Welcome to the Recovery U online module on Boundaries.

Module Goals

1. Participants will be able to identify key concepts related to Recovery, Peer Support and Boundaries.
2. Participants will develop an understanding of various types of boundaries and boundary dilemmas.
3. Participants will be able to identify their boundaries and develop a plan for consultation and support.

By the end of this Learning Module, you will be able to: 1. identify key concepts related to Recovery, Peer Support and boundaries; 2. develop an understanding of various types of boundaries and boundary dilemmas; and 3. identify your own boundaries and develop a plan for consultation and support.
The adoption of recovery by behavioral health systems in recent years has signaled a dramatic shift in the expectation of positive outcomes for individuals who experience mental and/or substance use conditions. Today, when individuals with mental and/or substance use disorders seek help, they are met with the knowledge and belief that anyone can recover and/or manage their conditions successfully.

The value of recovery and recovery-orientated behavioral health systems is widely accepted by states, communities, health care professionals, peers, family, researchers, and advocates including the U.S. Surgeon General, the Institute of Medicine, and others.

Recovery is a key component of Peer Support for both the Certified Peer Specialist who uses their lived experience of recovery and the individuals they are supporting on their own recovery journeys.
SAMHSA defines recovery from mental disorders and/or substance use as “a process of change through which individuals improve their health and wellness, live a self-directed life, and strive to reach their full potential.”

There are many things that contribute to a life of recovery and SAMHSA has identified four key areas: Health, which focuses on overcoming and managing symptoms and informed choices; Home, which focuses on stabilizing housing; Purpose, which focuses on meaningful daily activities and the ability to engage in them; and Community, which focuses on relationships. Each person is unique and it is important to understand and explore boundaries to be able to successfully support Recovery.

As a guide to promoting Recovery, SAMHSA has generated the Guiding Principles of Recovery:

- Recovery emerges from hope;
- Recovery is person-driven;
- Recovery occurs via many pathways;
- Recovery is holistic;
- Recovery is supported by peers and allies;
- Recovery is supported through relationship and social networks;
- Recovery is culturally-based and influenced;
- Recovery is supported by addressing trauma;
- Recovery involves individual, family, and community strengths and responsibility;
- Recovery is based on respect.

As you look over these principles, take note of how they resonate with you. First and foremost, Recovery emerges from hope. Certified Peer Specialists are uniquely poised to bring hope by sharing their lived experiences with others.
Peer Support has gained recognition as a valuable component for those overcoming mental health and substance use challenges. It’s important to spend some time defining Peer Support and related terms to better understand this vital role. SAMHSA defines it as you see on this slide. A peer provider, otherwise known as a certified peer specialist, peer support specialist, or recovery coach is a person who uses his or her lived experience of recovery from mental illness and/or addiction, plus skills learned in formal training, to deliver services in behavioral health settings to promote mind-body recovery and resiliency.

Throughout this presentation, you will hear the terms Peer Support, Peer Support Specialist and Certified Peer Specialist used to describe individuals in the Peer Support role. Because of the nature of this role, there are many boundary issues Peer Support Specialists may experience. We will explore some of these issues throughout this module.
Wisconsin has further defined the role and utilizes the term Certified Peer Specialist to describe “a job title within an agency or employment where the role of peer specialist is specific to the lived experience of that specialist and how that experience is utilized to help others move forward on their recovery journey.”

They also focus on the Certified Peer Specialist being differentiated from a mental health or substance use disorder health technician and being an active member of the recovery team. As a member of the recovery team, Certified Peer Specialists may face challenges related to integrating into the team, defining their role, and managing their own symptoms. Certified Peer Specialists can have lived experience with mental health issues, substance use issues, or both.

### Peer Support Roles

Although roles may vary depending on service agencies, it is generally recognized that Peer Specialists provide the following services:

- Use personal recovery experience as a tool.
- Present recovery information.
- Provide information about mental health/substance use disorder resources.
- Assist in identifying and supporting consumers in crisis.
- Facilitate self-direction and goal setting.
- Communicate effectively with other treatment providers.
- Create an environment of respect with peers.
- Encourage peers to construct their own recovery/wellness plans.

Wisconsin also provides examples of typical roles and activities that Certified Peer Specialists engage in. Peer Specialists provide the following services: they use personal recovery experience as a tool; present recovery information; provide information about mental health and substance use disorder resources; assist in identifying and supporting consumer in crisis; facilitate self-direction and goal setting; communicate effectively with other treatment providers; create an environment of respect with peers; and encourage peers to construct their own recovery and wellness plans. Each of these may be relevant when discussing Boundaries.
We’ve identified Recovery and Peer Support. Now let’s take a look at Certified Peer Specialists in Wisconsin. The Wisconsin Department of Health Services, Division of Mental Health and Substance Abuse Services has created a Scope of Practice document to guide Certified Peer Specialists in identifying their roles. The primary function of Certified Peer Specialists is to provide peer support.

