of this policy.

All people working on behalf of Beetroot Consulting should abide by this policy to safeguard the interests of customers and staff. It covers:

- Promoting positive relationships with customers
- Promoting positive relationships between staff and colleagues
- Gifts and Hospitality
- Personal political and religious views

### **3. Roles and Responsibilities**

**All staff** have a responsibility to apply and maintain professional boundaries and professional conduct with customers and colleagues. A staff member should seek the guidance of their line manager if they are unsure about their boundaries, feel their boundaries are being compromised or if they feel they need advice on how they intend to deal with a situation.

**Managers/Directors** are responsible for monitoring practice (through observation, feedback and supervision) on professional boundaries and challenging staff where standards are not being upheld, including taking disciplinary action if appropriate. Furthermore, managers should ensure that professional boundaries and boundary issues are discussed and suitable training/feedback provided where necessary. They will ensure that there is an appropriate schedule of touchpoints and opportunities for communication between team members.

**Directors** will ensure that teams are encouraged to undertake team activities and foster positive working environments for all staff.

### **4. Promoting positive relationships between staff and customers**

The only appropriate relationship between a customer and a member of staff is one that focusses exclusively on the needs of the customer.

If there is an existing personal, friendship or business relationships with a customer before they access the service i.e. it precedes the professional relationship workers must inform their line manager at the earliest opportunity. Any such instances will be handled in a sensitive manner and the worker will be given the opportunity discuss and explore potential boundary conflicts.

Staff must not engage in any form of intimate or sexual conduct with current customers or with others directly involved in a professional relationship which involves an unequal distribution of power or authority in the staff member’s favour. Staff must not knowingly enter into an intimate or sexual relationship with a former customer without careful consideration, taking advice as appropriate.

***Maintaining healthy and constructive relationships with customers can be aided by the following guidelines:***

- **Befriending** All staff must be aware of the difference between befriending a customer (which is a professional relationship, made to meet the customers needs), and becoming a customers friend (which is a relationship that meets the needs of both people).

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- **Providing Advice** In general, advice should normally only be offered to customers when they request it unless there are good reasons to be more directive. Where you do offer more directive advice, for example in a situation where there is a potential for physical harm or danger, you should aim to do this in a non-judgemental manner.
- **Fostering Independence** Staff should be aware of the need to empower customers and therefore not “do everything for them” but encourage and enable them to achieve outcomes themselves.
- **Favouritism** There should be no favouritism, or the appearance of favouritism shown towards different customers. Whilst staff may find different customers more approachable, willing or difficult to work with, this must not be reflected in the quality or level of the service individual customers are offered or receive.
- **Customer needs** Staff have a duty to place customers' needs and interests before their own beliefs, aims, views and advantage, and not to use professional relationships to gain personal, material or financial advantage. Staff should be careful not to influence customers with their own beliefs or personal values. e.g. promote their own religious or political beliefs upon customers
- **Anti-Discriminatory Practice** Staff have a duty to be non-judgemental and comply with Beetroot Consulting Equality and Diversity Policy and not discriminate or victimise customers or colleagues on any of the 9 protected characteristics: gender, age, race, disability, sexual orientation, gender reassignment, religion and belief, marriage and civil partnership, pregnancy or maternity.
- **Fraud** Staff must not endorse or encourage customers to engage in fraudulent activity and/or to accept payment for work in addition to claiming benefits.
- **Respect** Staff must not comment, criticise or make fun of customers or colleagues as human beings. Actions or behaviours can and should be challenged, but the individual should always be prepared to admit error, or a lack of knowledge
- **Childcare** Staff should not look after clients children, unless this is specifically part of their job description.

## 5. Self-determination, Informed Consent & Confidentiality

Staff will not act without the informed consent of customers, unless required by law to protect that person or another from risk of serious harm. Where customers' capacity to give informed consent is restricted or absent, staff will as far as possible ascertain and respect their preferences and wishes and maintain their freedom of decision and action, whether or not another person has powers to make decisions on the customer's behalf.

Staff must ensure that customers know that staff cannot keep knowledge or suspicion of illegal activity confidential.

Staff must respect customers' rights to a relationship of trust, privacy, reliability and confidentiality. To this end, all staff are required to comply with the Confidentiality Policy. Staff should refer to the Vulnerable Adults and Safeguarding Policy and leads when confidentiality needs to be breached under these policies.

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## 6. Promoting positive relationships between staff and colleagues

A quality service can only be delivered by cohesive and consistent teamwork, based on a shared understanding and application of values and principles. For this to be achieved it is important that all staff work constructively together through establishing and maintaining professional, co-operative and open relationships with colleagues. Staff must take personal responsibility for contributing constructively to effective team practices and procedures.

Failure to communicate effectively with, and support, co-workers is frequently a major contributory factor in instances of risky, dangerous and violent incidence at work.

### ***Maintaining healthy and constructive relationships between staff can be aided by the following guidelines:***

- **Communication** Effective communication between staff members will be supported through regular staff meetings and training. These events / systems will help to maintain a cohesive and positive team. They require commitment from every staff member and should be given due priority.

Such meetings provide opportunities for discussion and resolution of issues that have arisen during work and help prevent the spread of gossip and rumour, which can easily increase misunderstanding and tensions between staff members. All staff members have a responsibility to respect the importance of these forums and to actively support and participate in them.