They engage and encourage peers recovering from mental health and/or substance use disorders in addition to creating a sense of community and belonging through supportive relationships and valued roles. They promote wellness, self-direction, and recovery and work with peers as equals. Exploring, identifying, and developing strategies for maintaining healthy boundaries is crucial for Certified Peer Specialists to be effective in their role and take care of themselves.
Boundaries, Values, and Ethics in the ED Setting. While they are sometimes used synonymously, they are different. Ethics are the set of rules that govern the behavior of a person, established by a group or culture. Values refer to the beliefs for which a person has an enduring preference. Ethics and values are important in every aspect of life, when we have to make a choice between two things. Ethics determine what is right, values determine what is important.

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<thead>
<tr>
<th>Theme 2</th>
<th>Boundaries Defined</th>
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<tbody>
<tr>
<td><strong>Merriam Webster:</strong> Boundary are something that indicates or fixes a limit or extent.</td>
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<td><strong>International Association of Peer Supports (iNAPS):</strong> Boundaries are the formal and informal understanding of how people interact with each other.</td>
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Now that we have a basic understanding of Recovery and Peer Support, let’s discuss a few other terms. There are a number of ways to define Boundaries. Merriam Webster defines a Boundary as “something that indicates or fixes a limit or extent.” The International Association of Peer Supports, also known as iNAPS, defines boundaries as “the formal and informal understanding of how people interact with each other.”

Wikipedia offers an interesting definition for Personal Boundaries which references the give-and-take of Boundaries: “Personal boundaries are guidelines, rules or limits that a person creates to identify reasonable, safe and permissible ways for other people to behave towards them and how they will respond when someone passes those limits.” Do these definitions fit your idea of Boundaries? What would you add?
Our boundaries are tied to our values and fall into common categories—physical, mental, and emotional. Many of us can tell when someone invades our personal space boundary by standing too close. We may lean back, move away, or ask them to move. We also may have different comfort levels with different individuals. You may be comfortable with your children, family, or close friends sitting close to you on a couch but your comfort level may be different with a stranger.

Many of us also recognize when someone violates a mental or emotional boundary especially if it’s a blatant violation—someone calls you stupid, is demeaning, or yells and swears at you. It can be more complicated when the person engaging in the boundary violation is someone we are working with in a professional manner. We’ll continue to explore this throughout this module.

**Core Competencies for Wisconsin CPSs**

- Values
- In-depth knowledge of recovery
- Roles and Responsibilities of a Certified Peer Specialist
- Skills
In addition to the Scope of Practice Document we discussed in a previous module, the Department of Health Services, or DHS, has created a Core Competencies document which includes the following domains: Values, In-depth knowledge of recovery, Roles and Responsibilities of a Certified Peer Specialist, and Skills. While all of these domains relate to boundaries, two domains of particular interest to this discussion are Values and Skills. As we discussed earlier, our boundaries are tied to our values. According to iNAPS, “Values are our core beliefs about what is important and guide our decisions about what is right and what is wrong. Values are the internal rules that guide our behavior.”

The Values Domain of the Core Competencies focuses on the Values of Peer Support. For example, it states that the Certified Peer Specialist “Believes that recovery is an individual journey with many paths and is possible for all. They believe in and respect people’s rights to make informed decisions about their lives. They believe that personal growth and change are possible and believe in the importance of empathy and listening to others.” These examples embody the person-centered, strengths-based, hopeful, supportive nature of peer support. Many of the Skills identified in Domain 4 focus on the Certified Peer Specialist having the ability to bring those same things to the relationship while being aware of their own needs and engaging in self-care.

We can’t talk about values without discussing Ethics. As we’ve discussed, values are our core beliefs about what is important. Boundaries are the formal and informal understanding of how people interact with each other. We use Ethics to guide our behavior in situations where our values and/or boundaries conflict. Wisconsin Certified Peer Specialists have a Code of Ethics to help guide them in their professional roles and relationships. “A code of ethics is a written document that outlines the basic values and principles of a practice discipline and offers guidance in understanding the difference
between “right” and “wrong” related to that practice discipline.” Many of the principles included in the Code of Ethics may seem obvious.

For example, many people would recognize that it’s unethical to “intimidate, threaten, harass, unduly influence, physically force or restrain, verbally abuse, or make unwarranted promises of benefits to peers”. However, because this is peer support, dual relationships might not be as obvious for Certified Peer Specialists. It states, “I will not engage in sexual or any form of intimate activities with any peers I am currently serving, and for a minimum of one year after my peer services end. I will also not enter into dual relationships or commitments that may conflict with the interests of peers I support.” A dual relationship may occur if the lines get blurred between Peer Support Provider and peer. For example, a client asking the Peer Support Provider to a family event.

Another way to better understand these concepts is to think about Ethical Boundary Violations as “any behavior or interaction that damages the person who is being served, the provider, and/or the integrity of the service relationship.” Ethical boundary violations are actions or behaviors that are never okay. See the chart on this slide for examples. Ethical Issues are situations where boundaries are unclear or uncertain. Ethical Violations typically have courses of action while Ethical Issues may be mired in shades of gray.

In the next section, we will address boundary dilemmas in the ED Setting.
In this module, we’ll discuss some of the Boundary Issues that are unique to Certified Peer Specialists as indicated by research in the field. One of the biggest challenges is balancing the nature of the relationship with the peer you are working with. As we’ve discussed, an essential component of Peer Support is sharing your lived experience. By its very nature, Peer Support has more fluid boundaries which can be helpful in cultivating a supportive relationship. Peer support is also challenging if that relationship becomes more of a friendship.

Peer Support providers have experienced something called “splitting,” where clients would only tell them things and avoid sharing with other team members. Another boundary issue experienced relates to different lived experiences that the Peer Support Provider may have in comparison to the client that unintentionally create unrealistic expectations of recovery for clients. Your journey may not be comparable to their journey.
Peer Specialists work with individuals in various stages of recovery with their own recovery journeys. This issue also ties into pressure Peer Support Specialists may experience related to being Role Models. This can be especially difficult if your own recovery is going through a challenging time. Peer Support Specialists also found that the timing of disclosure was relevant and that they could be overstepping boundaries if the client wasn’t receptive at the time. There is an “art” to determining when to share your lived experience.

Boundary Dilemmas are not restricted to peers. Certified Peer Specialists also experience challenges with colleagues due to the nature of their role. Team members may not understand the role of the Certified Peer Specialist or the value of their services. As a result, Peer Specialists may be misutilized or placed in roles that don’t utilize their lived experiences.

The Peer Specialist role includes advocating for clients which may place them in an awkward position with colleagues. Peer Specialists may point out language that colleagues are using that is stigmatizing. Peer Specialists also can experience stigma themselves. This stigma may be overt, meaning it is done or shown openly. Or the stigma may be covert meaning it is not openly acknowledged or displayed.

Organizations may not have appropriate accommodations in place to support peers should they need time off due to an increase in symptoms. Peer Support providers may also experience stigma associated with their mood being viewed through a symptom lens. This stigma can also contribute to Peer Support Providers being left out of team activities by not being included in decision-making bodies within the organization or not being invited to social functions.
Team members may exclude Peer Support Specialists because they don’t want to put them in a position where their recovery might be jeopardized. For example, if the team is meeting for Happy Hour and the Peer Specialist is in recovery from a Substance Use Disorder, the team may feel awkward having peers in recovery at social events due to their substance use disorder. All of these experiences can create boundary issues with colleagues.

Certified Peer Specialists may also experience dilemmas related to previously being a recipient of services and currently being a provider. For example, Peer Specialists may participate in team meetings in hospital settings where they were previously hospitalized. They may also work with providers who once worked with them. These situations may involve boundary issues as participants navigate through them.

Other team members may not even be aware of these dilemmas because they don’t have the lived experience of being a former recipient and current provider. Triggers are another area where Peer Specialists might experience boundary issues. Team members may not recognize a Peer Specialist’s actions or behavior as related to a trigger. The Peer Specialist may also be experiencing triggers in this role for the first time and may not have thought about ways to navigate these experiences.
In this next section, we will take a look at Identifying Boundaries as they apply to working in the ED Setting and beyond.

We’ve spent some time identifying a number of boundary dilemmas you may encounter as a Certified Peer Specialist. Are there other boundary issues that you’ve experienced? Keep them in mind as we explore ways to navigate these experiences. One of the Core Competencies for Wisconsin Certified Peer Specialists acknowledges the first step in addressing these issues: “the ability to be self-aware and embrace and support your own recovery.”

Awareness of self as well as managing boundary dilemmas are key components of recovery. You are best at noticing internal discomfort that may be an early warning sign of a boundary issue or an ethical dilemma. This internal self-awareness sets the stage
for conscious awareness of boundaries that may be tested. It is also important to be aware of others and their boundaries.

The individuals you are working with may have very different boundaries than you do. This includes both clients and colleagues. Maintaining an awareness and curiosity about the other person and their boundaries can set the stage for open communication.

Being aware of your own values can lend insight into your personal boundaries. These boundaries can be physical, emotional or both. There are many resources available through the internet to explore your core values. You can Google the phrases “value exploration exercises” or “value exercises for adults” and find a variety of exercises.

Peer Support Providers have found this to be very helpful to aid in clearly defining roles in a team with ongoing supervision, support, and conversation about boundaries as they are noticed. Team members may also benefit from participating in value-clarification exercises as a team. The Core Competencies also provide us with direction through the following competencies: “The ability to set, communicate and respect personal boundaries of self and others.”