- **Personal Responsibility** Every staff member should actively aim to maximise team performance and contribute positively to team discussions. It is your responsibility to make constructive contributions for the well being of the team and the Service. If you are dissatisfied you have a responsibility to deal with this in a professional manner employing, where necessary, appropriate organisational policies and procedures.
- **An honest and open approach** Teamwork is based on effective communications. Differences in attitudes, views, personality and competencies, and difficulties and grievances for example, should be resolved in an open and constructive way. If this isn't achieved, then teamwork and the quality of the service delivery will inevitably suffer.

## 7. Relationships and conduct with external agencies

Staff must always remember that they are representing Beetroot Consulting, when working with partner agencies and professionals and must conduct themselves in a professional manner.

Staff should discuss only relevant information, keeping this concise and accurate, avoiding gossip and anecdotal evidence.

Staff must dress appropriately for the working environment, for example smart casual appearance.

Staff must ensure that any issues that may impact on confidentiality or conflicts of interest are discussed with your line manager prior to meetings and or events.

It is expected that all staff may have personal views that differ from Beetroot Consulting approach on specific issues. Staff are, however, expected to present and support Beetroot Consulting viewpoint, and not

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voice personal views. Staff should seek clarification from their manager if they are unclear about Beetroot Consulting position on a particular issue and use supervision to explore any complicated issues that you are expected to respond to.

Staff should be clear when making public statements (or in writing), whether they are speaking as private individual or as representatives of Beetroot Consulting and to only speak on behalf of Beetroot Consulting with prior approval from a senior manager.

This also applies to staff with dual roles (for example who work for the group and also practice their profession independently) who attend events or conferences, or are active on social media, in either of their roles.

Staff should refrain from any acts outside of working hours which may bring Beetroot Consulting into disrepute. Any act of conduct which damages the reputation of the organisation will be treated very seriously and may lead to disciplinary action for the individual concerned and potentially dismissal for gross misconduct.

## **8. Managing personal relationships between colleagues**

All professional relationships contain the potential for conflicts of interest. Staff may, on occasions, develop strong feelings for a particular customer or colleague. These feelings in themselves are neither abnormal nor wrong. They only compromise the relationship if the member of staff acts upon them improperly.

Where personal or business relationships pre-exist the professional relationship, or where dual relationships exist (such as in small communities where the staff may already be a personal friend of a customer or a colleague), it is the responsibility of staff to maintain each relationship within its own appropriate boundary.

It is the responsibility of each employee to declare all known pre-existing relationships, along with new relationships that develop, to their line manager, thereby preventing any future potential conflict of interest. This declaration must be made in writing as soon as knowledge of any relationship arises.

If a manager embarks on a relationship with a more junior member of staff, they should declare this to their line manager as soon as reasonably practicable. This is particularly important if they line manage the employee because of the risk or perception that a member of staff is being afforded more or less favourable treatment.

In order to avoid a situation where you have managerial authority over a junior member of staff with whom you are having a relationship, we reserve the right to elect to transfer one or both of you to a job elsewhere within the organisation, either on a temporary basis or permanently. We will first consult with both of you to try and reach an amicable agreement on the measure(s) to be taken.

The group will take steps to avoid line managers and staff members working together where a conflict of interest might occur, e.g. family members, friends or partners.

Managers should avoid, where possible, interviewing candidates with whom they have a personal relationship outside of work.

## **9. Conflict of Interest**

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All staff will be alert to the possibility of any conflict of interest, which may affect their ability to exercise professional discretion or bias their judgement. Conflicts of interest can arise in tendering for contracts with other agencies, and the recruitment & selection process.

Where a conflict of interest arises or is likely to arise, staff must declare it immediately to their line manager and take appropriate action to ensure the professional relationship, or decision making, is not prejudiced.

## 10. Gifts & Hospitality

In the course of work staff may be offered gifts (including money) or hospitality by people they come into contact with e.g. customers, representatives from other agencies. The offer of a gift or an invitation to an event is usually meant as a sign of appreciation. However, the acceptance of these can leave staff in a compromising position and open to allegations of corruption.

Under no circumstances should staff ask for a reward, gift, or any other inducement. They should also not put themselves in debt to someone where this would be likely to influence their work.

It is forbidden for staff to receive or give any gift, loan, fee, reward or advantage in order to influence their conduct.

It is forbidden to accept any gift or consideration in the knowledge or belief that it is intended as inducement or reward, whether the staff member receiving it is influenced or not.

If an allegation is made, it is for the member of staff to demonstrate that any such rewards have not been corruptly obtained.

Where a gift or hospitality is offered staff must:

- Inform their line manager and seek their advice (where the refusal of an unsolicited gift may cause offence, the gift may be donated to the service or another charity).
- Seek approval from their line manager or equivalent in the case of invitations to events or functions – whether during or outside normal working hours.

When declining a gift or hospitality, staff should courteously but firmly inform those making the offer of the procedures and standards operating within Beetroot Consulting.

## 11. When things go wrong

If customers are unhappy with staff behaviours they should be encouraged to inform the Director, who will utilise the HR policy and processes for complaints.

Staff should feel free to discuss openly difficulties they are having with colleagues. However, we recognise that whilst behaviours are best changed via direct dialogue with individuals, staff can use the HR Policy for any Grievances if they feel unable to resolve relationships with colleagues.

Breaches of the Professional Boundaries policy by staff will be dealt with under the HR Policy on Disciplinarys.

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