Peer Support Providers also need to set limits that will work in both professional and personal life. As we’ve discussed, this can be challenging at times because of the fluid nature of the mutual peer relationship. Discussions with peers about their values may also aid in early identification and recognition of boundary issues allowing for open communication and resolution of problems.
Certified Peer Specialists have many resources available to help in verifying and clarifying work boundaries. The Wisconsin Certified Peer Specialist Core Competencies, Scope of Practice, and Code of Ethics provide guidance and clarification of some boundaries. Your agency of employment will have a personnel manual or some other type of documentation that guides staff and practice.

If your agency is licensed through the state, there are additional guidelines you can reference for clarification about ethical violations, rules and guidelines. There are also various Peer Support Practice Guidelines that can assist in decision-making. Engaging in ongoing self-reflection and value-clarification exercises will help you in clarifying your own personal boundaries. You may also note that at times your personal boundaries may vary depending on what’s going on in your own life. If you are overly stressed, you may also need to set a boundary around late night phone calls to effectively manage your own stress.

At other times, you may find that you can balance late night phone calls and self-care. We’ve already discussed ways to determine an Ethical Violation versus an Ethical Issue in our conversations about ethics. There are a variety of ways to explore ethical issues. iNAPS discusses ethical issues in their Recovery to Practice Participant Workbook, and we reviewed one of their ethical decision making tools earlier.
As with noticing boundaries, it’s important that we pay attention to self, peers, clients, and team members as we may have different needs for support. As an individual, you may need to clarify what your boundaries are in each situation. As a Peer Supporter, your role depends on flexible boundaries and not hard and fast limits. You may also need support from your team, your supervisor, or other Certified Peer Specialists. Peers and clients may also require different support.

Boundaries can be challenging and as you are role modeling healthy boundaries, peers and clients may need support in navigating them as well. Encouraging open and honest communication can be a very supportive approach. Team members also may need different types of support. Maintaining open and honest communication here can also be very helpful.
Support and Consultation. It is important to know who your support network is and have a firm understanding of where to go for consultation when working within the ED2 Recovery Program. In this next section, we will discuss how to lean on these support networks and develop a plan for success.

Addressing boundary issues can be stressful and confusing. There may or may not be a clear solution. Many times, it’s important to seek external support and consultation within the bounds of confidentiality. There are also different levels of support. Family and friends may be able to provide emotional support even without knowing the details of the situation.

Your provider or therapist, if you have one, may be able to help you process your experiences and identify coping skills and resources that you can use. Your team and supervisor may be able to discuss the situation, offer different viewpoints, problem solve, and consult. Your supervisor may also be able to provide concrete direction or other decision-making tools to assist in resolving the dilemma.

Who else would you go to? Who do you go to now for consultation? If you don’t have anyone identified, take some time to identify someone you can consult with as needed. Another way to think about support is through what you already may have in place through your WRAP. As a Certified Peer Specialist, you may want to update your WRAP to include a plan to manage work related stressors, boundary issues, et cetera.
Most agencies will also have pathways for support through their employee manual or human resources department. Often there is an identifiable chain of command in terms of who receives reports related to ethical violations, complaints, or grievances. If you don’t know what those processes are, it is important to find out. Your colleagues and supervisor within the agency should also be a support and available for consultation as needed. The agency will have codes and statutes it abides by that may also be able to provide you with some guidance.

The larger Peer Support community can also be a resource. The International Association of Peer Supporters, or iNAPS, has a variety of resources available to Peer Support Specialists. Within Wisconsin, you may be able to connect with other Certified Peer Support Specialists for ongoing support and consultation as well.
Resources continue at the local, state and federal levels. Become familiar with the other agencies in your area providing peer support. You may be able to collaborate with Certified Peer Specialists in those agencies for support and consultation.

Your county may also be a resource to connect you with other Peer Support Providers in your area. The Wisconsin Peer Specialist Employment Initiative website is also a resource for information, updates, agencies providing Peer Support Specialists and other resources. At the Federal level, SAMHSA has a lot of information available through their website as well.

In this module, we’ve discussed key concepts related to Recovery, Peer Support and boundaries; developed an understanding of various types of boundaries and boundary dilemmas; and identified your own boundaries and developed a plan for consultation.
and support. We reviewed SAMHSA’s identification of Recovery and identified and discussed Peer Support.

We also defined boundaries, values, and ethics. We identified Ethical Violations vs. Ethical Issues. We also explored boundary dilemmas unique to Certified Peer Specialists and discussed noticing, exploring, verifying and clarifying and supporting boundaries. Finally, we explored resources for support in navigating boundaries. There are many resources out there if you are interested in exploring boundaries in more detail. Please see the attached resources for a place to start.